Learning and Support Docs

Welcome to the user documentation for CORE from 5th Kind. Here you can learn how to use the CORE system and have your questions answered quickly and easily. And if you can't find the answer to your question, contact your company's Tier 1 support person.

Using 5th Kind's CORE

CORE is a powerful, cutting-edge, web-based application that centralizes and secures all digital files to improve collaboration, eliminate duplication, simplify access and reduce costs. CORE is the workflow backbone for DAM, digital dailies, and digital workflows for all types of industries.

You and your team can use it to share files, images, videos, and documents with each other, while making sure that everyone only sees what they need to.

To your top right you will find a link to view this document as a PDF.

View as PDF

Download this manual for your offline convenience. You can also save individual sections through your *Save as PDF* function when printing.

To your left is the Navigation Pane, where you can find everything you need to know. Let's start at your Welcome email and create your New Account.

CORE

› Accounts

New Account

When your administrator creates an account for you, you will receive an email containing a link to initiate your account.

Hello Asset Viewer,

Your username is: assetviewer

Please follow this link to set your password for the system: Click this link to initiate your account and set your initial password

For an optimal experience please use latest version of Chrome, Firefox, Edge, Safari, or Microsoft Edge, and ensure your Adobe Flash Player is up to date.

If you cannot play video, please ensure the HDS protocol in enabled in your company firewall.

Thank you,

When you click the link, you will be be prompted to set a password. Enter your password, and click **Submit**.

Logging In

Enter your Username and Password, then click **Login**.

Hello Asset Viewer,

Your username is: assetviewer

Please follow this link to set your password for the system: Click this link to initiate your account and set your initial password

For an optimal experience please use latest version of Chrome, Firefox, Microsoft Edge, or Safari.

If you cannot play video, please ensure the HDS protocol in enabled in your company firewall.

Thank you,

Multi-Factor Authentication & SSO

Your company policy may require you to log in using Multi-Factor Authentication. If so, follow these instructions to log in. Multi-factor authentication (MFA) is an authentication method in which a user is granted access only after successfully presenting two or more pieces of evidence (or factors) to an authentication mechanism.

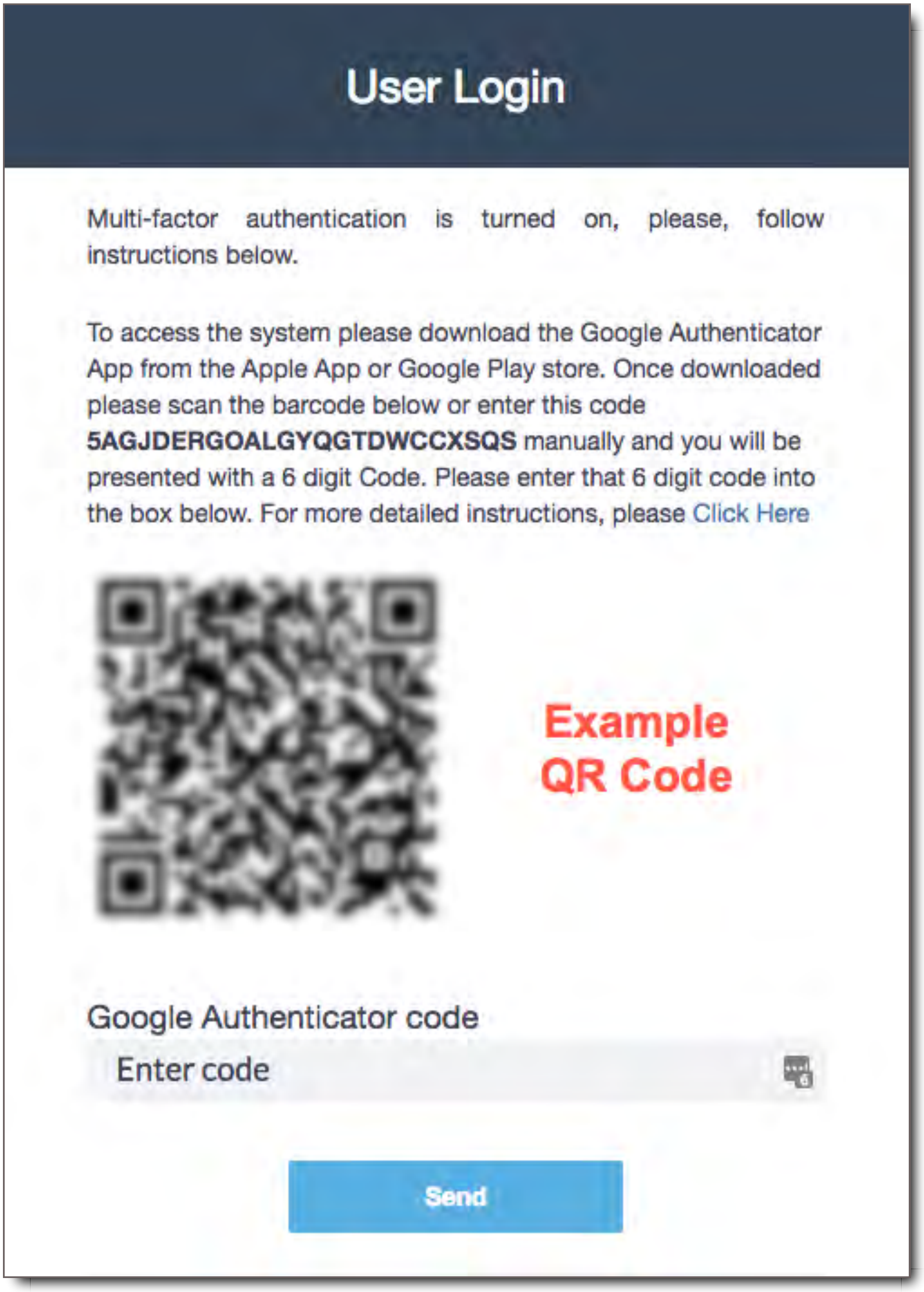
After entering your User Name and Password, click **Login**.

Note: If you are logging in for the first time you will need to set up your account on a computer even if you are a Mobile User. Do not try to activate your account for the first time through the iOS app on iPhone or iPad. After you log in you will be prompted to link your account with the Google Authenticator.

Google Authenticator

Installation and Setup

If this is the first time you are logging in, you will be shown a barcode, and prompted to link the account with Google Authenticator.

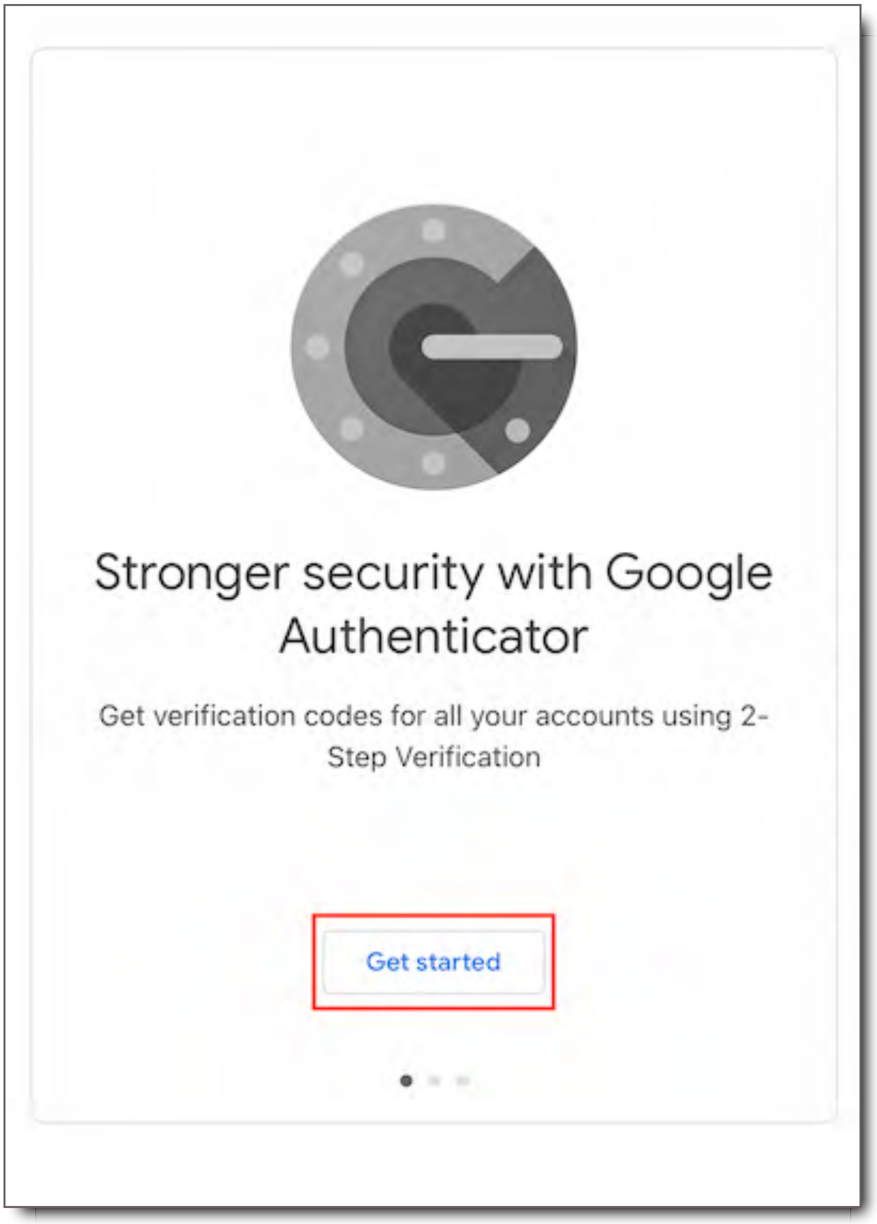


Install Google Authenticator on your Android or iPhone. Find it by searching for it in the Play Store/App Store, or by using the links below.

Android: https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en

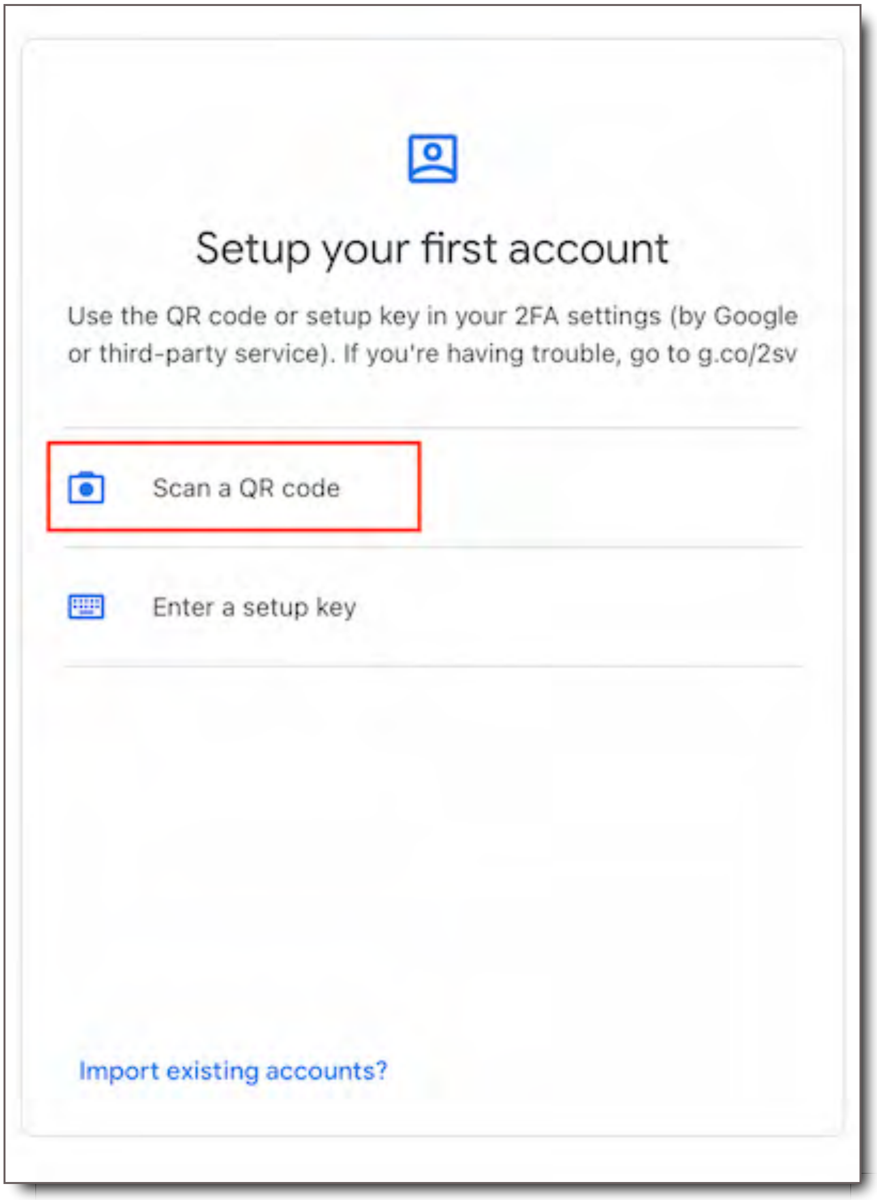
iPhone: https://itunes.apple.com/us/app/google-authenticator/id388497605?mt=8

On your phone, open Google Authenticator, and click Begin.



Select "Scan a barcode," then point your phone's camera at the onscreen barcode.

Once you've scanned the barcode, your account will be added to Google Authenticator automatically.



Google Authenticator Troubleshooting

If you are experiencing trouble with your Google Authenticator code and you are using an Android phone, it might be because the time on your Google Authenticator app is not synced correctly.

To make sure that you have the correct time:

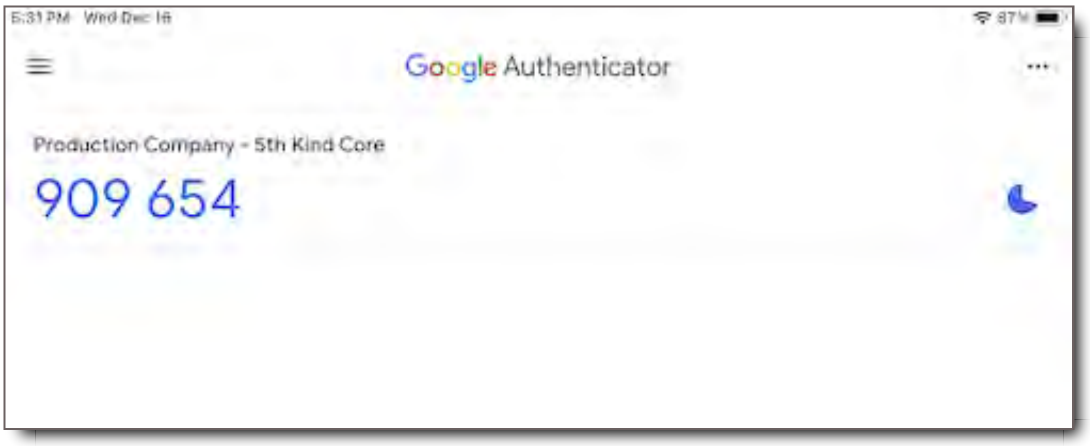
- Go to the main menu on the Google Authenticator app
- Click Settings
- Click Time correction for codes
- Click Sync now

On the next screen, the app will confirm that the time has been synced, and you should now be able to use your verification codes to sign in. The sync will only affect the internal time of your Google

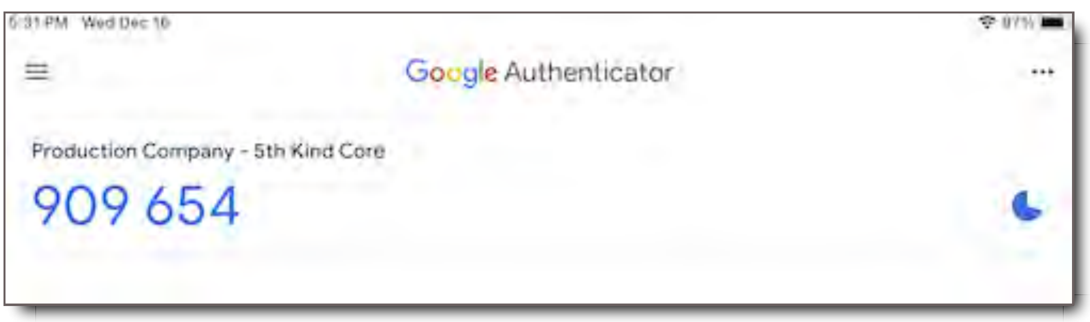
Authenticator app on your Android phone, and will not change your device's Time and Date settings.

Logging In

After your account has been added to Google Authenticator, you will need to enter the 6 digit code from it each time you log in. The code changes every :30, so make sure to enter the current code. The code turns RED to warn you that it will change soon.

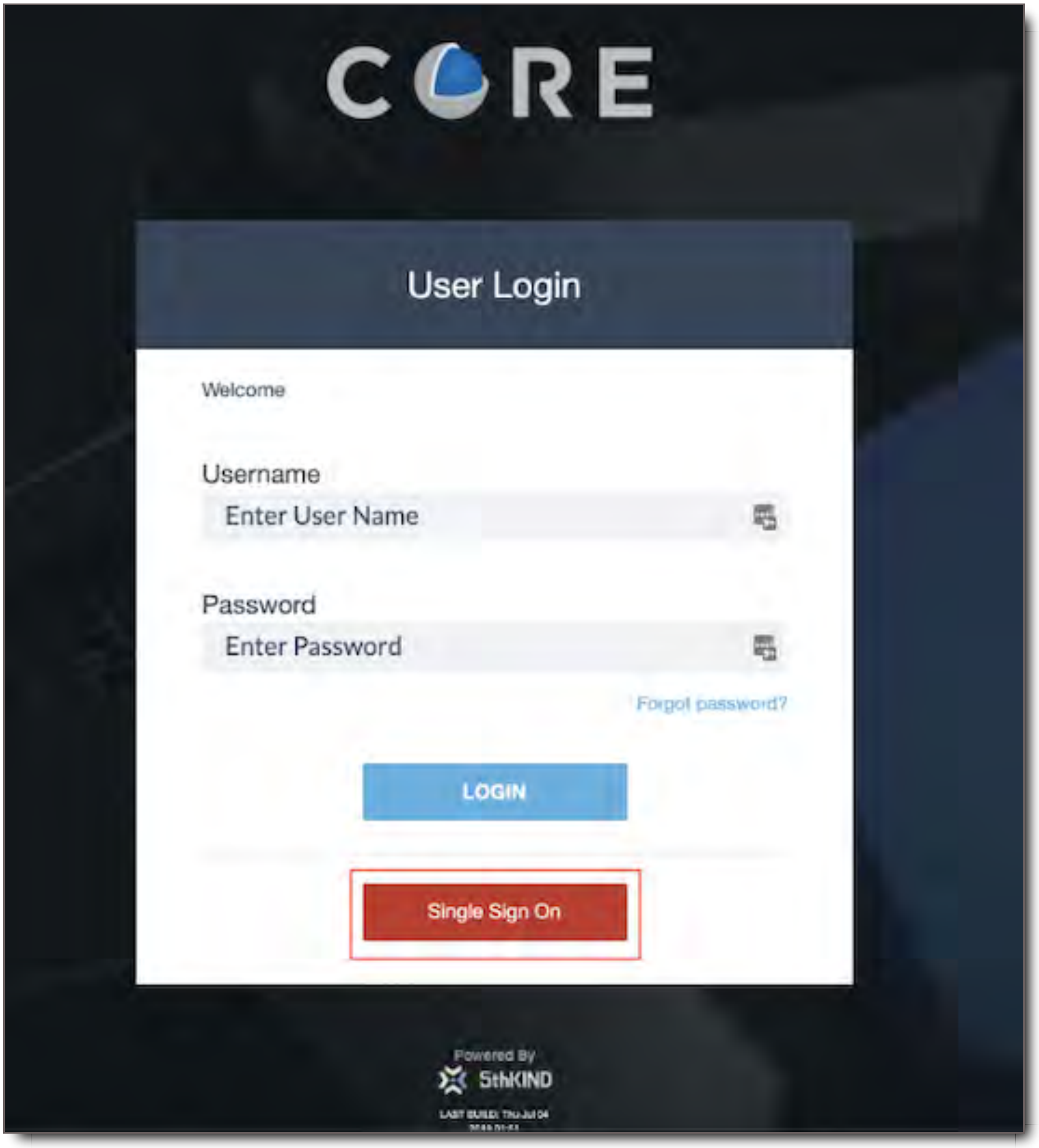


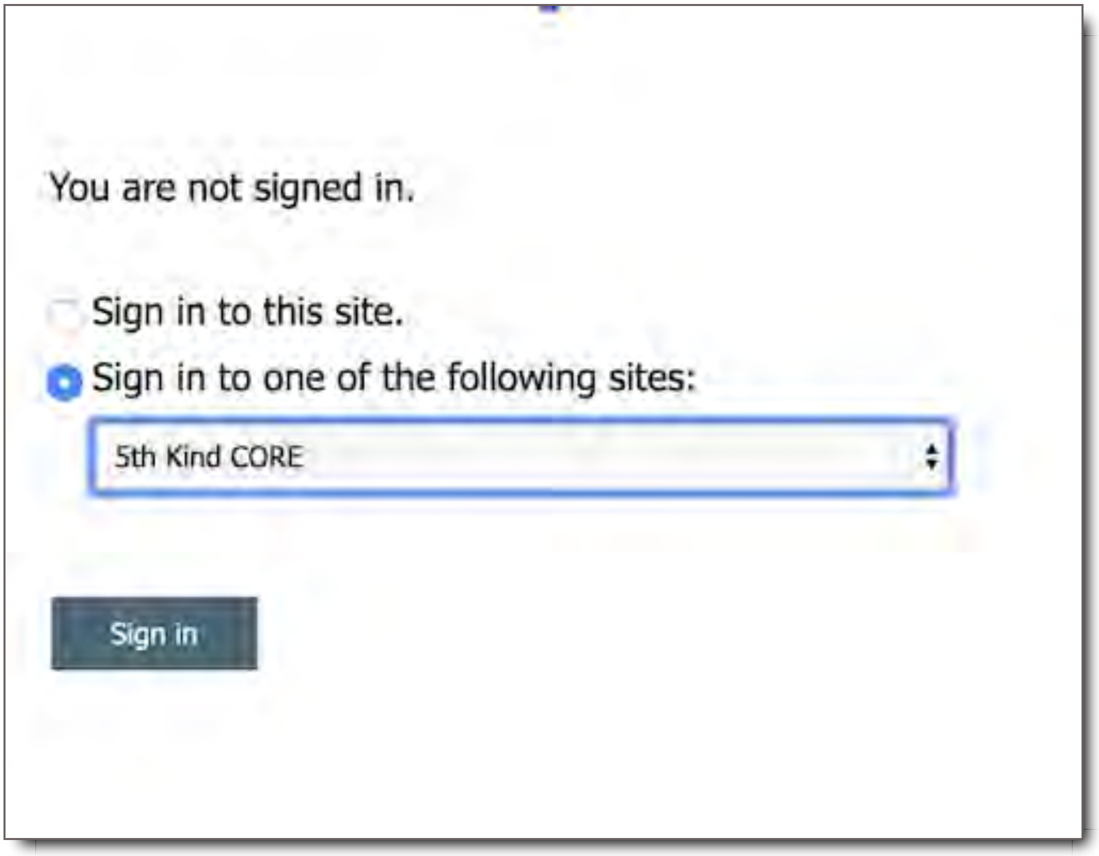
Enter the current code and click **Send**.



SSO Authentications

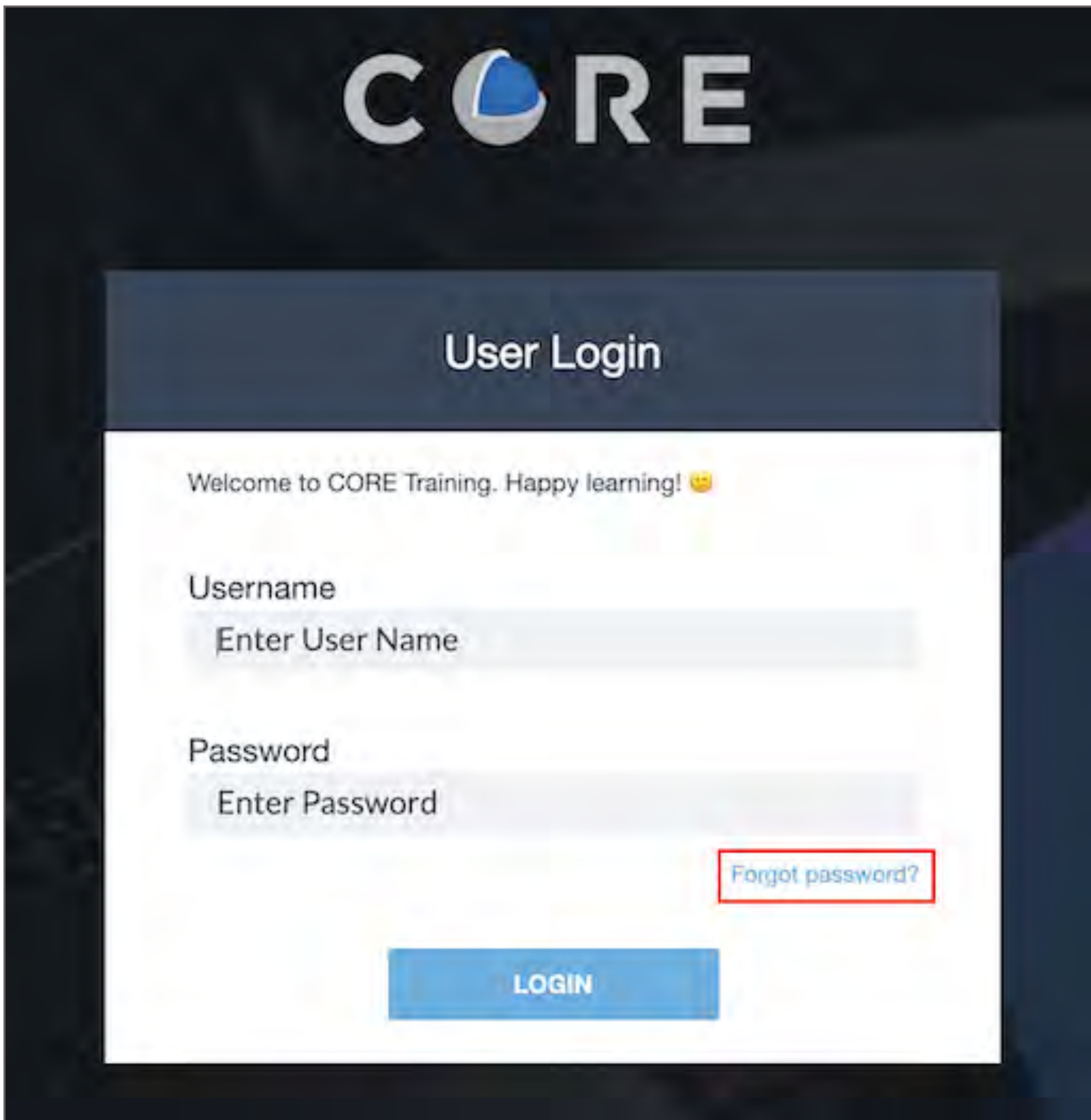
Single sign-on (SSO) is a session and user authentication service that permits an end user to enter one set of login credentials (such as a name and password) and be able to access multiple applications. Your company policy may require you to utilize SSO. If so, you may find that your SSO interface looks different from the one pictured here; however, functionality will be the same.


CORE
User Login
Welcome
Username
Enter User Name
Password
Enter Password
Forgot password?
LOGIN
Single Sign On
Powered By
5thKIND

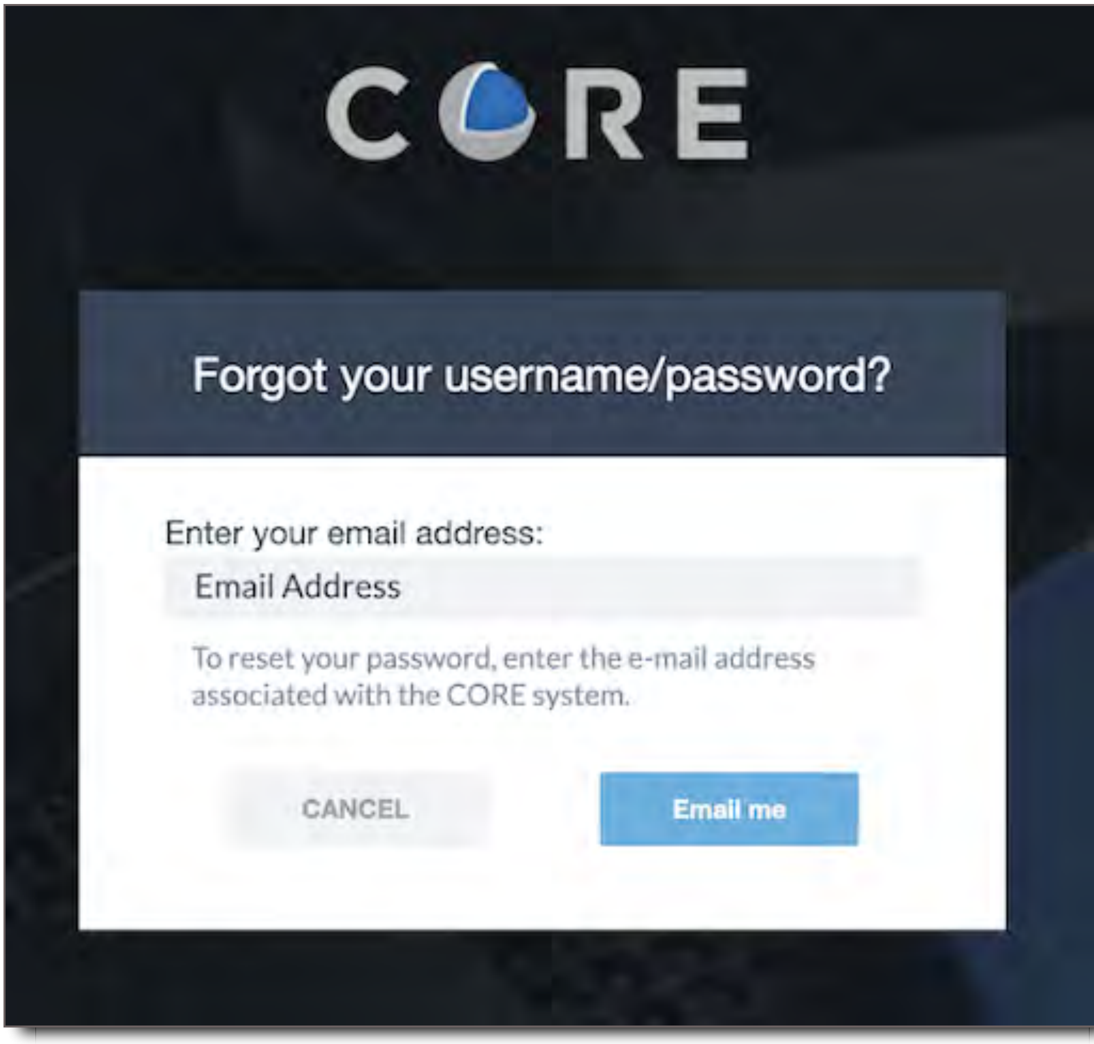

You are not signed in.
Sign in to this site.
Sign in to one of the following sites:
5th Kind CORE
Sign in

Password Reset

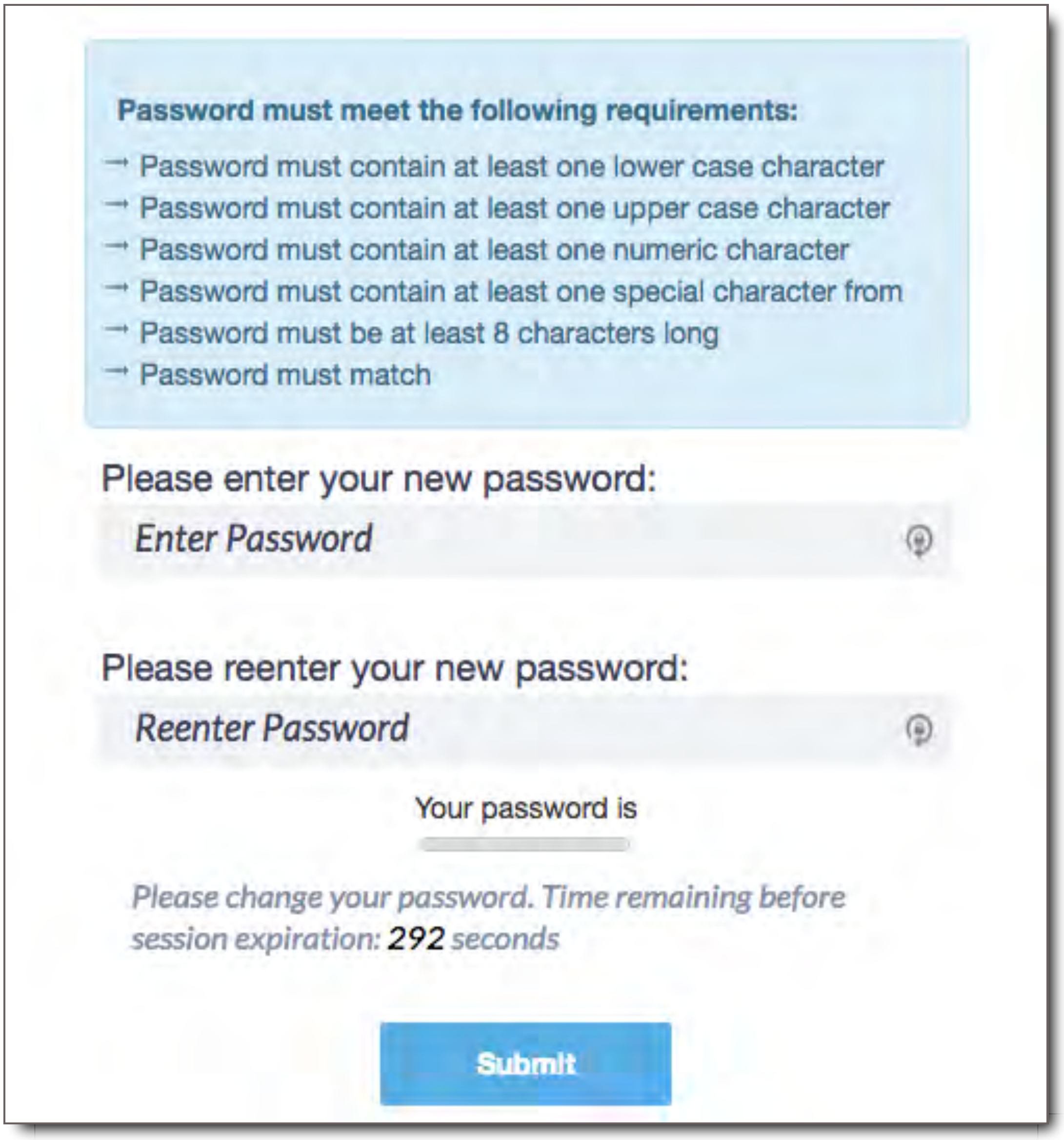
If you've forgotten your password, click Forgot Password



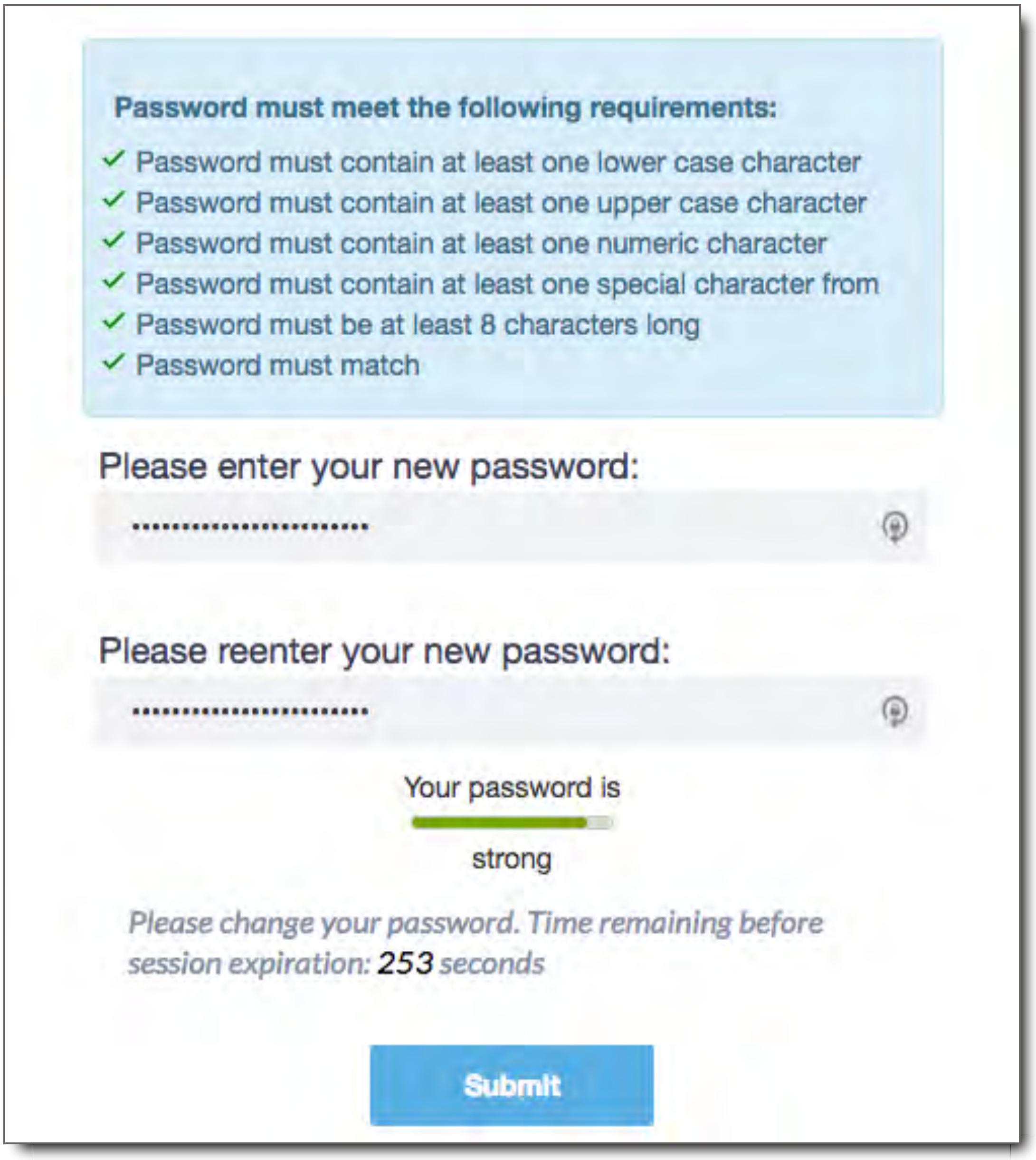
Enter your email address and click **Email Me**



You'll receive an email at the address you entered. Click the link, and you'll be prompted to enter a new password. For security reasons, you must submit your new password within 300 seconds. Your password must meet all listed requirements.

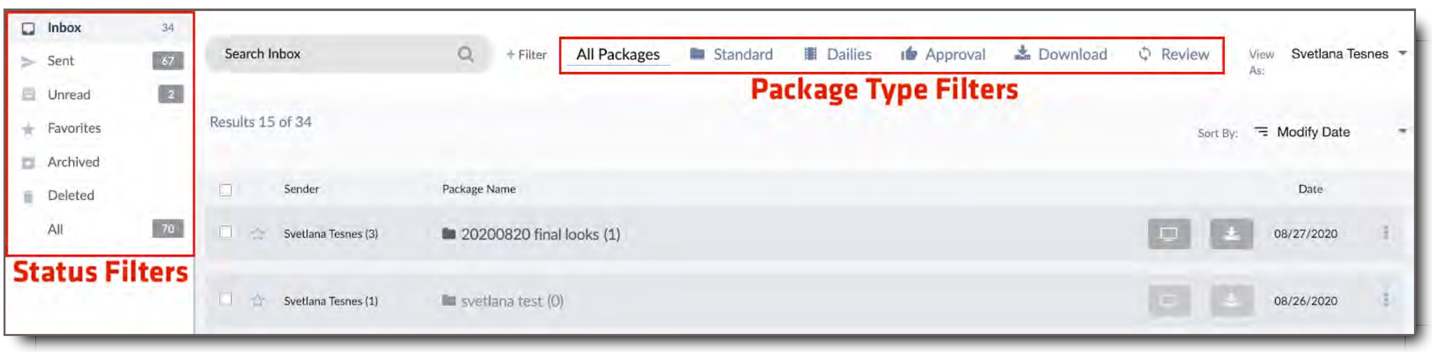


As you type, the requirements will update. Once all password requirements are met, click **Submit**.


Password must meet the following requirements:
✓ Password must contain at least one lower case character
✓ Password must contain at least one upper case character
✓ Password must contain at least one numeric character
✓ Password must contain at least one special character from
✓ Password must be at least 8 characters long
✓ Password must match
Please enter your new password:
Please reenter your new password:
Your password is
strong
Please change your password. Time remaining before session expiration: 253 seconds
Submit

Package Inbox

The Package Inbox is where you can view all Packages that have been shared with you or that you have created.



Filtering

Filtering options are an easy way to narrow down the list of Packages in your Inbox to a desired subset.

Status Filters

1. **Inbox:** Filter your Inbox to only non-Archived Packages you have received
2. **Sent:** Filter your inbox to Packages you have sent to yourself or other users
3. **Unread:**Filter your inbox to only Packages you haven't viewed yet
4. **Favorites:** Filter your inbox to only Packages you've Favorited
5. **Archived:** Filter your inbox to only Packages you've Archived
6. **Deleted:** Filter your inbox to only Packages you've Deleted
7. **All:** Show all Packages, regardless of their status

Package Type Filter

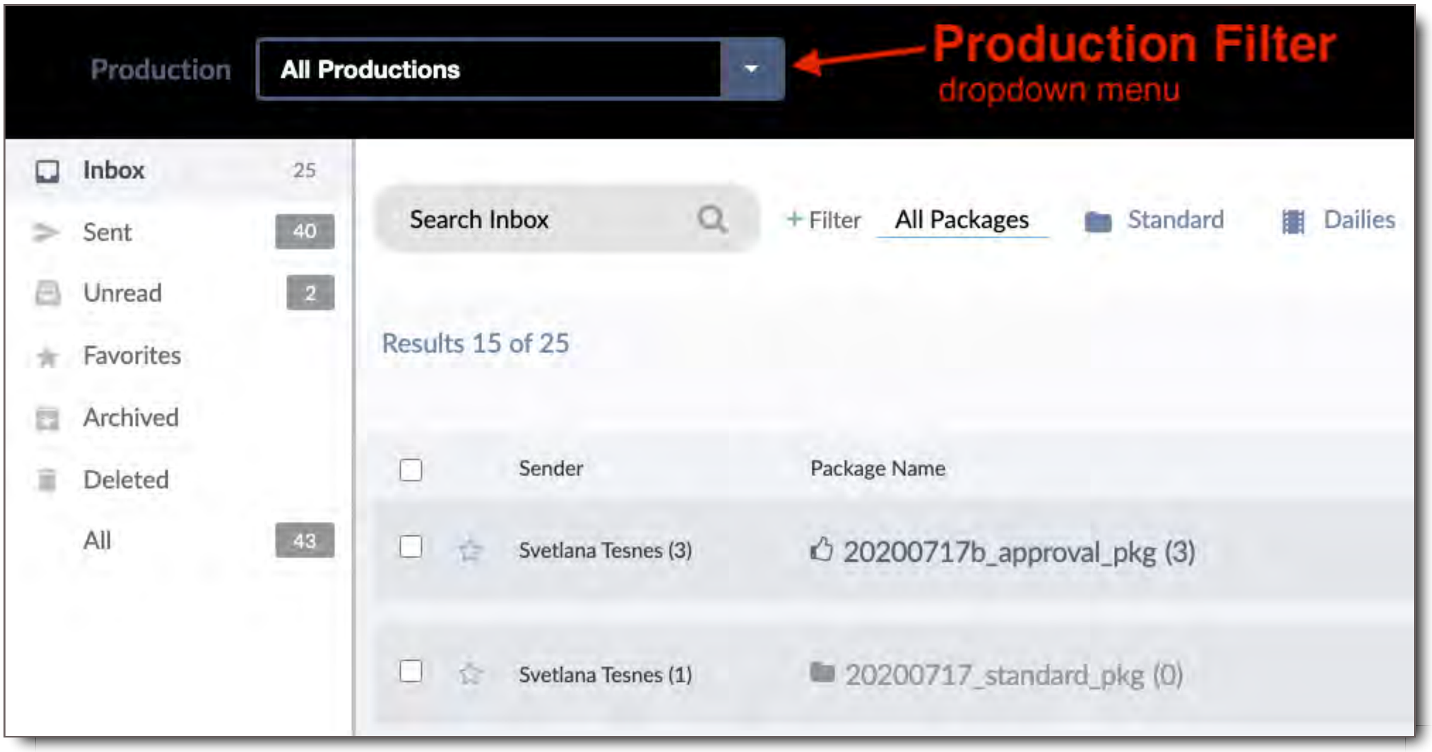
Select a Package Type to filter your Inbox to only Packages of the selected type.

- **All Packages:** Displays packages of any type: standard, dailies, approval, download, & review.
- **Feedback: (Standard)** Filters by Standard type packages. Clicking on a Feedback (Standard) package will display its contents, and allow you to view and/or download them with the comment or download panel enabled. Users are aware of other users on this share. .
- **Dailies:** Filters by Screener type packages. A Screener package launches the recipient directly into the player with the first file open. Only the sender can see who is included in the share. This Package Type streamlines the experience for users.
- **Approval:** Filters by Approval type packages. An Approval package type opens to a view of all files, with the approval panel enabled. Everyone on the share is visible, but each person can only see their own approvals or if you are the sender or an approvals manager you can see all Approvals.
- **Download:** Filters by Download type packages. A Download package generates a simple, web-based download page. It's the easiest way to share files when you know recipients only need to download the files, rather than take action in Core.
- **Sync Review:** Filters by Sync Review type packages. A Sync Review package type enables a real-time, hosted review. Recipients cannot see or access the files except when guided by the host (sender)

Production Filter

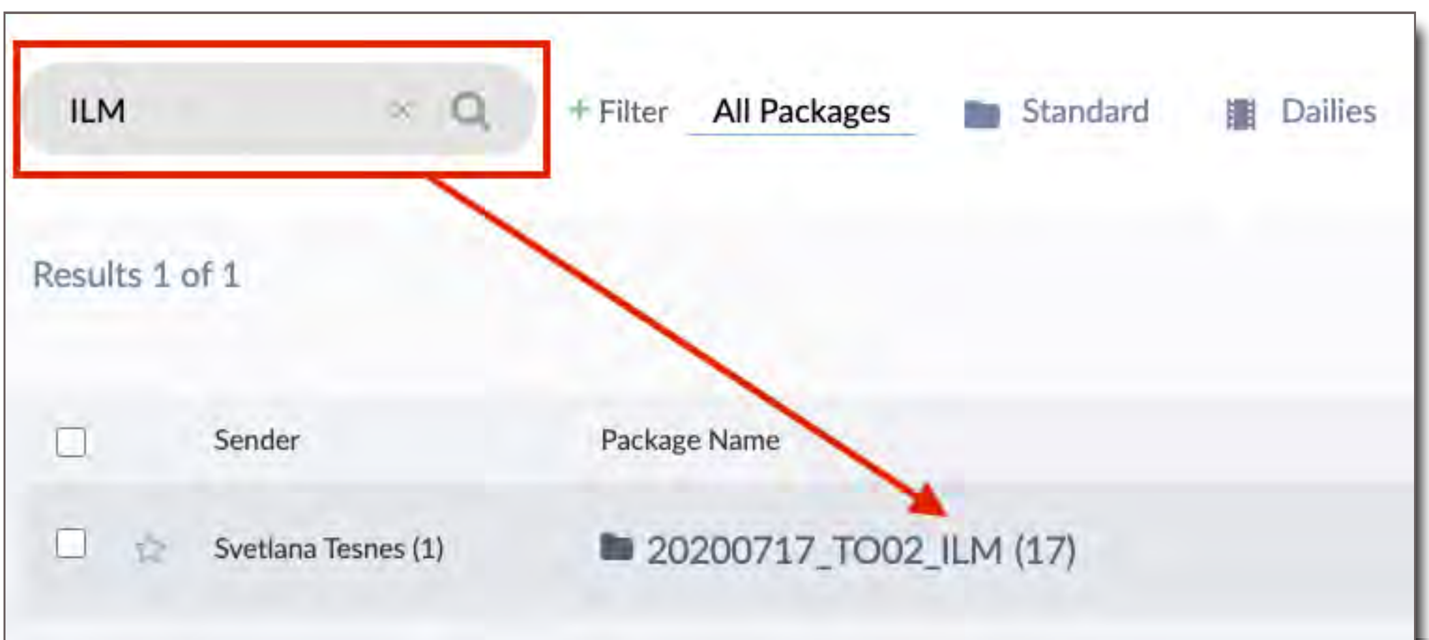
With the All Productions filter, which is a dropdown menu above the other Status Filters, you can sort your Package Inbox by the Productions for which you’ve been sent a package.

Note: If you’re having trouble finding a package, check to make sure your Production filter is switched back to All Productions.



Search

Use the Search box to search for your Packages. Type in keywords into the search box and packages containing those keywords in the package name will appear on the list. In example below, we searched for the keyword 'ILM' in the Search Box and a package containing that keyword in the package name appeared on the list. Search Box will also search content within your packages by a specific filename.



Add More Filters

Click this to further filter your Packages by Sender and After or Before the Package’s creation date.

Select a filtering method, then set the values you'd like to filter by. Filters can be used in combination with each other.

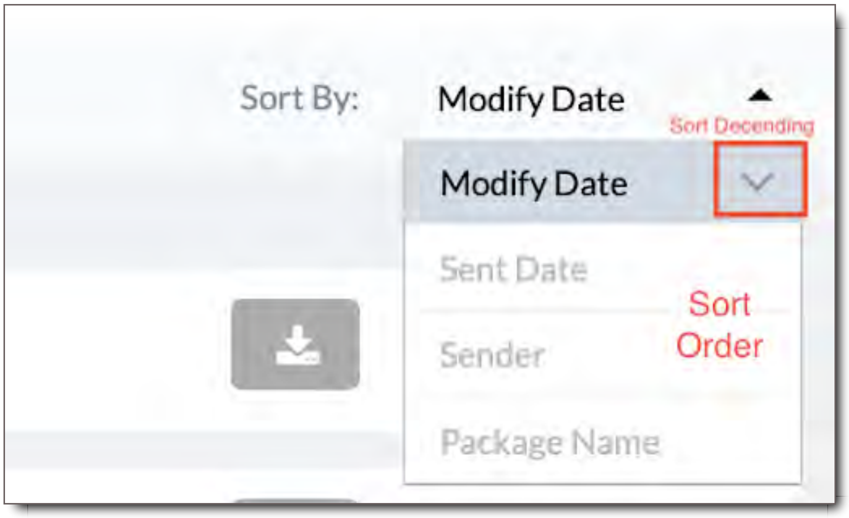
Click the ✕ to remove a Filter. Click the Clear Filters button to remove all Filters.

Packages

The main area of the Package Inbox shows you all the Packages you have sent or received which match your current filter criteria. Click on a Package Name to view it.

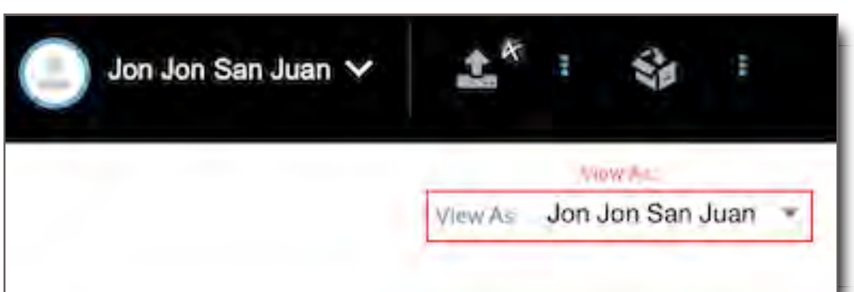
Sort Options

By default, your Packages will be listed in the order you've received them. Select a different Sort Option to change the method by which your Packages are sorted. When you mouse over an option, you can select the Sort Order for that option by clicking on the arrow. Clicking this toggles between ascending and descending order for the selected Sort Option.



View As:

Admins have an additional feature located above Sort Options called View As: This pull down menu reveals users you have access to so you can view their Package Inbox. As an Admin, you can emulate the person's Inbox. You can perform Admin functions and provide additional support to the user as well as share packages from their Inbox.



Selecting Multiple Packages

Click the check box to the left of a Package name to select it. Once you've selected one or more

Packages, a new menu of icons will appear and you can choose an action to apply to the chosen packages. NOTE: This option is only available to Admins currently.

1. **Share:** Allows sharing of package from your inbox (this option is currently only available to Admins).
2. **Archive:** Set the selected Packages to be moved to the Archived folder. Once Archived, Packages will no longer show up in your Inbox.
3. **Delete:** Set the selected Packages to be moved to the Deleted folder.
4. **Merge:** Combine the contents of selected Packages into a single new Package.
5. **View:** Flag package as Viewed.

Favorite

Click the Star icon on a Package to set it as Favorite. Once you've set a package as Favorite, it will show up when you select the Favorites filter. Click the Star icon a second time to un-Favorite it.

Download

If you have Permission to download the contents of the Package, you can click here to do so. For more information, navigate to the section on Downloading.

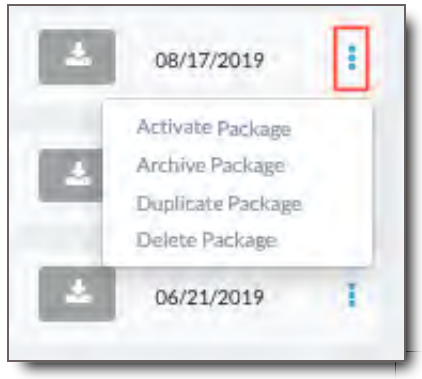
More

Click the More button to view additional options that are available for the package.

2. **Archive:** Archive package. Once Archived, Packages will no longer show up in your Inbox.
3. **Duplicate:** Make a duplicate of the package that can then be sent as is or edited.
4. **Delete:** Delete Package places the package in the Deleted filter of your inbox.

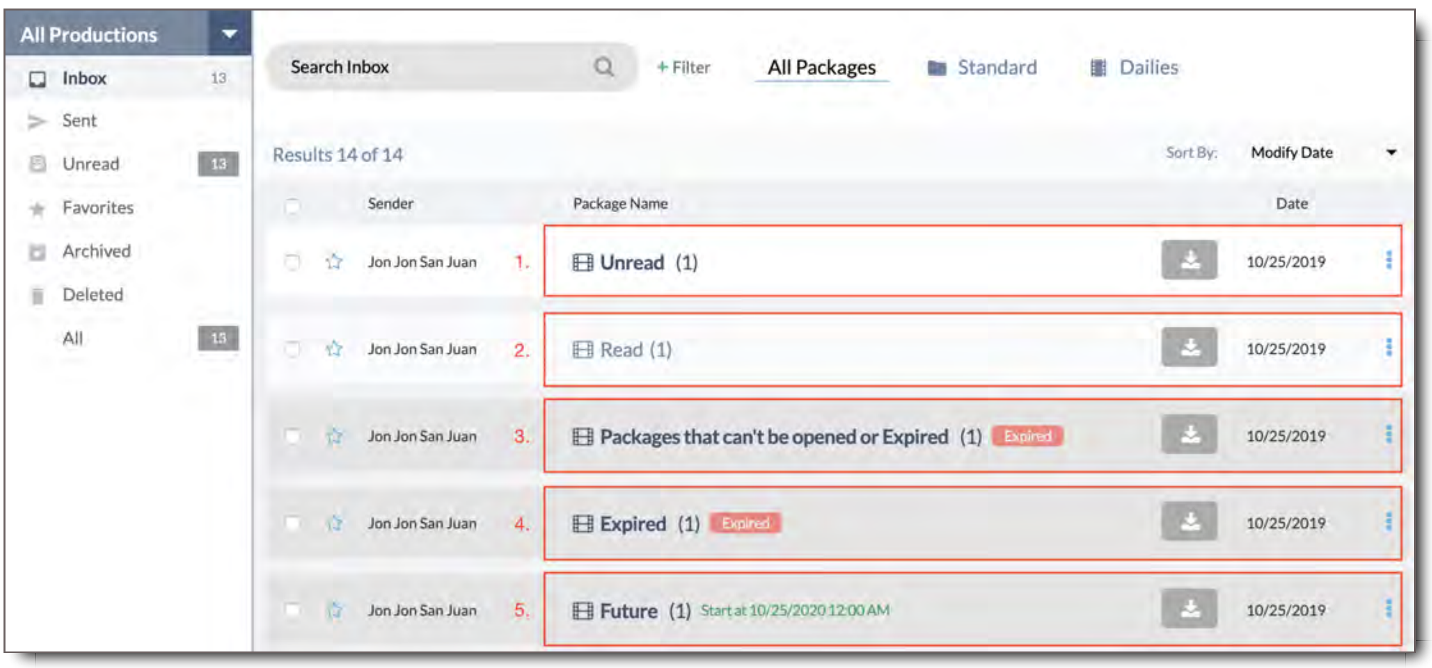
Package Inbox Status Indicators

1. **Activate:** Activating a package means you are selecting it in order to interact with it, either to share it as it is or to add or remove files from it. When a package is activated, a green dot appears next to the package title. The package also becomes the active package in the Active Packages section.



You can check the status of your package in your inbox by looking at the following Package Inbox Status Indicators:

1. **New/Unread:** Text Color: Black l Style: Bold l Background White
2. **Read:** Text Color: Light Black l Style: Normal l Background: Light Gray
3. **Packages that can't be opened or Expired: Text Color:** Light Black l Style: Normal l Background: Dark Gray
4. **Expired:** Red Expired label appears to the right of title and file numbers
5. **Future:** Green text with start date and start time appears to the right of title and file numbers



Troubleshooting Packages

My Package Won't Open in Package Viewer

If your package opens, but only in the Player, go to Troubleshooting in Asset & Package Viewer . If your package won't open when you click on it from your Inbox, then check for the following:

1. Is it expired?

- Reach out to the sender of the package if you need more viewing time.

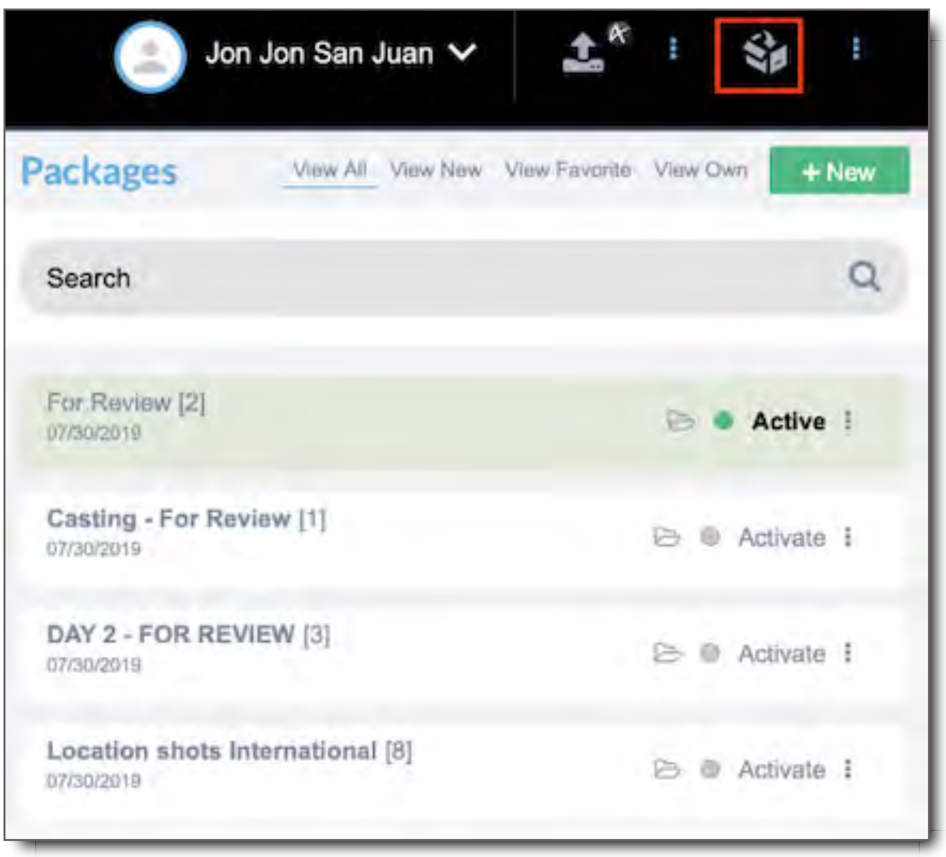
2. Have you reached the maximum views allowed?
   - Reach out to the sender of the package if you need more views.
3. Does the package show (0) files at the end of the package name?
   - All files have been removed from the package, reach out to the sender to have them re-share a new package. The package may appear to flash to open but immediately will close and is not viewable.

Creating & Modifying Packages

To create an empty Package that you can add Files to, follow one of these methods:

Create a New Package from the Package Menu

Click the Package icon in the upper right hand corner of the screen to access the Package Menu, then click the "+ New" button to create a new Package.

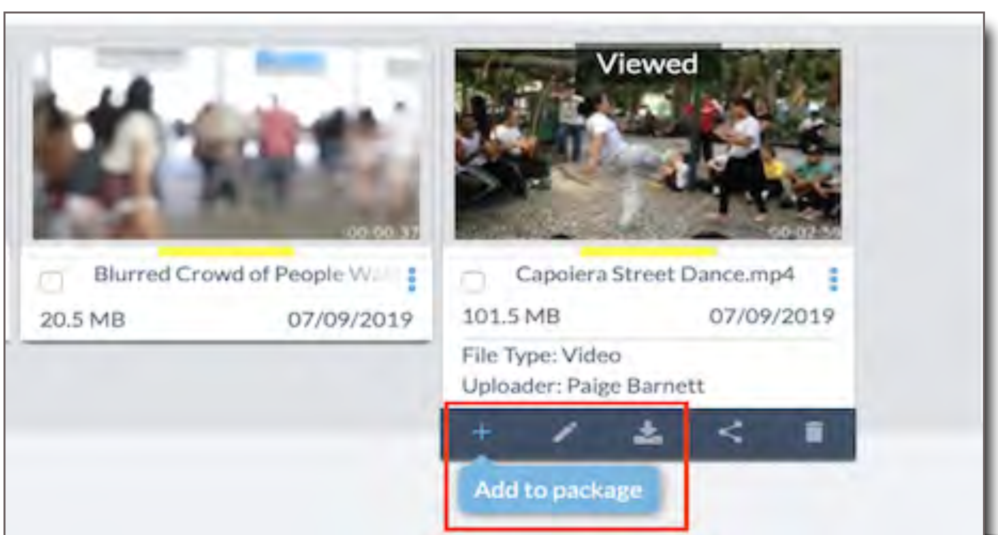


Type the name of the Package, then click "Create."

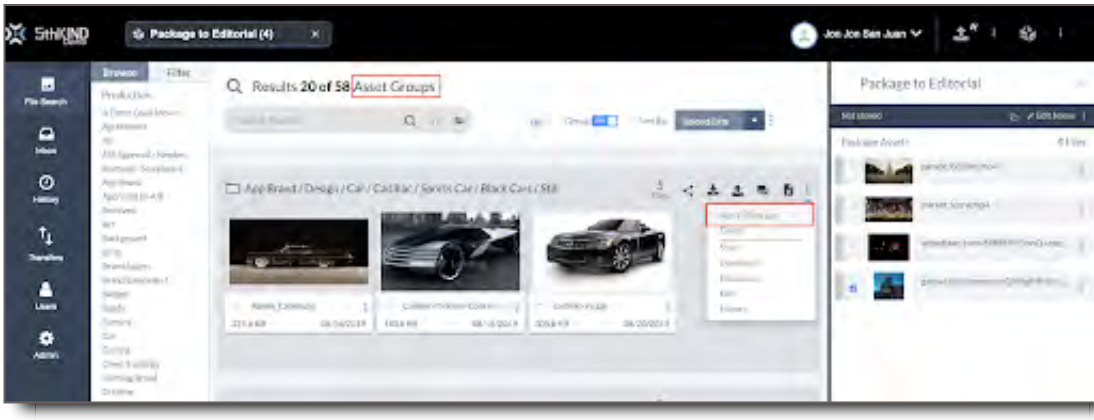
Create a New Package from File Search

If you have no Active Package, hover over the thumbnail and then the '+' icon on any File or the "⋮" icon for the Asset Group. Name the package, and this will allow you to create a new Package with the selected Files added to that group.

Creates Package from a File (Also adds to an existing Package)



Creates Package from an Asset Group (Also adds to an existing Package)

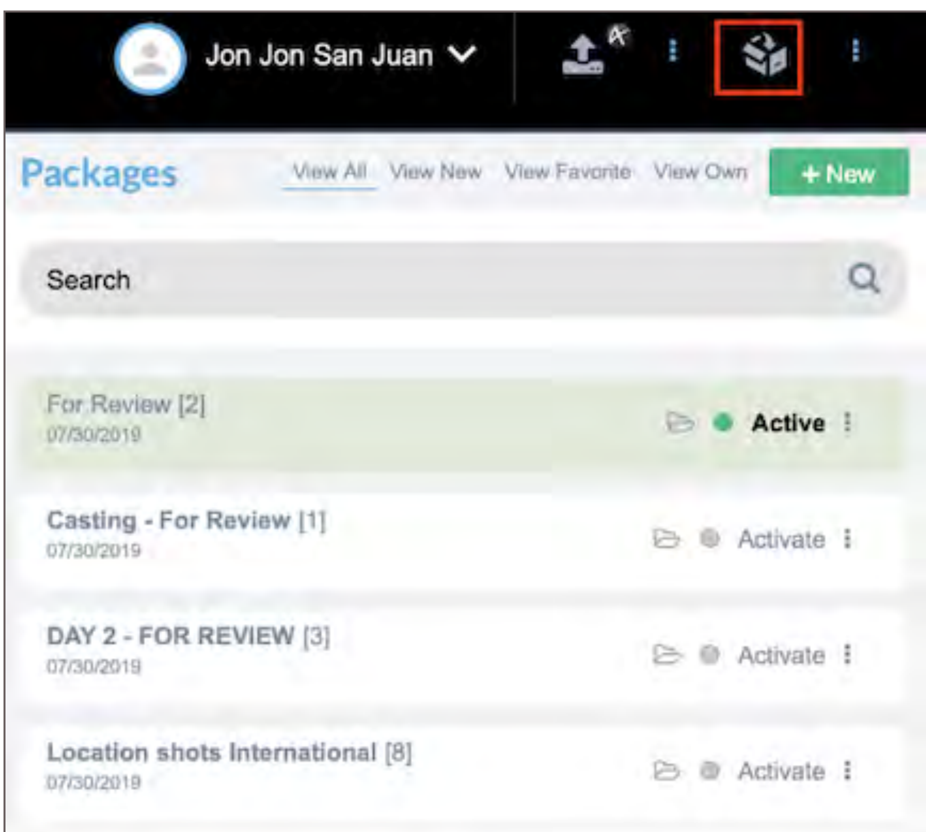


Add Files to an Active Package

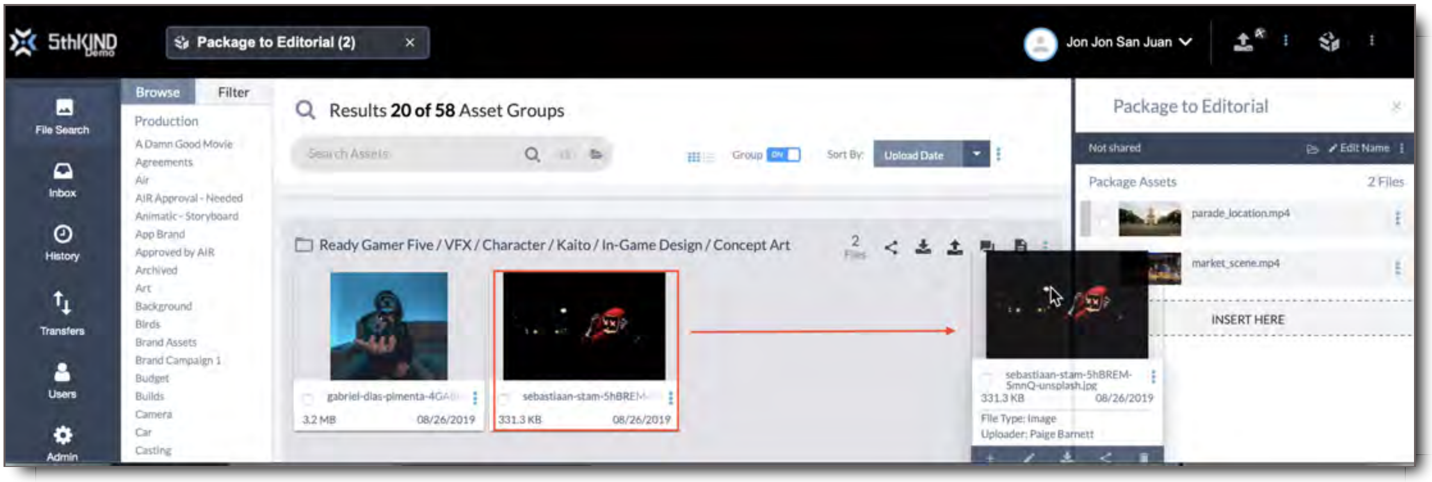
You can add Files to an Active Package in several ways.

Drag and Drop

When browsing Files in File Search, open the Package Sidebar. If it's not already open, click the Package icon in the upper right corner, then click the Package you want to add to.



With the Package Sidebar open, simply drag and drop any File into it.

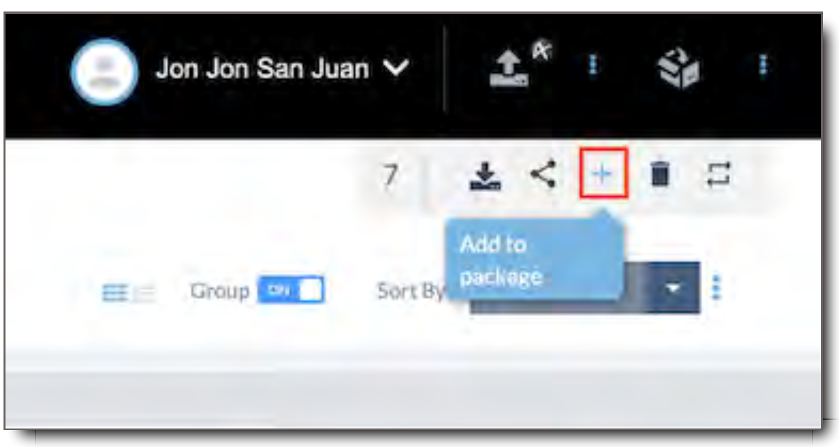


Adding Multiple Files to a Package

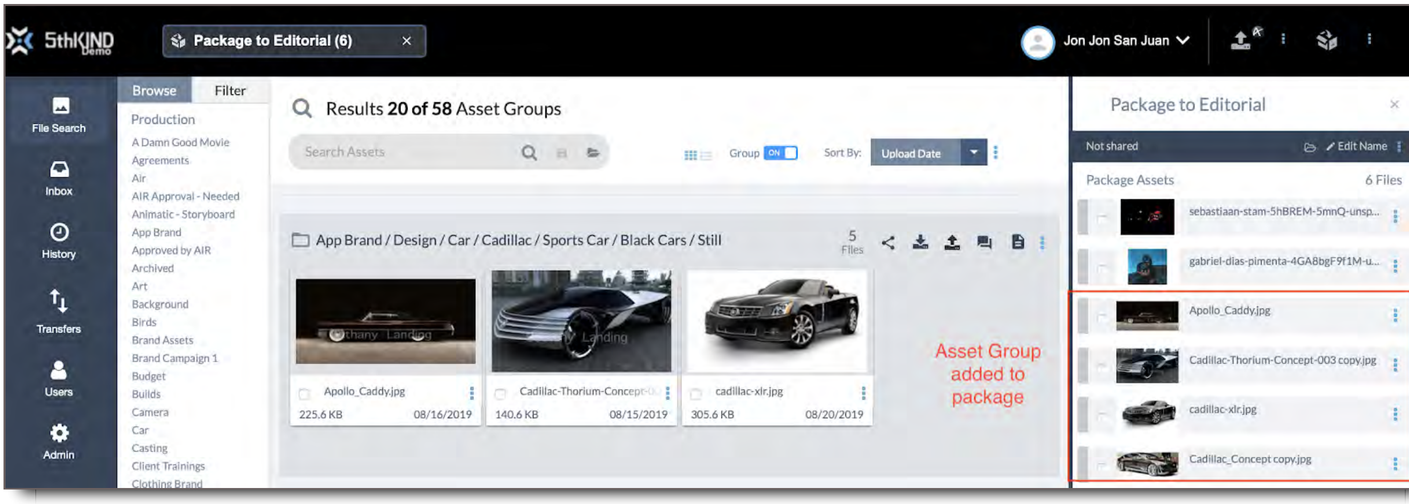
If you have selected one or more files, you can add all of them to a Package at once.

From File Search When Selecting Multiple Files Regardless of Asset Groups

With one or more File selected, a group of additional options will appear along the top of the Search Results. Click the ✚ icon to add all selected Files to your Package.



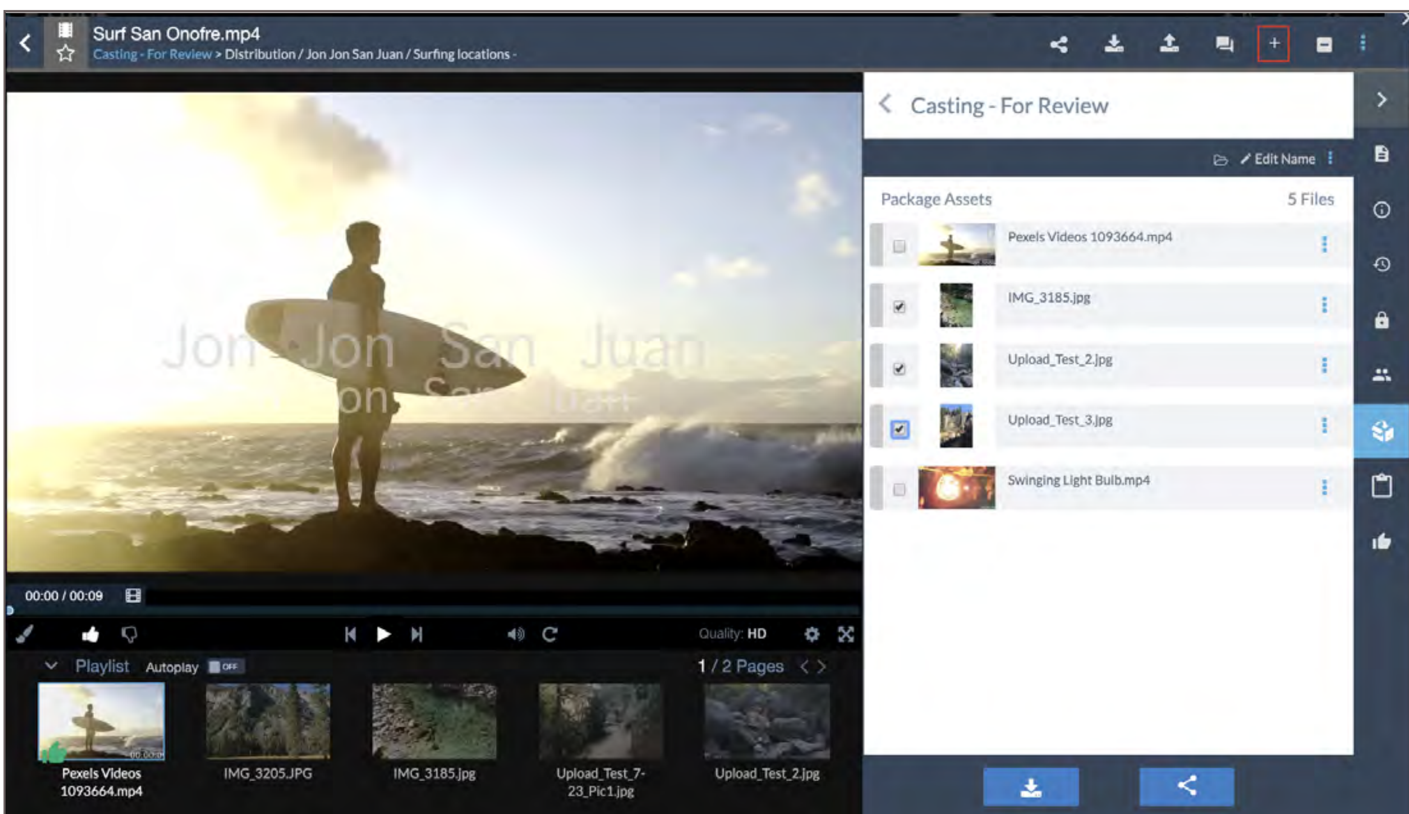
From File Search When Adding an Entire Asset Group



Click the "⋮" icon and select Add to Package to add all selected Files from that group to your Package.

From an Asset Group or Package That is Selected and Open in the Viewer Module

With one or more File selected, click the **+** icon on the Viewer Top Bar to add all selected Files to your Package.

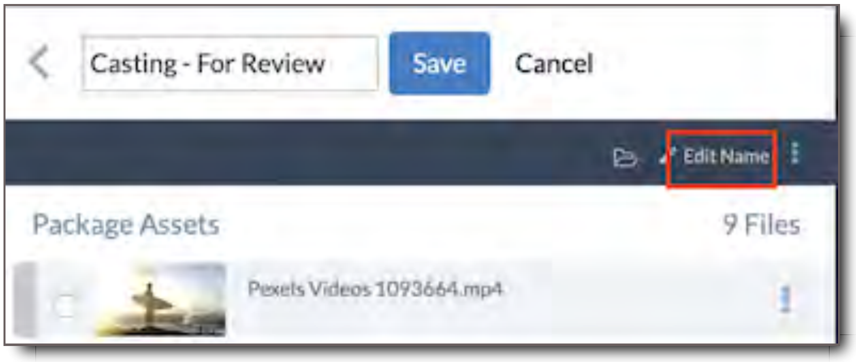


Modifying Packages

Once you've created a Package, you can re-order or remove its contents at any time.

Rename a Package

When viewing a Package in the Package Sidebar, click the "Edit Name" button. Type the new name for your Package, then click Save.



Reorder Package Contents

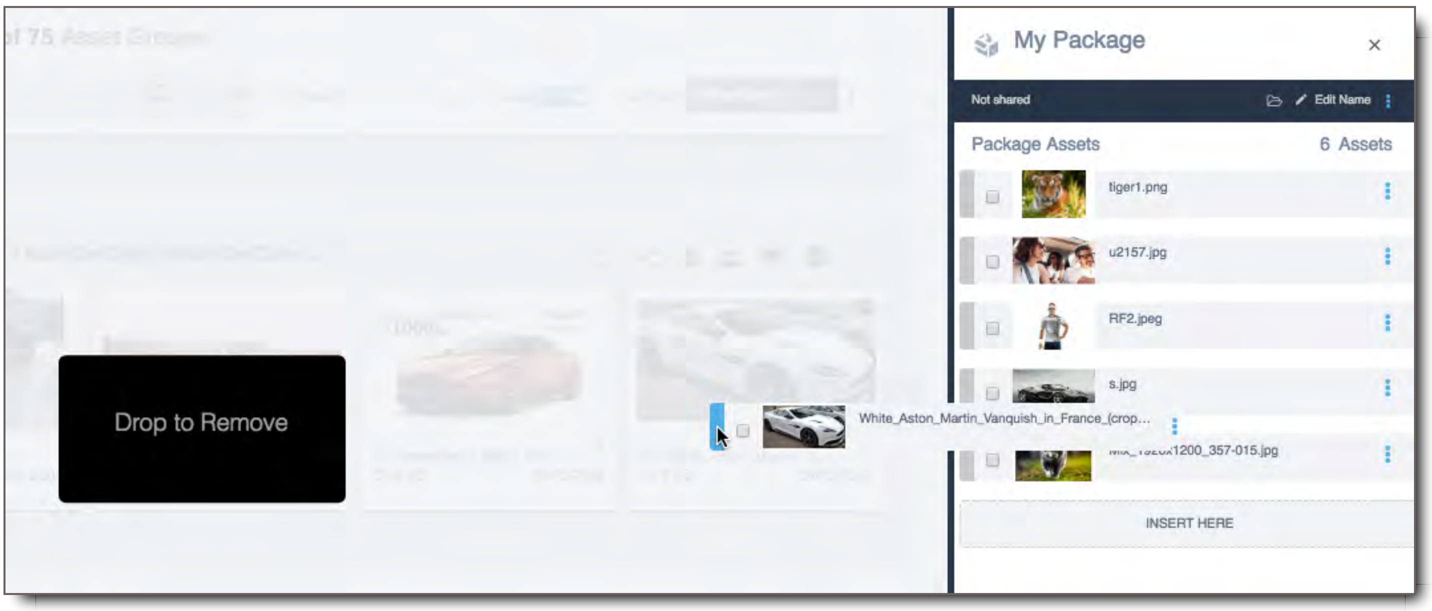
To reorder Files in a Package, open it in the Package Sidebar. If it's not already open, click the Package icon in the upper right corner, then click the Package you want to modify.

Mouse over the File, and select it on the Gray Left Bar. You can then drag it to the position you want it to be in.

Remove Files from Packages

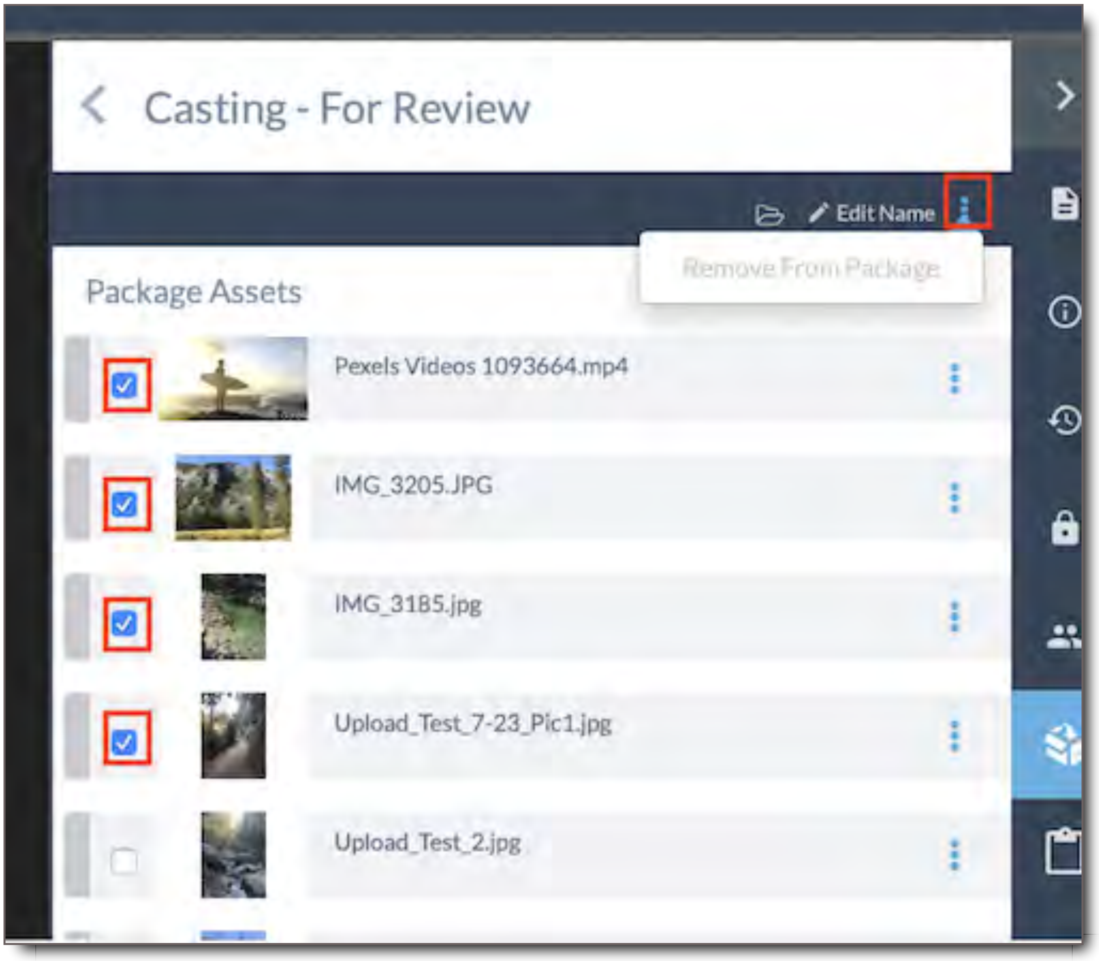
From File Search - One File

If you've got the Package open in the Package Sidebar, mouse over the File you want to remove, select it along the Gray Left Bar, then drag and drop it outside of the Package.

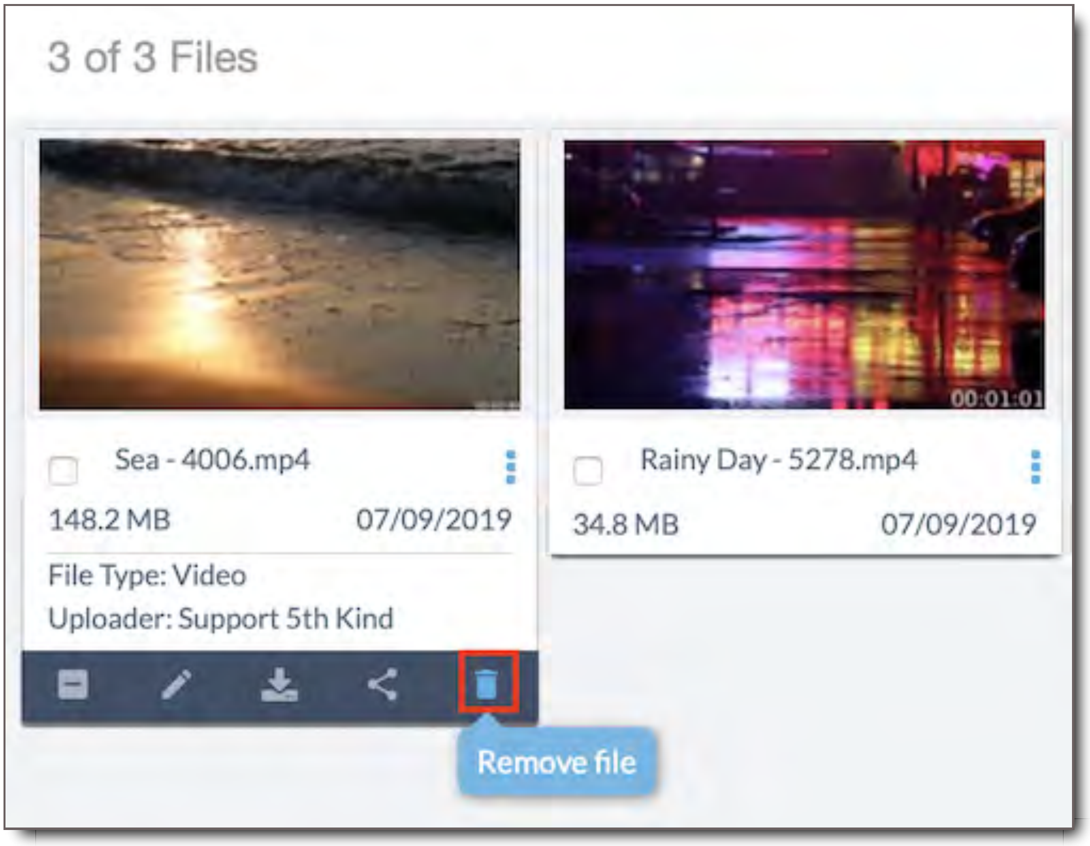


From File Search or Viewer - Multiple Files

If you'd like to remove more than one File from a Package at once, check the boxes next to the ones you'd like to remove, then click the More ⋮ icon and select "Remove From Package."



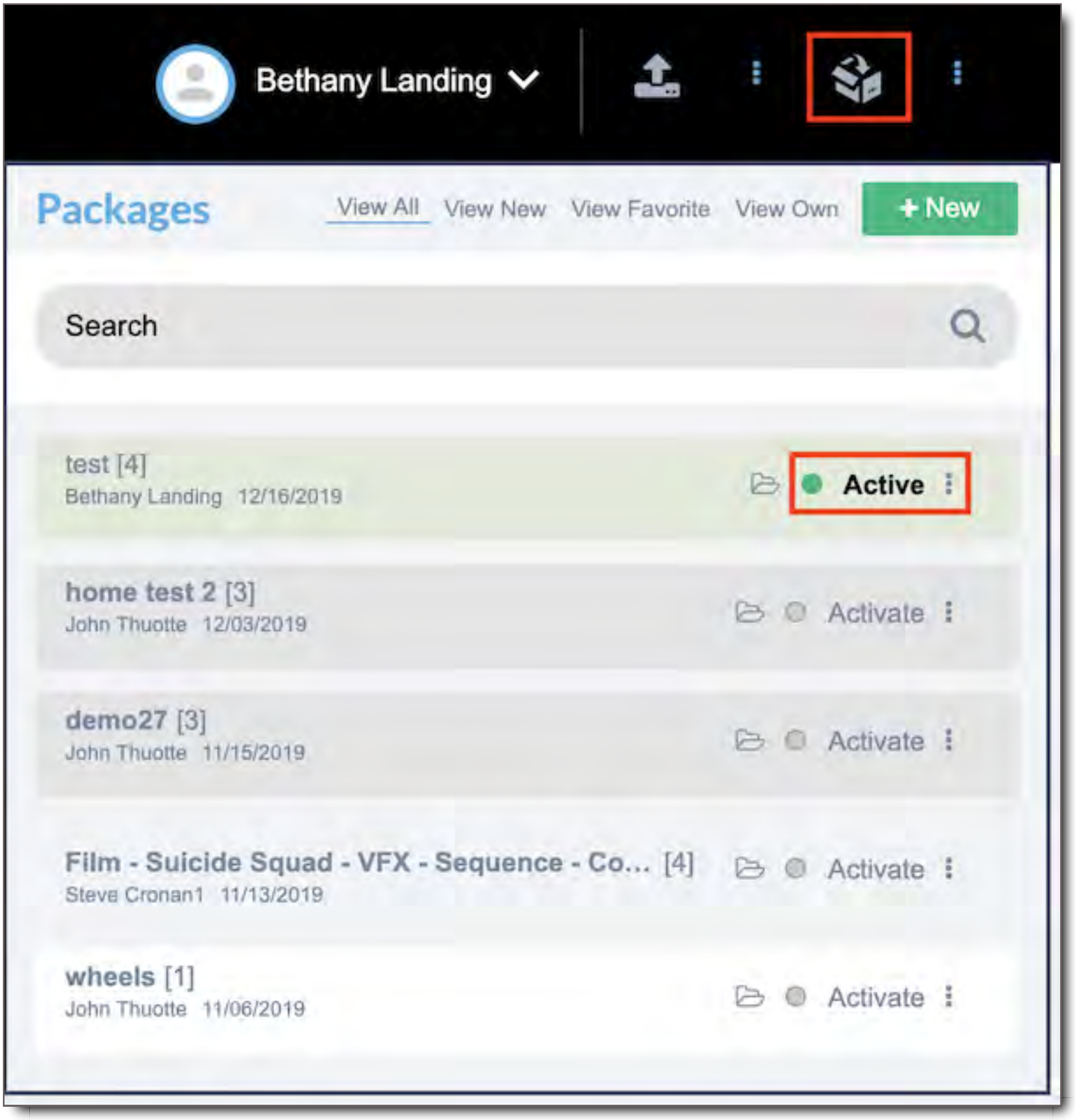
NOTE: If your permissions allow you to see icons at the bottom of a thumbnail, and you choose the Trash Can icon to 'Remove File', this action will delete the files from system entirely not just from package. Trash Can = Delete, so do not use this when removing Files from Packages.



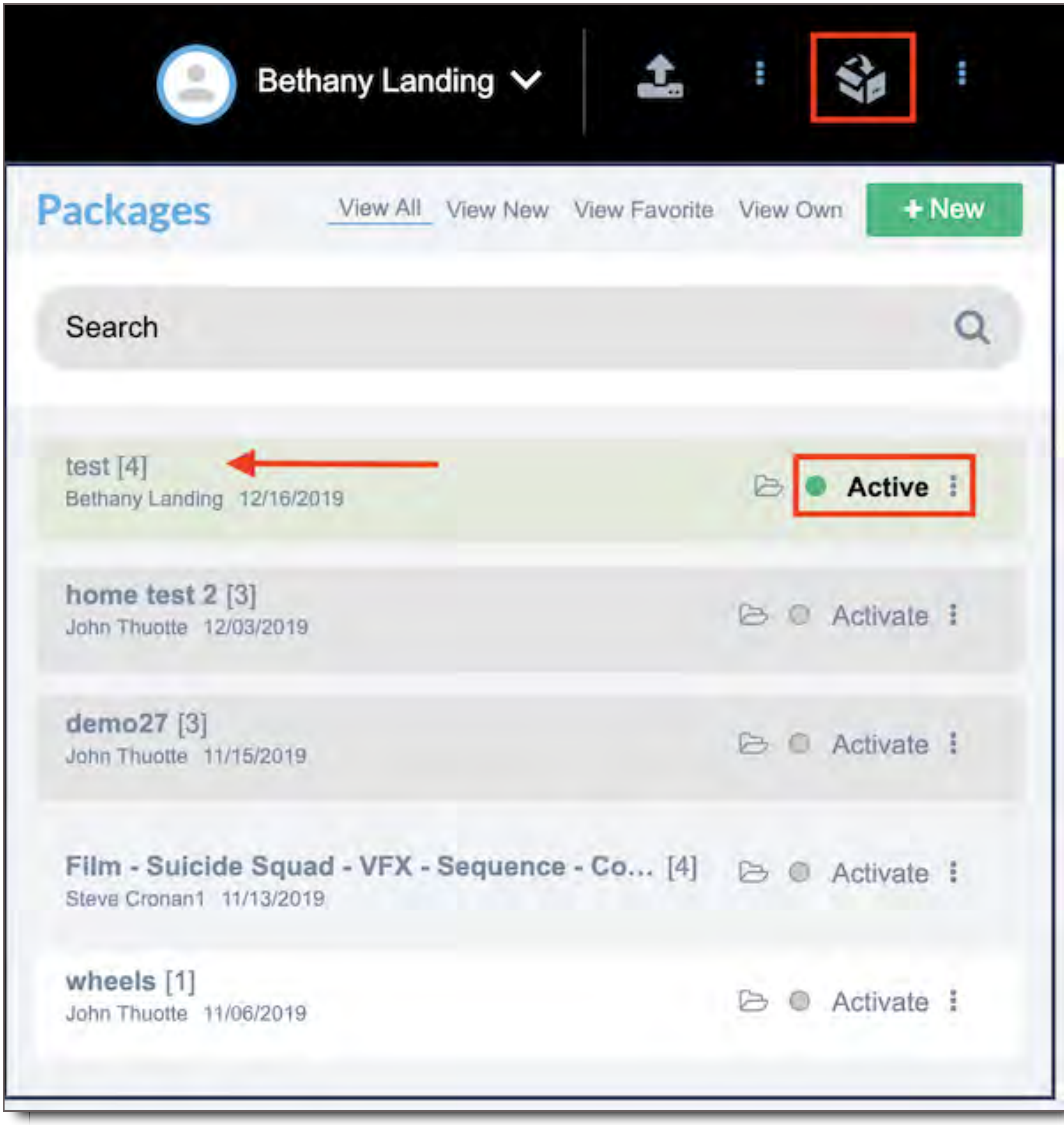
Active Package Panel

The Active Package Tab shows contents of your current Active Package.
To activate a package is like turning it on so you can Edit its contents or Share it. To Activate a package:

1. Click on the package icon in the top right corner
2. Click on a package from the list and the dot next the package will turn Green to show the package is active. The green dot will also show up in your Inbox next to a previously sent package that you've chosen to activate.



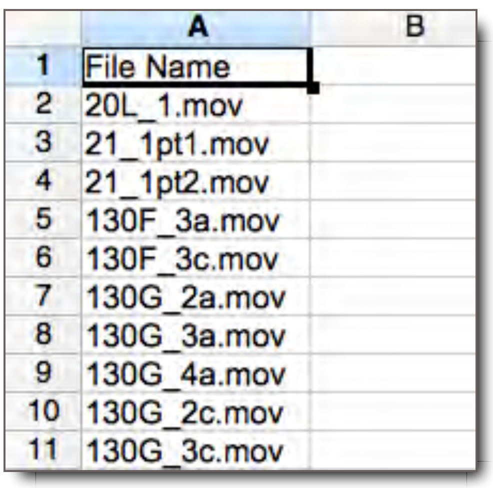
You can also click the package icon when in the asset viewer on the right panel. This will show the assets in the current active package. Assets in the package can then be edited as seen above in this Help module.


Bethany Landing
Packages
View All
View New
View Favorite
View Own
+ New
Search
test [4]
Bethany Landing 12/16/2019
Active
home test 2 [3]
John Thuotte 12/03/2019
Activate
demo27 [3]
John Thuotte 11/15/2019
Activate
Film - Suicide Squad - VFX - Sequence - Co... [4]
Steve Cronan1 11/13/2019
Activate
wheels [1]
John Thuotte 11/06/2019
Activate

Creating a Package from a CSV File

You can automate the creation of a Package in CORE by uploading a CSV file. Simply create a CSV file containing the names of the Files you'd like to add to your package, and upload it through the interface.

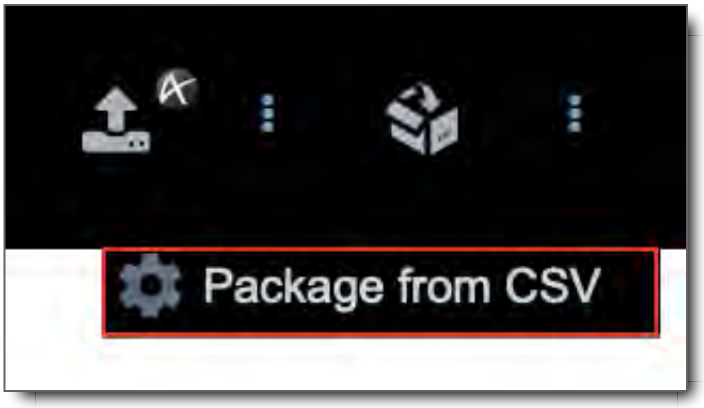
First, create a CSV file containing the filenames of the Files you'd like to add to your Package, in the order you'd like them to appear. The first line of the file must say "File Name". Click here to download the CSV template.



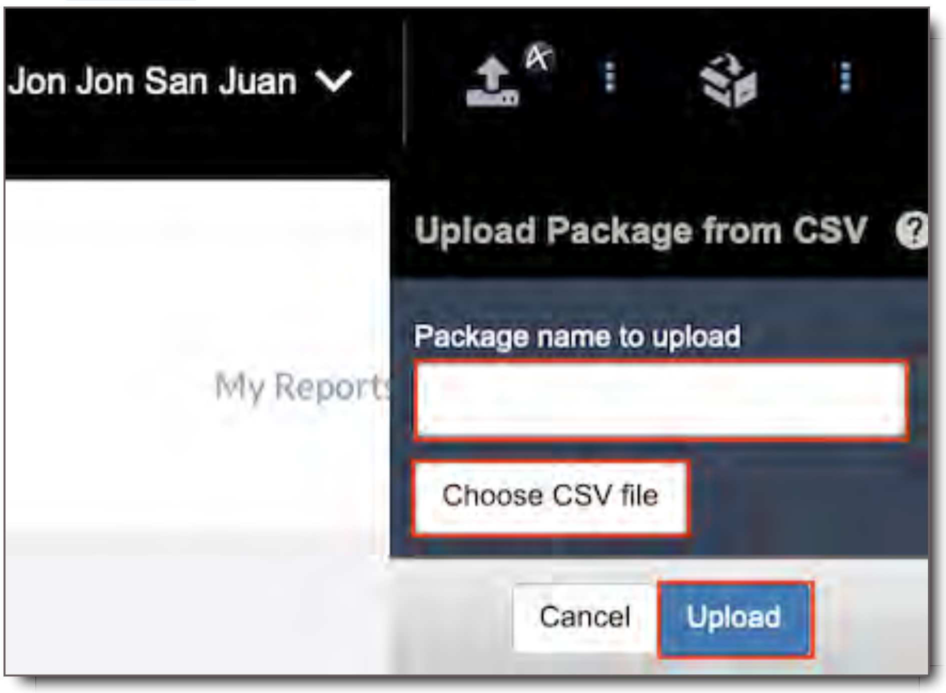
	A	B
1	File Name	
2	20L_1.mov	
3	21_1pt1.mov	
4	21_1pt2.mov	
5	130F_3a.mov	
6	130F_3c.mov	
7	130G_2a.mov	
8	130G_3a.mov	
9	130G_4a.mov	
10	130G_2c.mov	
11	130G_3c.mov	

To create your package, click the ⋮ next to the package icon in the upper right corner of the screen.

Select "Package from CSV."



Enter the name of the Package, then click "Choose CSV file." Select the CSV file you created, and then click **Upload**.



Any Files in the system matching the filenames given will be added to your new package.

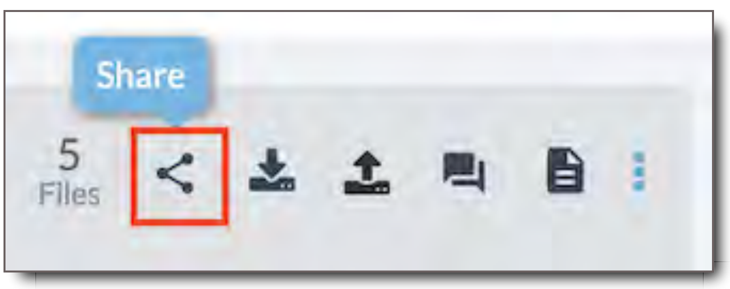
Important: Files must be categorized in the system in order to be added to a Package. Also, you can only add Files that you have Permission to view. If you require access to additional Files in the system, please contact your Administrator.

Sharing Packages

In this section, we will break down how to share packages with other users in CORE. We'll learn about Share Settings from Package Types to Download Options, Recipient Settings, Permissions and Package Restrictions.

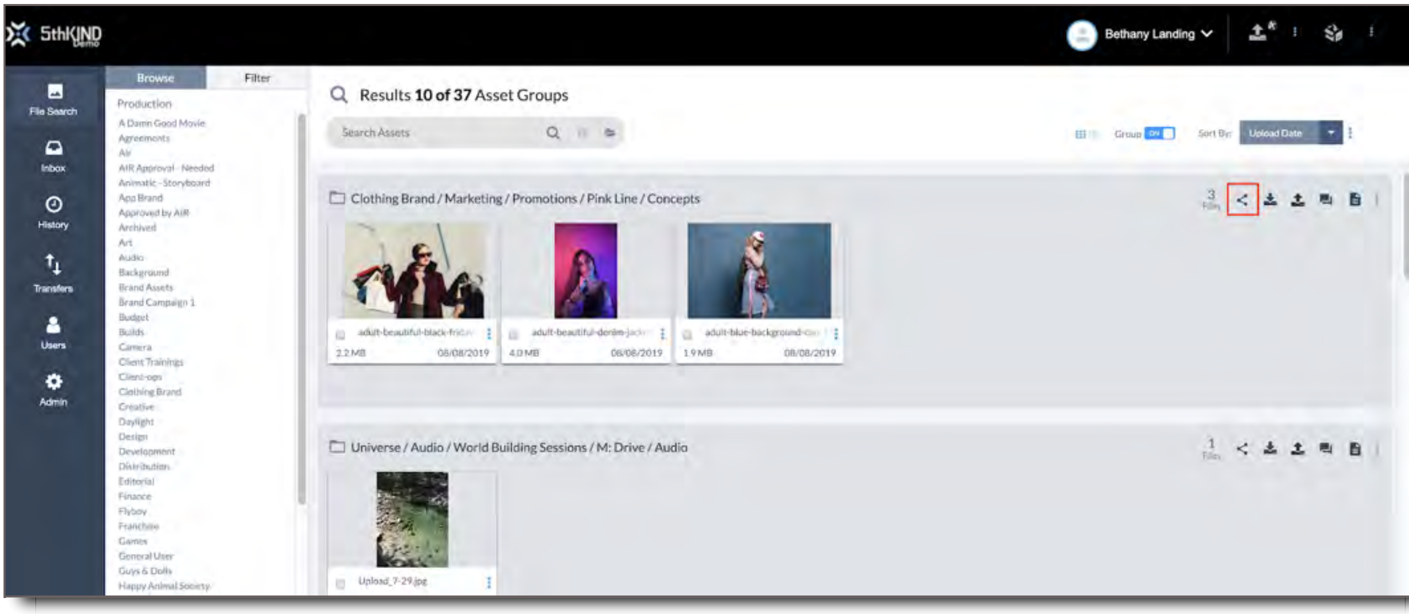
Share Icon

First choose the Share Icon in CORE.

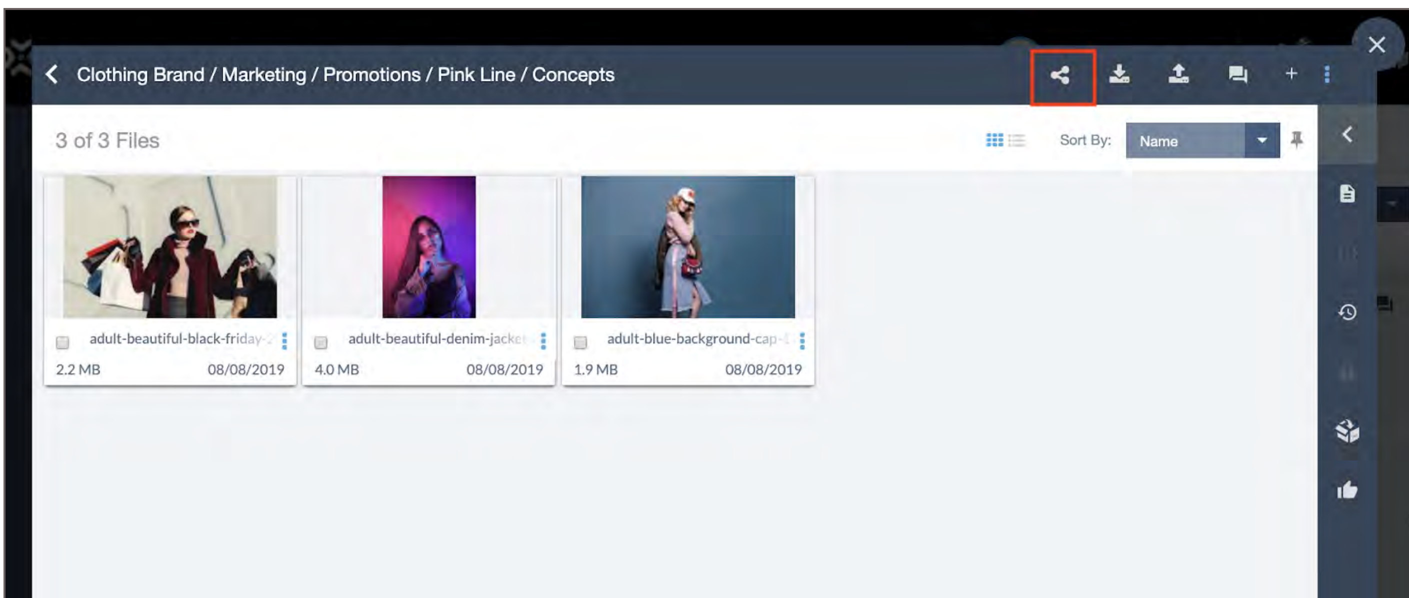


The Share Icon can be found in multiple places within the system.

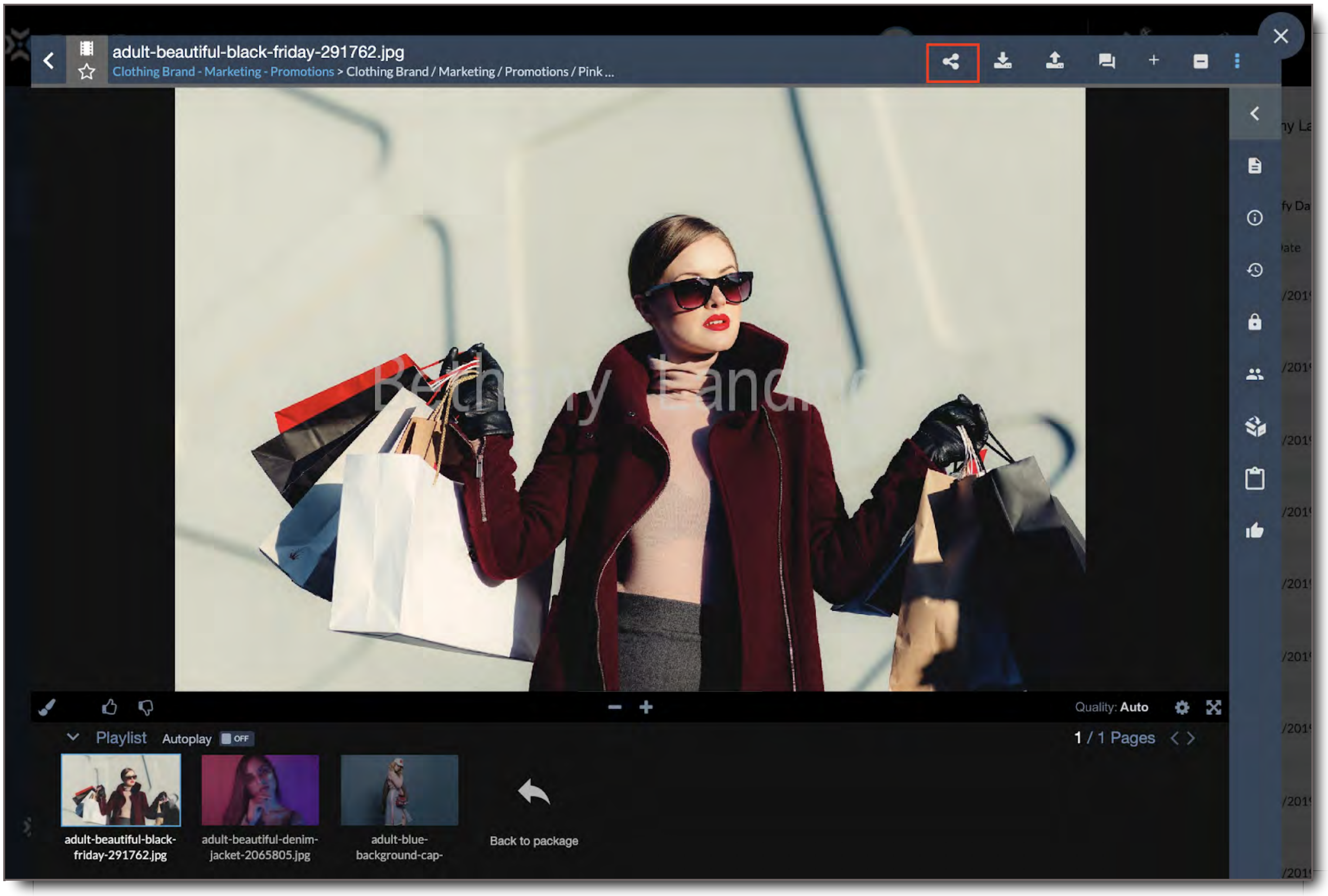
In File Search to the right of the Asset Group name.



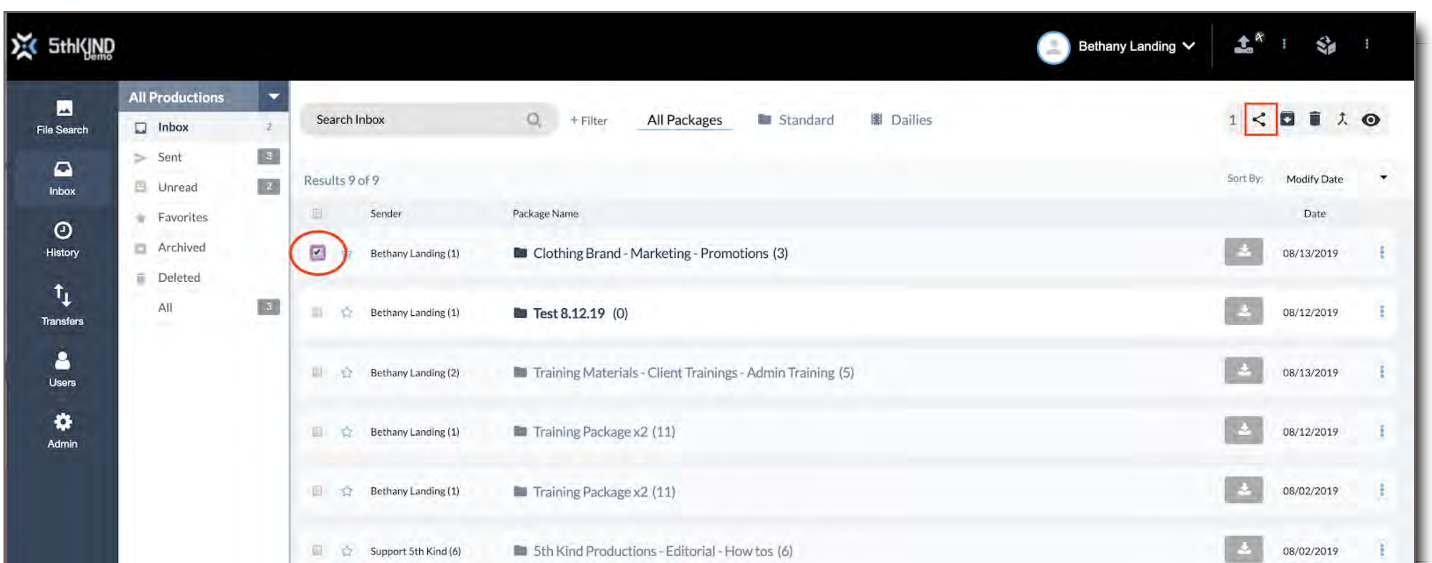
In the Asset Viewer Top Bar.



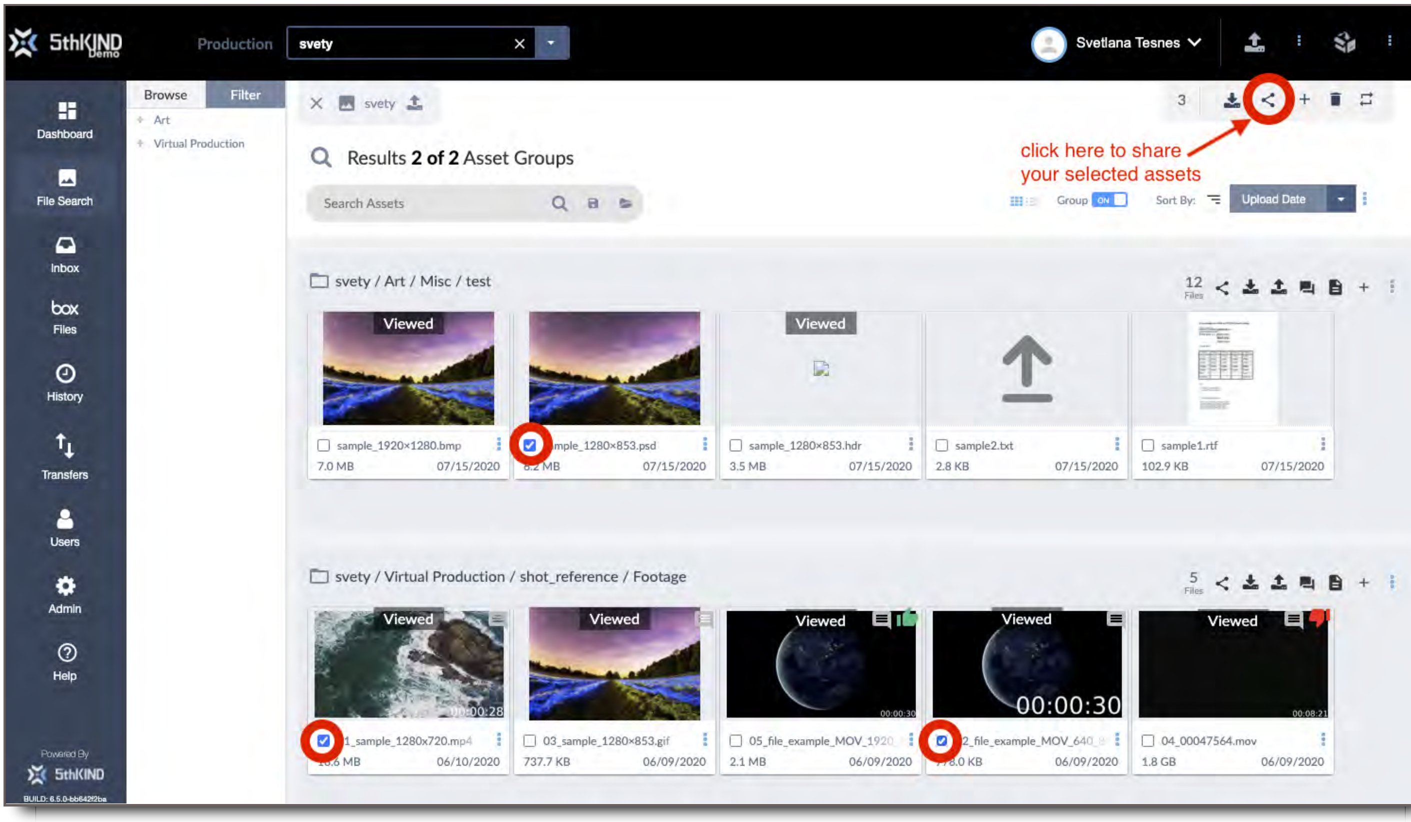
In the Asset Player - Top Bar - to the right of the File name.



For ADMIN Users Only - From your Inbox, click the checkbox next to an item or multiple items. Once checked, the icon will appear in the top right of the Package Inbox.



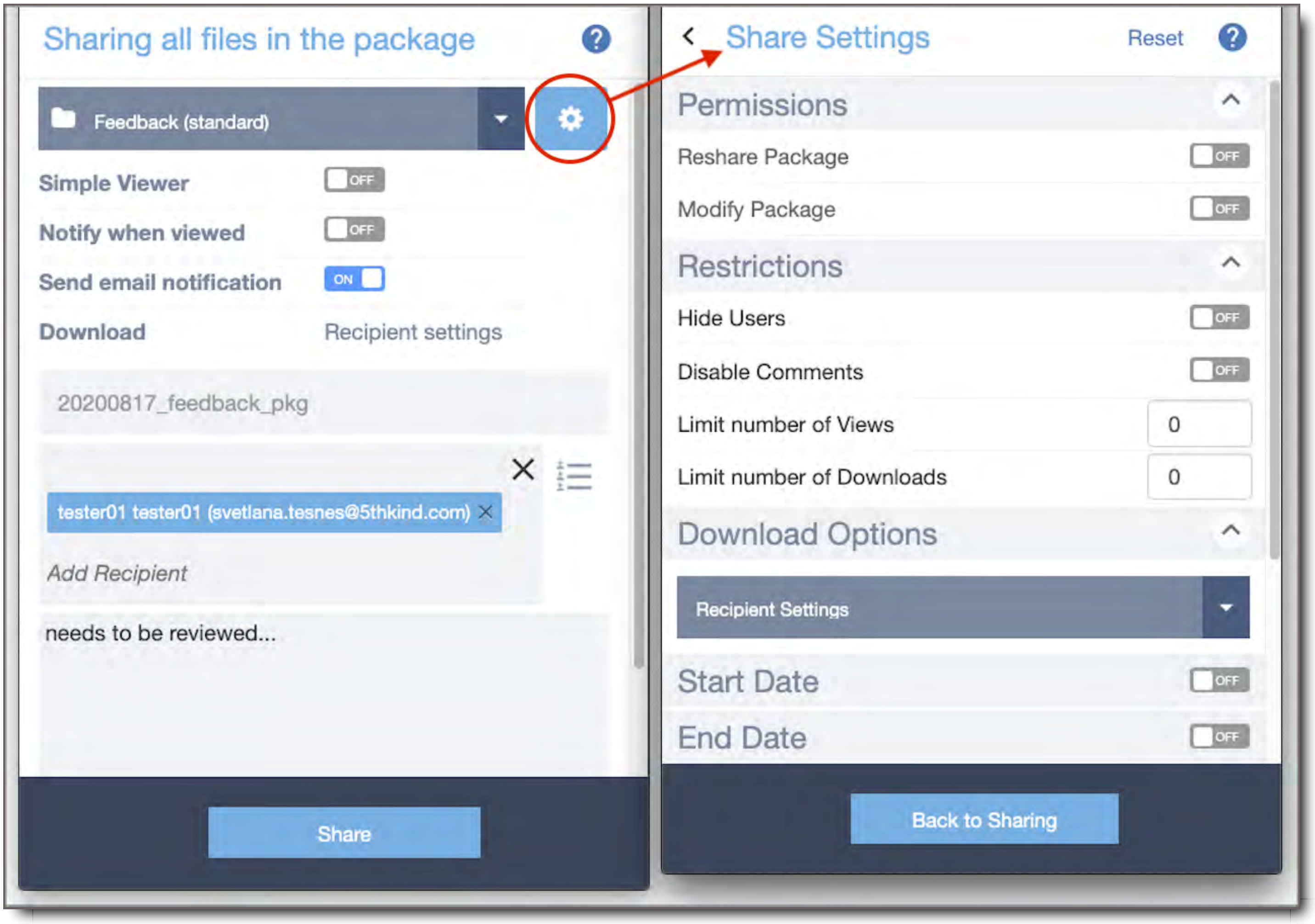
In File Search, select individual assets from various asset groups by clicking in the checkbox for each asset you want to share, then click on the icon at top right of the page to share your assets.



No matter where you choose the share icon in the system, the following steps are the same for users to share assets in CORE /or send a package in CORE.

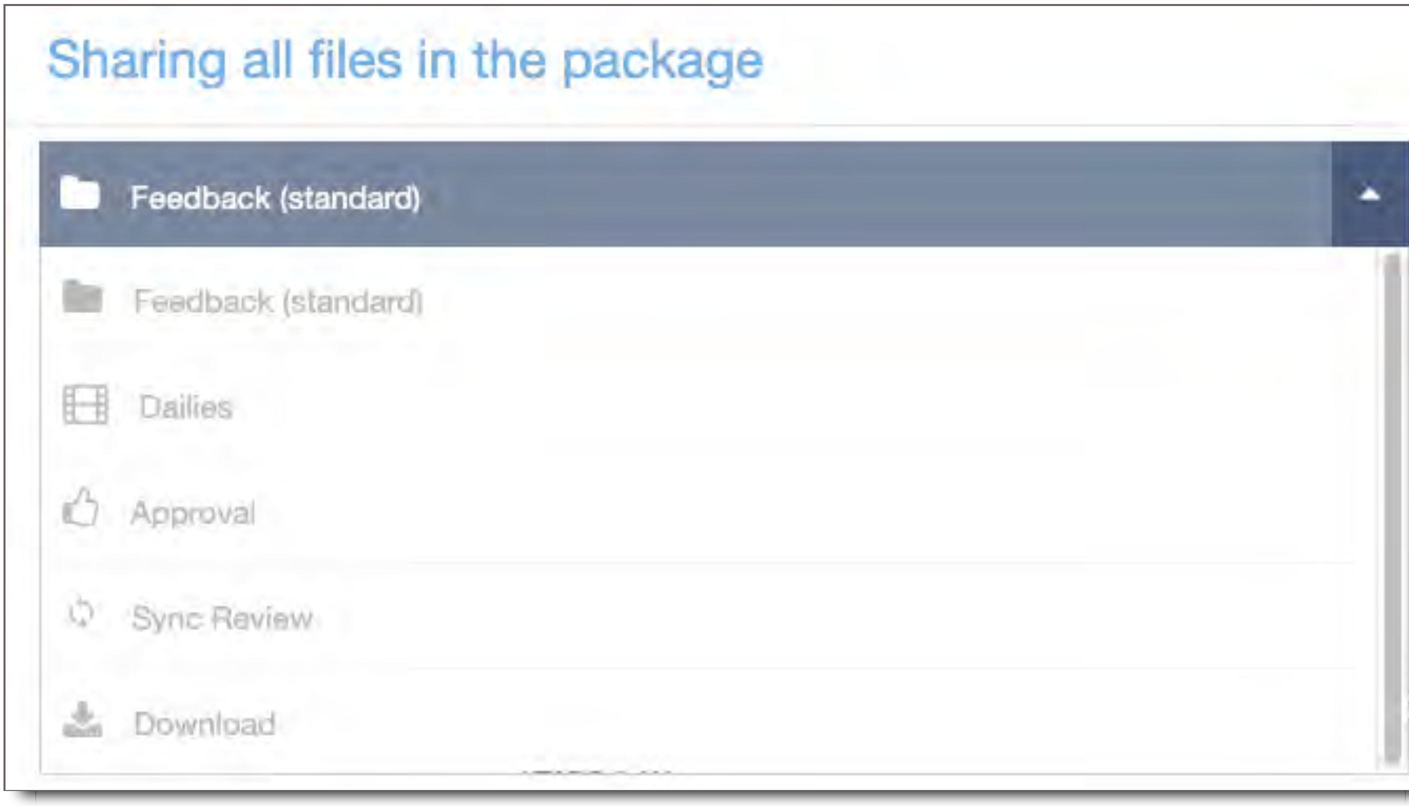
Share Settings

To edit the choices shown in the share settings area click the Edit button.



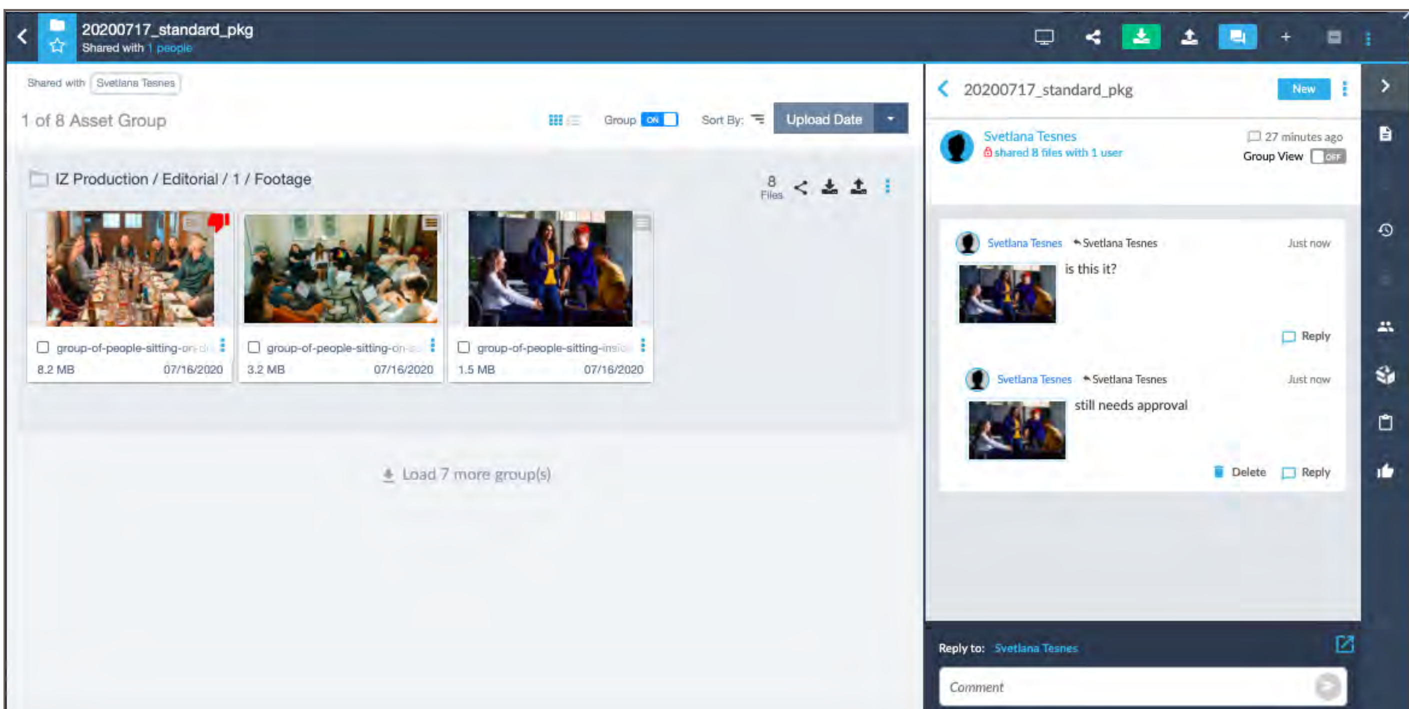
Package Type Filter

Select the type of Package.



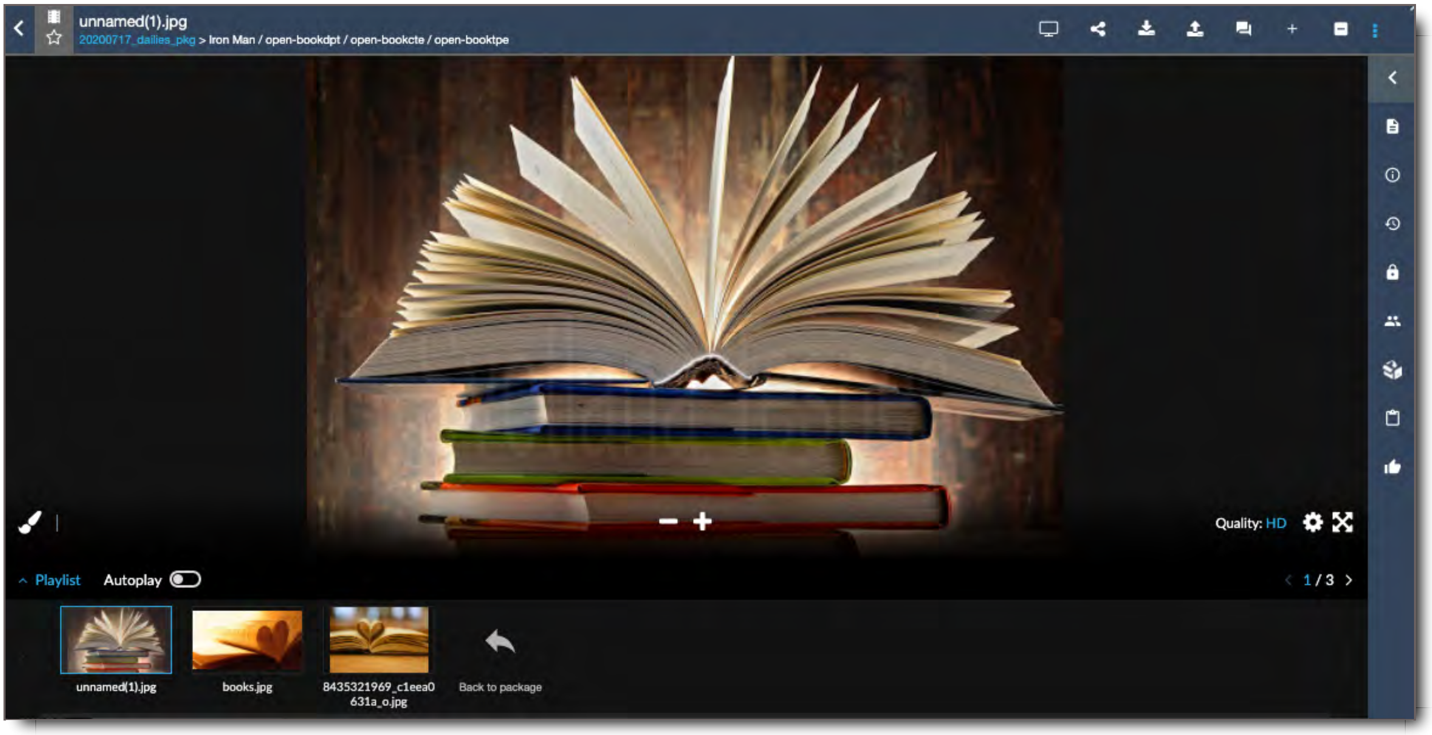
Feedback (Standard)

This package opens to a view of all files, with the comment panel enabled. Everyone on the share can collaborate and see each other.



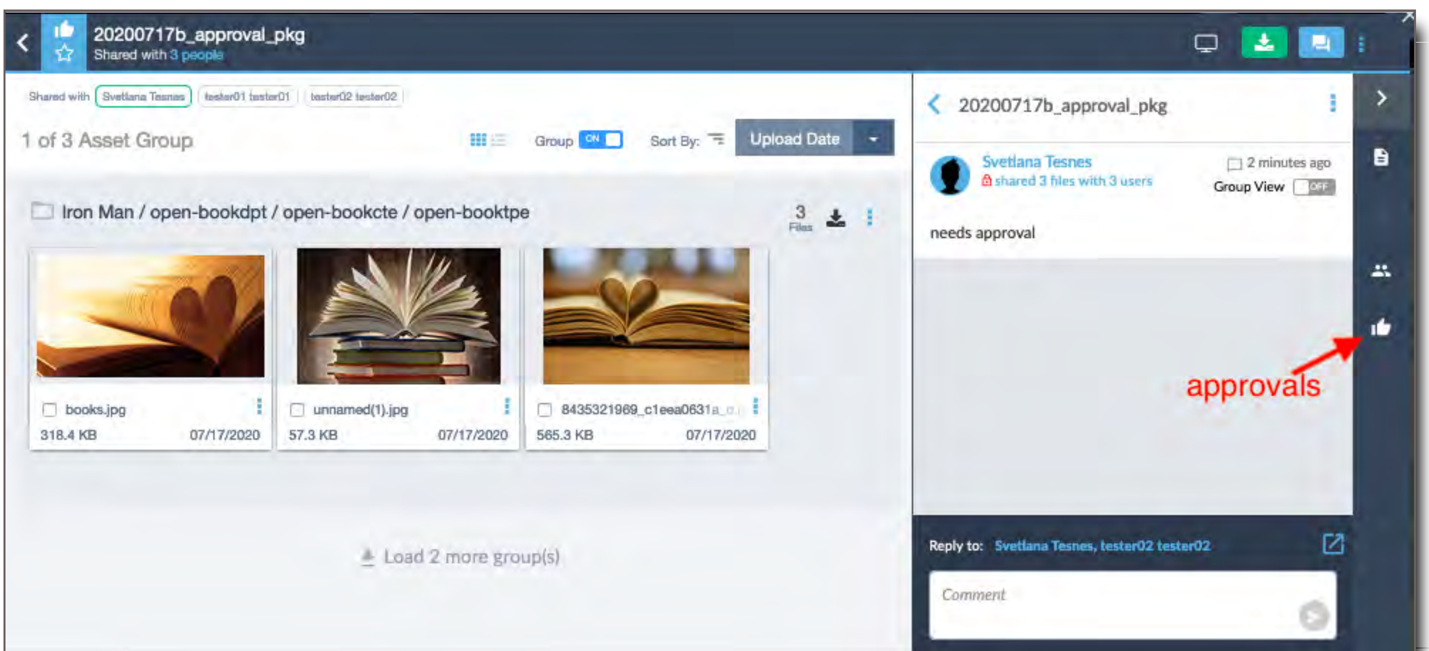
Dailies

This package launches the recipient directly into the player with the first file open. Only the sender can see who is included in the share.



Approval

This package opens to a view of all files, with the approval (thumbs up/down) panel enabled. Everyone on the share is visible, but each person can only see approvals based on their role.

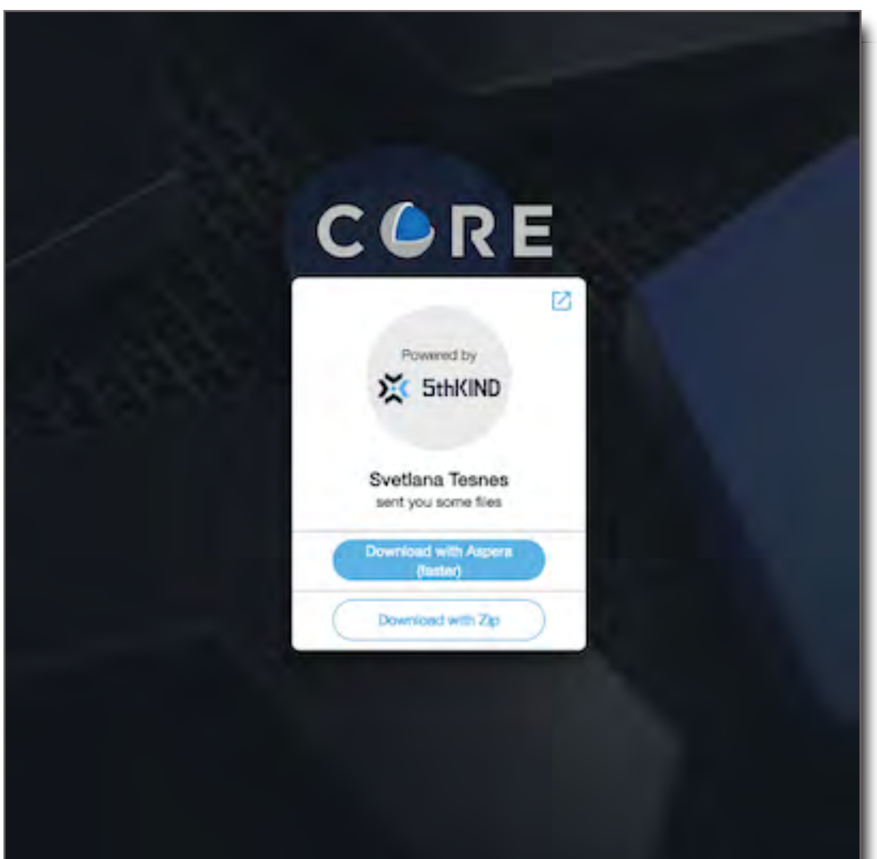


Sync Review

This package enables a real-time, hosted review. Recipients cannot see or access the files except when guided by the host (sender). Recipients can open it only with HTML5 player (not with Flash). Recipients of a Sync Review package will have a designated time/day to Review the assets with the host. Recipients will be guided through the Review of the assets as controlled by the host. They will be able to make real-time 'drawing' annotations on the assets while being reviewed.

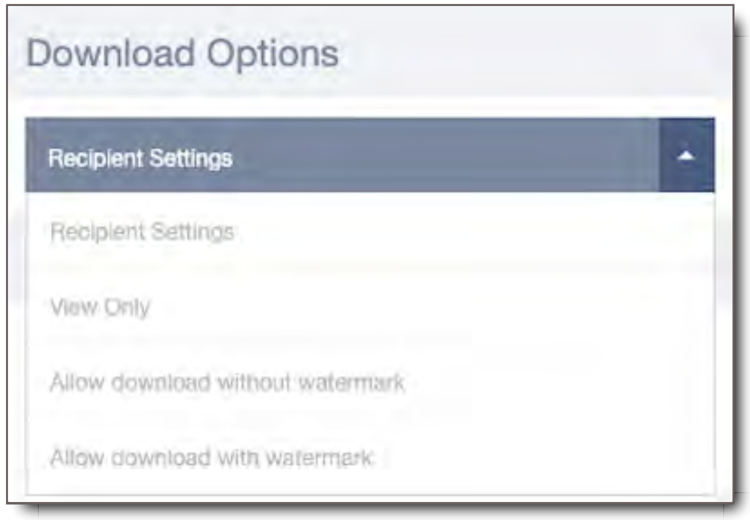
Download

A download package generates a simple, web-based download page. It's the easiest way to share files when you know recipients only need to download the files, rather than take action in Core.



Download Options

Recipient Settings



This is the default option. Each recipient will be able to download according to the permissions assigned to their User Role and set up by the System Administrator. For instance, some users may be view only and not be able to download at all, and others may be able to download with their watermark or download source files.

View Only

All recipients will only be able to view the contents of the Package, and will not be able to download them, regardless of their assigned permissions.

Allow download without watermark

Recipients can download the contents without a watermark. You must choose a quality setting with this option selected.
NOTE: The option to share without watermark, as well as to share the source files, are only available with certain permissions. If you do not see this option but feel you need it, please contact your System Administrator.

Allow download with watermark

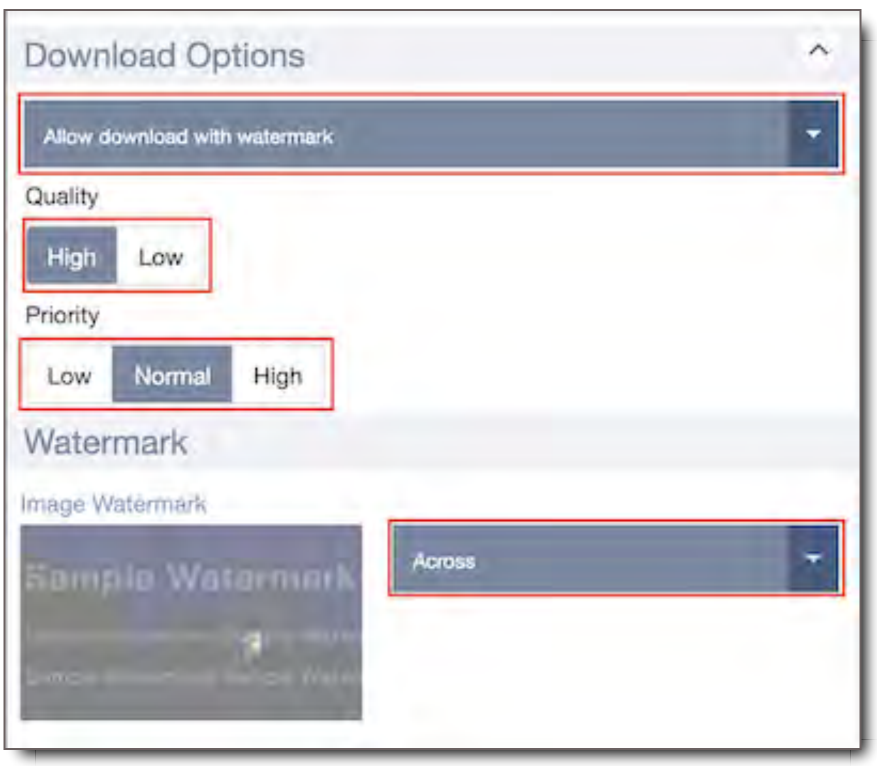
Recipients can download the contents of the package with a watermark burned in. You must choose a quality setting and priority, as well as a watermark style for each type of file with this option selected.
NOTE: The option to share with watermark is only available with certain permissions. If you do not see this option but feel you need it, please contact your System Administrator.

Watermark Style

This option will appear if you are sharing with a watermark. For each type of file (Image, Video, or PDF) contained in the package, select the style of watermark to apply.

Priority

With the proper permissions you may select how high the priority is for the watermarking process. For urgent watermarking jobs, select **High**, for watermarking jobs that are less urgent, select **Low**. Otherwise, leave this set at **Normal**.



Quality

Source

Recipients can download the original source of each file sent in the Package.

High

Recipients can download a high resolution proxy of each file in the Package.

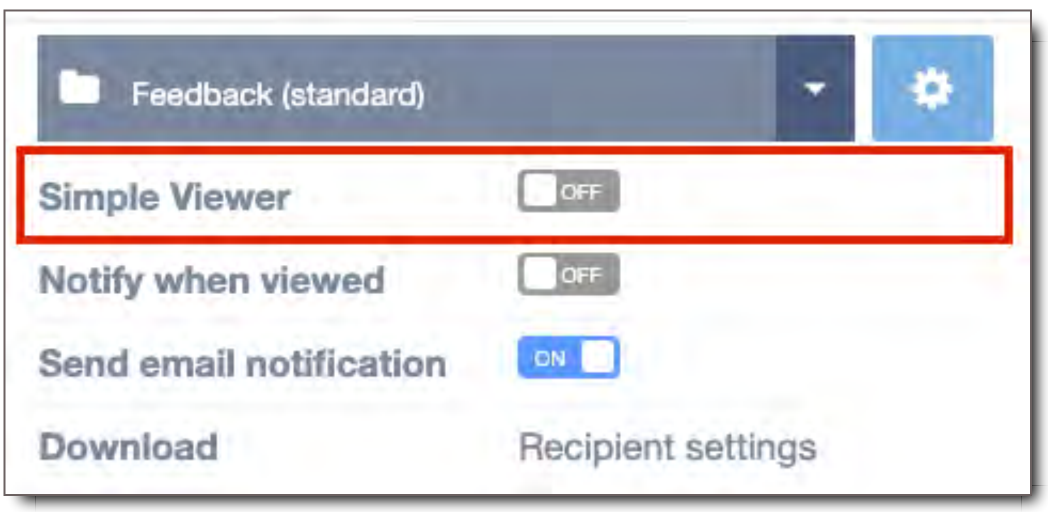
Low

Recipients can download a low resolution proxy of each file in the Package.

Viewing

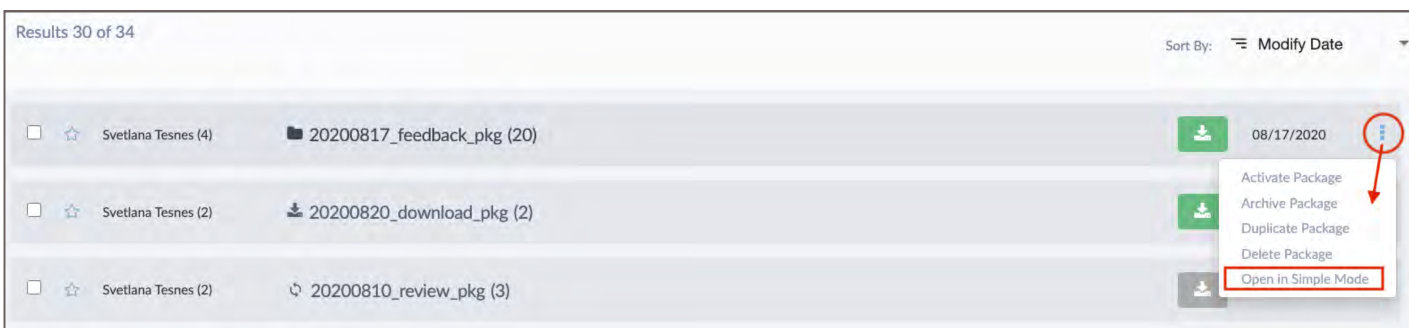
Simple Viewer

If this is ON, when recipients open the package, it will launch a simple file player with no panels or clutter.

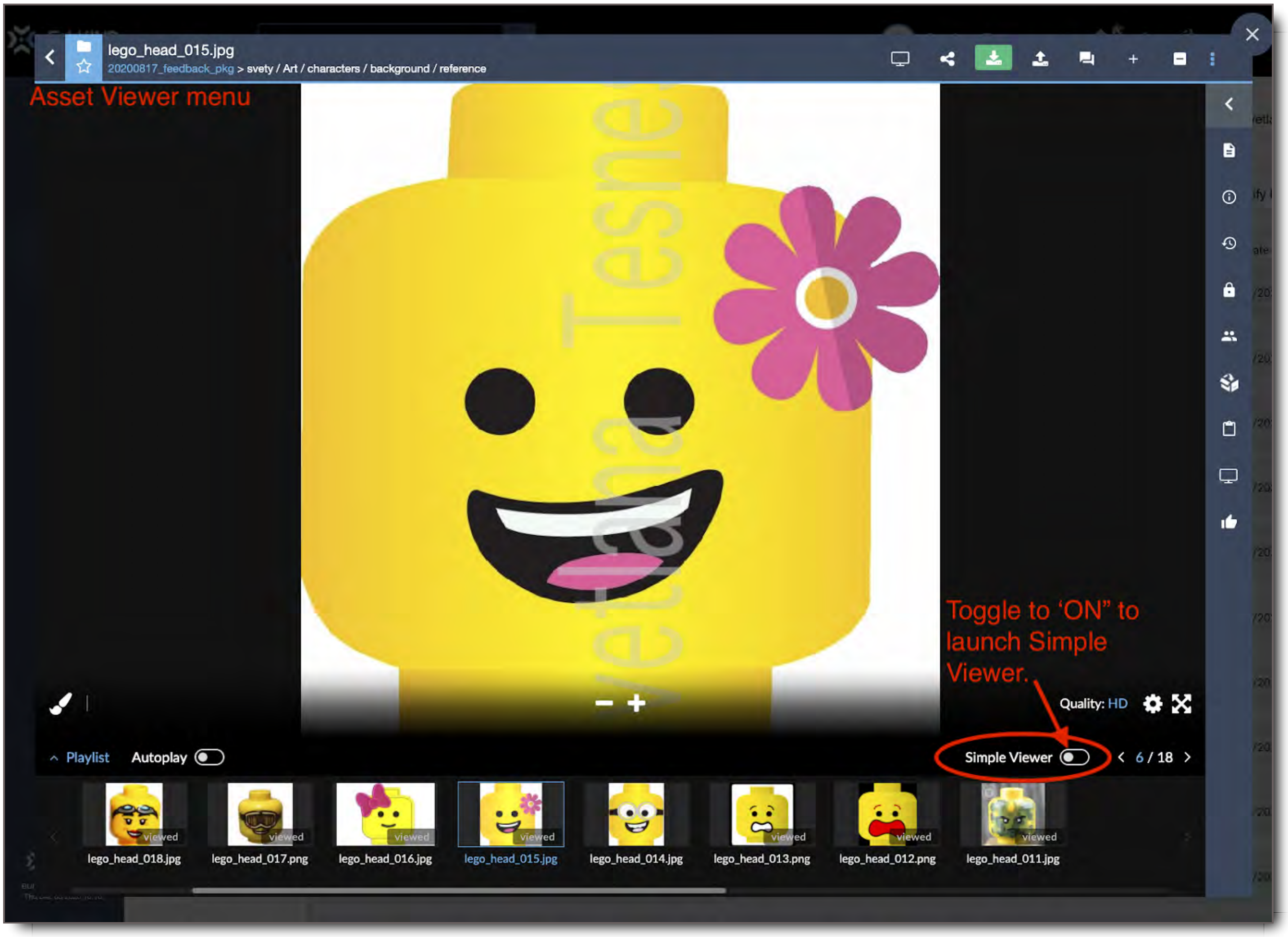


Simple Viewer will launch once the recipient has opened their package.

Another way to launch the Simple Viewer is, in package inbox, click on the three-dot ⋮ menu icon, located to the right of your package and select 'Open in Simple Mode' option from the dropdown menu.



Simple Viewer can also be launched from the Asset Viewer menu, Navigate to an asset and toggle the Simple Viewer toggle to 'ON' located at bottom right corner of the page, and this will launch you into the Simple Viewer



Permissions

Set Permissions on the Package before you send it. Permissions determine how the recipients can interact with the contents of the Package, and how long, or how many times they can access it.

Reshare Package

If this is ON, the recipients of the Package will be able to forward or 'reshare' the package with other users within the system that they have access to share with.

Modify Package

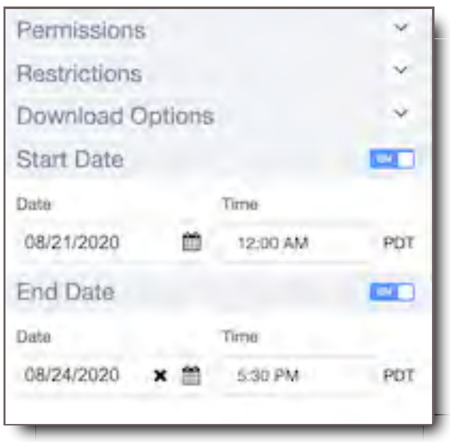
If this is ON, the recipients of the Package will be able to add or remove additional files from it.

Forensic Streaming

Forensic watermarking is only offered through a 3rd party integration and will require a license for users to enable this option. Forensic watermarking places an 'invisible' watermark on assets in order to track their location and provides the highest level of trackable security available for assets being shared outside of CORE. Forensic watermarking can work in conjunction with visible watermarks in the CORE system.

Start Date & Time

Choose a Start Date and Start Time for a Package to be available to the recipient.



NOTE: The time you choose is reflective of the Start Time in your timezone. When a user receives their package, the Time will be converted to the recipient's own timezone. For example, if your browser is set to PDT (Pacific Daylight Time), and you set the Start Time to be 12:00AM, then the Start Time for someone in the UK will be 7:00AM BST (British Summer Time). That user won't see 12:00AM. They will see 7:00AM as their Start Time. Furthermore, if you're sending a package to 10 people all in different timezones the system will automatically reflect the time zone of each recipient based on their browser's time zone or the time zone they are located in.

End Date & Time

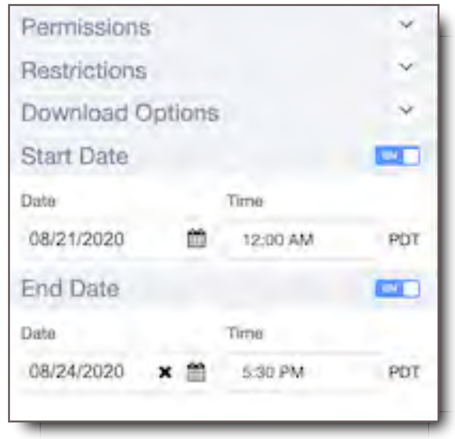
Choose an End Date and End Time for a Package to no longer be available to the recipient.

NOTE: The time you choose is reflective of the End Time in your timezone. When a user receives their package, the Time will be converted to show the recipient's own timezone. For example, if your browser is set to PDT (Pacific Daylight Time), and you set the End Time to be 11:30 PM, then the End Time for someone in the UK will be 6:30AM BST (British Summer Time). That user won't see 11:30PM. They will see 6:30AM as their End Time. Furthermore, if you're sending a package to 10 people all in different timezones the system will automatically reflect the time zone of each recipient based on their browser’s time zone or the time zone they are located in.

Restrictions

Limit the number of Views -Click in the box and type the number of views you would like to restrict the recipient to.

Limit the number of Views - Click in the box and type the number of views you would like to restrict the recipient to.

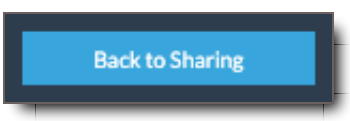


Limit the number of Downloads - Click in the box and type the number of Downloads you’d like to restrict the recipient to (if download is available to them).

Hide Users option - when turned ON, will hide users from each other on the package, users will not have the option to see other recipients on the package share.

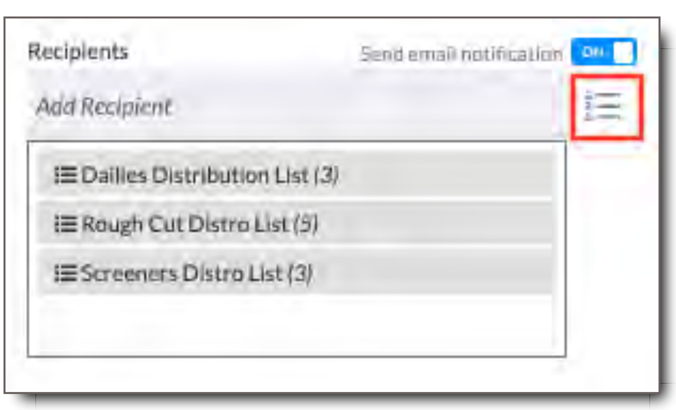
Disable Comments - when turned ON, users will not have the option to comment on the package share.

When finished with the choices on the Share Settings page Click ‘Back to Sharing’.



NOTE: The next time you go to share the system will recall your previous share settings (minus the date/restriction settings).

Choose Recipients



Recipients

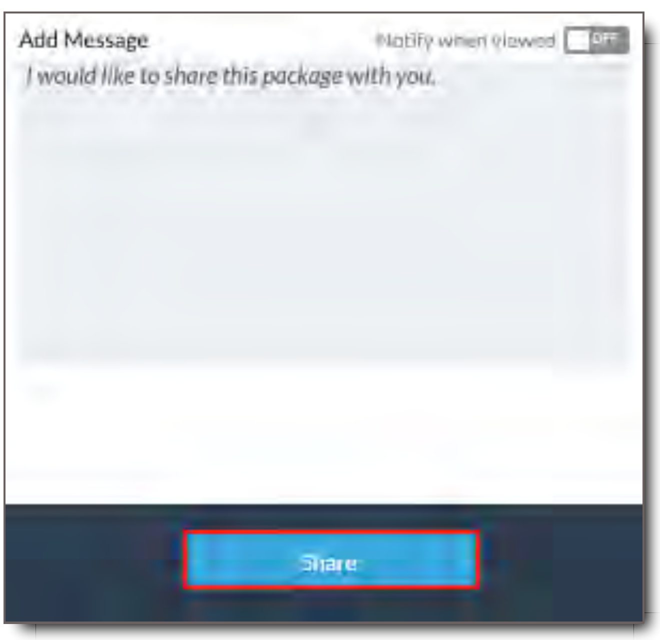
Choose the recipients for the package, either individuals or a user list. To add an individual user, click in the 'Add Recipient' box and start typing a user name or user list name. Only names of users and user lists that you have access to share with will appear. Click on the name of the user or user list you'd like to share with to add them to your recipients. Repeat until you have added all of your recipients. You can also click the user list icon to the right of the box.
NOTE: You can only add recipients that have been invited to CORE. If you do not have permission to add users to CORE reach out to your System Administrator.

Send Email Notification

The 'Send email notification' switch defaults to ON. When it is on, the recipients will receive a notification that they have a package to review in CORE. The notification will have a link to the package and they will have to log in to CORE to access the contents.

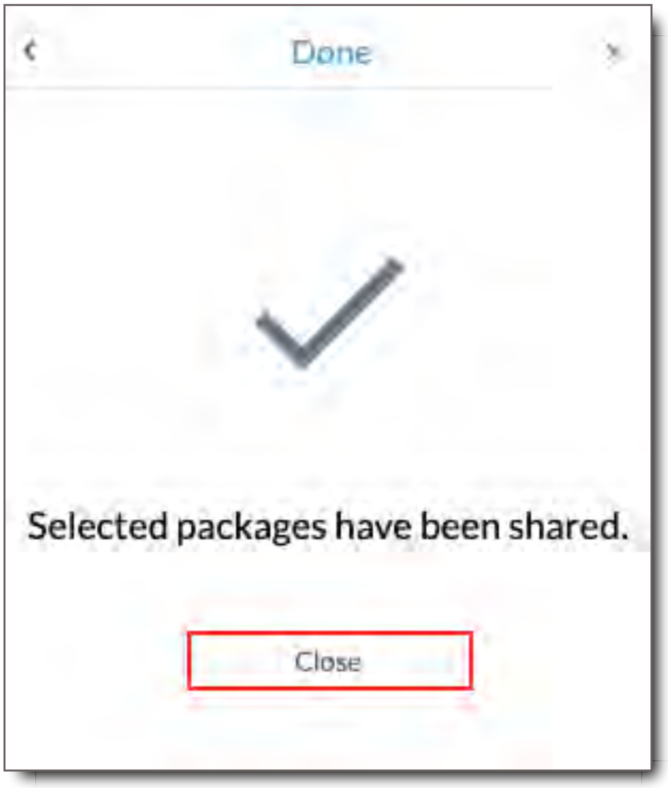
Add Message

Write a message to your recipients in this box. You can also choose to be notified when recipients view the package for the first time by flipping the notification switch to ON.



Click Share when the message is complete.

You will get a confirmation screen in the Share panel once the Package has been shared. Click Close.

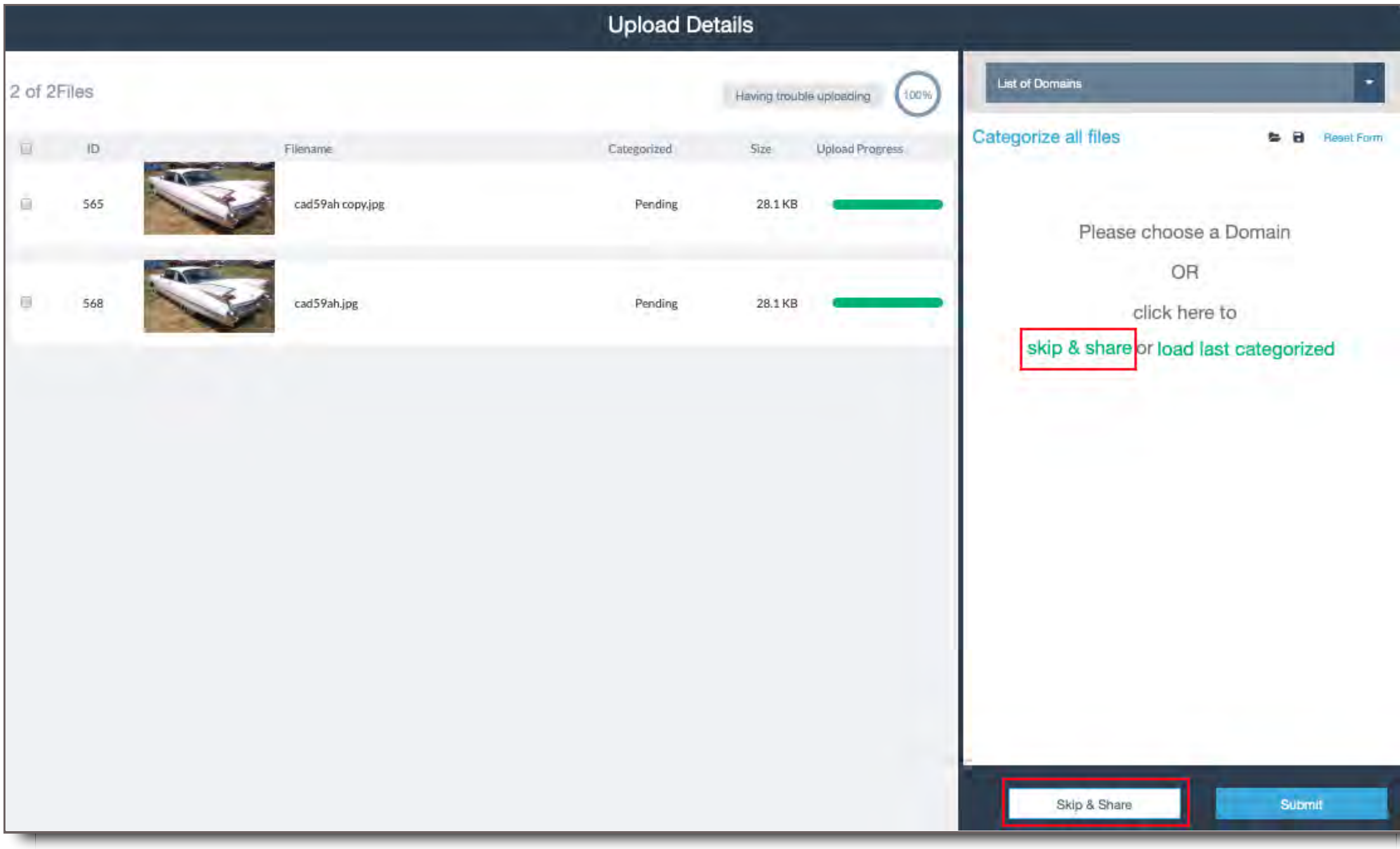


Skip and Share Files

Please go to the Uploading Module for further instructions about how to upload to CORE.

After uploading your files, you have the option to categorize them, or to Skip and Share, essentially skipping categorization (you can go back and categorize them later - See the section called Uploading & Tagging Files)

To Skip and Share, Select either of the Skip & Share buttons once your files are uploaded.



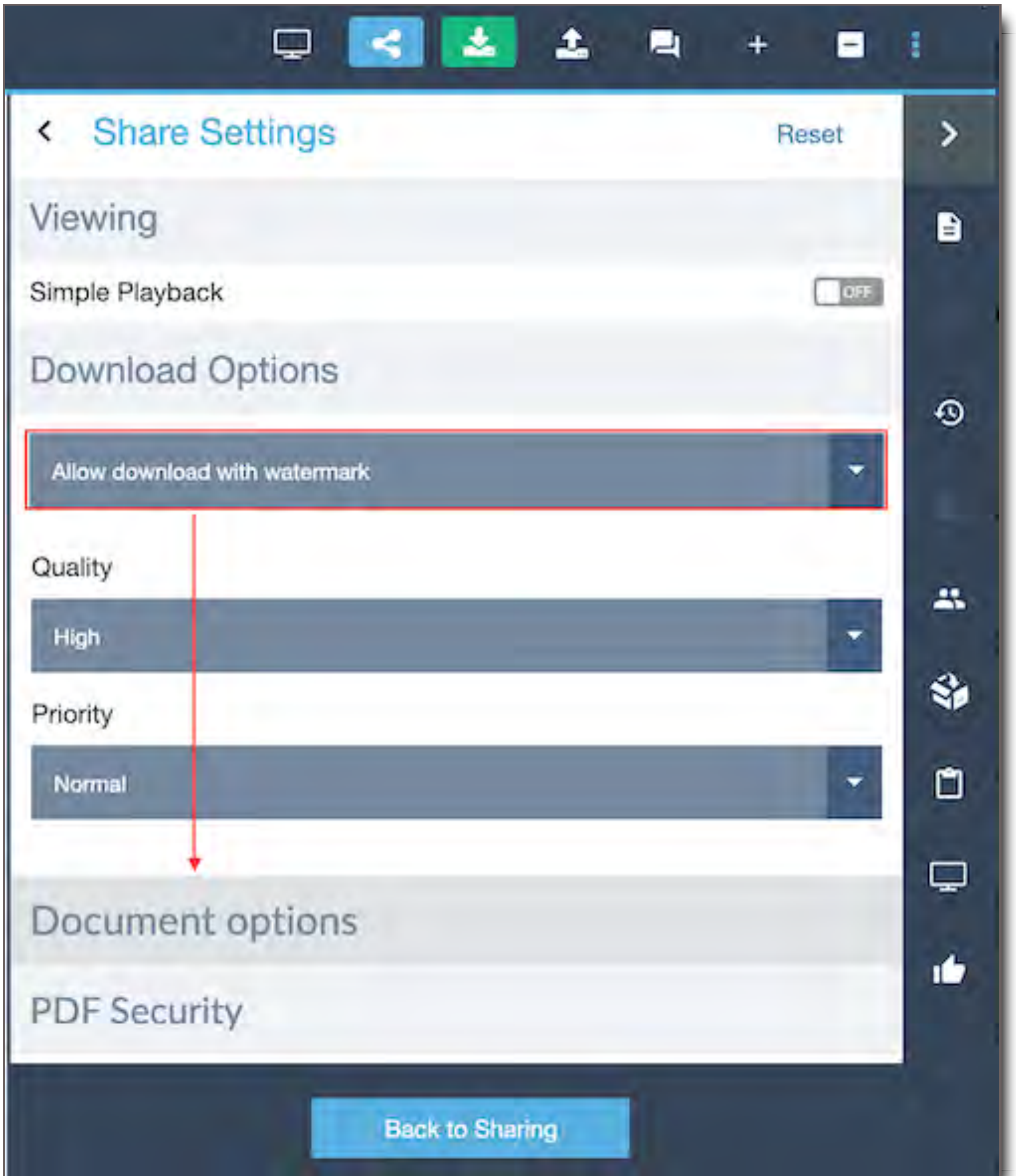
Once you've clicked Skip & Share, you will be taken to the Share Settings Share Settings module and can follow the steps outlined above.

Drawbacks of Skip and Share

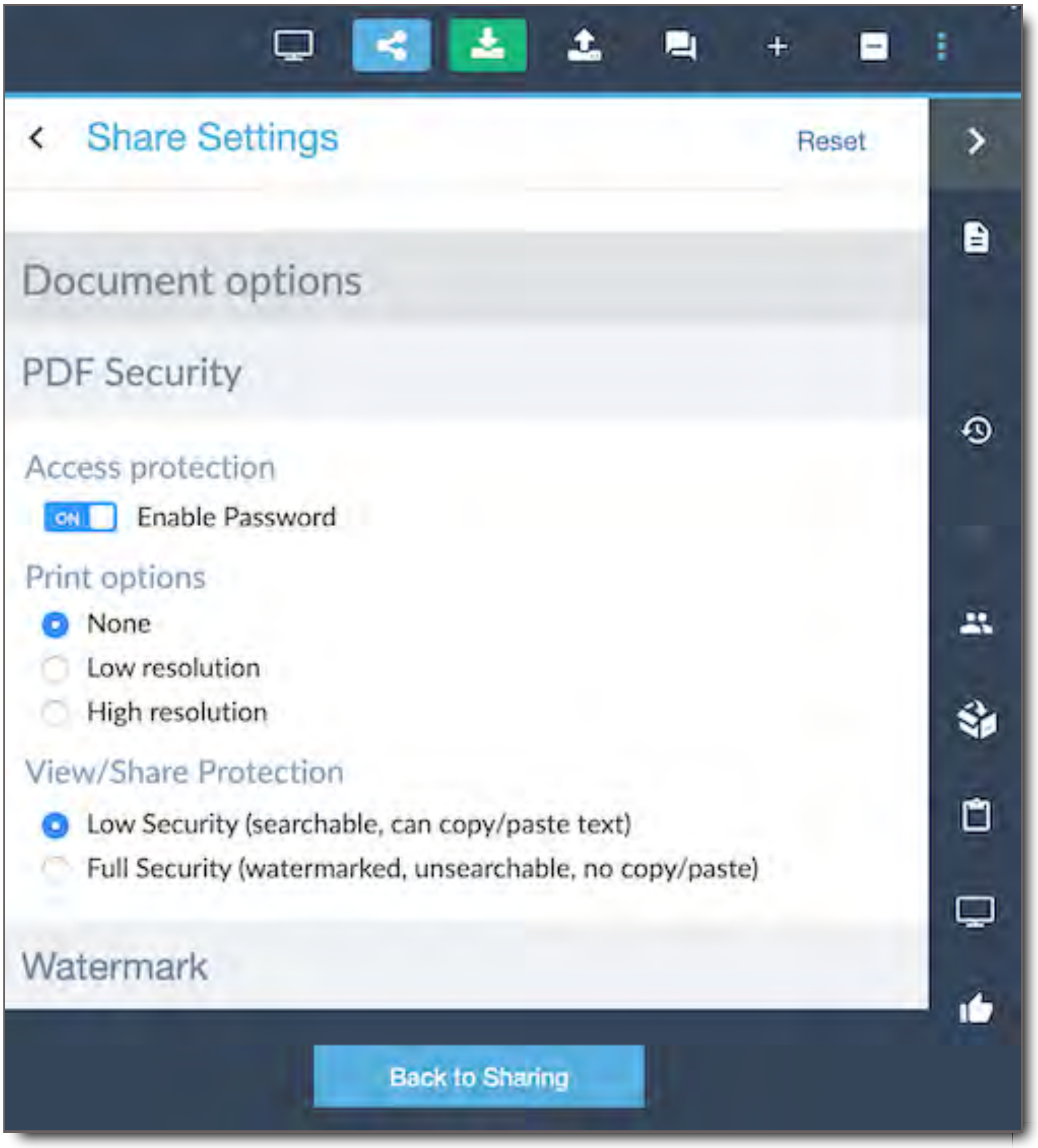
- Files will NOT be available in File Search to other users. Files will be available only in the Distribution area of File Search accessible by the Uploader or System Admins.
- Once you have shared the files, they will only be available in the user's Inbox and will NOT be searchable in the Inbox using the production filters or search tools because no files in the package have been tagged.
  Important: File Categorization is extremely important in CORE. The way files are categorized determines how people will find them in the system, as well as who has access to them. If you have questions about how to categorize the files you are uploading, please contact your System Administrator.

PDF Document Security

When sharing a PDF document to be downloaded with a watermark, there are some additional security features that can be added to the share settings. (For a full description of the options on sharing a package click here.)



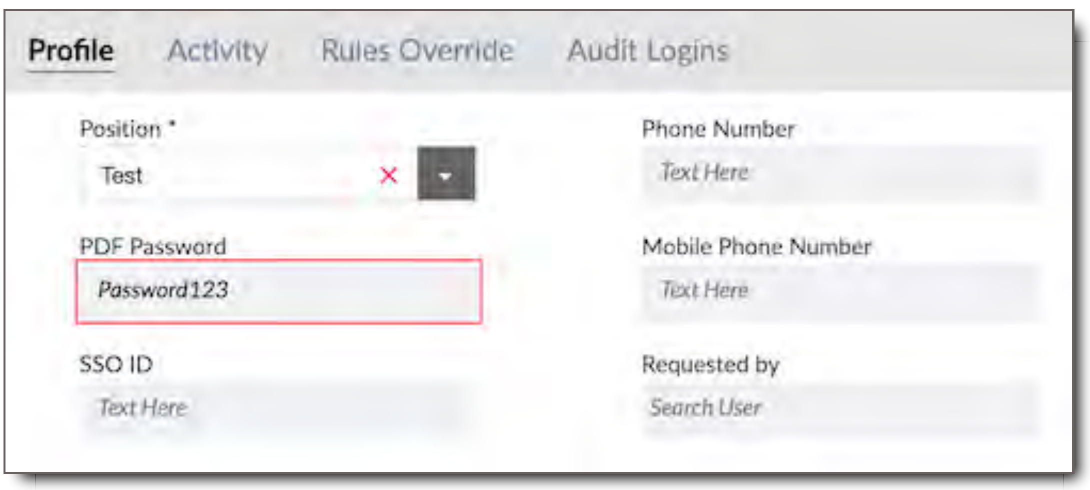
The additional PDF security features include Access protection, Print options and View/Share Protection. These options protect any sensitive PDF documents when applied.



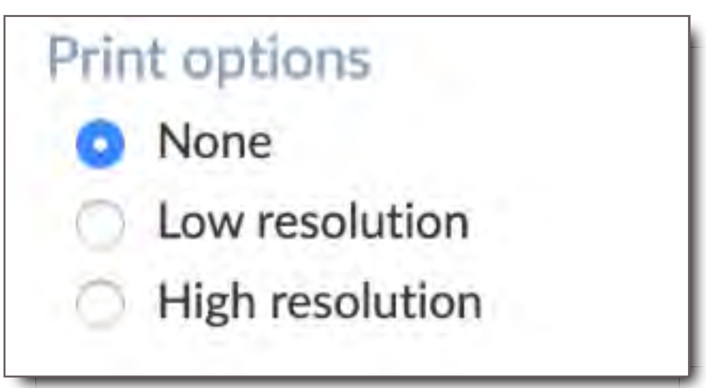
Access Protection

The Access Protection option allows you to enable a password requirement to open up the document after it has been downloaded by the recipient. This ensures that only the recipient of the PDF file can open it on their computer.

The PDF Password is automatically generated and can be found under the user's profile. With certain permissions this password can also be changed to a password of your choice for the recipient..



The option to allow the recipient to print the PDF document. It can either be turned off completely to prevent the document from being printed or printing can be allowed with low resolution or high resolution.



The View/Share Protection can be set to either Low or High Security. If the PDF document is set to Low Security, the recipients will be able to use the search and copy/paste functions on the text within the document. If shared with Full Security, the document will be automatically watermarked. Full security will also ensure the document will not allow search or copy/paste of any text within the document.

Create Packages Using ALE

Using ALE Files in CORE

What is an ALE

An **Avid Log Exchange (ALE)** file is a text-based metadata exchange format, and is used for transferring film, video, and audio data between systems

How Does CORE Use an ALE file?

With the ability to import ALE files, users can now import valuable, rich metadata to production material before the content is loaded on the system. When the content is loaded to CORE, the matching key metadata in the files are matched to the metadata in the ALE.

There are two ingestion workflows:

1. Data first (ALE metadata) and Files second
2. Files ingested first and Data Second (ALE metadata).

How Metadata on an ALE File Appears in a Tab-Delimited File

Heading								
FIELD_DELIM	TABS							
VIDEO_FORMAT	1080							
FILM_FORMAT	35mm, 4 perf							
AUDIO_FORMAT	48kHz							
FPS	24							
Column								
Name	Tape	Tracks	Start	End	Duration	TC 24	Sound TC	Camera TC
Data								
BW09_FS1_BW09	BW09_C001_031!	V	13:44:31:17	13:44:35:14	00:00:03:21	13:44:31:17		13:44:31:17
BW09_FS2_BW09	BW09_C002_031!	V	13:49:38:21	13:49:42:22	00:00:04:01	13:49:38:21		13:49:38:21
BW09_FS3_BW09	BW09_C003_031!	V	13:50:38:09	13:50:40:13	00:00:02:04	13:50:38:09		13:50:38:09
Y29AF_3_BW09	BW09_C004_031!	V	13:52:13:21	14:05:45:13	00:13:31:16	13:52:13:21	11:22:34:17	13:52:13:21

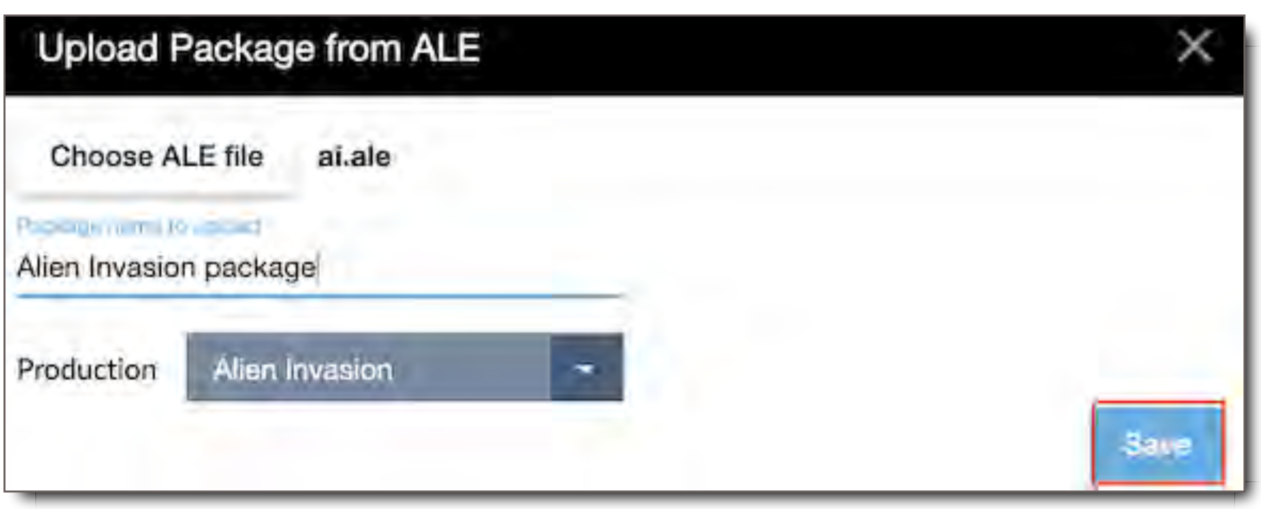
How Metadata from a ALE File Appears in CORE

How to Upload the Package via ALE

1. Start by clicking on the “more” icon located to the right of the package icon in the top right of the screen.

2. Choose your existing ALE file then assign a package name to upload.

3. Choose the Production that the ALE is associated with and click Save.



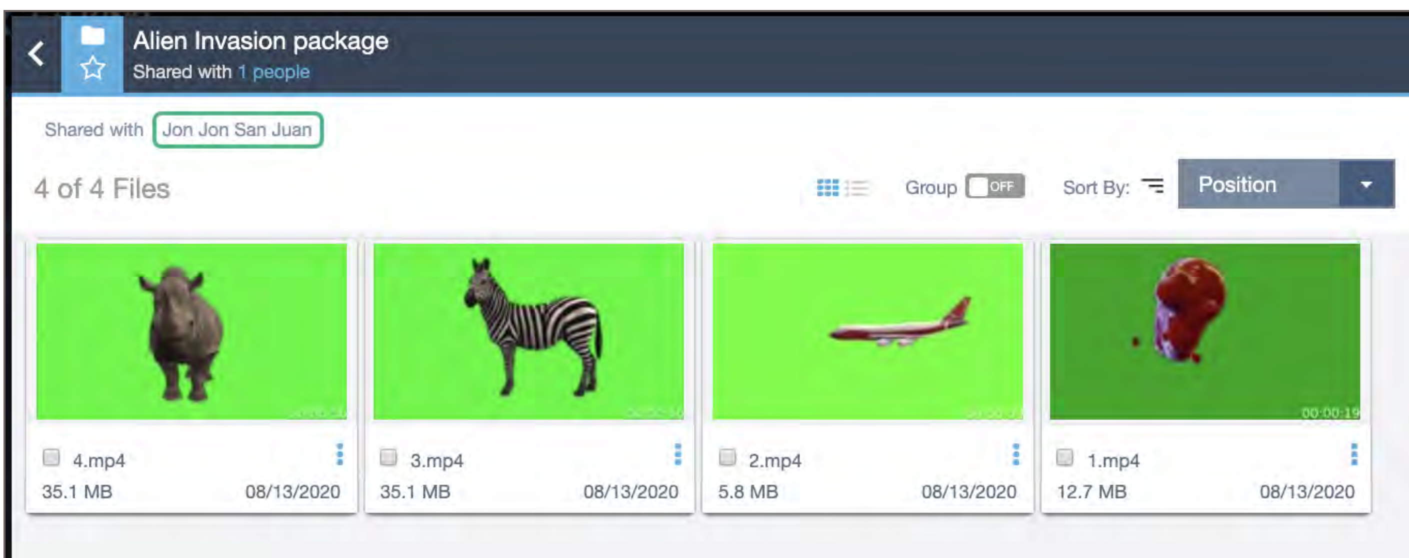
The ALE metadata information is then ingested and the rich metadata is connected/merged to the related files.

💡 **CORE Tip: How does the ALE metadata info connect to existing files on CORE?**
The lookup of the existing related files pivots off the metadata keys of the existing assets in CORE to match the files with the metadata in the ALE.

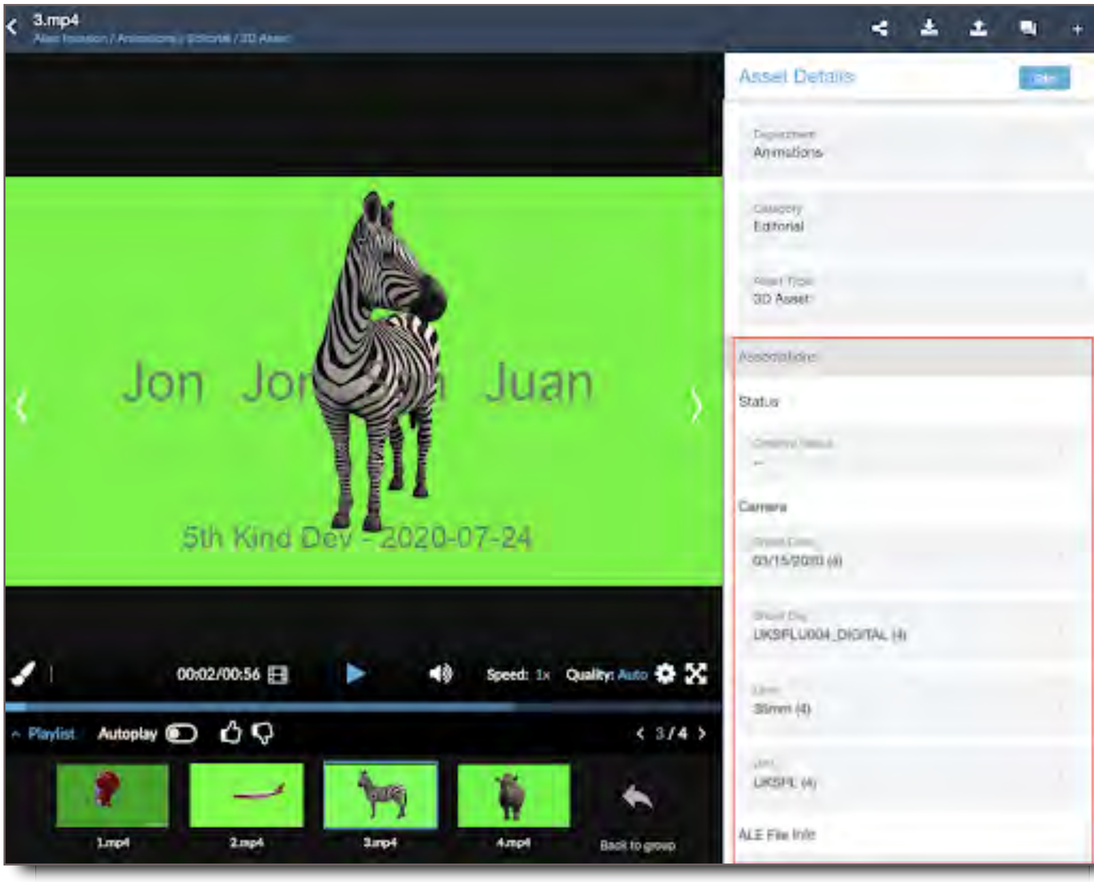
Issues creating your package via ALE? Go to Troubleshooting .

View your New Package with Associated Metadata

Click “Open New Package” to view the package with files and associated metadata.



When opening the media you will see the asset related metadata in a playlist along with the rich metadata contained in the ALE.

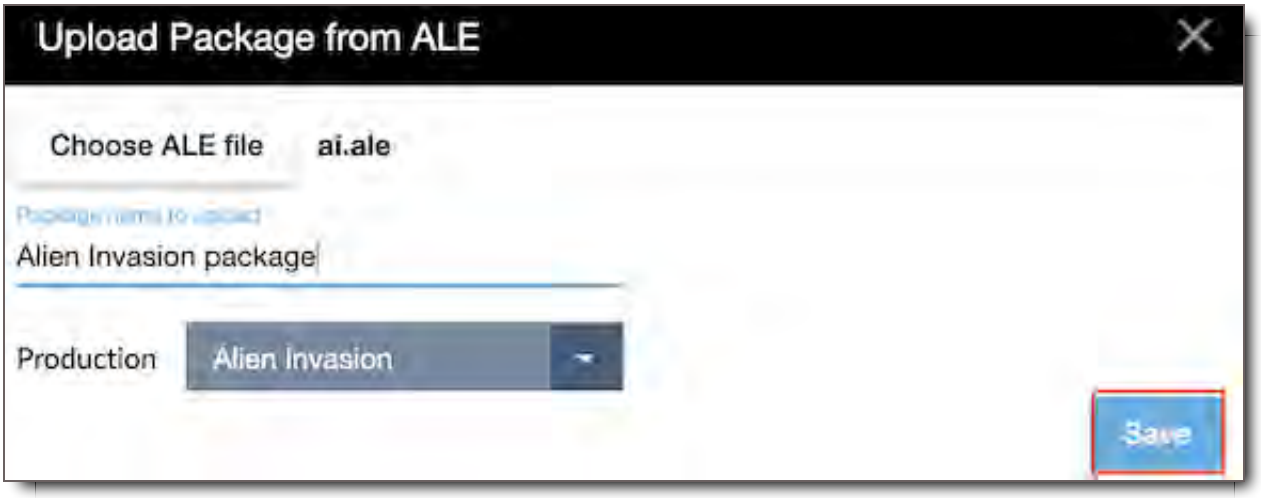


Files Ingested First and Data Second

This can be done in various ways to upload media via HTTP/Aspera. These files will contain key metadata fields which would later match to the ALE file.

1. Upload via HTTP or Aspera

2. At a later date when the .ale file is available, Users can create an ALE package.



The ALE metadata information is then ingested and the rich metadata is connected/merged to the related files.

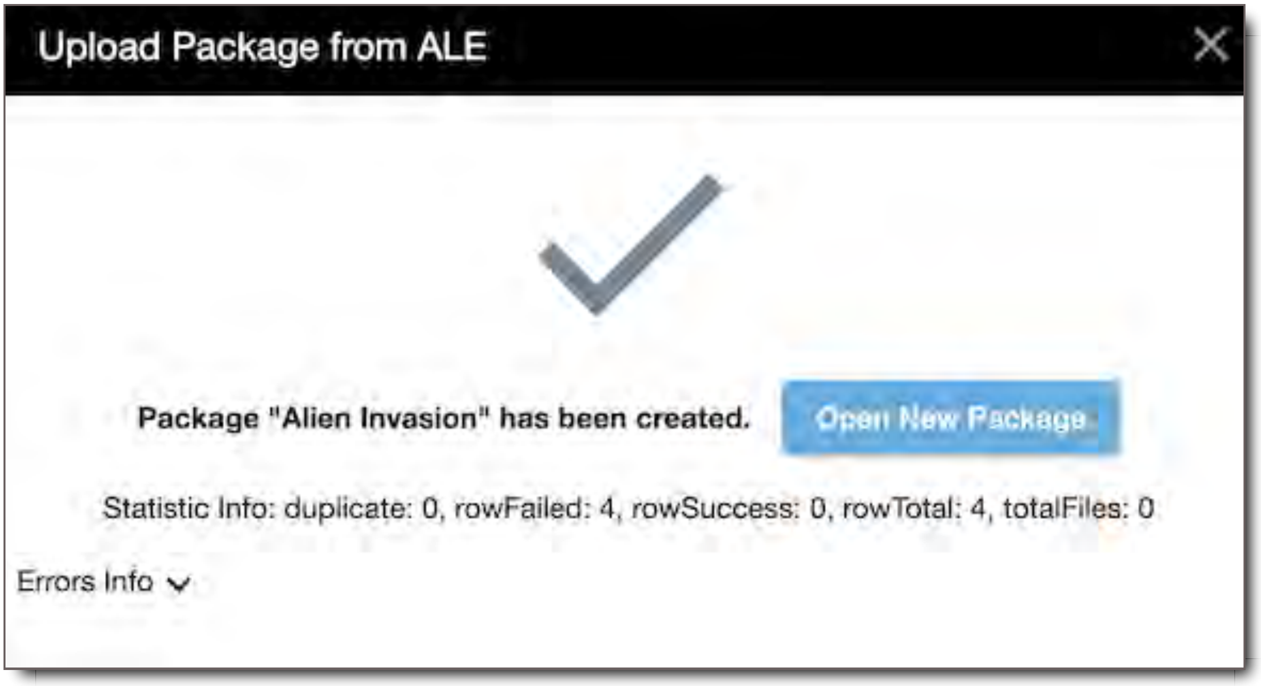
Troubleshooting

Is the ALE Package Not Created upon opening New Package?

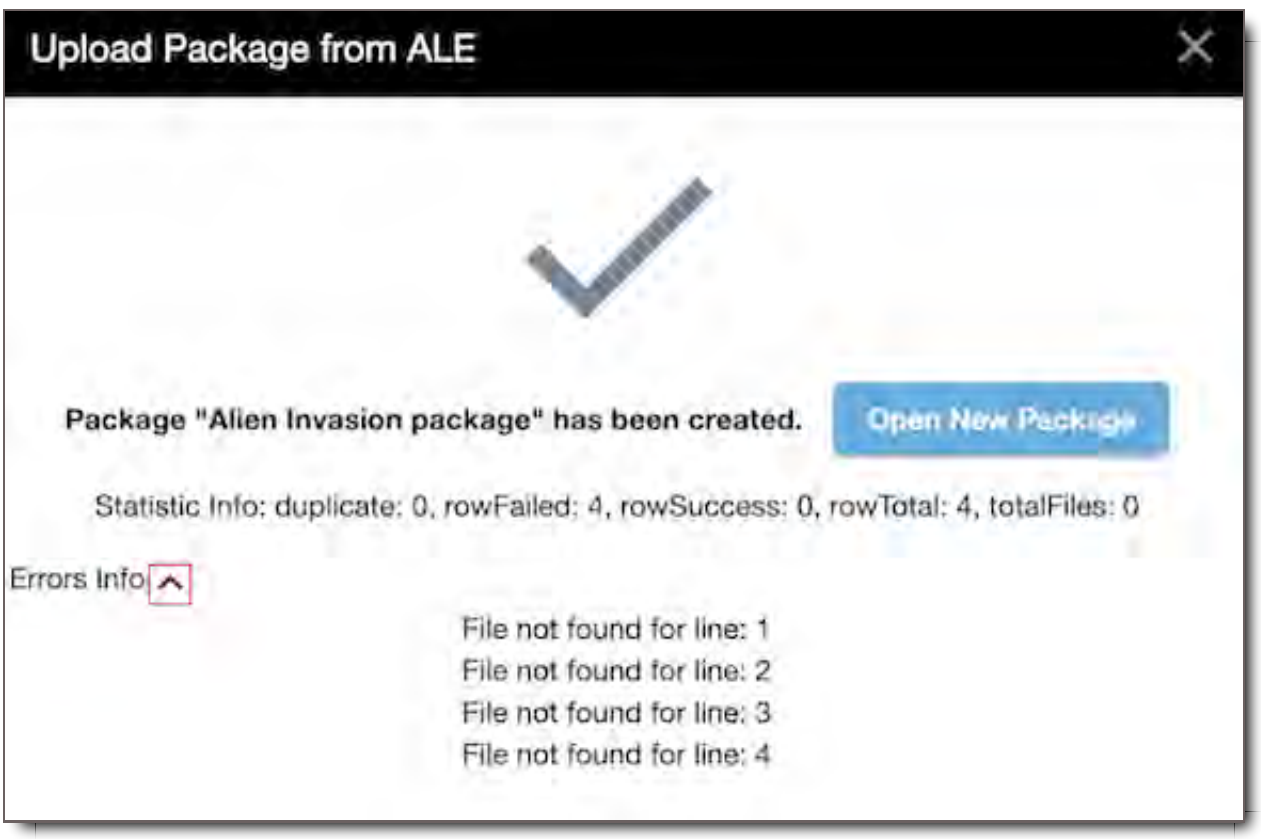
The Statistic Info is a tool that displays statistics on Successful and Unsuccessful ALE Package Creation.

Duplicate - Total duplicated files found from creating the ALE package
RowFailed - Number of files not found from creating the ALE package
RowSuccess - Number of files found from creating the ALE package
TotalFiles - Total files found from creating the ALE package
RowTotal - Total rows processed from creating the ALE package

Example of ALE Package share with Errors



To see the expanded the Error information, click on the chevron to view possible errors



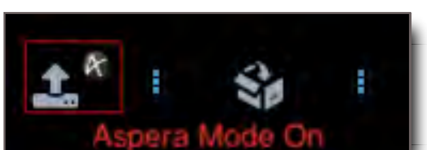
Uploading and Tagging Files

For users with the permission to upload to CORE, uploading files is fast and simple, and can manage high volumes of data and files. Uploading the actual files is just the first step in the uploading process. Categorizing the files is the next step. Both are outlined here, along with navigating the Transfers Module where you can track and monitor your uploads.

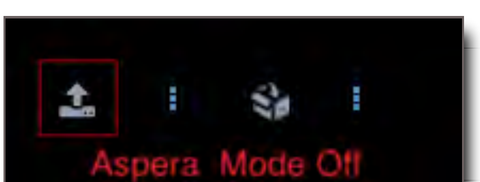
Choose an Upload Mode

There are two modes to upload files to CORE.

1. Aspera - This is the primary uploader and downloader of files in CORE. Aspera provides high speed data transfer solutions to send, share, stream and sync large files and data sets. * Requires downloading Aspera to your computer.

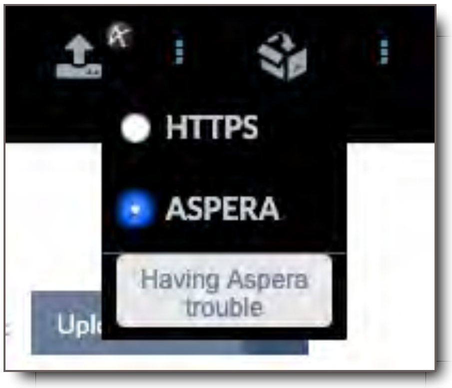


2. HTTPs - Is a simpler, slower, speed alternative to Aspera, and is useful in lower bandwidth wifi situations and if Aspera use is blocked by your company firewall.



To choose your preferred mode, click the ⋮ icon next to the Upload icon in the upper right corner of the Top Navigation Bar.

We recommend using Aspera to upload, for faster speeds and greater reliability.



Use of Aspera requires installation. When first selected, you will be prompted to download the Aspera Connect plugin. The plugin link can also be accessed here: https://downloads.asperasoft.com/en/downloads/8?list

When Aspera mode is enabled, the gray Aspera logo will appear next to the Upload icon.

Start an Upload

There are two ways to start an upload:

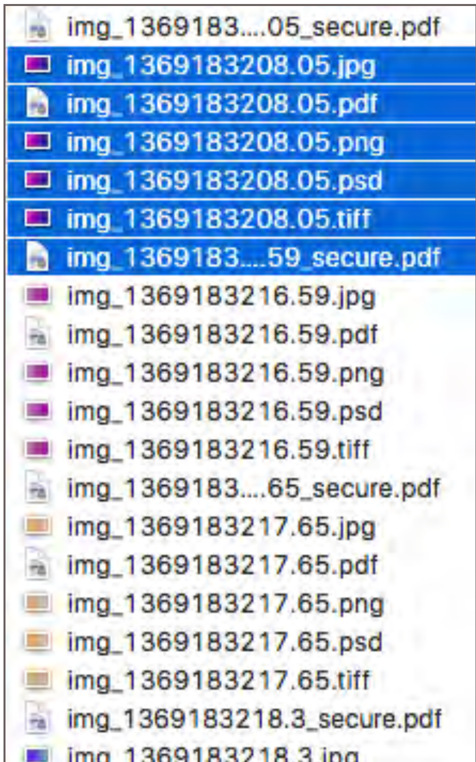
1. By selecting the Upload icon in any number of places throughout the CORE platform.
2. By dragging and dropping Files into File Search

Upload Files Using the Upload Icon

To begin uploading,

1. Click on the Upload icon in the upper right corner of the Top Navigation Bar anywhere on the site.

2. A File dialog window will open. Select as many files as you would like to upload. To select multiple files, hold Ctrl (Command on MacOS) as you click. To select a range of files, hold Shift as you click to extend your selection.

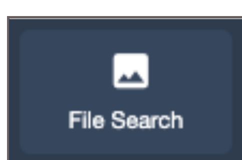


3. Select “Open.”
4. The dialog box will automatically close.
5. A pop-up confirming you are uploading files will appear. Select Allow. The files will initiate uploading, and the Upload Details View will open in Upload Mode.
6. **Important:** If you are in HTTPS mode - Once you have initiated an upload, you must keep your browser window open until the upload has finished. The upload cannot continue if the window is closed.

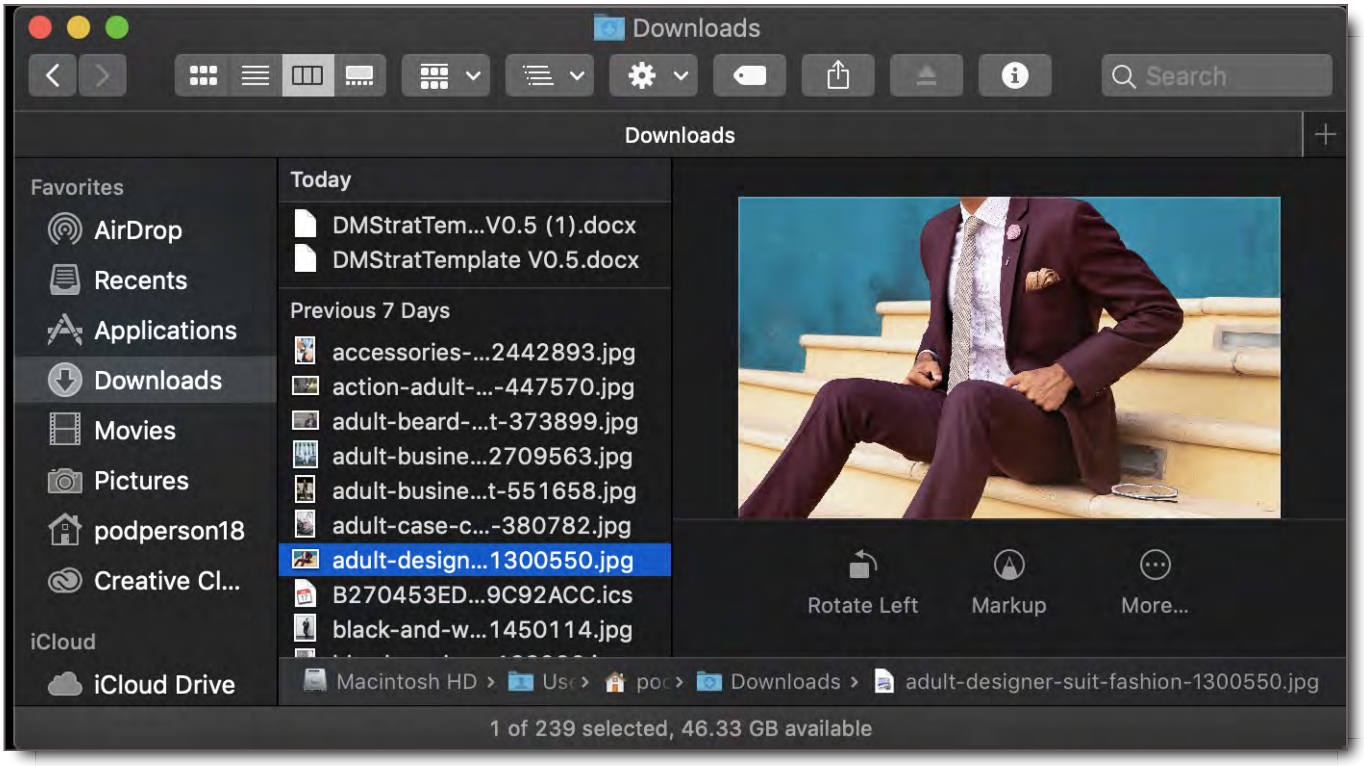
Upload Files Using Drag and Drop

To begin uploading using drag and drop,

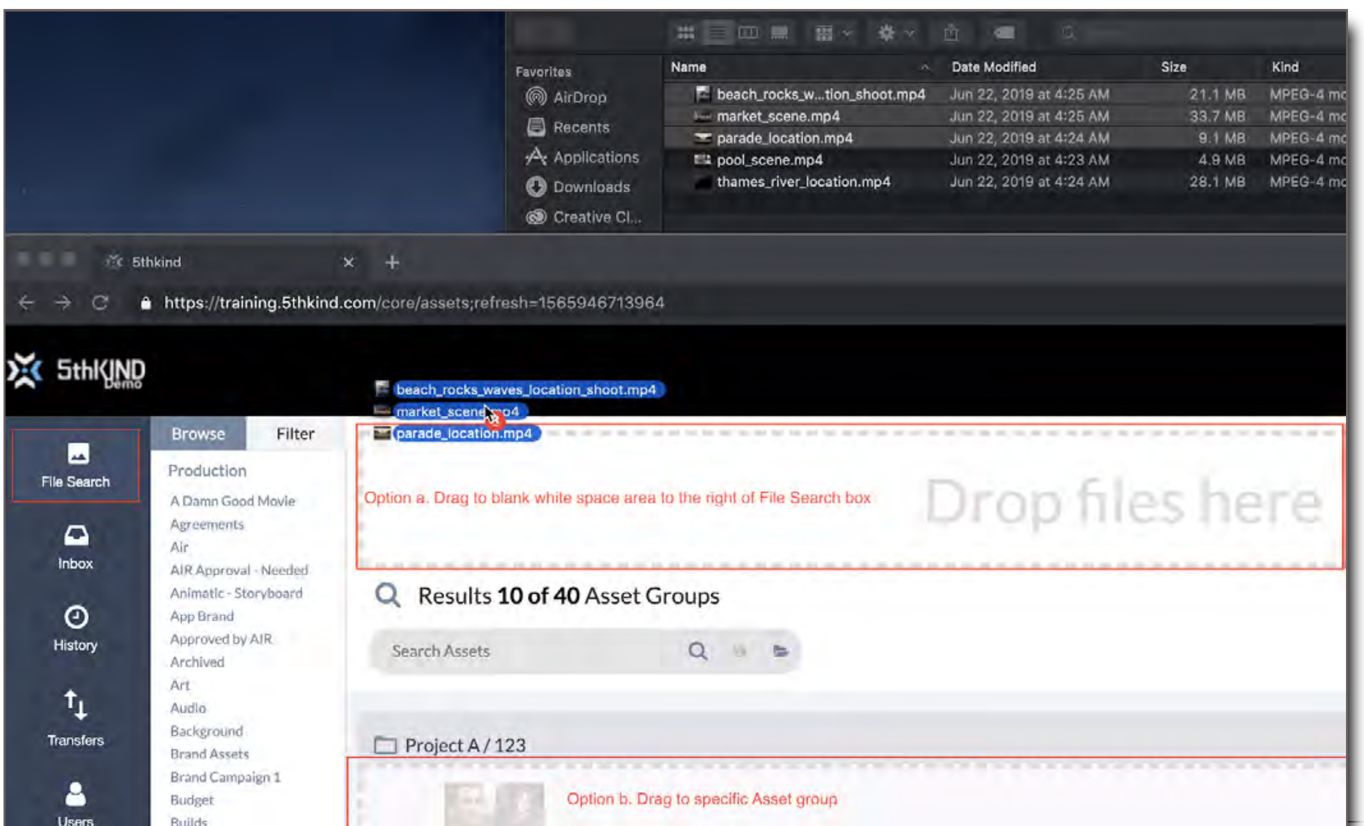
1. Go to **File Search** in the Left Navigation Bar.



2. Select a file from your desktop or file viewer

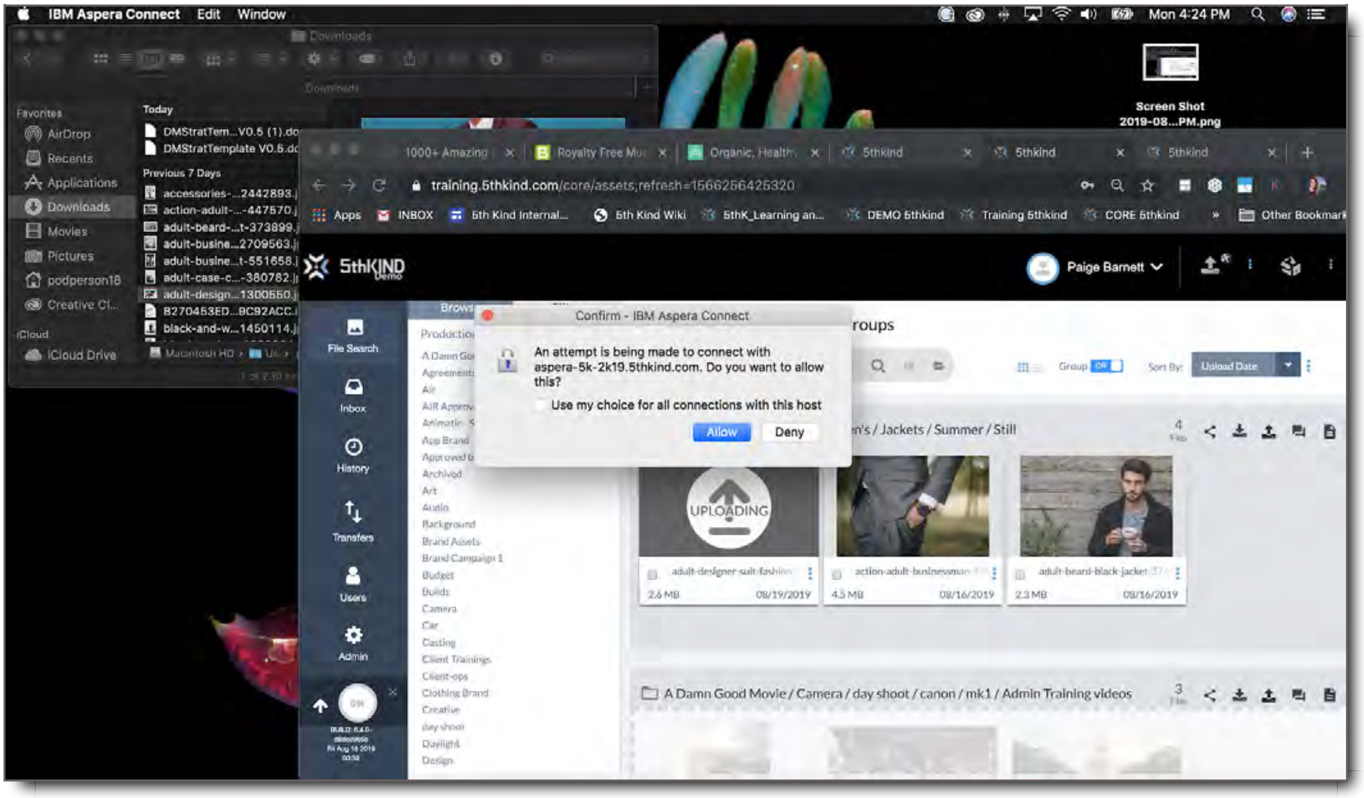


3. Drag and drop the file(s) into one of two places:
   a. The blank white space to the right of the File Search box
   b. A specific Asset Group

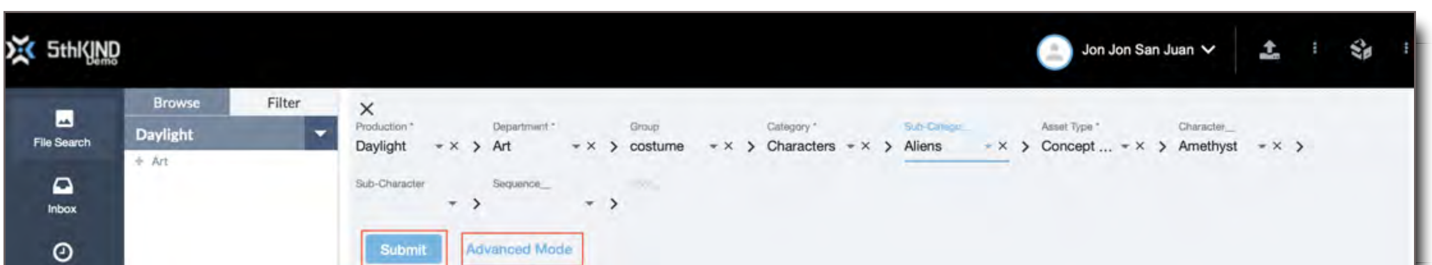


4. A pop-up confirming you are uploading files will appear. Select **Allow**. (In this image below, a file has

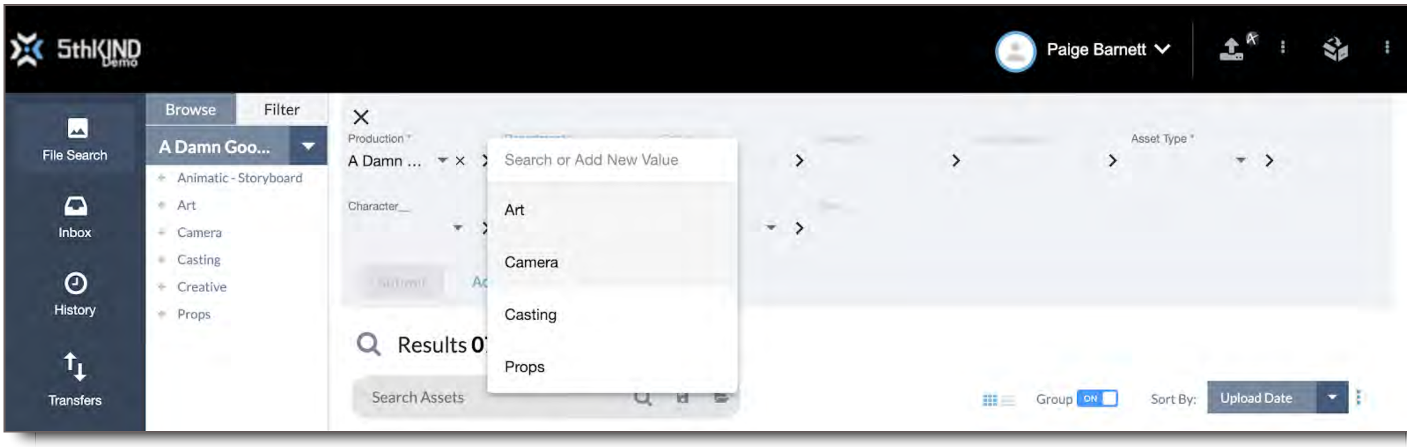
been added to an existing Asset Group, which you can see by the “Uploading” thumbnail.)



5. When the files are dropped into a specific Asset Group, they will be categorized structurally with the same tags as the group. However, when files are dropped into the top white search area, the files must be structurally categorized in that moment. This is referred to as Simple Categorization. You also have the option of clicking on Advanced Mode which will take you to the Standard Categorization form.



6. To structurally categorize the files, select the Tag Values from each of the dropdown menus at the top of the page. These tags create an Asset Group name for your files.

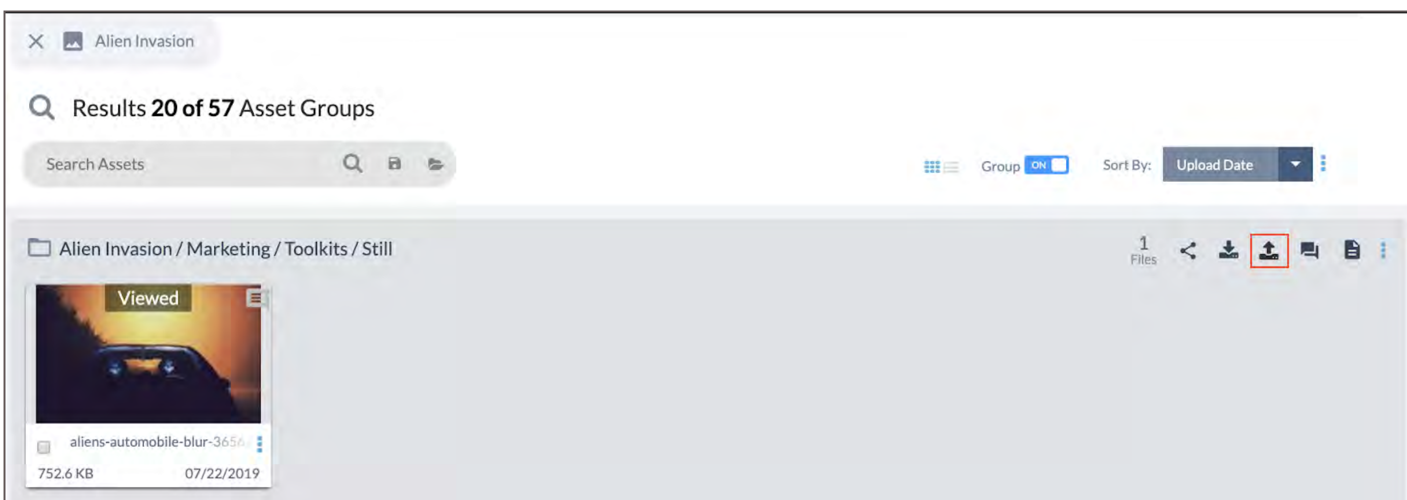


Where to Find the Upload Icon in CORE

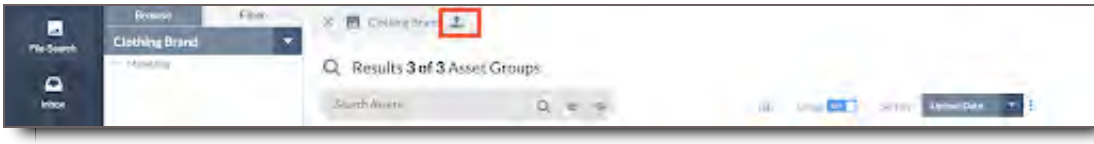
The Upload icon is found throughout CORE in the following places:

1. **Top Navigation Bar (everywhere on platform)** - This initiates a general upload of one or more files that requires categorization.

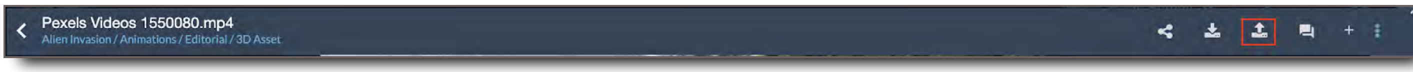
2. **File Search >> Individual Asset Group** - This initiates an upload of files into the selected Asset Group.



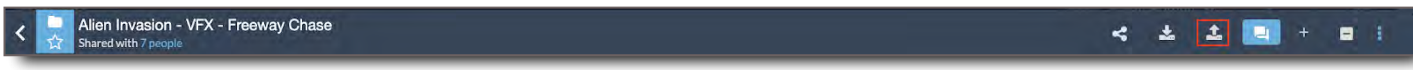
3. **File Search >> Top Tagging Bar >> Next to Selected "Production Name"** - This initiates an upload of files into the selected Production.



4. . **Asset Viewer Module >> Top Bar** - This initiates an upload of files into the selected Asset Group.



5. **Inbox >> Package >> Top Bar** - This initiates an upload of files into the Package.



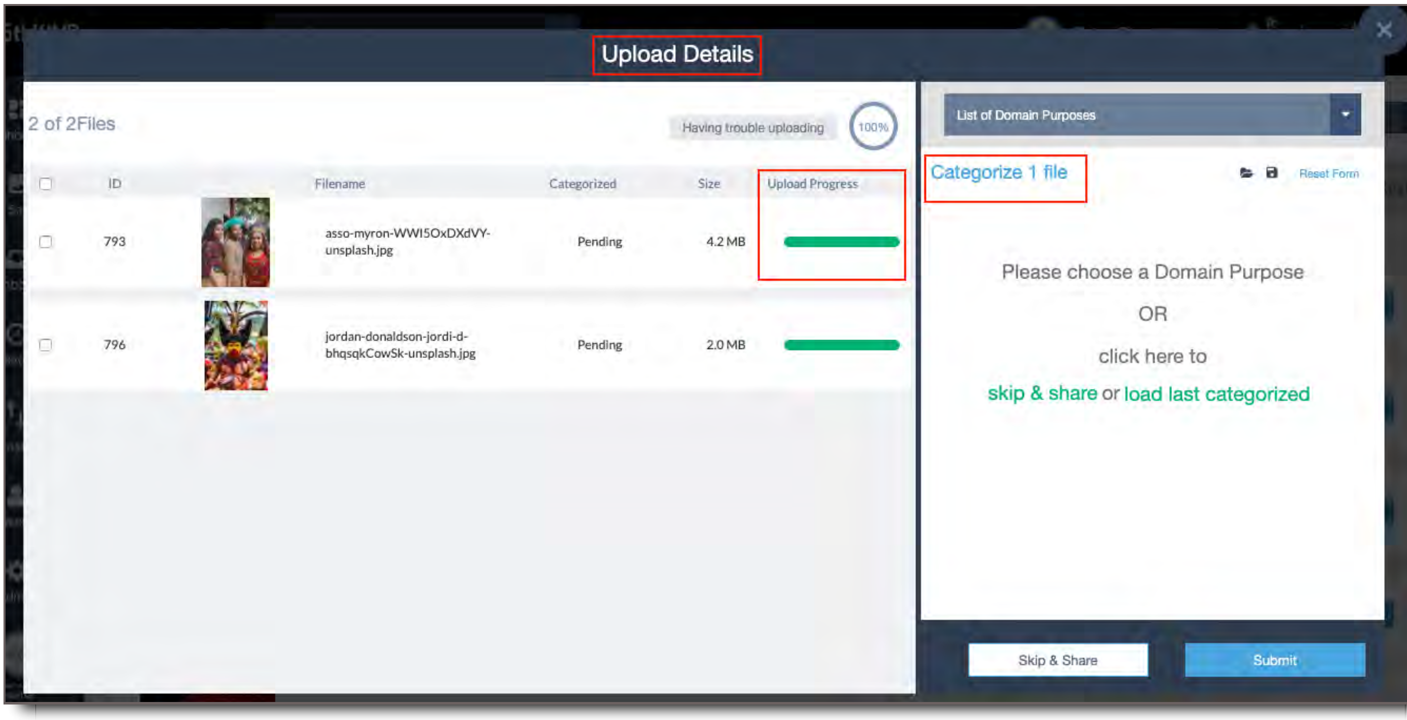
Categorize Uploaded Files

Your uploaded Files will appear in the Upload Details View, where you can categorize them.

Important: File Categorization is extremely important in CORE. The way files are categorized determines how people will find them in the system, as well as who has access to them. If you have questions about how to categorize the files you are uploading, please contact your system administrator.

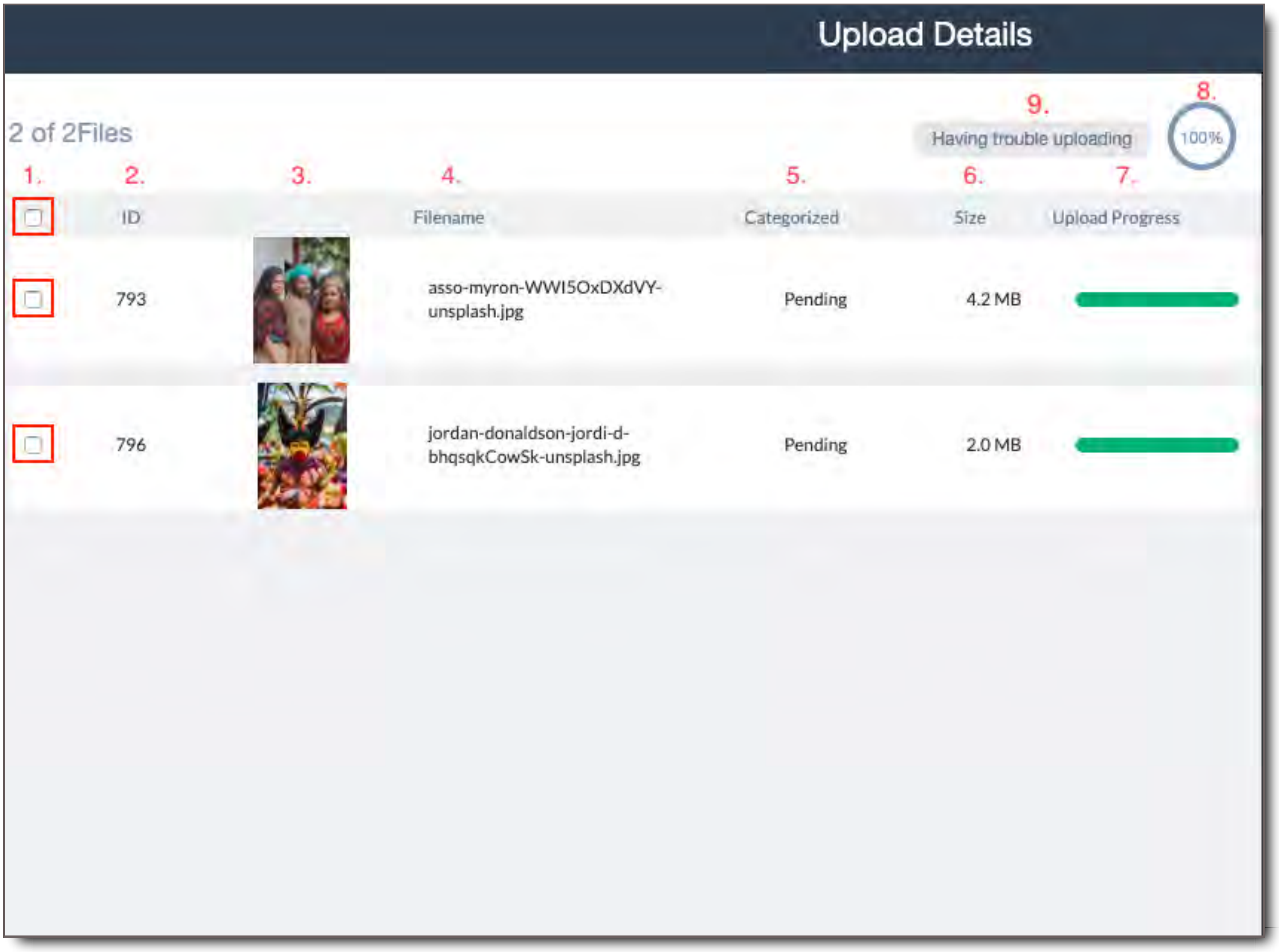
Elements of Upload Details View

When you upload a file, the Upload Details view will pop up, where you can view your files' progress, categorize / tag your files and then eventually share your files. Below are the different elements of the Upload Details View.



Elements of the Files Viewer

View information about your uploading files here. You can select them to apply categorization to a subset of files.



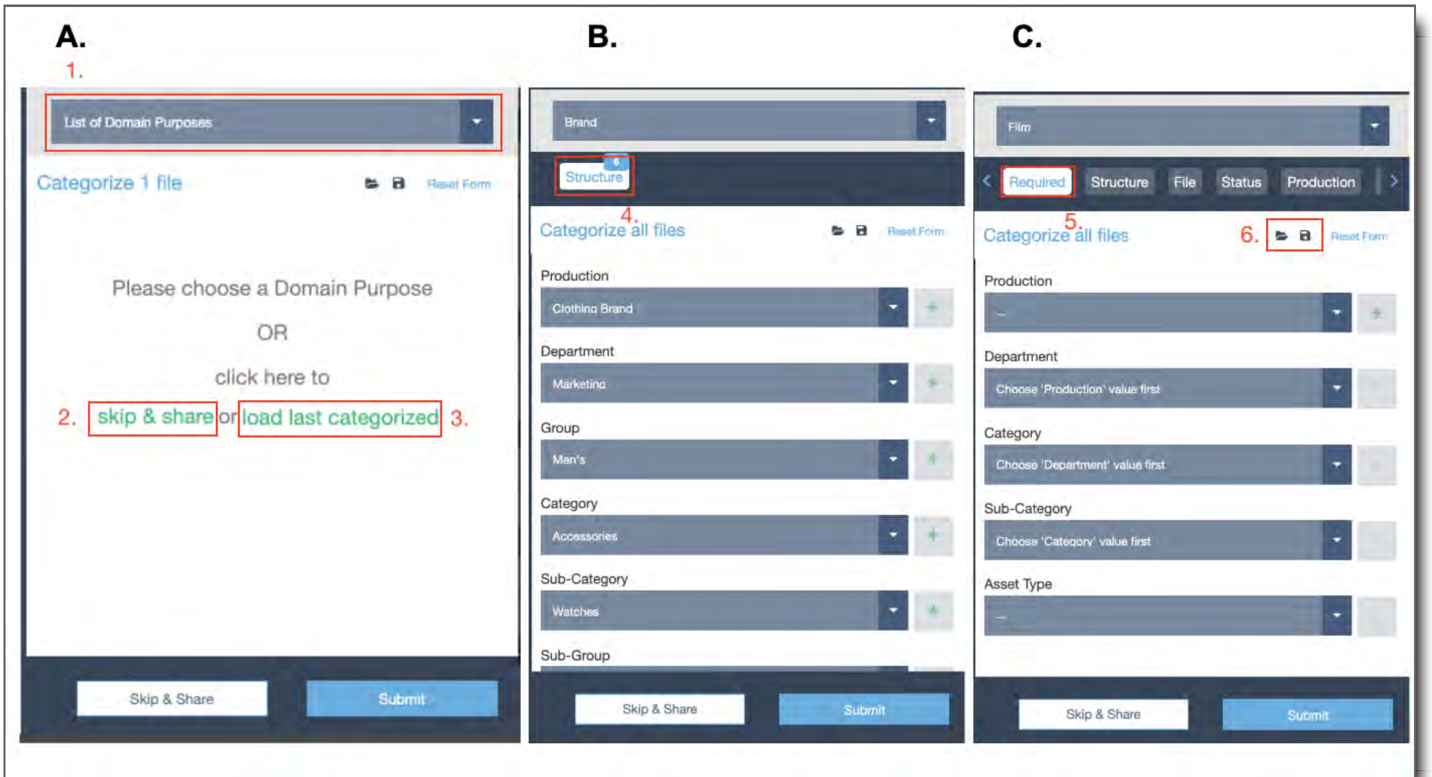
1. **Select** - Check the box to select a file. If you have files selected, the categorization settings you choose will apply only to them. *If you do not sub-select files all files will be categorized in the same way.
2. **ID** - The identification number for the individual file.
3. **Thumbnail** - Files will display a default icon as they upload. Once they have been ingested and processed, the thumbnail will be updated to that of the File.
4. **Filename**- The name of the individual file.
5. **Categorized** - Status of the file's categorization. There are two statuses:
   - **Pending** - Means this file needs to be tagged.
   - **Categorized** - Means the file has been tagged.
6. **Size** - File size of the individual file.
7. **Upload Progress** - The progress bar for each File will update as it uploads.
8. **Overall Upload Progress** - This circle shows the overall upload progress for all Files. It will update as the Files upload.
9. **Troubleshooting uploads -** Click this button for any troubleshooting issues with Aspera upload

Elements of the Categorization Panel

This is where you categorize the uploaded Files. If no single File is selected via the Select checkbox, this categorization will apply to all Files; otherwise, it will apply to the selected Files.

Categorization Panel Views

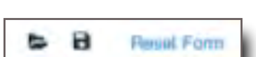
A. View when user first uploads
B. View of Domain with Structural Tags only
C. View of Domain with multiple Tag Groups



1. **Domain Select** - Select the Domain that the uploaded Files belong to. This must be selected in order to categorize your Files.

2. **Skip & Share** - Link in "Please choose Domain OR click here to skip & share or load last categorized" that bypasses tagging files, and takes the user to the Sharing Panel.

3. **Load Last Categorized** - Link in "Please choose Domain OR click here to skip & share or load last categorized" that loads the last set of tags created by the user during the previous upload. Helpful when uploading batches of assets using similar tags. Can also be accessed via the folder icon next to save icon and Reset form.



4. **Tag Group Select** - Each Tag Group contains a set of Tag Fields that can be used to categorize your uploads. Click any available Tag Group to view the Fields it contains.

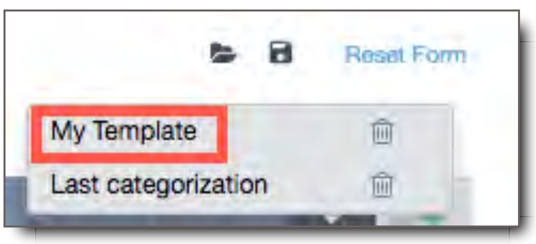
5. **Required Tags** - The Required Tag Group contains the Tag Fields from all Tag Groups that have been designated as Required by your Administrator. These fields must be filled in order to submit your tagged files.

6. **Templates** - Templates can save you time when you regularly use the same or common tag settings to categorize Files:

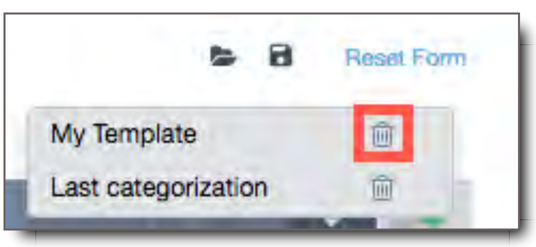
   - **Save Template -** When you create a template, it saves all current Field settings for later use. Click the icon, enter a name for your template, and click Ok to save.
     NOTE: Templates are unique to the User and are not viewable by other users.

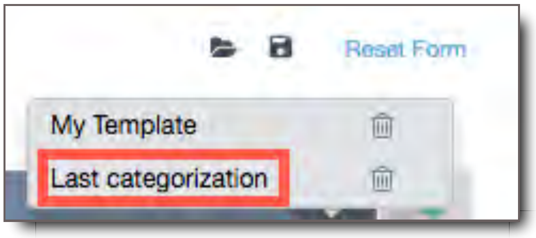
   - **Load Template -** Once you've saved a template, you can apply it to any other files. Click the icon, then select the template you would like to apply.

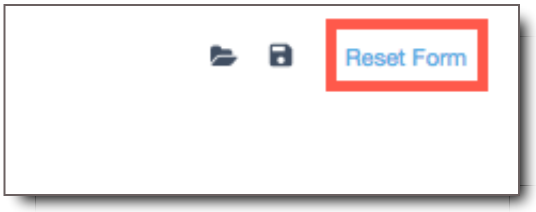
   - **Delete Template -** If you'd like to delete a saved template, click the icon to display your templates, then click the icon next to the unwanted template.

   - **Last Categorization -** CORE will automatically remember the last settings you used to categorize Files. If you'd like to repeat your previous settings, click the icon, and select Last Categorization.



- **Reset -** Click Reset to clear all Fields. Click Reset to clear all Fields.



- **Field -** For each Field in the selected Tag Group, click the dropdown to select a value. Some Fields are dependent on another; if so, you must select the drop downs in order of appearance.

- **Add New Value -** If there are no values in a Field, or if the value you want is not an option, click the + button. Enter the new value, then click Save. To cancel adding a new value, click **X** Close. **NOTE:** Reach out to your system Administrator if you do not have the + option and need new values added.

- **Exit -** Click the **X** to close out Upload Details window and skip categorization and sharing. You can return to it later by selecting your upload from the Transfers Uploads page. Note that if your files are not categorized, they will not appear in File Search view.

Categorize (aka Tag) Your Uploaded Files

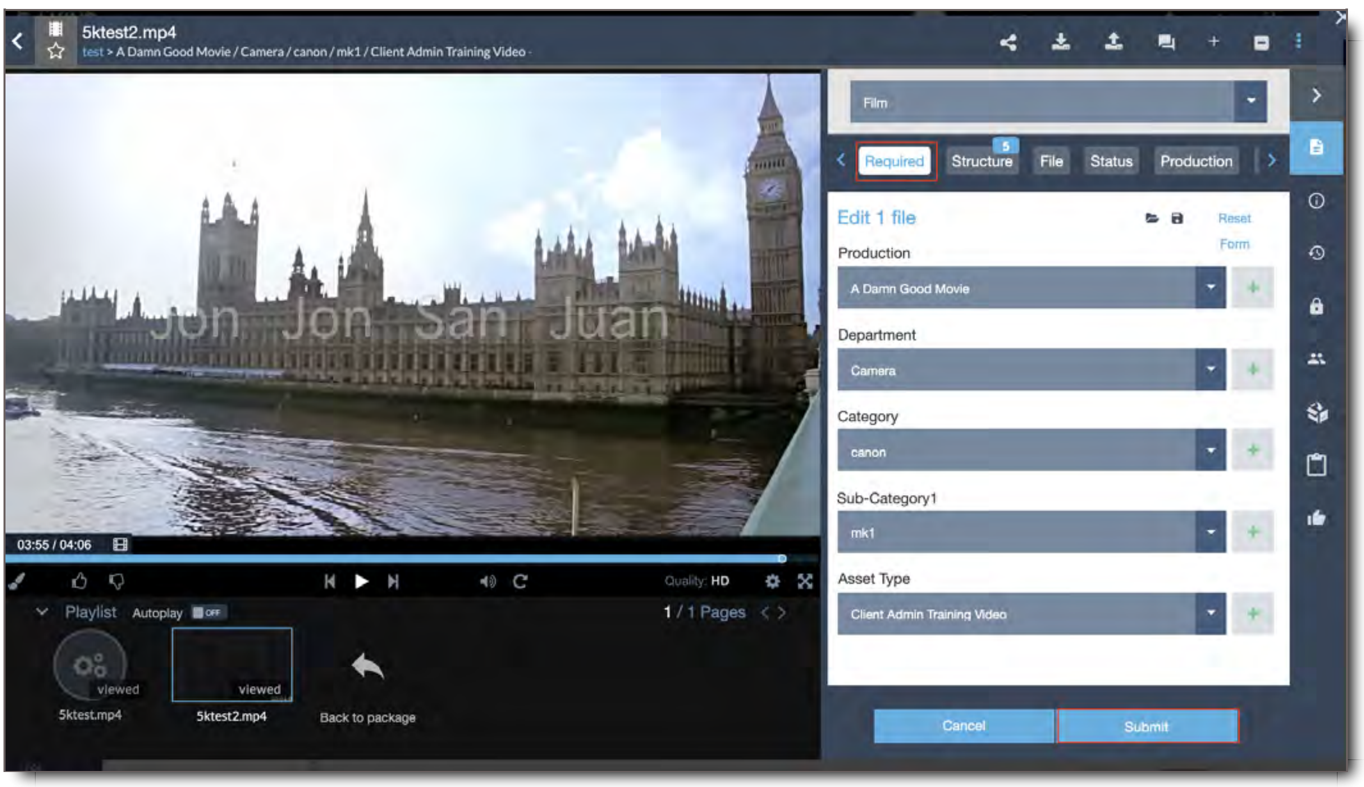
Files should be categorized during the upload process so that they can be found easily. Files in CORE are categorized by their metadata. Metadata = tags. CORE is a metadata-based system which means files are stored and found according to their tags. Files saved with the same tags are grouped together in Asset Groups. CORE doesn't have folders. It has tags. However, Structural tags organize files with the same tags under Asset Group names, like folders, so you can find them more easily. Go to the Tag Structure page to learn more about Structural Tags.

To categorize your files when you Upload,

1. Go to the **Categorization Panel** to the right of your uploading files.

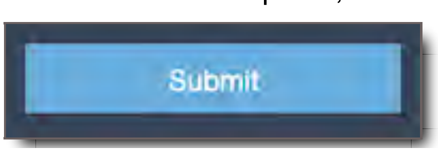
2. Select the **Domain** according to the rules set by your company. Each Domain has its own set of Tag Fields for you to choose from.

3. Start with the **Required** subpanel. Here are tags you must complete in order to submit the files.



- Fill out the required tags on this panel. If you don't know how to fill out these tags, please contact your team or company asset manager or Tier 1 support, who can assist you with the appropriate selections.
- Work left to right through each of the subpanels from Required through File Info, answering appropriately and per your company guidelines.

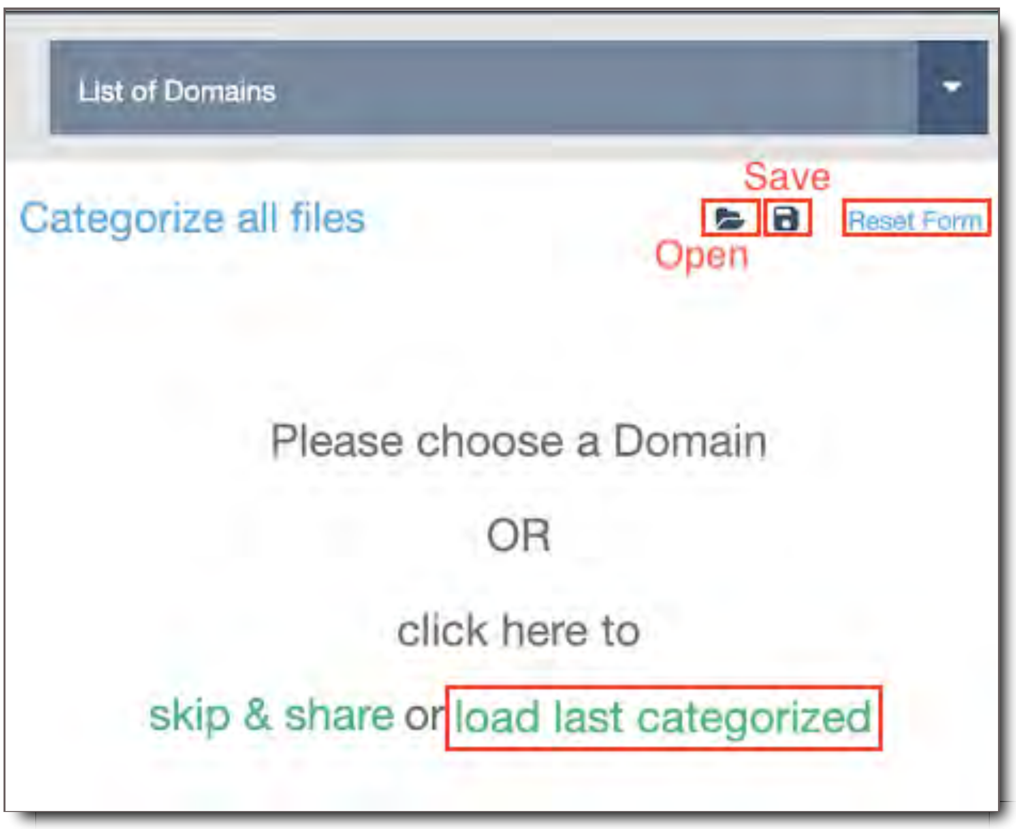
4. At the bottom of the panel, select **Submit**



NOTE:

- If you only need to upload your files (and not share them, etc.), you can verify your work by going to File Search to verify that the files you uploaded were tagged properly. To do so, go to File Search for detailed instructions about finding files and the Asset Viewer section to view the files and edit their tags, if necessary.
- If you need to share your uploaded files, select **Share Files**. Go to the Share Uploaded Files section in Share Uploaded Files section in Sharing a Package for instructions about how to share your files with the right people and settings.

CORE Tip: Save Tagging Time using "Load Last Categorization" and Templates
When tagging many batches of files, you can Load Last Categorization or select a template you've saved from the folder icon to auto-populate the Tag Fields with your Tag Values. When you have multiple Required tags or Tag Groups, this is especially handy.

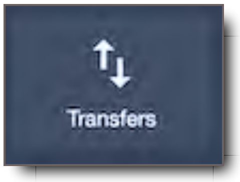


CORE Tip: Save Time While Tagging Using Duplicate Folder Structures On Your Computer
If you upload files and they come from a folder on your computer with the same naming convention as an existing Asset Group, the system will pre-fill the tags for you in the Categorization Panel. You can confirm them before saving. This feature is not yet available in the Top Tagging Bar for Drag and Drop.

Tag Your Uploaded Uncategorized Files from Transfers

Uncategorized files in File Search, appear under the Tag Field “Distribution.” To categorize files in File Search’s Distribution field,

1. Go to **Transfers**

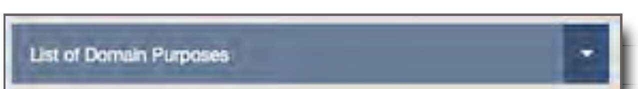


2. Select **Uploads**

3. Choose the file or files with the link that says “**# file(s) need categorization**”

4. Select the link

5. The link will open into the Upload Details View with the Categorization Panel

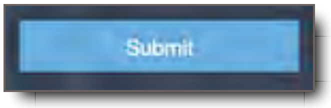


6. Select the **Domain**.

7. Enter the **Required** Tag Fields

8. Fill out any other desired information in each of the Tag Group’s Panels.

9. When finished, click **Submit**.

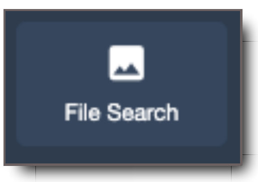


Congratulations. You've categorized your files.

Tag Your Uploaded Uncategorized Files from File Search

Uncategorized files in File Search, appear under the Tag Field "Distribution." To categorize files in File Search's Distribution field,

1. Go to **File Search**

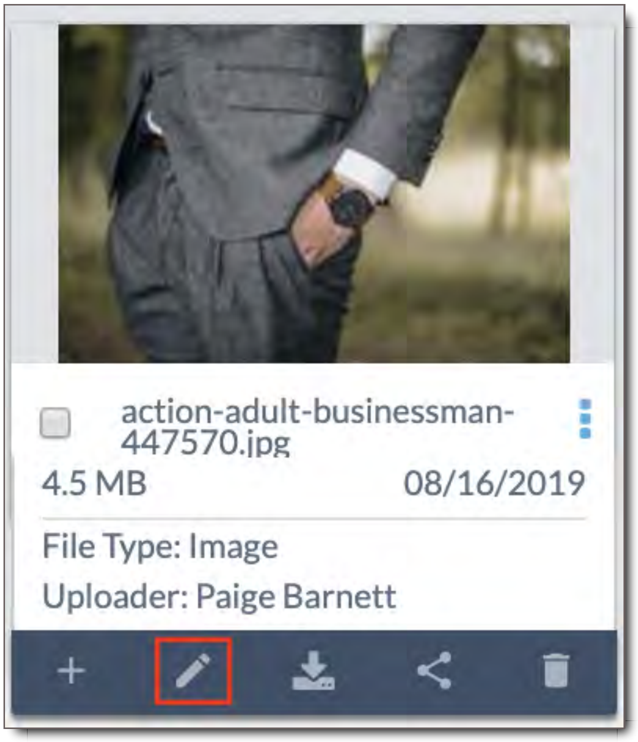


2. Go to **Distribution** which is listed alphabetically with Productions in the Left Browse Panel

3. Select the **File(s)** or **Asset Group** that you desire to categorize

   - For individual files

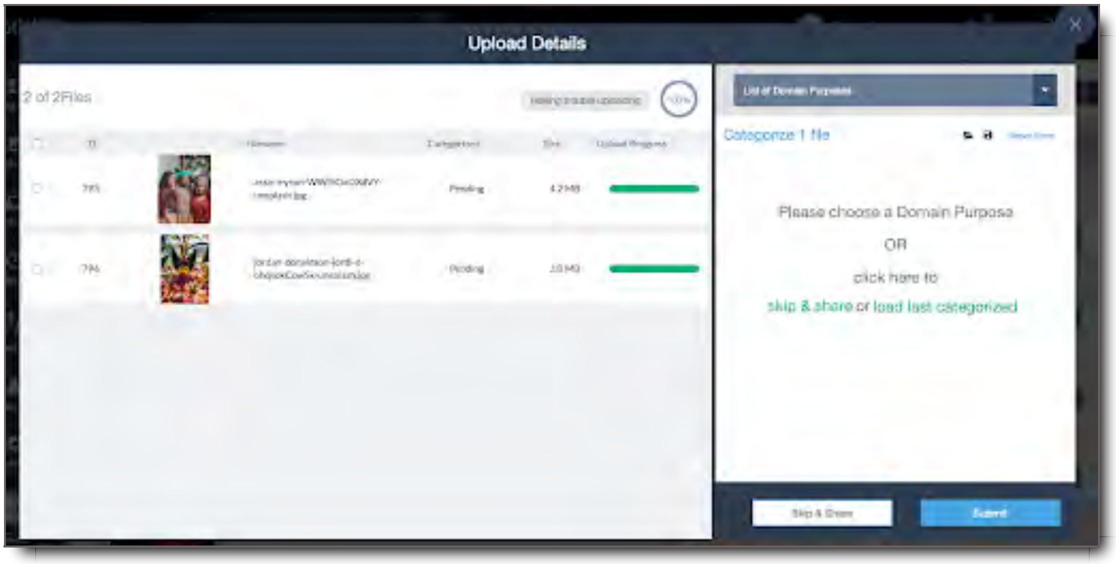
     - Select the Edit icon when in Thumbnail Mode



- Select the ⋮ **More** icon on the far right of the file when in List Mode.

- For Asset Groups select the ⋮ **More** icon, then select Edit.

4. Select the **Domain**.



5. Enter the **Required** Tag Fields

6. Fill out any other desired information in each of the Tag Group's Panels.

7. When finished, click **Submit**.

Congratulations. You've categorized your files.

Skip Categorization and Share

Important: File Categorization is extremely important in CORE. The way files are categorized determines how people will find them in the system, as well as who has access to them. If you have questions about how to categorize the files you are uploading, please contact your administrator.

If you upload files using the Upload icons, and you still want to bypass the categorization process or go back to it later, close the Upload Details View. if you want to bypass categorization and share the files you've just uploaded, click Skip and Share.

NOTE: All uncategorized files can be found and categorized later. Go to the Where to Find Uncategorized Files section for further instruction.

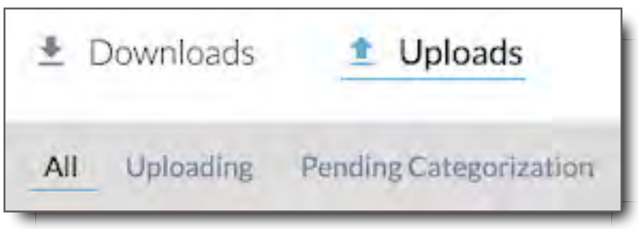
Skip and Share Your Files

Please go to the Skip and Share section in Sharing a Package Skip and Share section in Sharing a Package for further instructions about how to share your uploads with other users, as well as to understand the drawbacks of skipping and sharing files.

Where to Find Uncategorized Files

Files not categorized (i.e. Skip and Shared files) show up in the following locations:

- **Transfers Module -** These files can be found in the following submenus:
  - **All -** They will have links under the name saying they still require categorization
  - **Pending Categorization -** All files requiring categorization are listed here
  - **Uploaded** - Those file sets having completed processing with links under the name saying they still require categorization



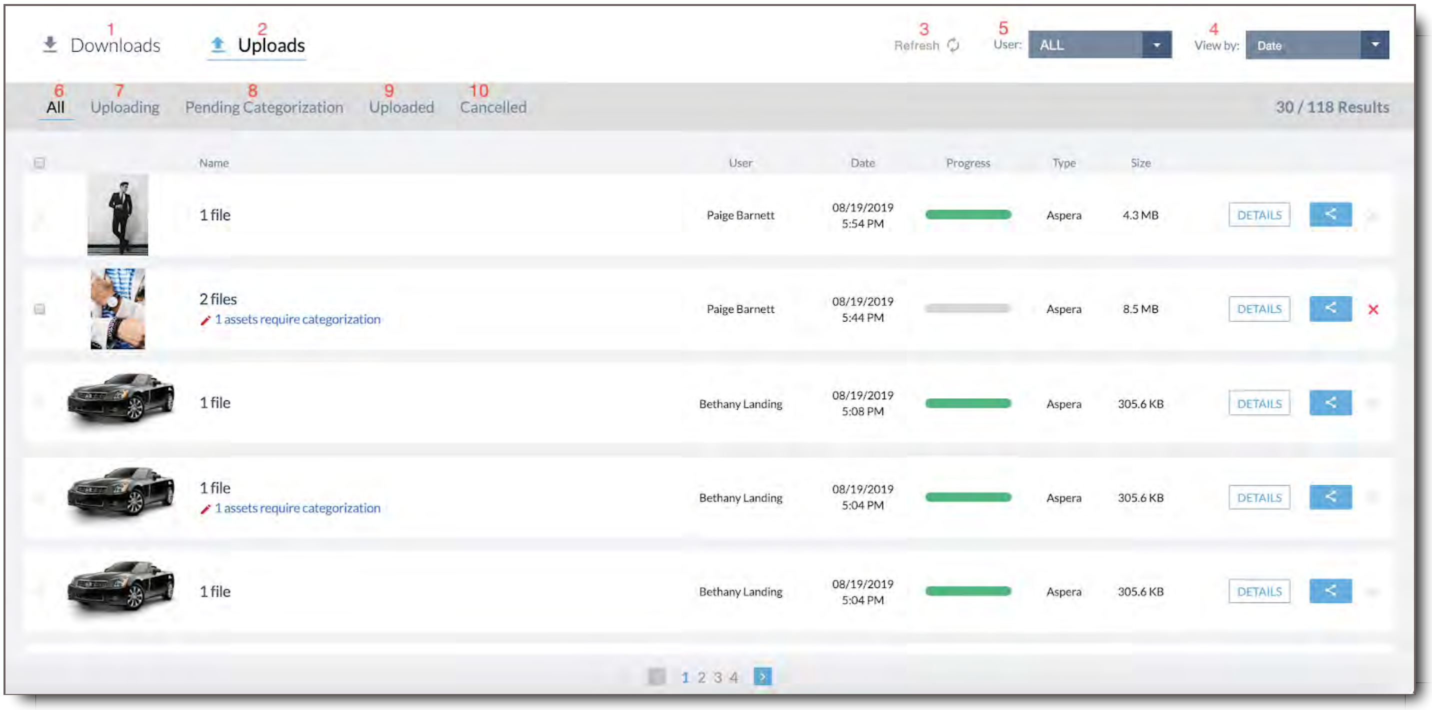
- File Search Module - These files can be found under the Tag Field “Distribution”

Find, Track, or Monitor Uploaded Files (in Transfers Module)

The Transfers Module enables users and administrators to track their uploaded files, monitor the files’ progress, and troubleshoot issues.

Elements of the Transfers Module >> Uploads

Uploads are one part of the Transfers Module.



1. **Downloads -** Section of Transfers Module, where a user can track their downloads, and an administrator or user with the permission can track the downloads of multiple users. Go to Downloads section for more information.
2. **Uploads -** Section of Transfers Module, where a user can track their uploads, and an administrator or user with the permission can track the uploads of multiple users.
3. **Refresh -** Refreshes the module page to sync and show the latest uploads or downloads.
4. **View By -** Sorts listed uploads and downloads by Date of the upload or download, or by the total Size of the files that were uploaded or downloaded.
5. **User** - Admin tool that enables Upload/Download Managers to see transfers by a specific user.

Uploads Submenu:

6. **All -** View of all uploaded files in the Transfers Module
7. **Uploading -** Filtered view of all files currently in the process of uploading.
8. **Pending Categorization -** Filtered view of all files that completed upload and still require categorization
9. **Uploaded -** Filtered view of all files that have completed the uploading process. This view shows all uploaded files in spite of their categorization status.
10. **Cancelled -** Filtered view of all files that started uploading, but were cancelled prior to completion of processing.

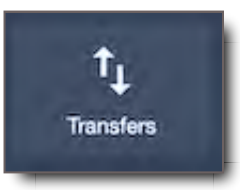
Uploads List:

11. **Select Box -** Allows the user to select a stalled or mid-process file set in order to cancel it/them.
12. **Name -** Name of the file set
13. **User -** The user who uploaded the file(s)
14. **Date -** Date and time of the upload
15. **Progress -** Progress status bar showing the progress of the processing upload
16. **Type -** Shows the type of upload process chosen, Aspera or Simple meaning HTTPs
17. **Size -** Total size of the file set
18. **Details** - A button that directs the user to the Upload Details View where you can see the same details for the individual files in the file set. This View is useful for troubleshooting file sets of more than one file where one or more files stall and disrupt the uploading of an entire file set.
19. **Share** - Share button that opens up the Upload Details View with the Share panel. Go to Sharing a Package section for more information about how to do this.
20. **Cancel X -** Will appear as a red **X** during the uploading process during which time a user can cancel the uploading files. The **X** will turn gray and become inactive once an uploaded file set has fully processed.

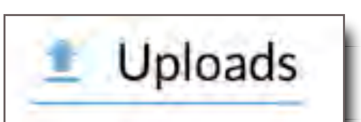
View Uploaded Files in Transfers

To view uploaded files in Transfers,

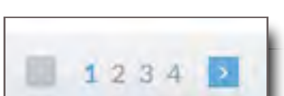
1. Go to **Transfers**



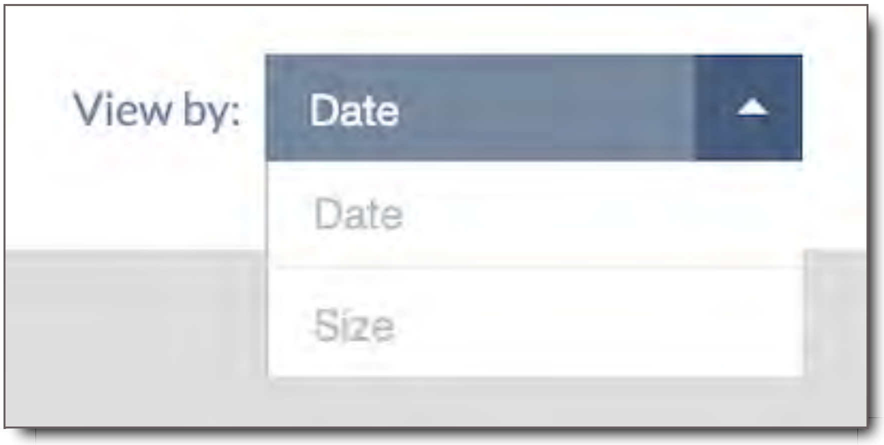
2. Select **Uploads**



3. View by All or another submenu, if desired
4. Scroll to the file you want. If it's beyond the first page, you can select other pages at the bottom.



5. Sort files by Date or Size for easier identification.



The Meaning of Upload Statuses in the Transfers Module

There are four statuses for uploads in the Transfer module:

1. **Uploading -** Uploading means that the files are in progress of uploading. They are uploading into the database where they will be saved.
2. **Pending Categorization -** Files that have completed uploading and then processed so that you can see the thumbnails and the files in the Asset Viewer are considered uploaded. Once they are uploaded, if you don't categorize them, they are considered Pending Categorization, i.e. they haven't been tagged.
3. **Uploaded -** Files that have completed uploading and then processed so that you can see the thumbnails and the files in the Asset Viewer are considered uploaded. These files may have tags or may still be pending categorization. Either way, they are uploaded.
4. **Cancelled -** Files that were in the process of uploading, but were stopped mid process are considered cancelled.

Upload/Download Managers: Filter Transfer Files by User

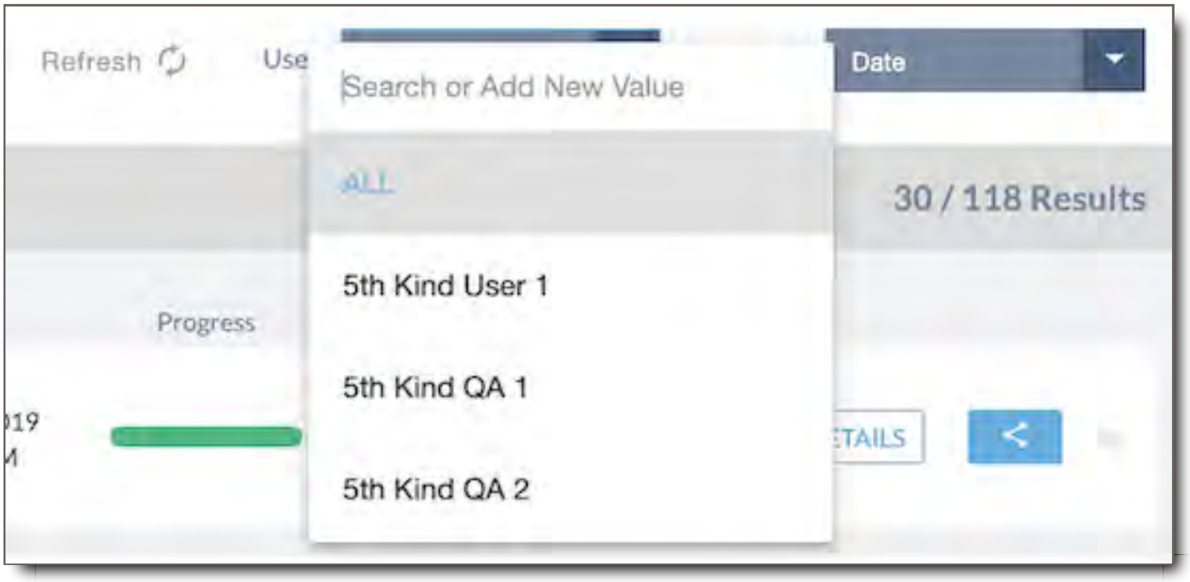
Users who are granted Upload Manager and/or Download Manager access have the ability to view other users' uploads and/or downloads.

UL/DL Managers can search for uploads and downloads by a specific user in the Transfers Module.

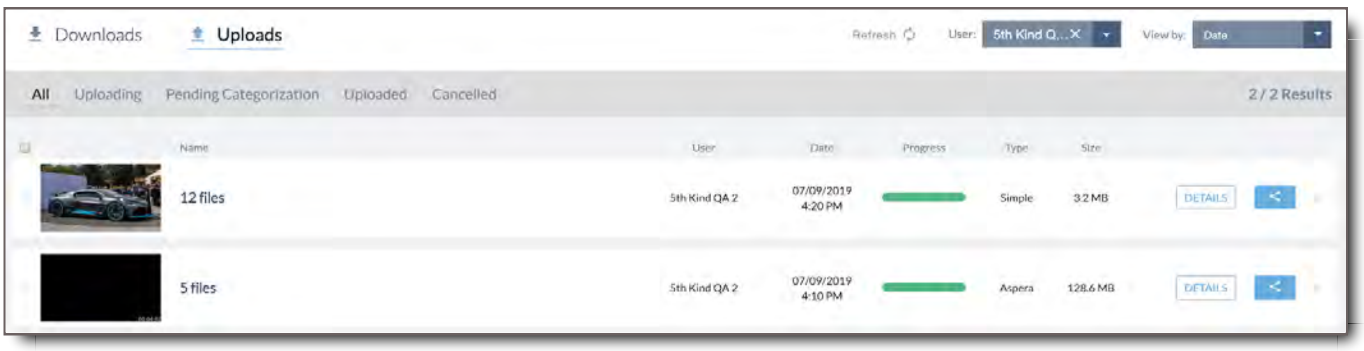
To filter uploaded or downloaded files by User,

1. Go to the **"User:" dropdown menu** in the upper right corner of the screen.

2. Click on the menu and select the user whose transfers you would like to view.



3. The Results Lists will filter to the Uploads and Downloads by that User.

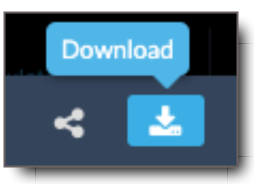


Downloading

For users with the permission to download from CORE, downloading files is simple and secure. In the following section you'll find multiple options for downloading files individually, in bulk and downloading for other users with their watermark.

Choose a Download Mode

To Initiate a download select the download icon from an asset, a group of assets, a package, or from the details window of files in the downloads section of the Transfers Module.



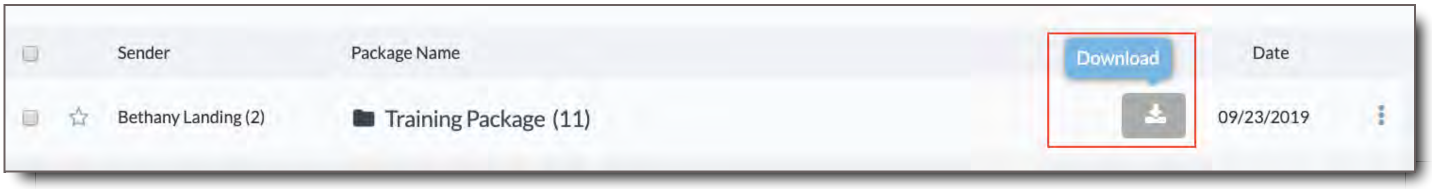
In most places, you will be given the default option to download using Aspera, but you also have the option to download as a zip (also known as a Simple Download, which means via HTTPs).

Download using Aspera

Aspera is the recommended option for downloading. Using Aspera allows accelerated download speeds, as well as the ability to pause and restart downloads. You must have Aspera installed to use this option. (See instructions on installing Aspera).

Aspera Download from a Package

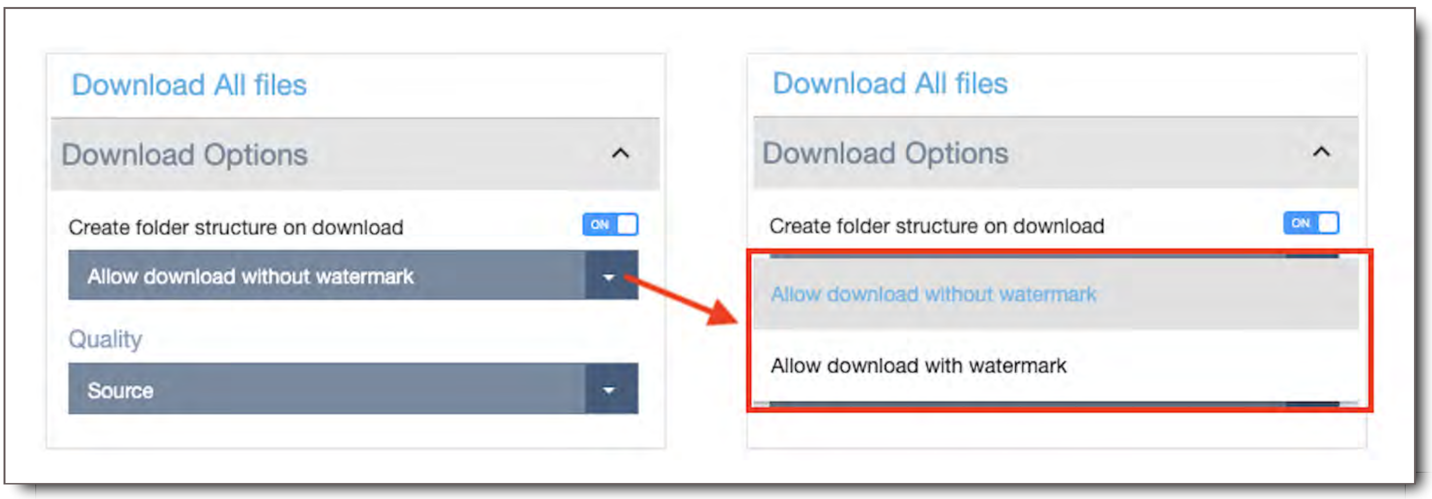
1. From your package inbox click on the download icon



2. The Package Download Options window will appear,

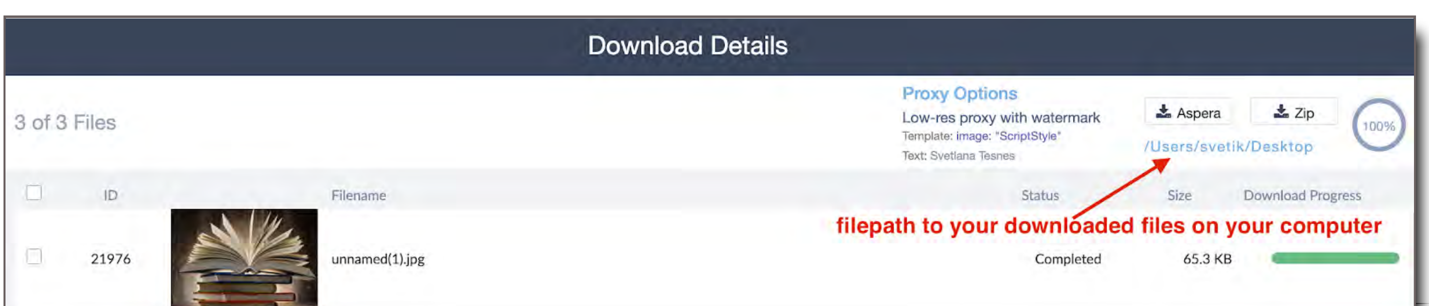
- By default you will be setup to download all the files in your package, but if you'd like to download only select files from the package, click on the checkbox next to the file name.

3. From here, select your download options (all options explained below).



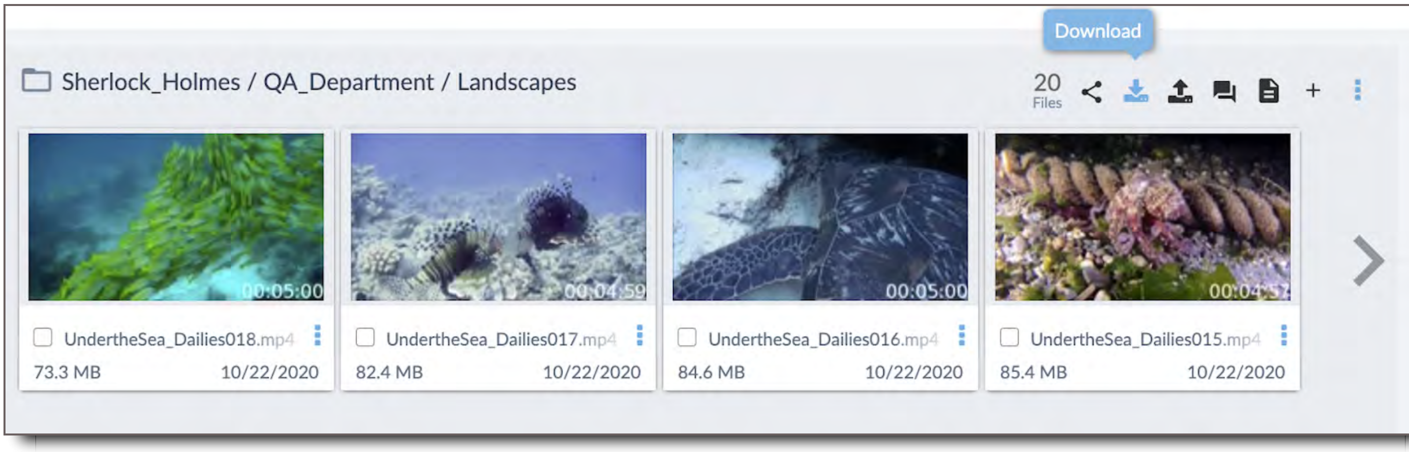
4. Click Download.
5. Aspera will open up a window for you to choose where you'd like to save the file.
6. Select the download location and click Open.
7. Your download will begin.
8. Once complete you can find it in the folder you saved it to.

- If you are unable to locate the files on your computer you can go to the transfers page and click on download details for that download. You will see the file path in the top right corner.



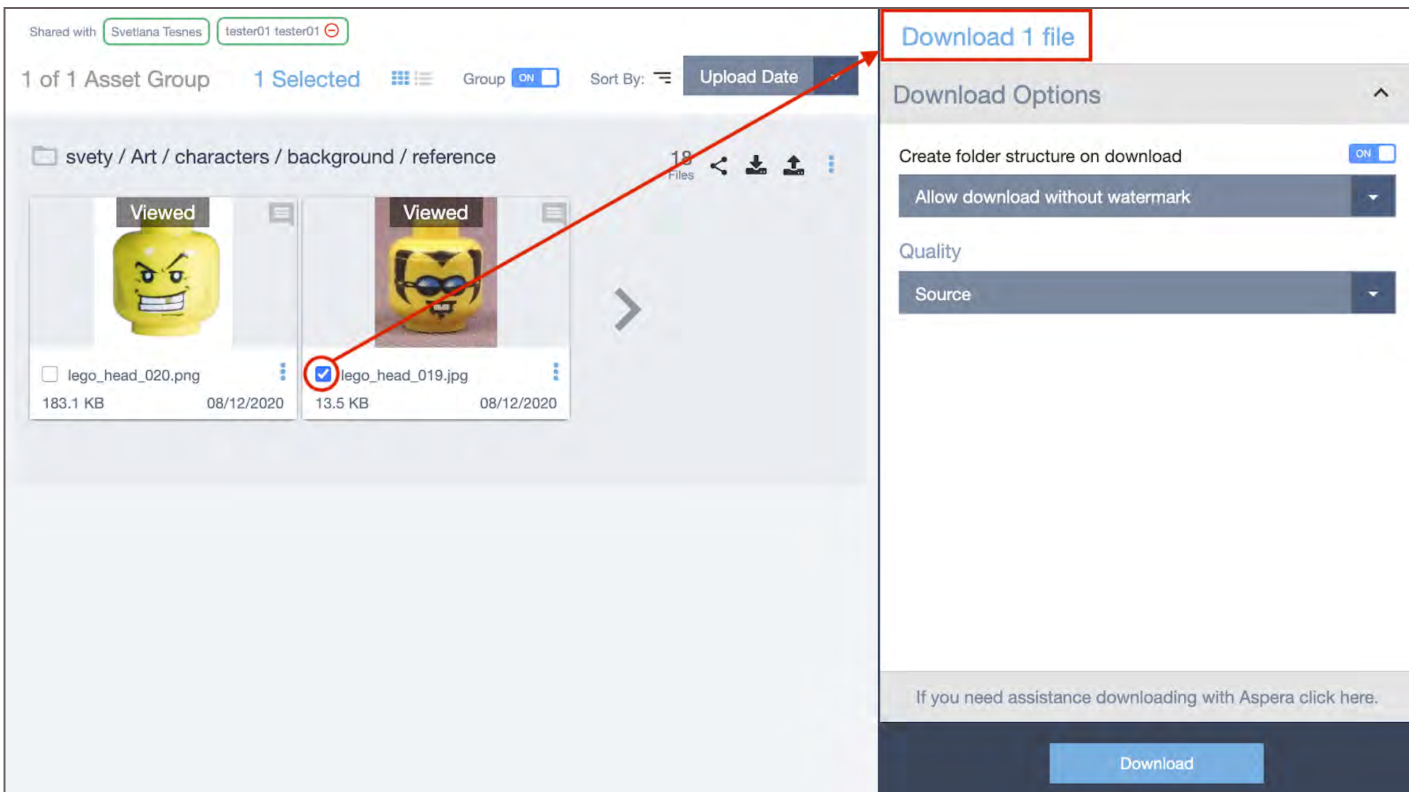
Aspera Download from an Asset Group in File Search

1. In file search, click on the download icon on any asset group to download the contents of that group.

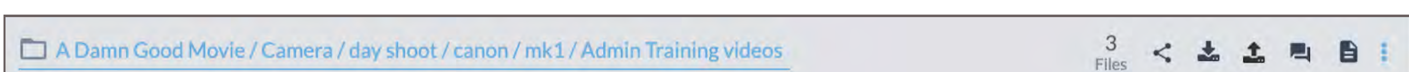


2. The Download All files, Download Options window will appear.

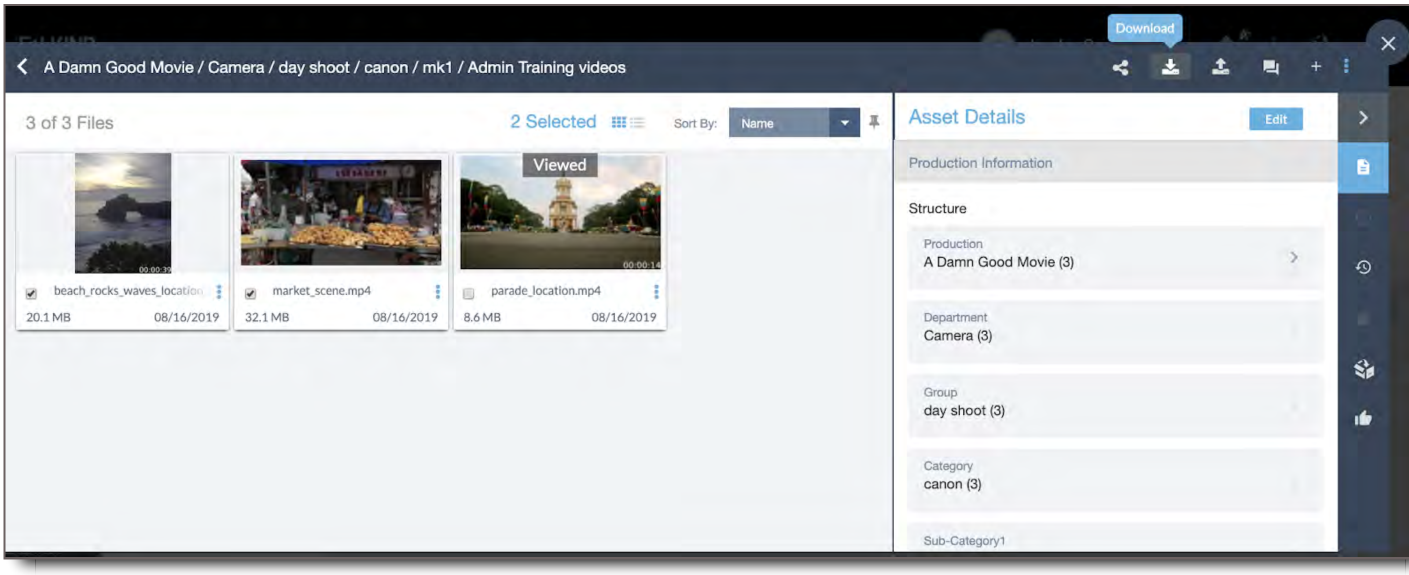
- If you only want to download a few files from the group, click in the checkbox next to the file name you'd like to download.



- To download only one or a select few assets from the asset group, click on the Asset Group Title

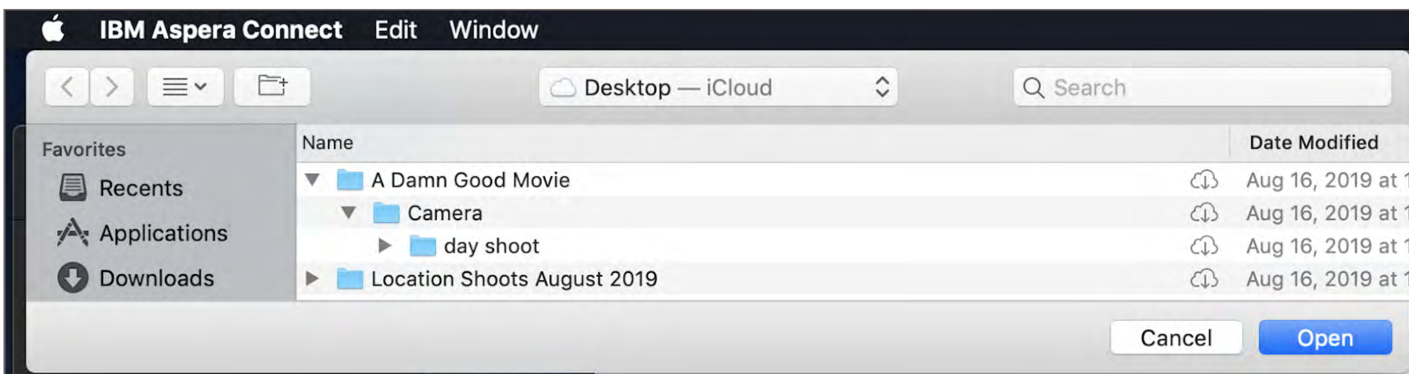


- Click the checkbox for each asset you'd like to download

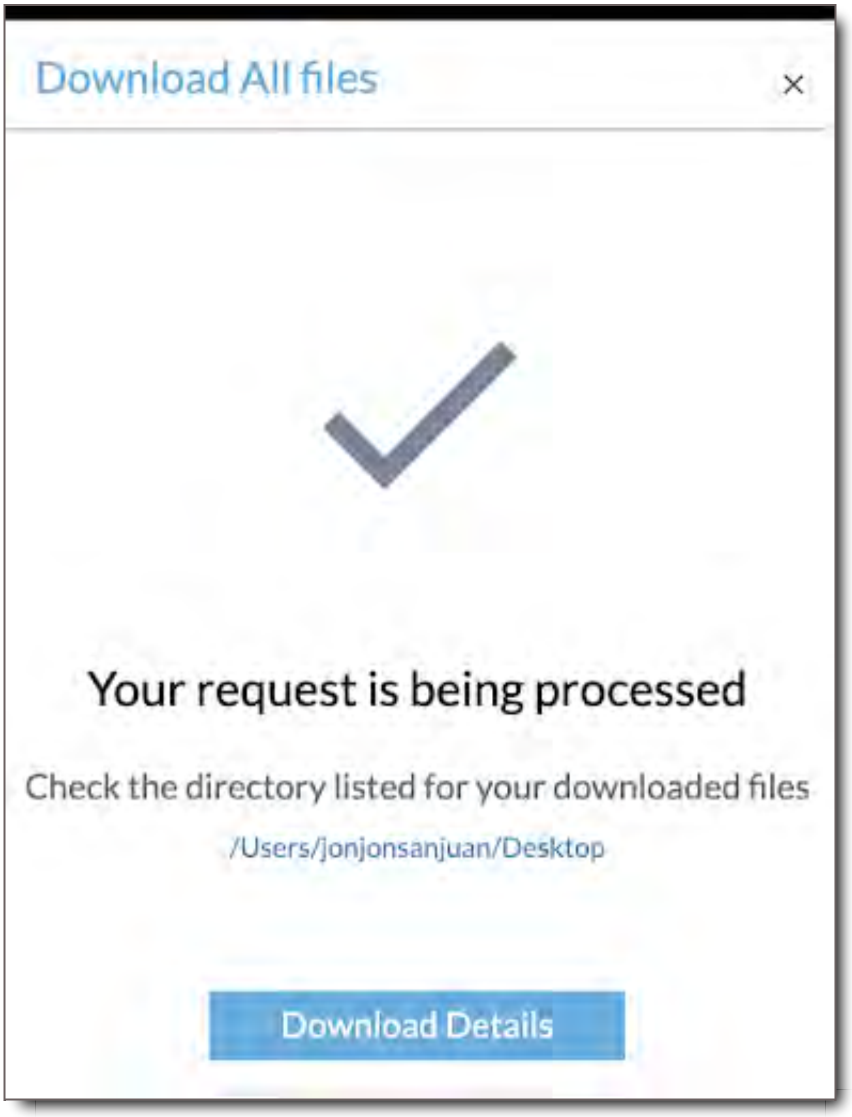


- Follow the steps below

3. From here, select your download options (all options explained below).
4. Click Download.
5. Aspera will open up a window for you to choose where you'd like to save the file.



6. Select the download location and click Open.
7. Your download will begin.



8. Once complete you can find it in the folder you saved it to.

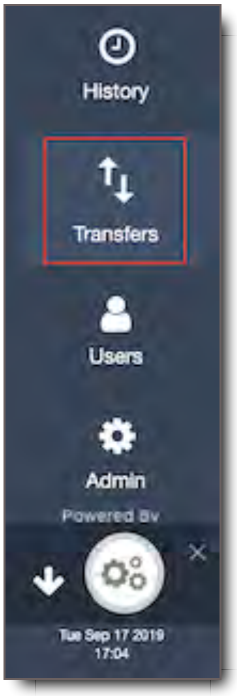
- If you are unable to locate the files on your computer you can go to the transfers page and click on download details for that download. You will see the file path in the top right corner.

Aspera Download from a Single Asset

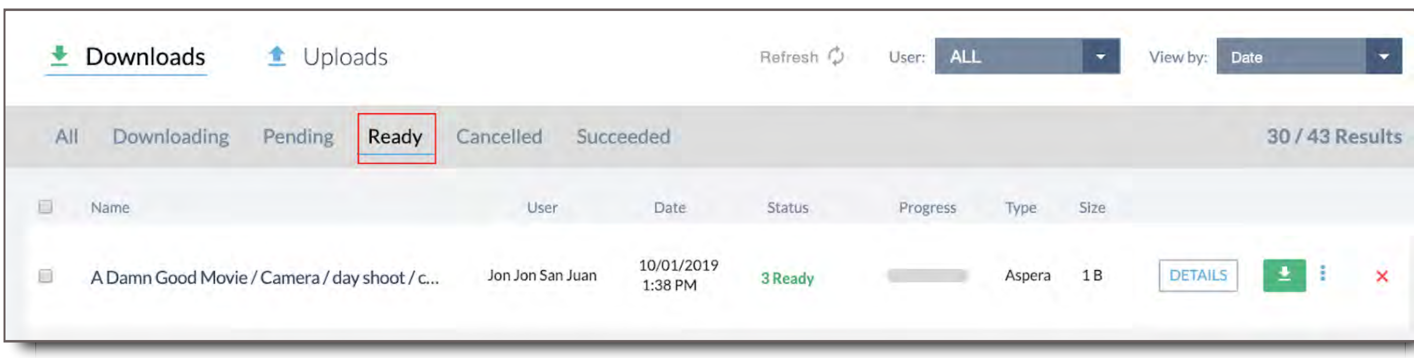
1. Whether you're in a package or an asset group, you can download a single asset by going to the asset list and hovering over the asset when in thumbnail mode.
2. From here you will see an icon menu appear.
3. Click the download icon and follow all the steps for download as written above.

Aspera Download from Download Details in the Transfer's Module

1. Click Transfers on the left navigation bar to go to the Transfer's Module

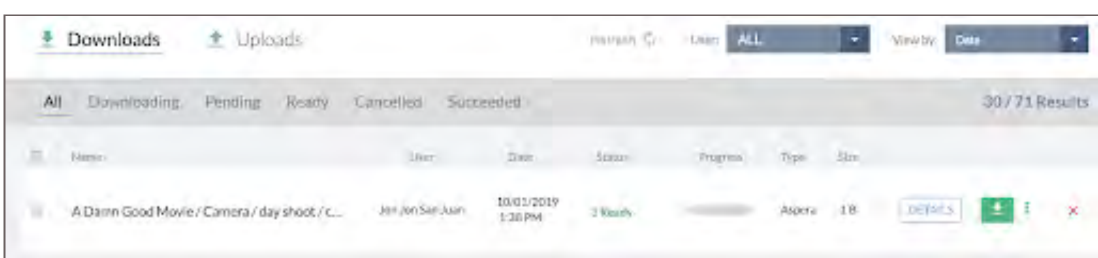


2. You will already be in the Downloads Section of the Module.
3. Select one of the sub headers to narrow down your search.



- See Transfer Module section for details on the sub-headers.

4. In this example we will stay in the default “All” header.



5. Click on DETAILS for the file(s) you’d like to download
6. The Download Details window will open
7. In the top right click Aspera

8. Select the download location and click Open.
9. Your download will begin.
10. Once complete you can find it in the folder you saved it to.

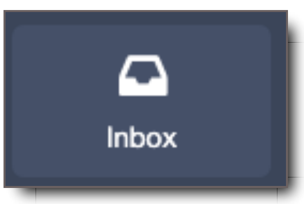
- If you are unable to locate the files on your computer you can go to the transfers page and click on download details for that download. You will see the file path in the top right corner.

Download Zip File

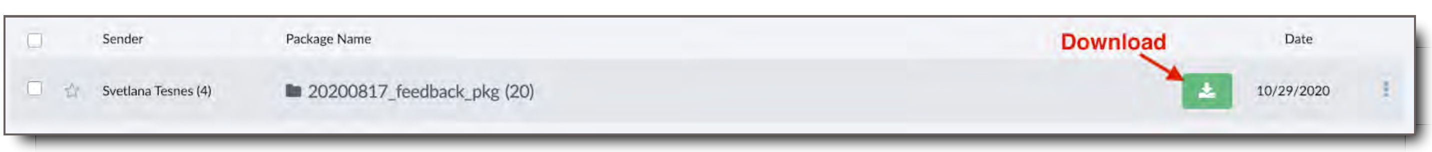
Downloading as a Zip file allows you to download one file containing all the selected files. This option is also known as a Simple Download (which means download via HTTPs). When selecting this option, please allow additional time for the Zip file to be created. When accessing the Zip option from an Asset group or package, you'll see a popup window with information on potential issues that are blocking Aspera. At the bottom of the pop up window it also gives you the option to download as zip. See below for steps on downloading zips from different areas of Core.

Zip Download from a Package

1. Click on Inbox on the left navigation bar

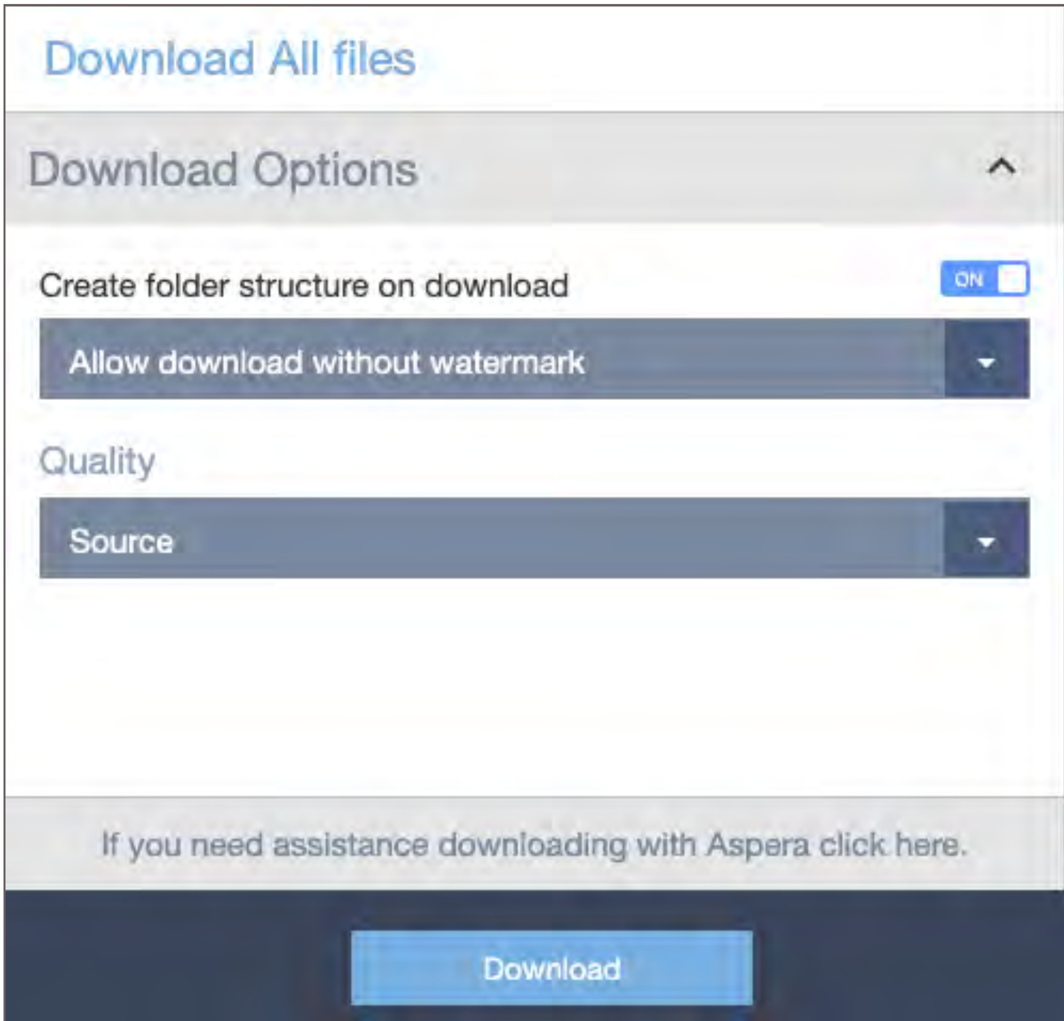


2. Click on the package you'd like to download to open it
    - To download the entire package you can select the download icon on the package directly from your inbox.
      NOTE: Not all packages are able to be downloaded, it depends upon the package or user's permissions.

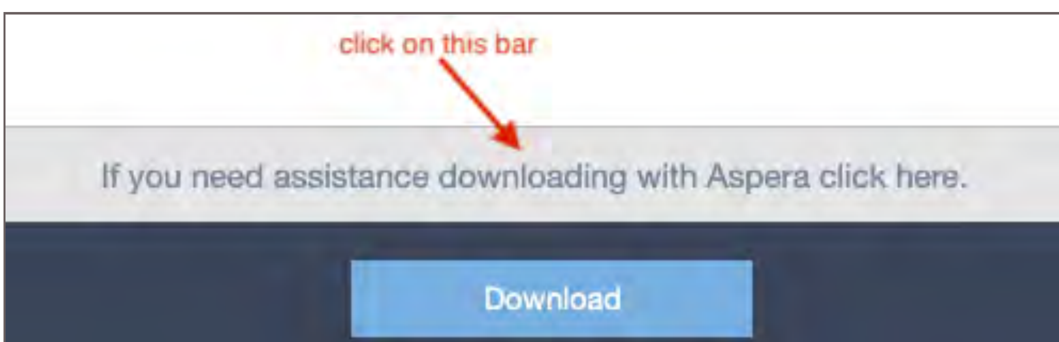


3. Once inside the package, select the download icon on the top right of the package window

4. Select your download options (all options explained in the "Download Options" section below).



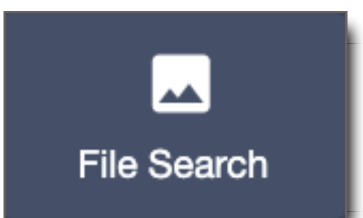
5. From here you will click on the "If you need assistance downloading with Aspera click here" button at the bottom of the menu.



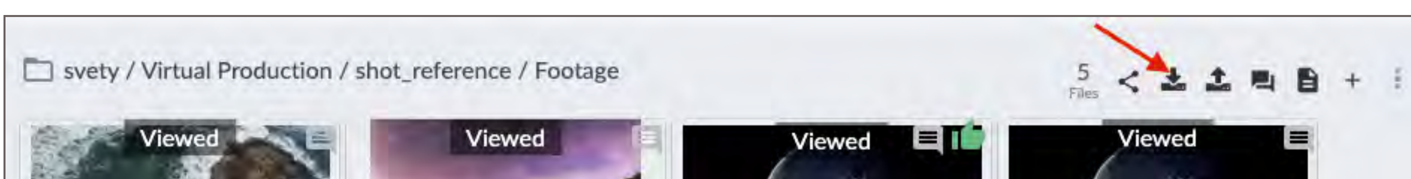
6. Click on the Download as zip button and a zip file will begin downloading to your computer once the zip has been created. Please allow additional time for the Zip file to be created.

Zip Download from an Asset group

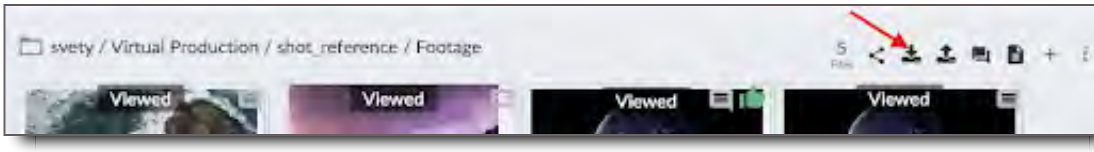
1. Click on File Search on the left navigation bar



2. Click on the Asset group you'd like to download to open it
   - To download the entire asset group, you can select the download icon to the right of the asset group in File Search



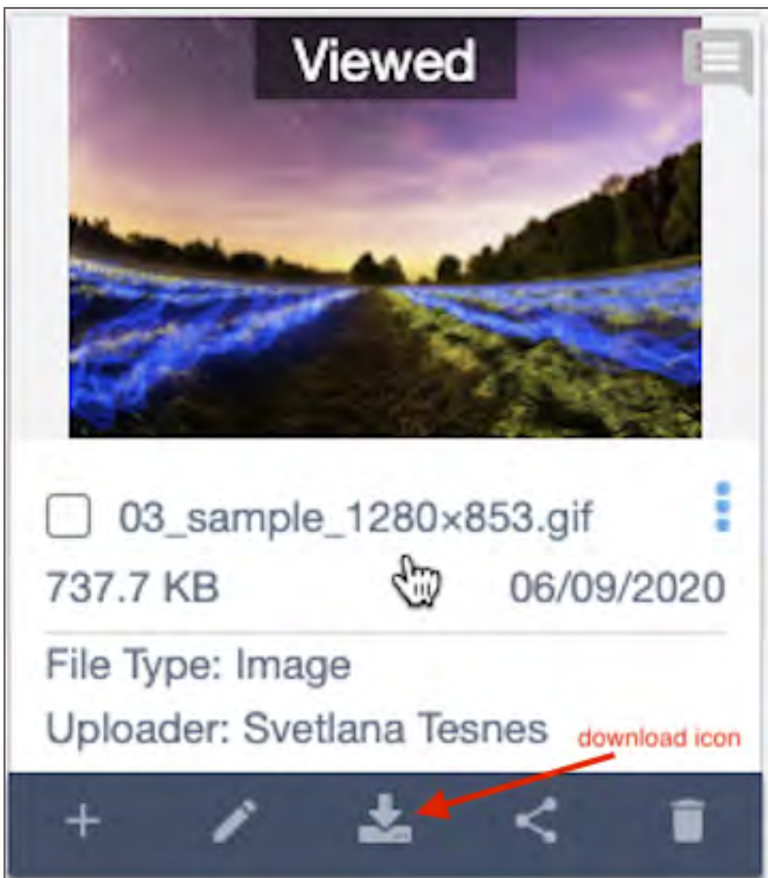
3. Once you are in the asset group, select the download icon on the top right of the asset group window.



4. Select your download options (all options explained in the “Download Options” section below).
5. From here you will click on “If you need assistance downloading with Aspera click here.”
6. Click on the Download as zip button and a zip file will begin downloading to your computer.

Zip Download from a Single Asset

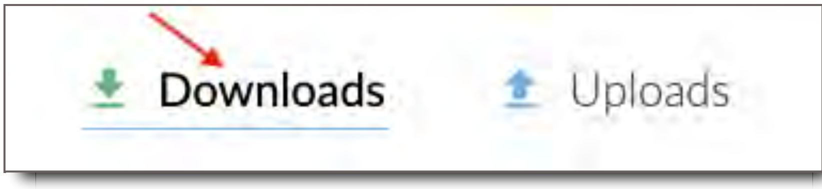
1. Whether you’re in a package or an asset group, you can download a single asset by going to the asset list and hovering over the asset when in thumbnail mode.
2. From here you will see an icon menu appear.
3. Click the download icon and follow all the steps for downloading a zip as written above.



Zip Download from Download Details in the Transfer’s Module

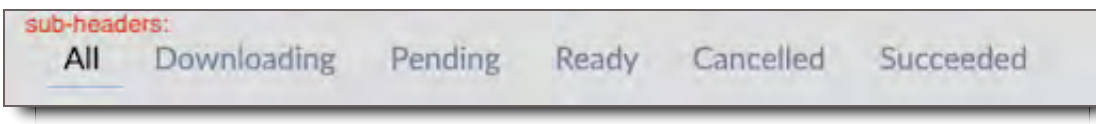
1. Click Transfers on the left navigation bar to go to the Transfer’s Module

2. You will already be in the Downloads Section of the Module 3

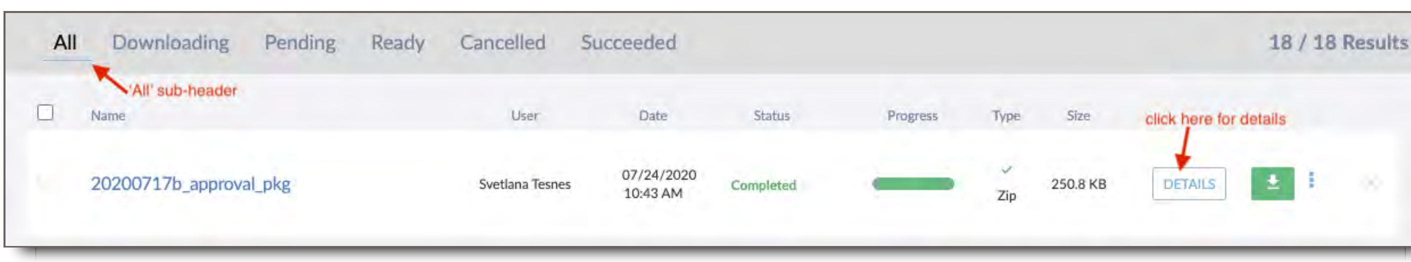


3. Select one of the sub headers to narrow down your search

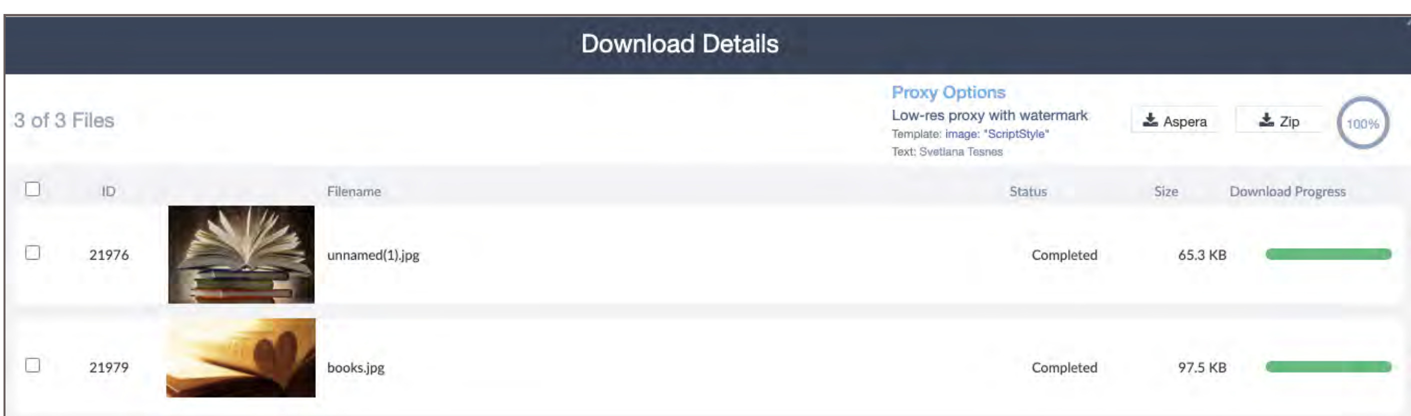
- See Transfer Module section for details on the sub-headers



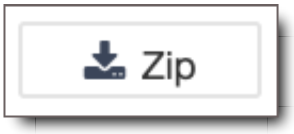
4. In this example we will stay in the default “All” header. Click on DETAILS for the file(s) you’d like to download



5. The Download Details window will open



6. In the top right of the window click Zip



7. The zip file will start downloading to your computer

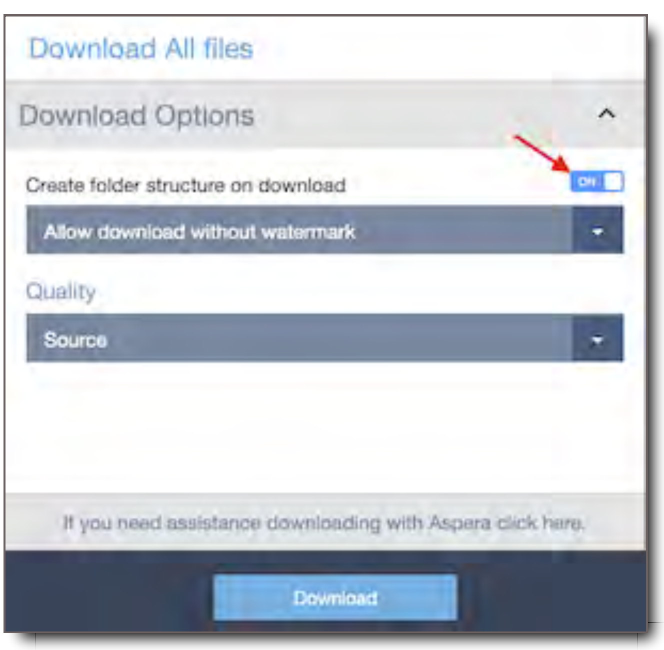
Downloading a zip tip!
Zip downloads will continue downloading to your computer even after you have logged out or your login session has expired.

Download Options

When downloading files a window will open that will allow you to choose options for your download. These options are based on your user settings or on the package settings. You may not have all of these options available, depending on your permissions. If you need download options that are not available to you, please contact your Administrator.

Create Folder Structure on Download

- If ON is selected folder structures will be created in your target folder based on the Asset Group Tags of files being downloaded. (eg. 5 Asset Group Tags = 5 folders deep, folder structure).
- If OFF is selected, all downloaded files will be placed without a folder structure, directly in the target folder selected.



Download without Watermark

Download the image, video, or document without a watermark burned in.

- Only select users will have the ability to download without watermark. Please contact your administrator if you do not see this option and need to download an unwatermarked version of the file.

Download with Watermark

Download the image, video, or document with a watermark burned in.

- If this is selected, you will be shown additional options for the watermark.

Quality

Source

Download the original Source file. This option is not available if you are permissioned to download with watermark only.

High

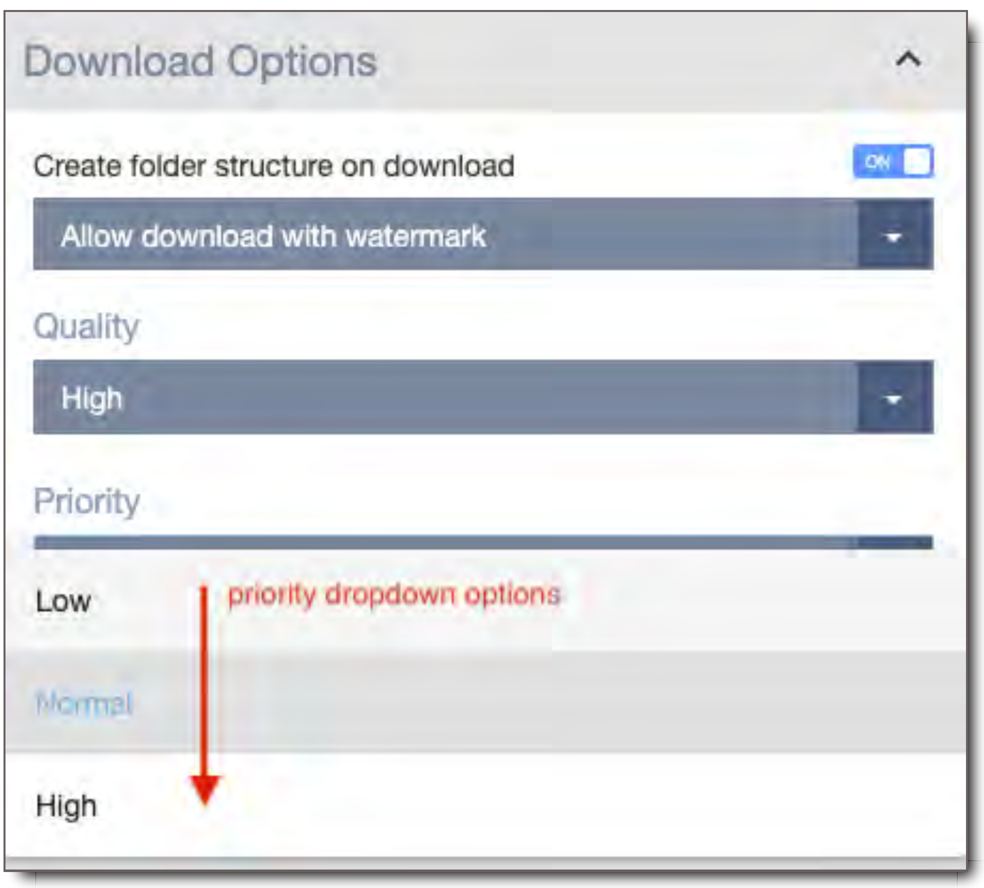
Download a high resolution proxy file with a burned in watermark.

Low

Download a low resolution proxy file with a burned in watermark.

Priority

Select the priority for the watermarking process. If you select High priority, your watermarking job will go to the front of the queue; if you select Low priority, it will go to the back of the queue. This option defaults to Normal.

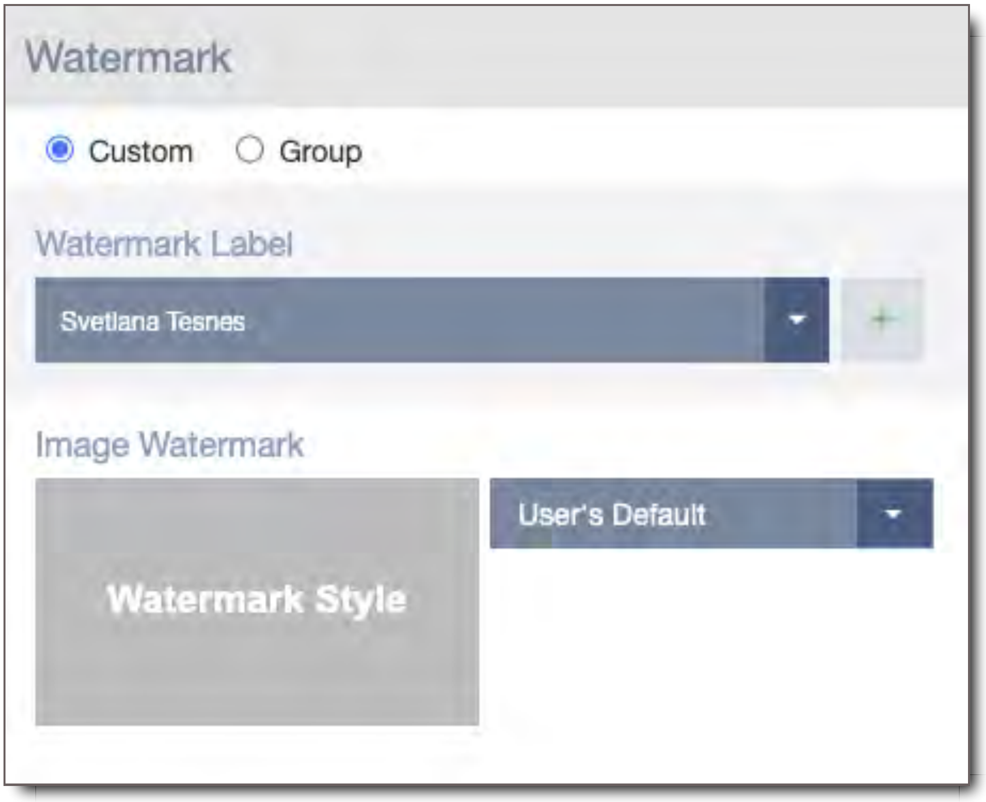


Watermark

This section will appear if you have selected to download with Watermark. You may not have all of these options available, depending on your permissions. If you need quality options that are not available to you, please contact your Administrator.

Custom Watermark

Specify the text that will be burned into the File as the Watermark, as well as the Watermark Style. Make sure the Custom option is checked before proceeding with your next selections.



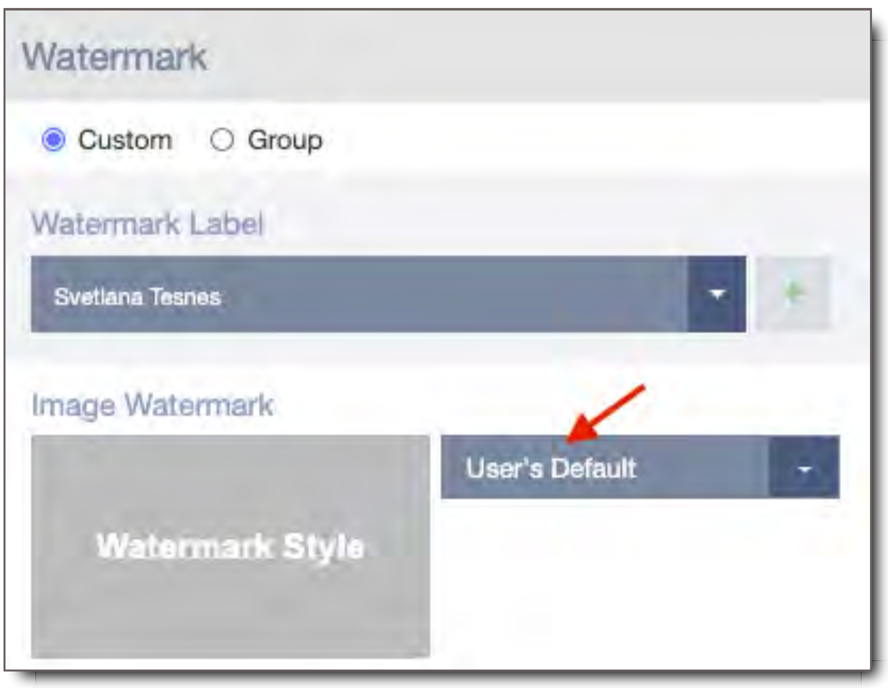
Watermark Label

This is the text that will be burned into the File as the Watermark. It defaults to your name, but you can change it by clicking the + button and adding a new label.

Watermark Style

Select the Watermark Style that will be used for each type of File that you're downloading: Image, Video, and Document. This defaults to your default as set in your User Role, but can be changed if you have the proper permissions.

- **'User's Default' watermark style:** This option uses the default watermark that is currently set up for the user in their User Role.



- The rest of the watermark styles are available as alternate watermark options for the user to select. Here are options that you might see in the dropdown menu: Across, Center Big, Diagonal, Little, Low Center Light, Outline Dark, Outline Light, Repeating Diagonal, ScriptStyle, Secure, Secure Light, Standard, Top (there could be other watermark style options depending on the company you work for).

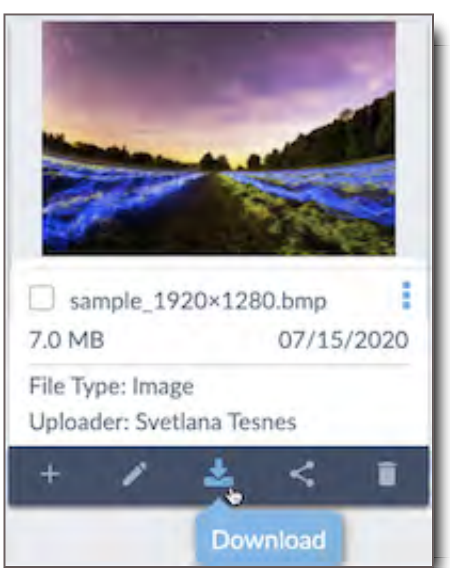
Group Watermark

This option lets you specify a group of Users and download a copy of each selected File for each of them, with their individual Watermark burned in.

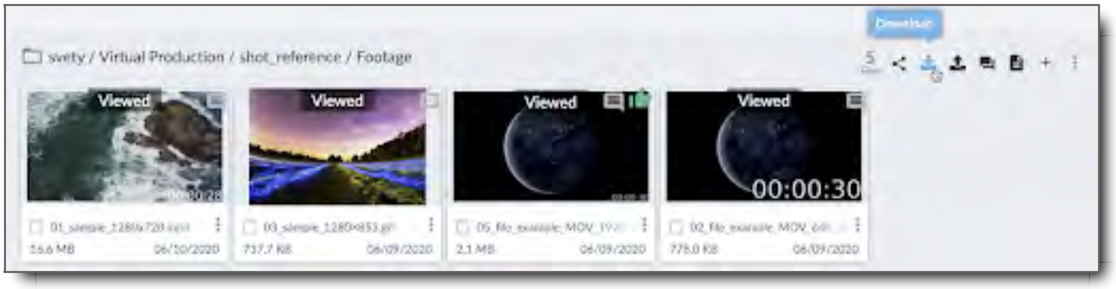
Where to Find the Download Icon in CORE

The Download icon is found throughout CORE in the following places: from an asset, a group of assets, a package or from the details window of files in the downloads section of the Transfers Module.

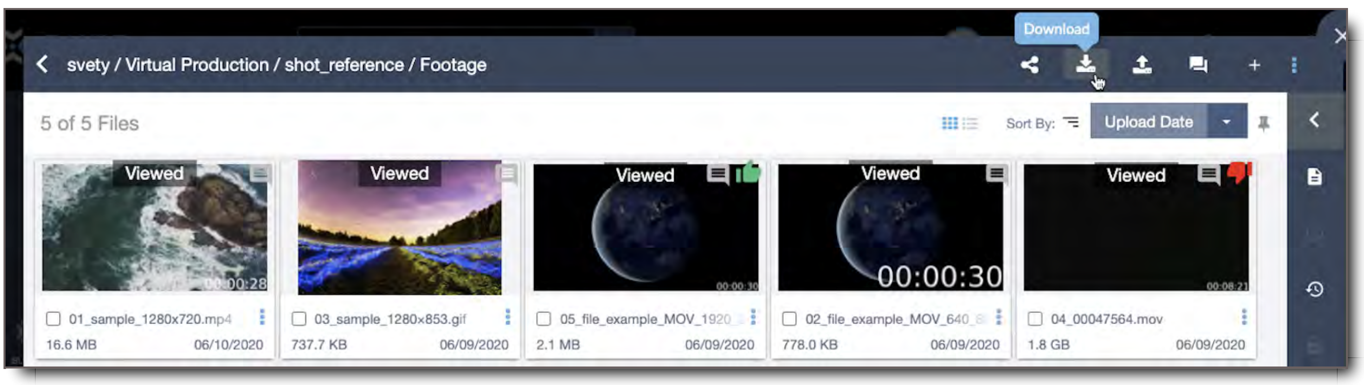
1. **File Search >> Individual Asset -** This initiates a download of one particular file you select from the File Search menu. Mouse over your asset for additional options to appear below your asset, and select the 'Download' option.



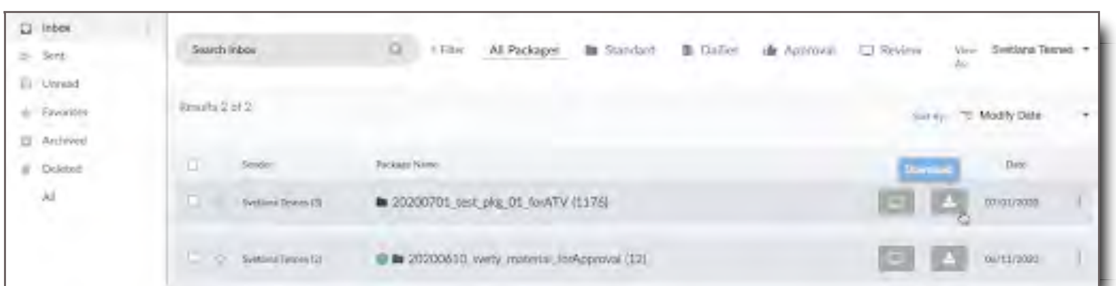
2. **File Search >> Individual Asset Group -** This initiates a download of files from the selected Asset Group from File Search menu. The download option is available at the top right of the asset group.



3. **Asset Viewer Module >> Top Bar** - This initiates a download of files from the selected Asset Group from Asset Viewer module. When you click on your selected asset group, the Asset Viewer module will open. The download option is available at the top right of the Asset Viewer.



4. **Inbox >> Package >> Top Bar** - This initiates a download of files from the Package. The download option is available to the right of the package from your inbox.

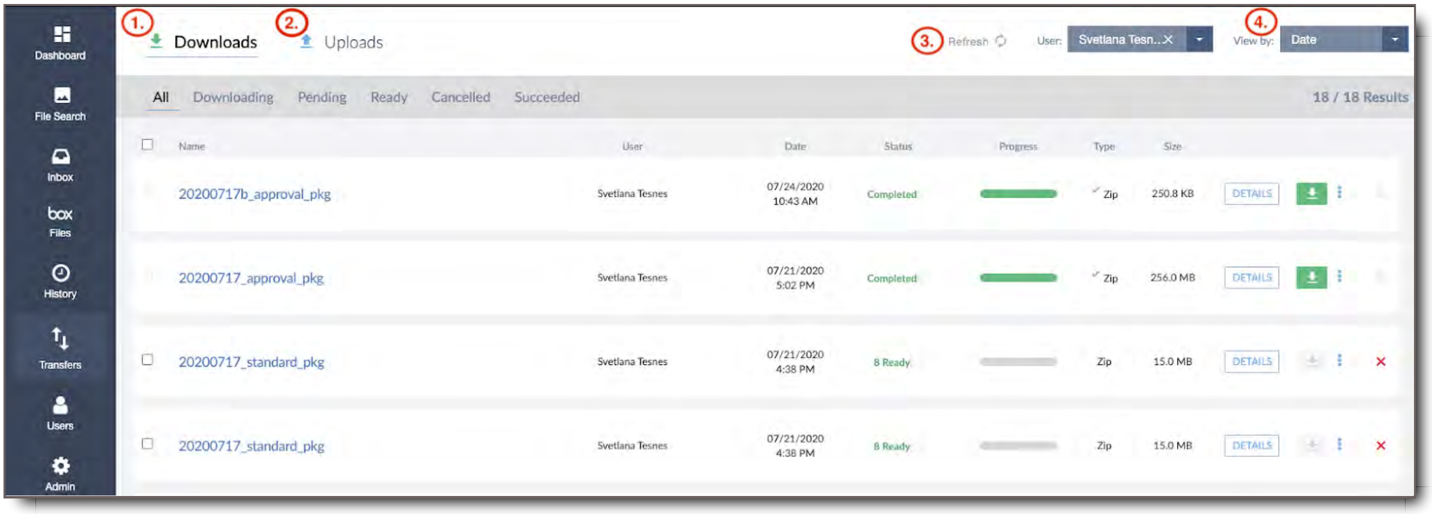


Find, Track, or Monitor Downloaded Files (in Transfers Module)

The Transfers Module enables users and administrators to track their downloaded files, monitor the files' progress, and troubleshoot issues.

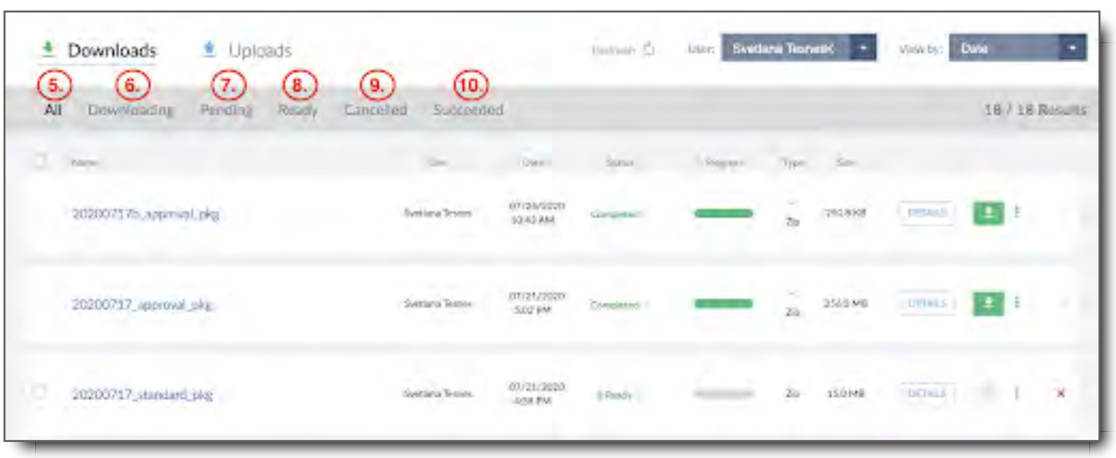
Elements of the Transfers Module >> Downloads

Downloads are one part of the Transfers Module.



1. **Downloads -** Section of Transfers Module, where a user can track their downloads, and an administrator or user with the permission can track the downloads of multiple users.
2. **Uploads -** Section of Transfer Module, where a user can track their uploads, and an administrator or user with the permission can track the uploads of multiple users. Go to Uploads section link here for more information.
3. **Refresh** - Refreshes the module page to sync and show the latest uploads or downloads.
4. **View By** - Sorts listed uploads and downloads by Date of the upload or download, or by the total Size of the files that were uploaded or downloaded.

Downloads Submenu:



5. **All** - View of all downloaded files in the Transfers Module.
6. **Downloading** - Filtered view of all files currently in the process of downloading.
7. **Pending** - Filtered view of all files that are pending download, they are being watermarked.
8. **Ready** - Filtered view of all files that are ready for download, they have been watermarked and/or zipped.
9. **Cancelled** - Filtered view of all files that started downloading, but were cancelled prior to completion of processing.
10. **Succeeded** - Filtered view of all files that have been successfully downloaded.

Downloads List:

11. **Select Box** - Allows the user to select a stalled or mid-process file set in order to cancel it/them.
12. **Name** - Name of the file set.
13. **User** - The user who downloaded the file(s).
14. **Date** - Date and time of the download.
15. **Status** - Download status of your file set. Here are the different types of statuses that you will see in this section:

- **Proxy processing:** lets you know that you have a file or files in your file set that are still processing in the system. Once a file has processed, then it can be watermarked.
- **Watermarking:** lets you know that your files are being watermarked.
- **Ready:** lets you know that your files are ready to be downloaded. All the watermarking (if requested) and/or file zipping have been done on your file set. You will also see the Download button at the right of your package change from grey to green color.
- **Cancelled:** lets you know that a package download process has been cancelled for your file set and your package will no longer download.
- **Completed:** lets you know that your package has been successfully downloaded to your computer.
- **Error:** lets you know that a file or files in your package have encountered an error & will need to be checked before resuming your download.

16. **Progress** - Progress status bar showing the progress of the processing download.
17. **Type** - Shows the type of download process chosen, via Aspera or Simple (aka Zip), which means via HTTPs.
18. **Size** - Total size of the file set.
19. **Details** - A button that directs the user to the Download Details View where you can see the same details for the individual files in the file set. This View is useful for troubleshooting file sets of more than one file where one or more files stall and disrupt the downloading of an entire file set.
20. **Download Button** - A button that will initiate the download of your file set.
21. **Three Dot Menu** - A menu that gives you options to download your file set via Aspera or Zip.
22. **Cancel ❌** - Will appear as a red ❌ during the downloading process during which time a user can cancel the downloading files. The ❌ will turn gray and become inactive once an uploaded file set has fully

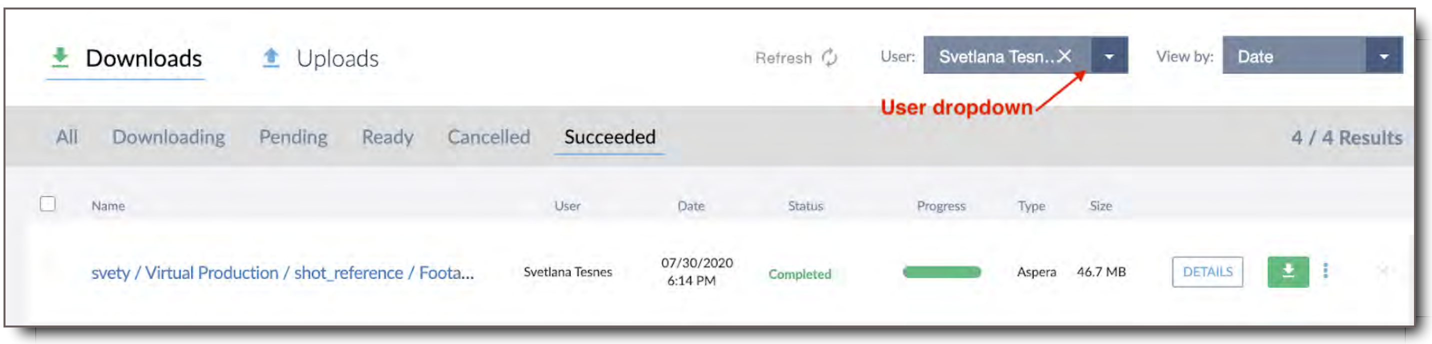
processed.

Upload/Download Managers: Filter Transfer Files by User

Users who are granted Upload Manager and/or Download Manager access have the ability to view other users' uploads and/or downloads. Full system Administrators are also able to perform these searches as well.

UL/DL Managers can search for uploads and downloads by a specific user in the Transfers Module.

To filter uploaded or downloaded files by User:



1. Go to the "User:" dropdown menu in the upper right corner of the screen.
2. Click on the menu and select the user whose transfers you would like to view.
3. The Results Lists will filter to the Uploads and Downloads by that User.

Video Specs

Here are the recommended specifications for uploading 720p and 1080p video into CORE for ingest . Video not matching these specs may take longer to be playable, or may have difficulty processing. Processing times for files not in optimal spec will be processed at a rate of approximately 3-4x real time.

720P Video Specs for Ingest

Parameter	Spec
Resolution	HD 1280 x 720
Data Rate (Bit Rate)	3300 kb/s or 3.3 Mb/s
Frame Rate	Same as source
	Progressive Streaming Fast Start (Compressed Header)
Encoding Profile	Baseline
Pixel Aspect Ratio	Square
Color Space ITU	Rec-709 (sRGB LUT)
Compression Type	.h264
Container Format	Quicktime (.mov)
Encoding	Faster encode (single pass)
Audio Format	AAC
Audio Bit Rate	192
Audio Channels	Up to 8 channels

1080P Video Specs for Ingest

Parameter	Spec
Resolution	HD 1920x1080
Data Rate (Bit Rate)	5000 kb/s or 5 Mb/s
Frame Rate	Same as source
	Progressive Streaming Fast Start (Compressed Header)
Encoding Profile	Baseline
Pixel Aspect Ratio	Square
Color Space ITU	Rec-709 (sRGB LUT)
Compression Type	.h264
Container Format	Quicktime (.mov)
Encoding	Faster encode (single pass)
Audio Format	AAC
Audio Bit Rate	192
Audio Channels	Up to 8 channels

Description

Video Resolution - Optimized Video Resolution settings for CORE for 720P or 1080P

Data Rate - Optimized Data Rate. If the Data Rate is higher than the spec mentioned will result in longer delays for the video to be playable on CORE.

Frame Rate - Frames Rates will be the same as source. It is preferred to be 24 frames per second.

Encoding Profile - Baseline - The Baseline profile is the simplest profile, and supported by most decoders.

Pixel Aspect Ratio - (often abbreviated PAR) is a mathematical ratio that describes how the width of a pixel in a digital image compares to the height of that pixel. CORE requires the square pixels type.

Color Space ITU - Color spaces are mathematical models describing the way colours can be represented. CORE specs recommend Rec. 709 or sRGB LUT.

Compression Type - CORE uses the H.264 compression type. H.264 is the well-known video compression standard for high-definition digital video (Also known as MPEG-4 Part 10 or Advanced Video Coding (MPEG-4 AVC).

Container Format (Wrapper) - CORE's recommended container format is .MOV (quicktime).A container format is a type of file format that contains various types of data compressed by standardized codecs.

Encoding Audio Format - CORE's recommended Encoding Audio Format is AAC. An encoding Audio format is a content representation format for storage or transmission of digital audio.

Audio Bit Rate - CORE's recommended Audio Bit Rate is 192 kbit/s or below.

Audio Channels - CORE's recommends up to 8 channels.

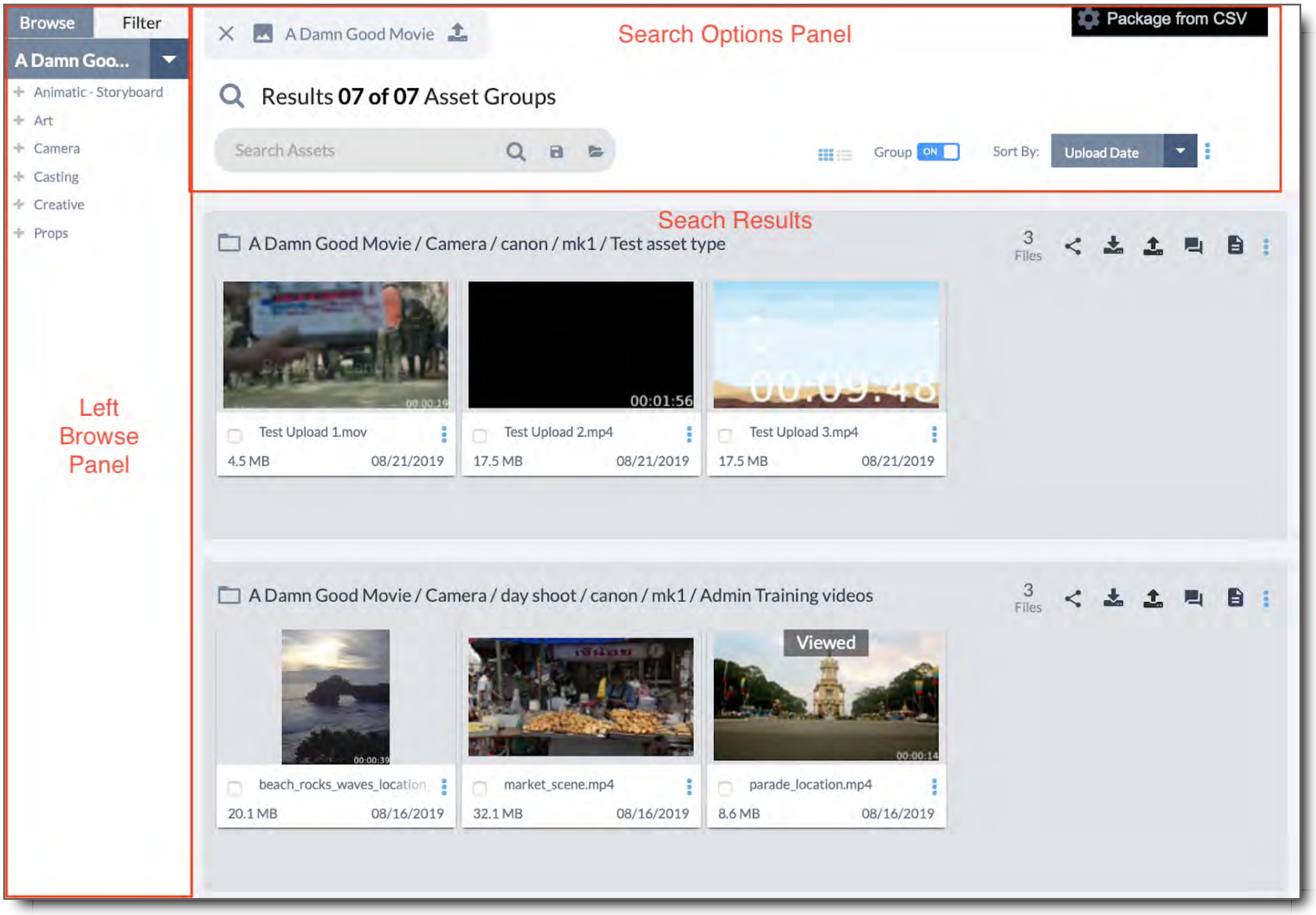
File Search

Users can search for files, assets, and packages in different modules throughout CORE.

- In File Search, users can find individual files and asset groups through a combination of Filters in the Search Options Panel at the top of the module and the Browser Panel's Browse Tab and Filter Tab. Search parameters can be saved with templates for future use, and results can be sorted and selected for various needs. (i.e. Package Sharing)
- In the History module, you can see what files you interacted with recently. Users with certain permissions can see what files accessed by other users.
- In the Inbox / Packages module, using Search, you can find packages that contain the files you seek. For instructions on this module, go to Package Inbox >> Search section

Elements of File Search Module

Note: When searching for files, the Tags and Metadata that appear in the Search Results, Filters, Browse Panel and Tabs are reflective of what files are in the system. If Tags you're looking for aren't displayed in the Browser Tab or Filter Tab, then there are no files with those Tags.



Elements of the Left Browse Panel

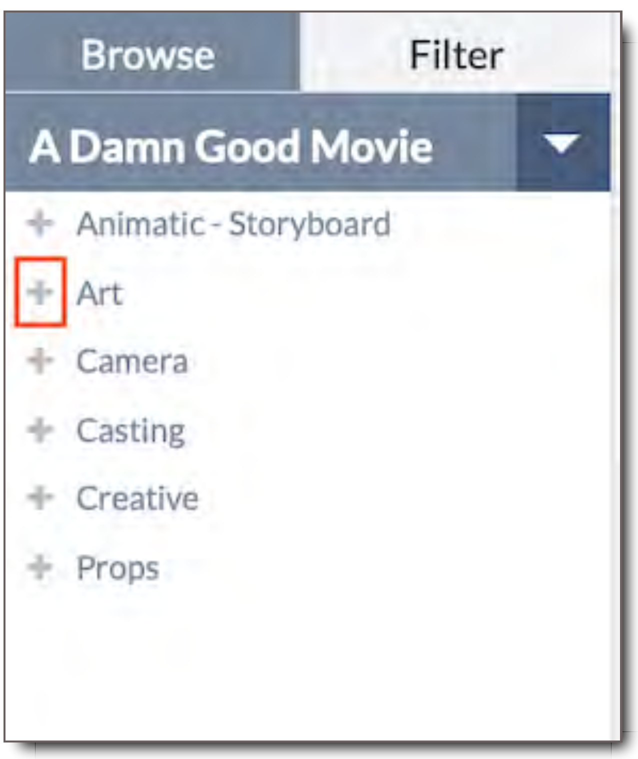
Browse Panel Tab

The Browse Panel tab lets you look through for files in a way that's similar to a directory structure on your computer. Select a Top Level Tag from the dropdown, then browse through the nested Tag Values. Clicking a value will add Search Filters in the Options panel, and search for files matching those values. This is equivalent to selecting and applying these filters manually.

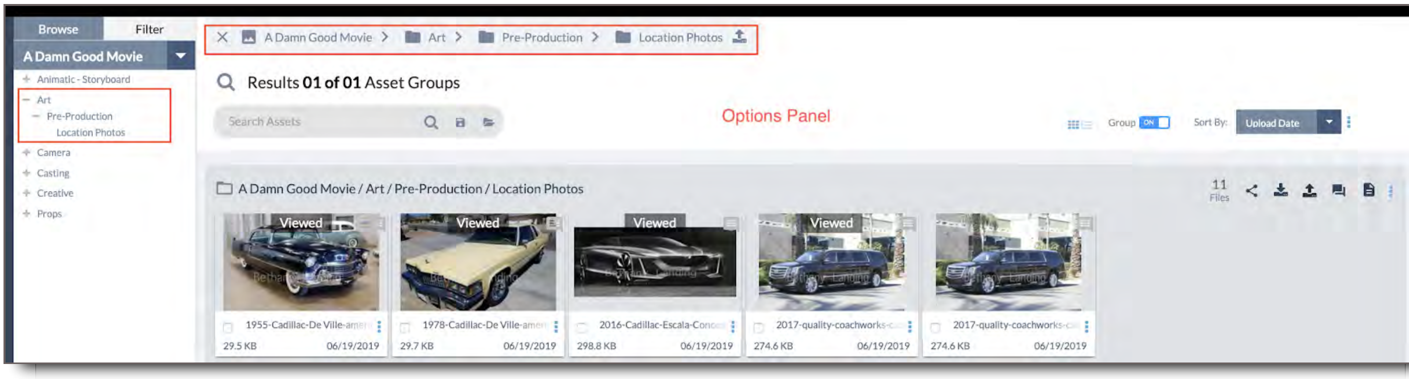
1. **Top Level Tag Select** - Click this dropdown to view Top Level Tag Values, and select one to view the nested Tags Values under it.

2. **Browse Directory** - The directory reflects the nested Tag Values of Files based on the Top Level Tag that you select. These Tag Values are the Structural Tags that you or another user chose when uploading the Files.

   - Click the ✚ next to any value to view the values nested beneath it.



   - Clicking on any value will add Search Filters to the Options Panel, and search for those values.



Filter Panel Tab

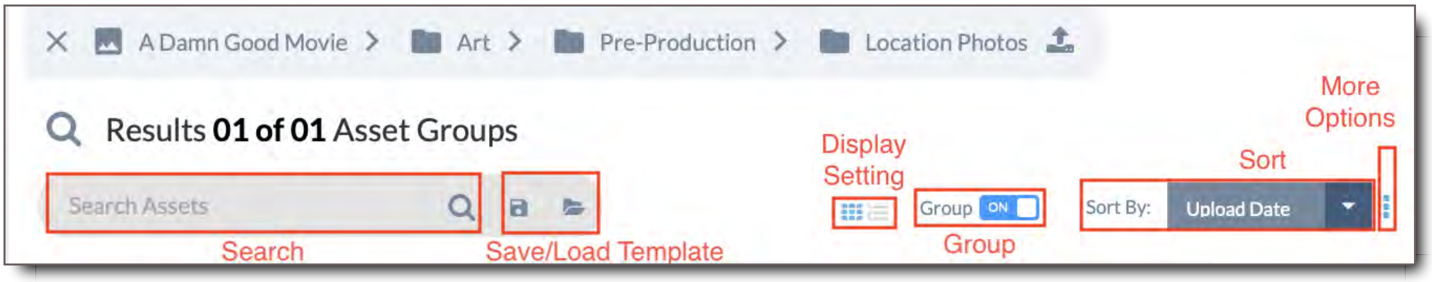
The Filter Panel tab has search options that enable you to narrow down the specific Tag Values to return the Search results you are looking for. The filter can be narrowed by any combination of Tag Fields. Only the Tags that are associated with files in the system are shown, with one exception: File Type. This list will always appear in the Filter Panel even if no files are associated with certain Tag Values.

Elements of File Search

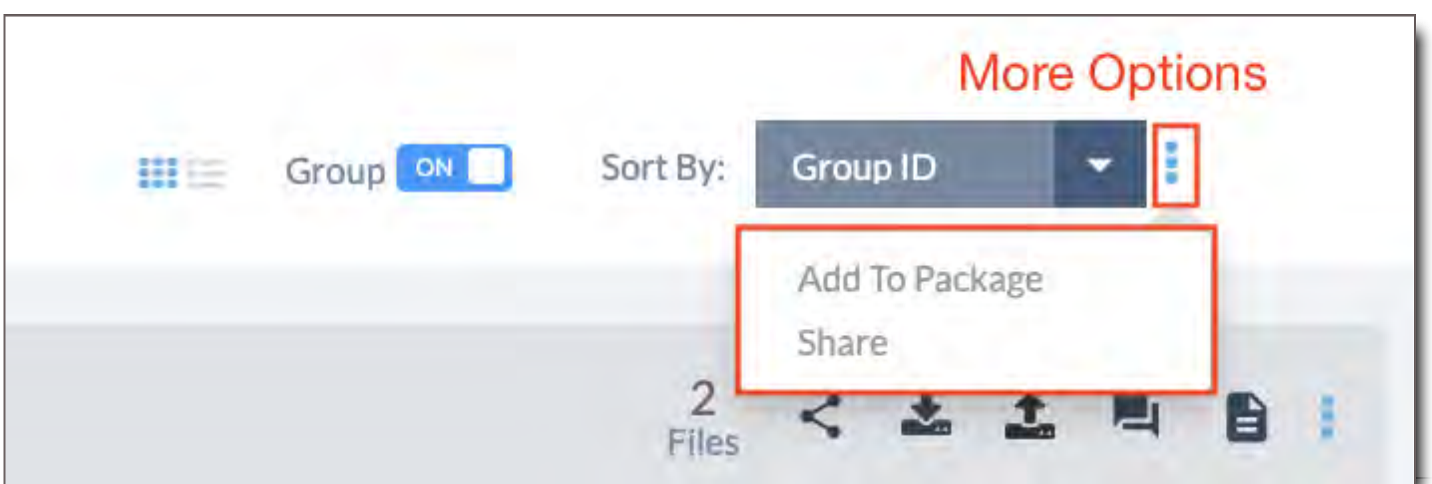
File Search lets you search and browse for Files in the system.

Note: The files and options that appear in this view may vary based on your permissions. If you need access to something that you do not have access to, please ask your Administrator.

Search Options Panel



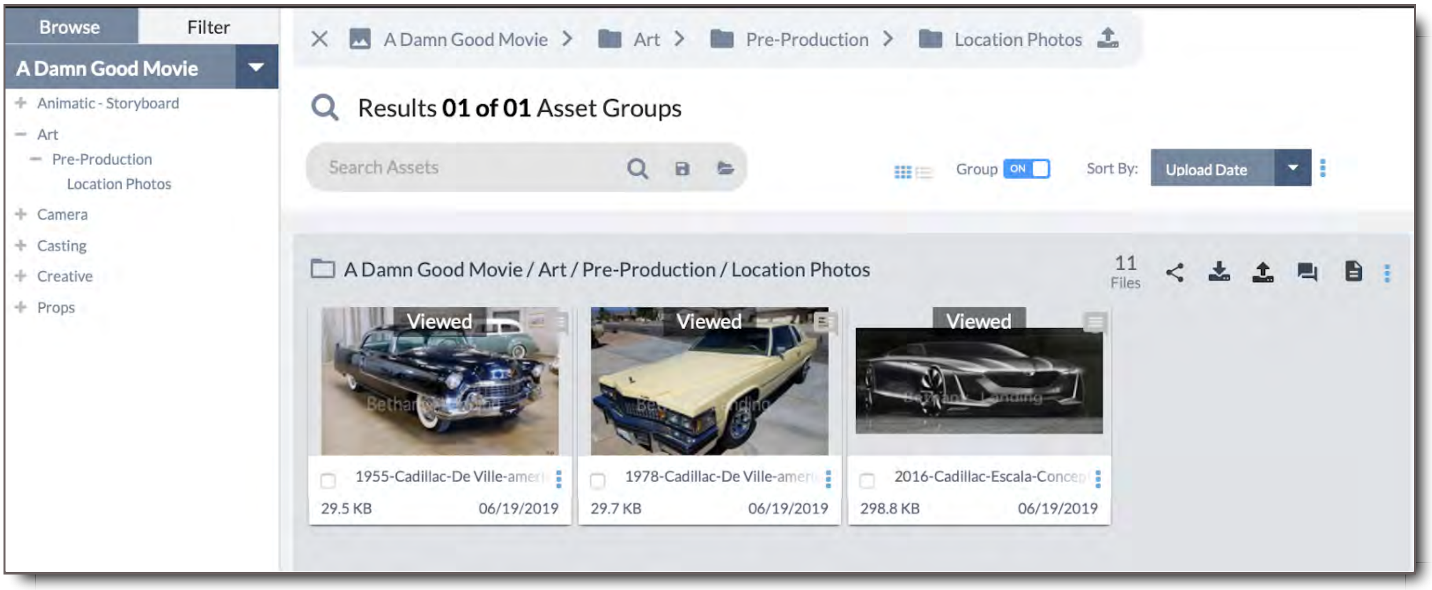
1. **Search Bar** - Search for Files whose filenames, tags, and other metadata match the terms you enter. Click the 🔍 icon or hit Enter to search.
2. **Save / Load Template** - Save sets of filters that you use frequently, and easily recall them later.
3. **Display Setting** - Choose between List Mode and Thumbnail Mode to display your files. Thumbnail is the default display setting.
4. **Group Mode** - Toggle Group Mode on and off. Group Mode displays files grouped together by shared Structural Tag Values. Group Mode ON is the default setting.
5. **Sort By** - Dropdown menu that enables the user to sort results by Upload Date or Name.
6. **More Options** - Dropdown menu with Add to Package and Share actions that when selected, open a right side panel that enables the user to drag and drop files from Search Results into the right side Package panel or Share panel. For more information about how to add files from Search Results to a package, go to Creating a Package . For more information about how to share files from Search Results, go to Sharing Packages.



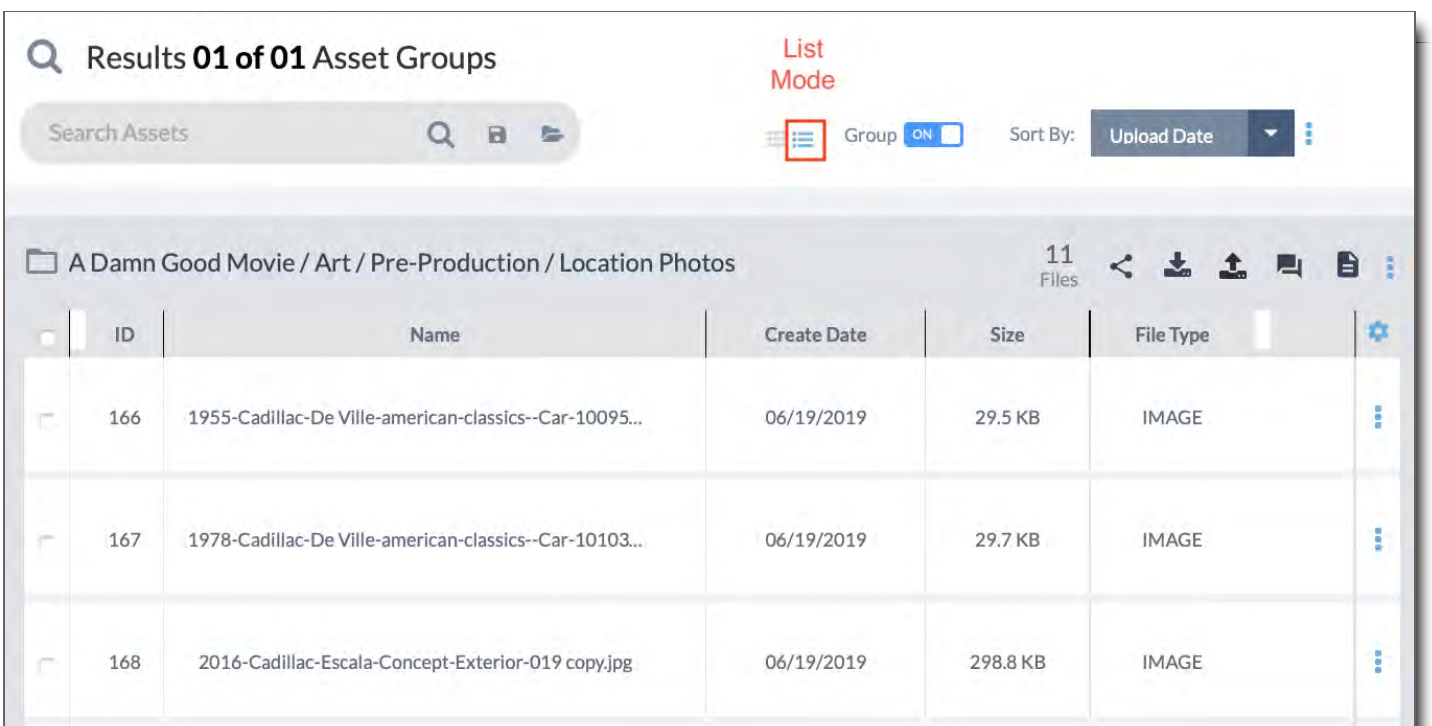
Search Results

This is where Files matching your search criteria appear. When you first navigate to this view, you will see the most recently uploaded Files shown first. Use the Search Bar, Filters, Sort, and Group options to change what and how Files are displayed. You will see only the Files that you have permission to access. If you cannot find the files you need, or if you believe you should have access to additional files, please contact your Administrator.

Search Results returned as Asset Groups with Thumbnails. (This is the default system setting.)



Search Results returned as Asset Groups in List Mode. Displayed columns are customizable. .



1. **Asset Groups -** Group Mode is the default view for the system. Group Mode displays files grouped together by shared Structural Tag Values.

- **Group Name -** The Group Name represents the Structural Tag Values that the Files within the Group have in common. Click the Group Name to open the group in Asset Viewer.

- **Group Options -** Click any of the icons at the top right of any Asset Group to interact with the group. Any option you click on will apply to all Files within the group.

- **Files in Group -** A number indicating the number of files in a specific Asset Group.

- **Share -** Share the Asset Group as a Package.

- **Download -** Download that Asset Group.

- **Upload -** Upload files to a that Asset Group specifically.

- **Comment -** Comment on that Asset Group.

- **Asset Details -** Contains the Tag and Metadata information connected with the specific Asset Group.

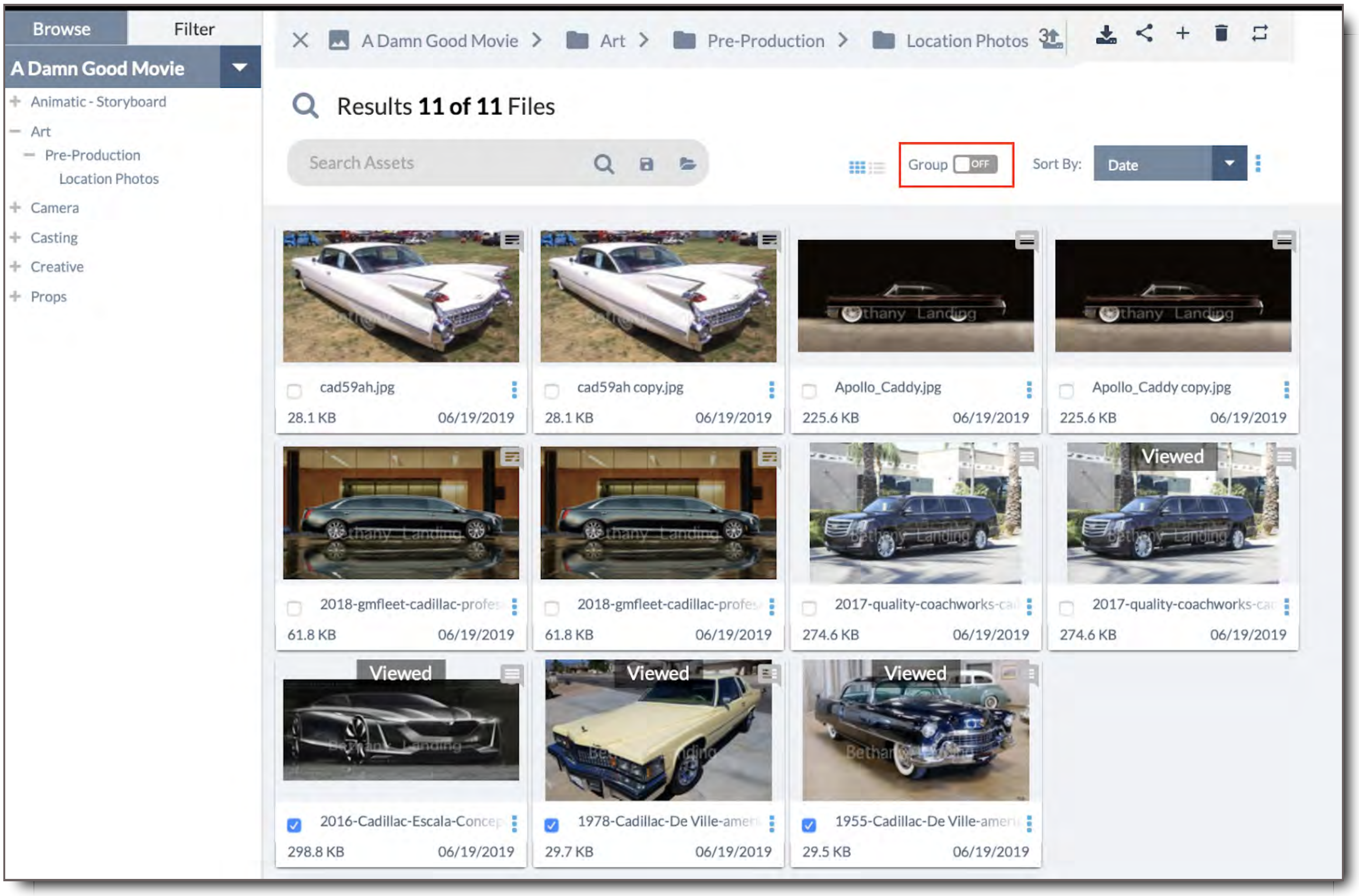
- **More Options -** Pop out menu that enables users to take further action with the Asset Group.

    - **Add to Package -** Creates a new package made up of the Asset Group, in which more Files can be added to the package as desired.
    - **Delete -** Deletes the Asset Group.
    - **Share -** Opens the Sharing Panel to enable the user to send the Asset Group as a Package to other users.
    - **Download -** Downloads that Asset Group. Depending on user's settings, will be downloaded as a Zip File when Simple is turned on, and individual files when Aspera is turned on.
    - **Discussion -** Opens the Commenting Panel for the Asset Group
    - **Edit -** The availability of this option depends on a user's permission. Selecting this option opens the Asset Details panel and enables you to edit an Asset Group's tags
    - **History -** Selecting this option opens the History panel showing user activity surrounding the specific Asset Group.

- **Files -** Group Mode will display a preview of the first few files it contains. Click any File to view it, or to access all Files within the group, click on the Asset Group's name to open the Asset Viewer. Files can be displayed in Thumbnail or List Mode within a Group. Further detail on each mode is provided below.

2. **Individual File Results -** When Group Mode is OFF, individual Files are listed all together in the main Search Results.

Search Results returned as individual files in Thumbnail Mode.

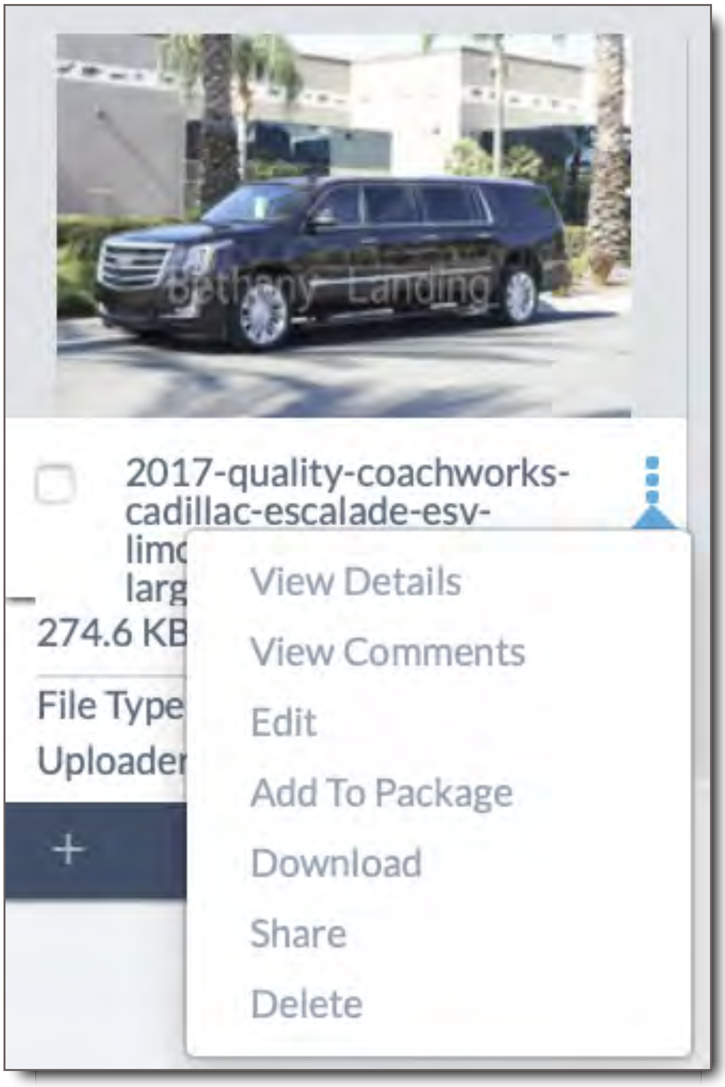


3. **Thumbnail Mode -** Thumbnail mode is the default file display mode.

   - Click on any thumbnail to view it.

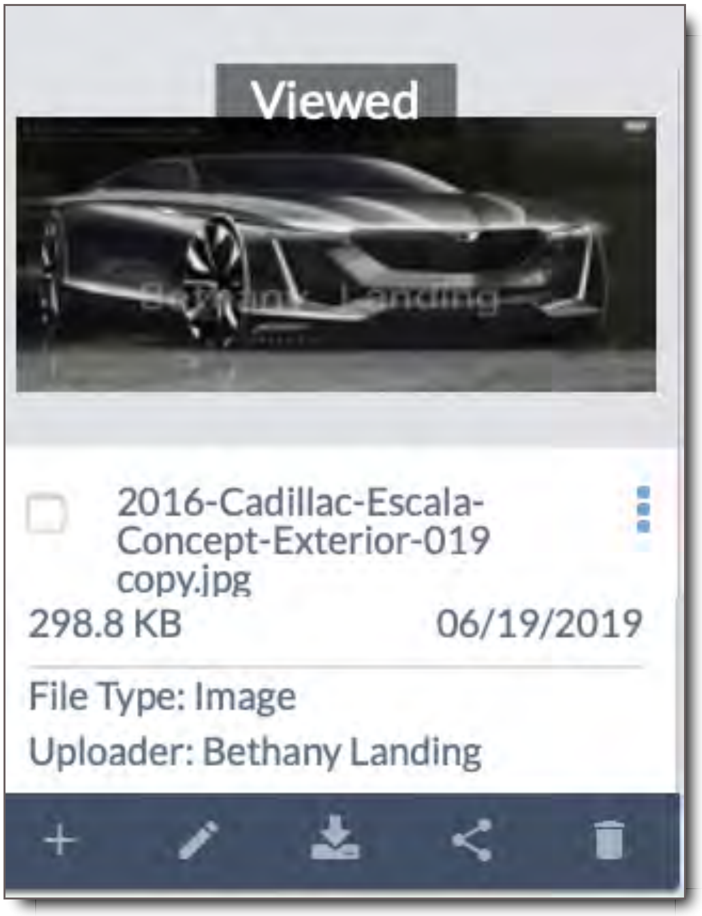
   - Click the checkbox on a file to select it.

   - Click the for more options.



- **View Details -** Opens the Viewer and Asset Details Panel for that File
- **View Comments -** Opens the Viewer and Comments Panel for that File
- **Edit -** If you have permission, opens the Viewer and Asset Details Panel in Edit Mode for that File
- **Add to Package -** - Opens the Package Panel on the right side of File Search, enabling you to create a Package with that File.
- **Download -** Opens Download Options on the right of File Search where you can initiate a download
- **Share -** Opens the Sharing Panel on the right side of File Search from which you can send the File
- **Delete -** Deletes the File

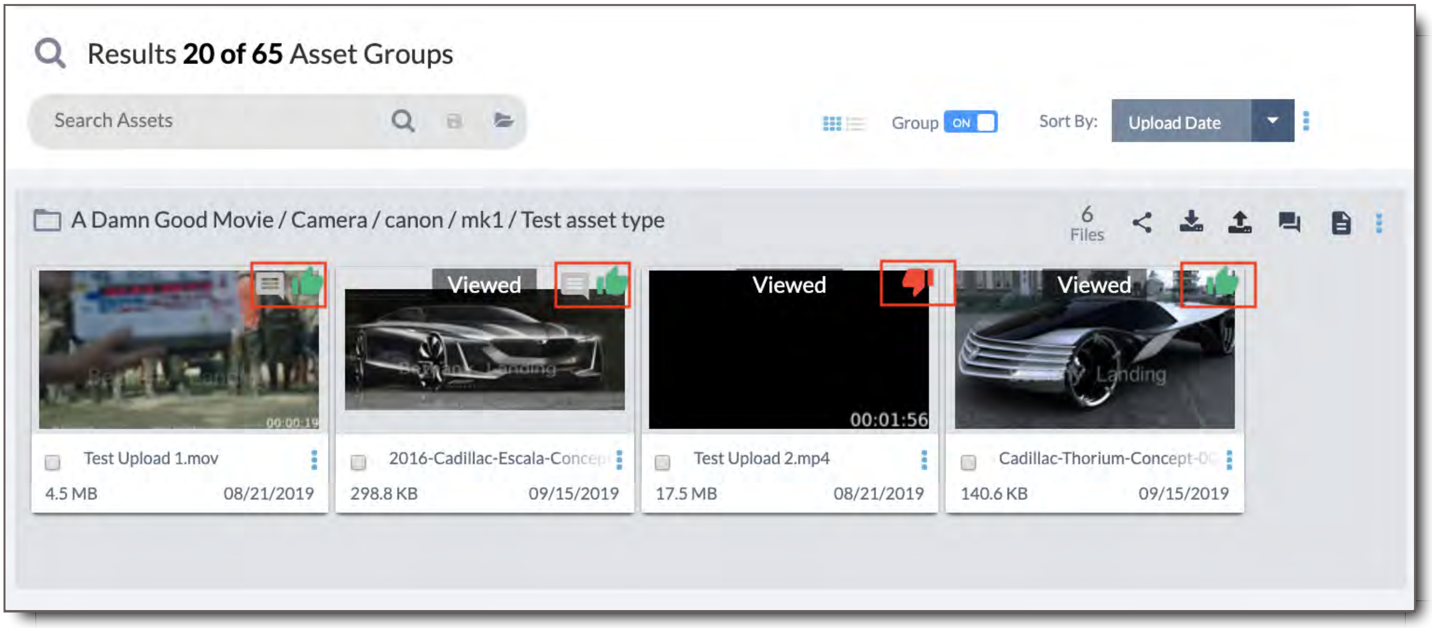
- Mouse over the thumbnail for details and additional options, including:



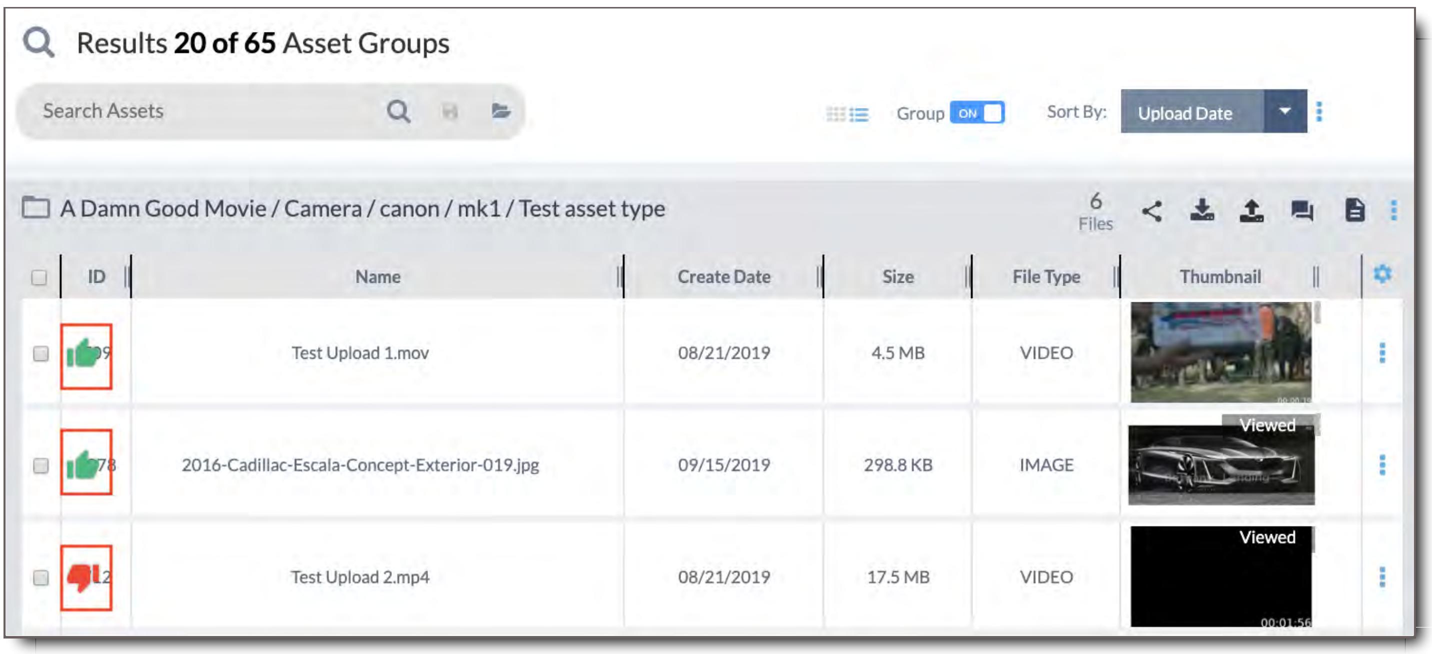
- **Filename**
- **File Type**
- **File Uploader**
- **Options icons:**
  - **Add to Package -** Opens the Package Panel on the right side of File Search, enabling you to create a Package with that File.
  - **Edit -** With permission you can edit the Asset Details about the File
  - **Download -** Opens the Download Options Panel on the right side of File Search where you can initiate a download
  - **Share -** Opens the Sharing Panel on the right side of File Search from which you can send the File
  - **Delete -** Deletes the File

NOTE: Files with comments and approvals will show those on their thumbnails in both Thumbnail Mode and List Mode when the Thumbnail is one of the columns.

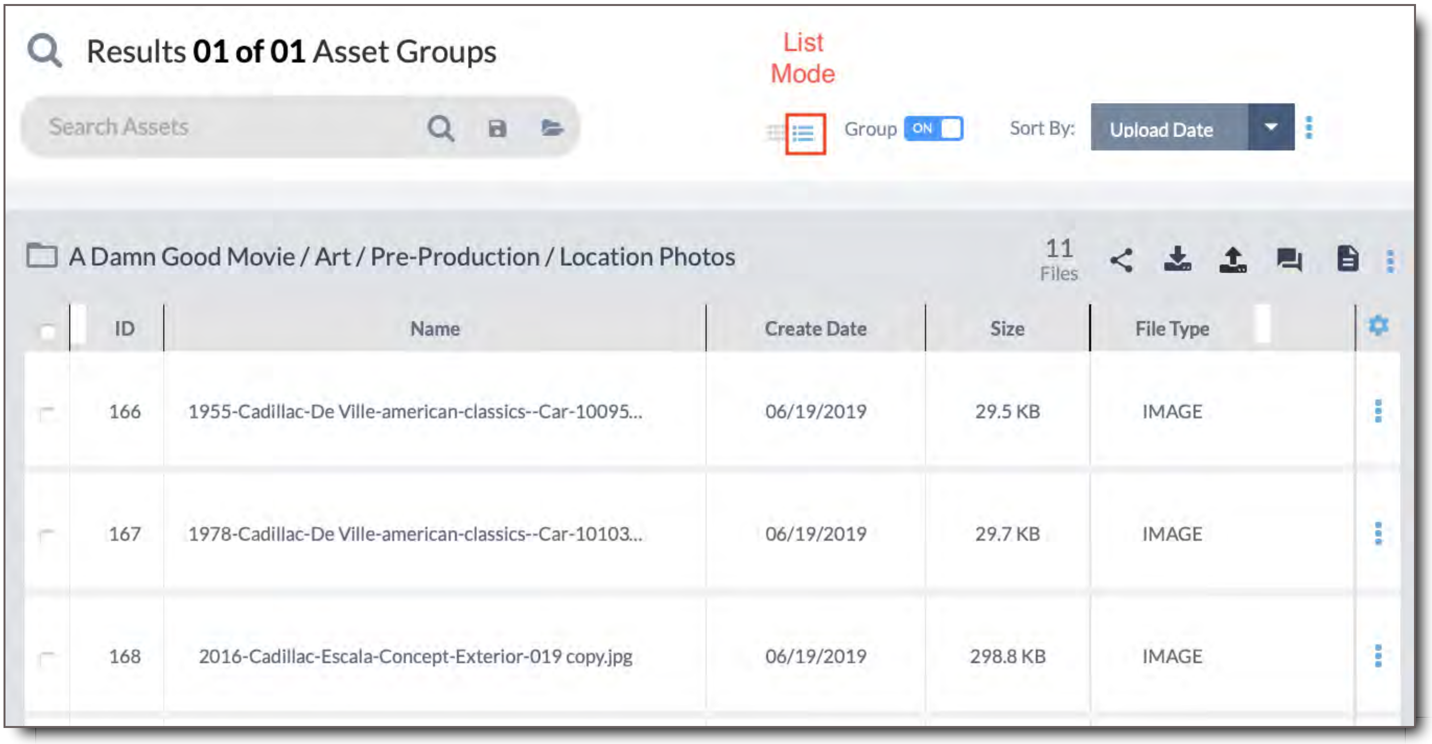
Comments and Approvals - Thumbnails View



Comments and Approvals - List View

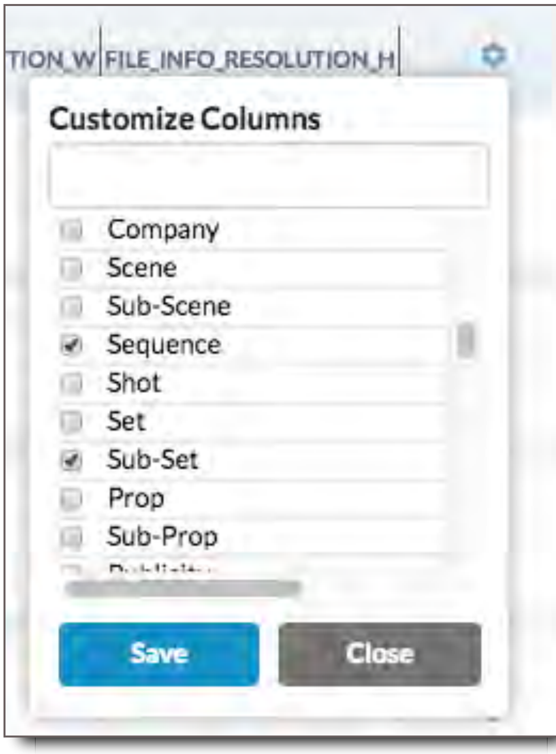


Search Results returned as individual files in List Mode

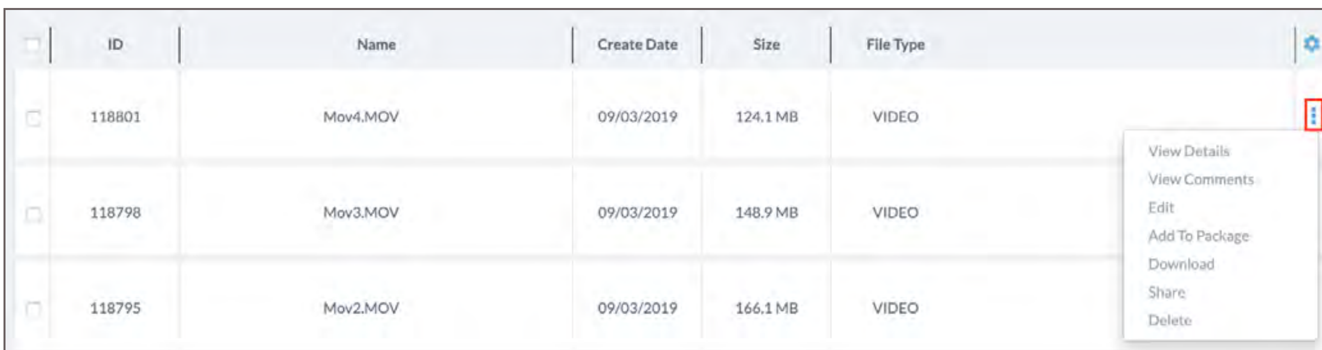


4. **List Mode -** In List Mode, you can view the full name of each file, as well as additional details about the file, such as File Size and the date that the File was received.

   - ID, Name, Create Date, Size, and File Type are the default columns shown.
   - Click the ⚙ Gear icon to open Customize Columns to add and remove list columns. You can also reorder the columns by dragging them up and down in the Customize Columns window. Click Save when you have them in the order you wish. Refresh the page when changes are saved.
   - You can also click your mouse on the divider lines between each column and increase or decrease the size of each column width.



- Click ⋮ for more options.



  - **View Details -** Opens the Viewer and Asset Details Panel for that File
  - **View Comments** - Opens the Viewer and Comments Panel for that File
  - **Edit -** If you have permission, opens the Viewer and Asset Details Panel in Edit Mode for that File.
  - **Add to Package -** Opens the Package Panel on the right side of File Search, enabling you to create a Package with that File.
  - **Download -** Opens the Download Options Panel on the right side of File Search where you can initiate a download.
  - **Share -** Opens the Sharing Panel on the right side of File Search from which you can send the File
  - **Delete -** Deletes the File
- When a thumbnail image is displayed in the columns, click the thumbnail to view the File in Asset Viewer.

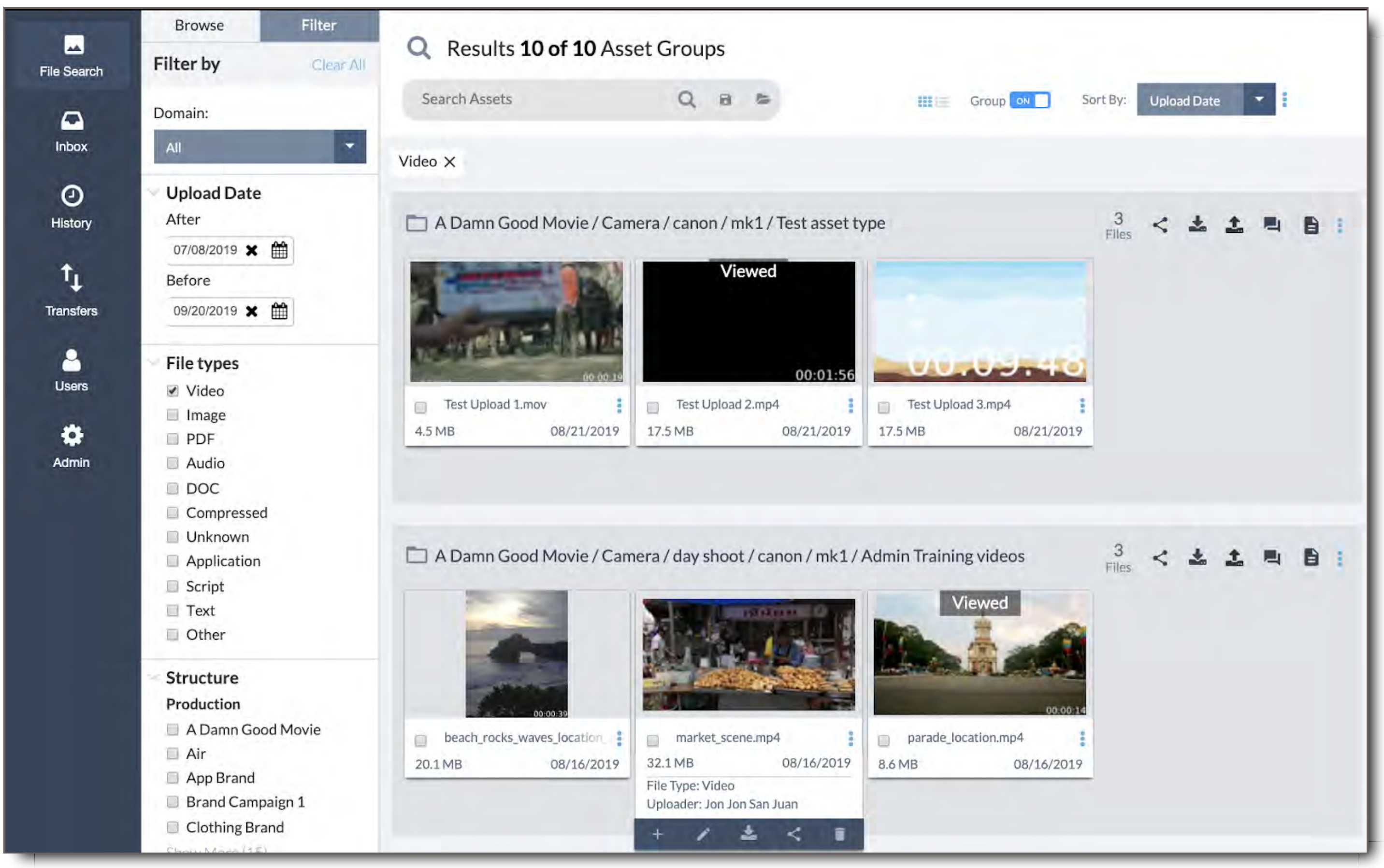
Find Files in File Search

Filter Your Search

You can narrow down your search results in the following ways:

1. Use the Filter Tab to select active tags and narrow down your results
2. Use the Browse Tab to select a specific production, if desired.
3. Use the Search Bar with keywords.

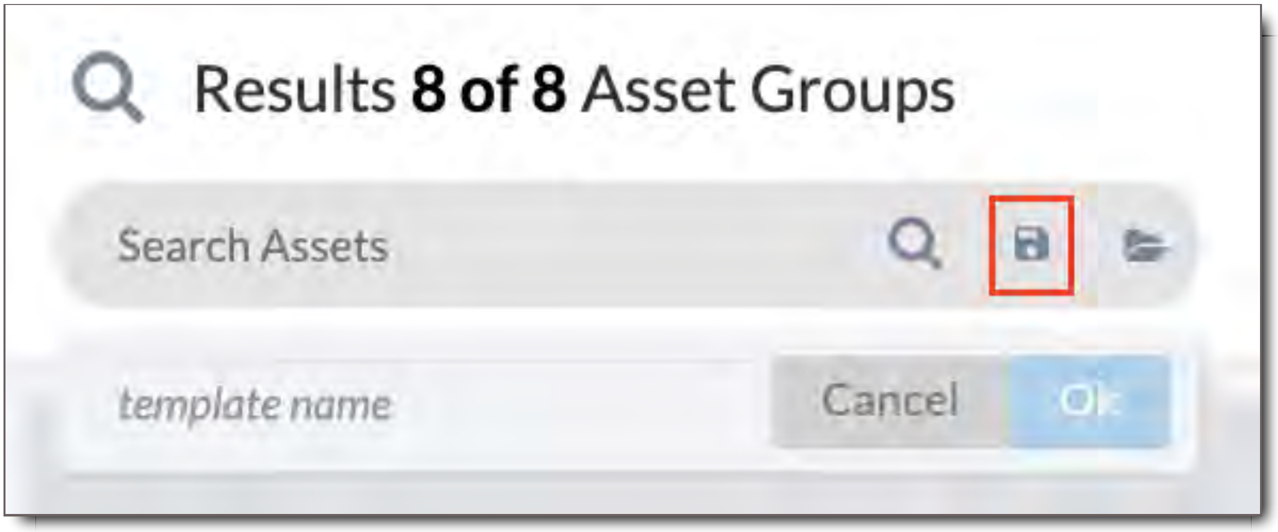
Users can use all of these methods individually, or a combination of some or all of them.



Save a Search Filter

To save a Search Filter as a Template that can be reused,

1. Click the to save the current set of filters as a template.
2. Enter a name for the template, then click **Ok** to save.

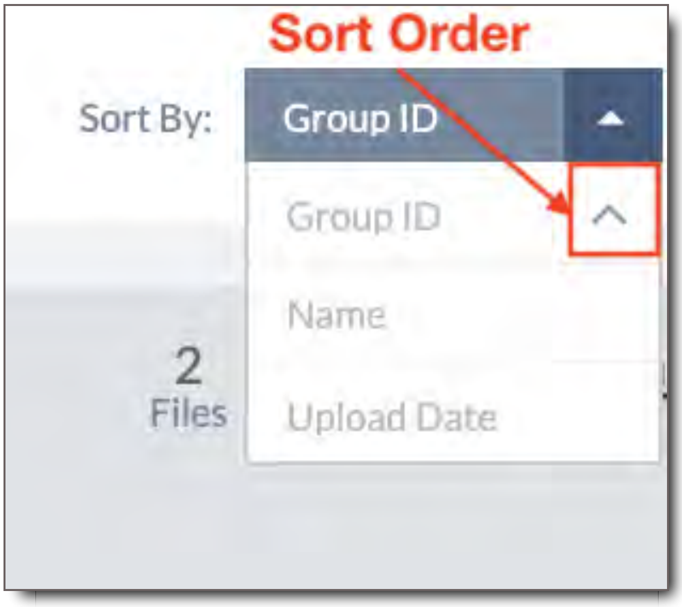


To access your saved Search Filter Templates,

1. Click the to view existing templates.
2. Click the template name to load it, or click the to delete it.

Sort File Results By Upload Date or Name

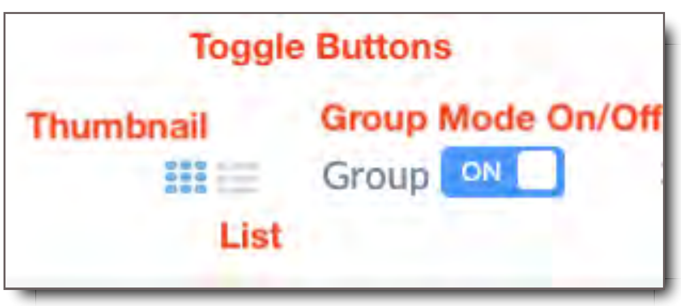
By default, Files will be listed in the order in which they were uploaded. To select a different Sort Option,



1. Use the dropdown to change the method by which your files are sorted.
2. Mouse over an option. It will highlight and an arrow will appear next to it.
3. Select the Sort Order Arrow for that option by clicking on the arrow. Clicking this toggles between ascending and descending order for the selected Sort item. The arrow will change direction indicating which Sort Order was selected.

Switch Between List Mode and Thumbnail Mode

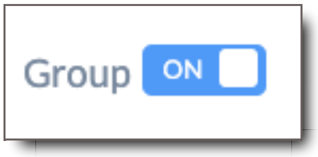
Switch easily between List Mode and Thumbnail Mode using the Display Setting in the Search Options Panel.



The icon that's blue indicates which mode is currently active.

Turn Group Mode On or Off

Toggle Group Mode ON or OFF in the Search Options Panel located above Search Results.



Customize List Mode View

While you're in List Mode, you can customize which columns are shown.

To change the columns,

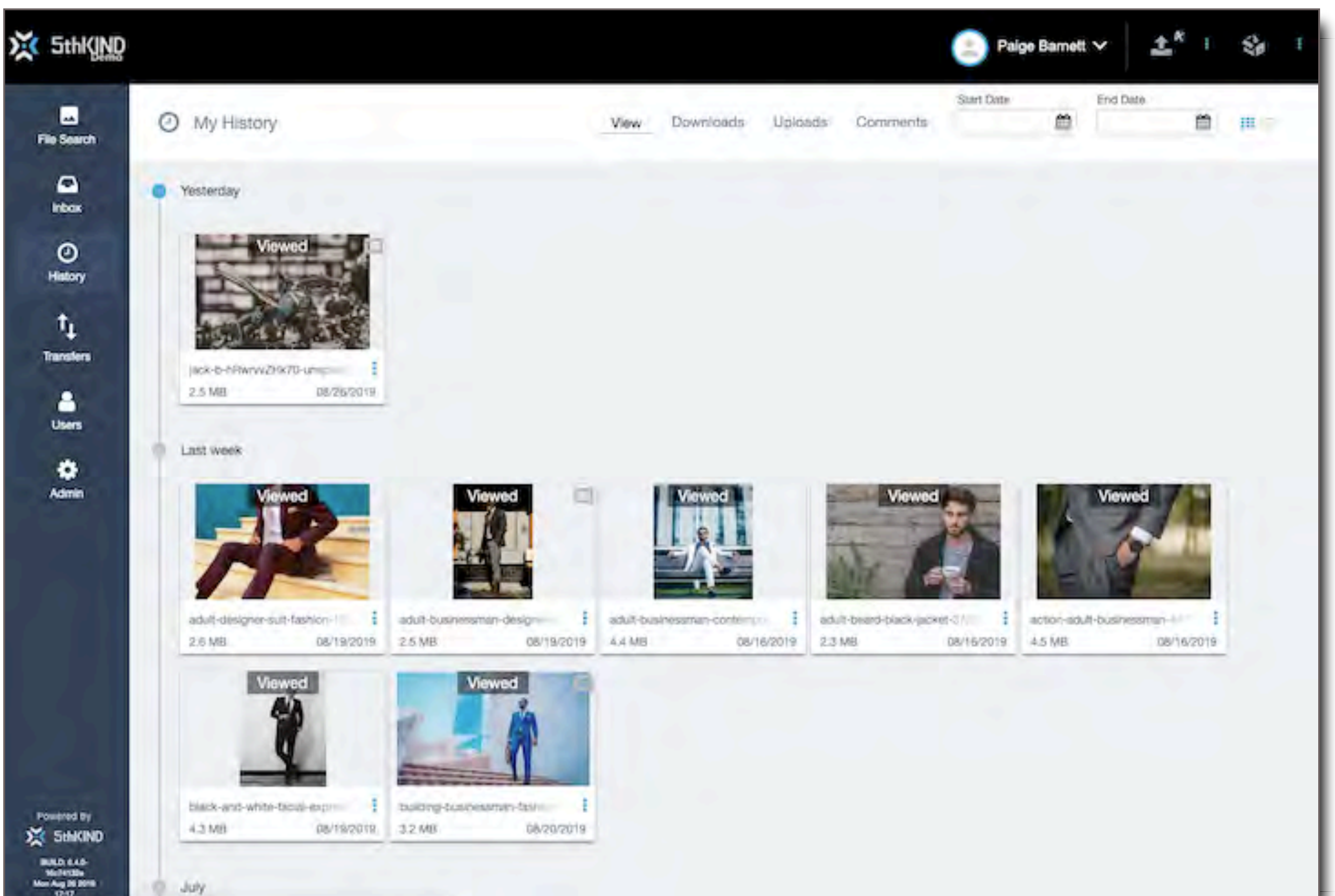
1. Click the icon in the upper-right corner of the Results.
2. Check a column to add it. Uncheck a column to remove it.
3. To find a column, type its name in the search field, and the columns will be filtered to those matching what you type.
4. Reorder columns by dragging a column to place it before or after another.
5. Click the **Save** button to save your settings.

History

In the History module, you can see what files you interacted with recently.

Elements of History

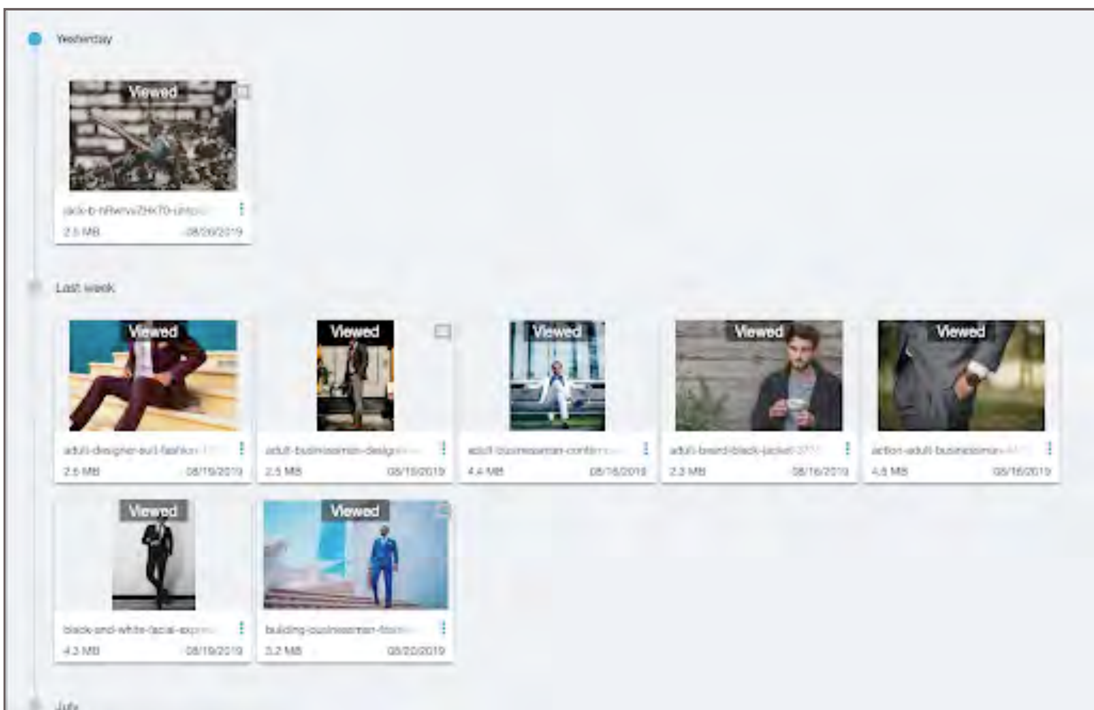
History is where you can find all the files you previously viewed. Files are displayed in Thumbnail Mode or List Mode on a timeline, which can be filtered by various options.



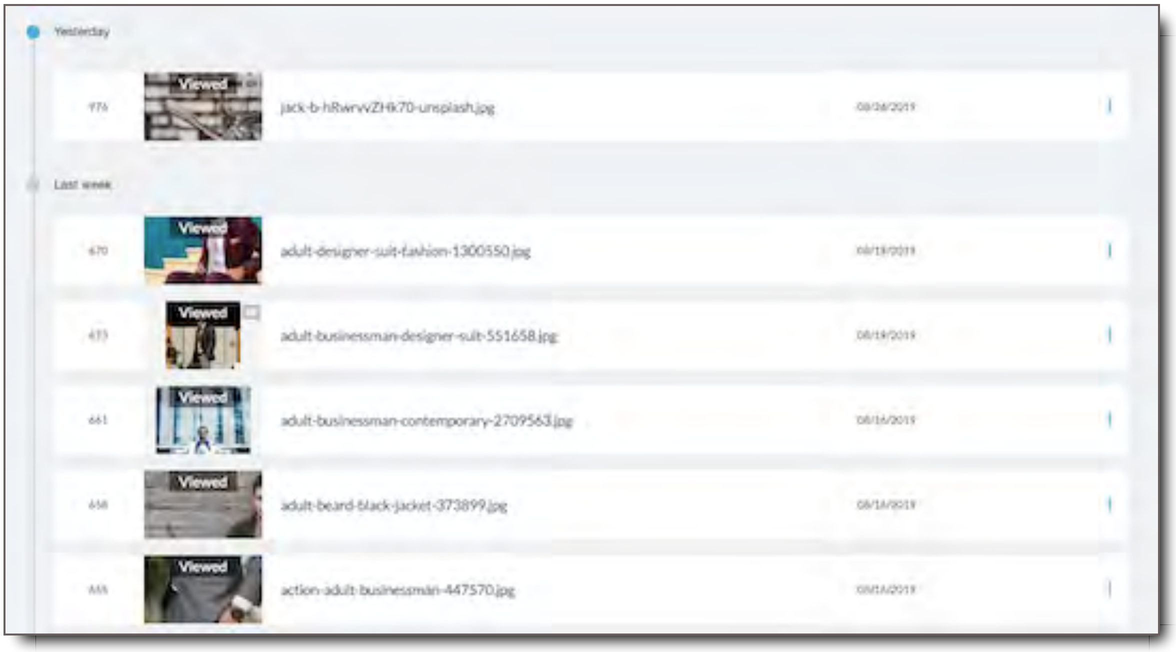
History Menu and Options

1. **View -** These are files that have been previously viewed by you.
2. **Downloads -** These are files that you've downloaded.
3. **Uploads -** These are files that you've uploaded.
4. **Comments -** These are files that you've commented on.
5. **Start Date -** The earliest date of the range in your file search.
6. **End Date -** The latest date of the range in your file search.
7. **Thumbnail Mode Select -** Set display to Thumbnail Mode
8. **List Mode Select** - Set display to List Mode

Timeline - Thumbnail Mode



Timeline - List Mode



Find or View Files in History

Find recent Files by scrolling through your timeline, or filtering by Date.

1. First, select the type of file you want to find or review
   - **View -** These are files that have been previously viewed by you.
   - **Downloads -** These are files that you've downloaded.
   - **Uploads -** These are files that you've uploaded.
   - **Comments -** These are files that you've commented on.
2. Next, if the files aren't recent, or you know the date you are looking for, include a date range in the Start and End Date fields.
3. Scroll to your desired file.

Note: Users with Admin permissions, when Impersonating another user can navigate to that user's History page to see what files the user has accessed.

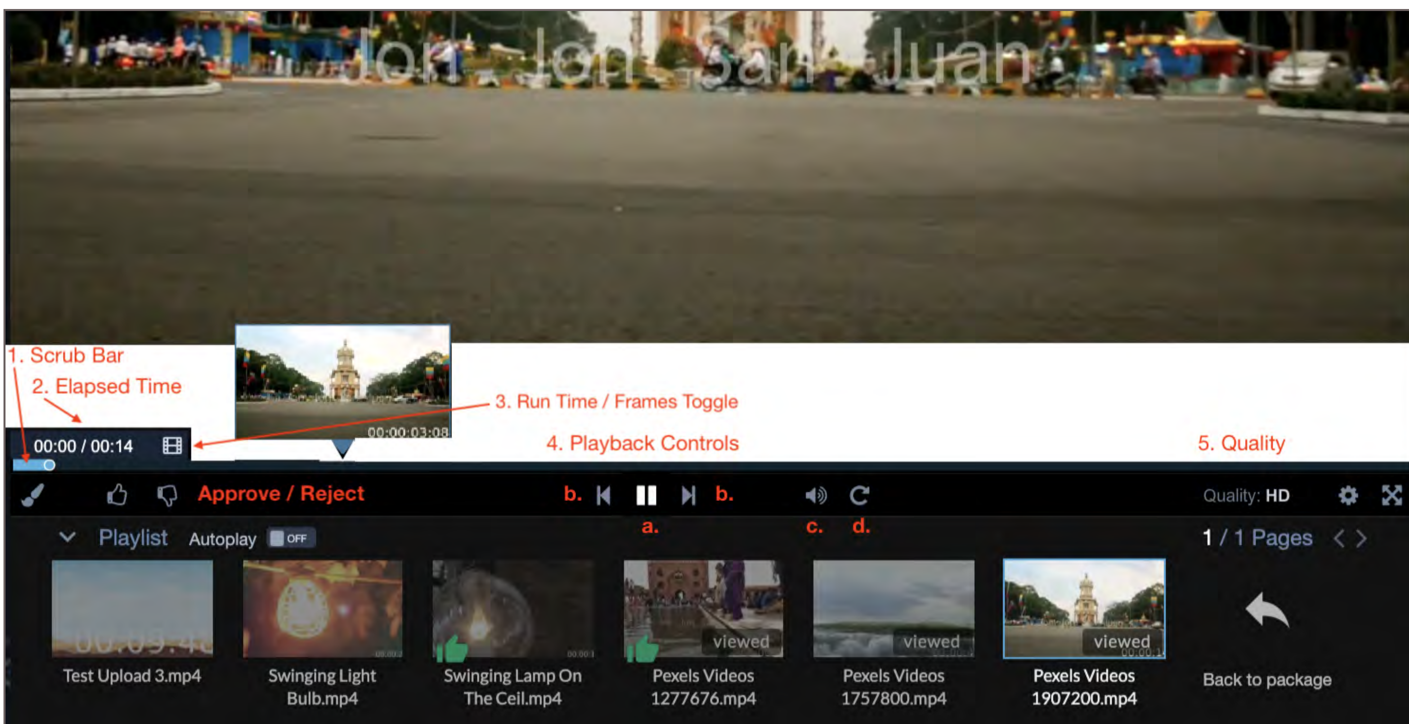
Quick Guide to Asset Viewer

Summary

Quickly and easily view your Files in the Asset Viewer from Packages or File Search. To open the Viewer, select the Package, Asset Group, or File you want to view. Skip down to View & Play a File if you're already familiar with the Asset Viewer Controls.

Asset Viewer Controls

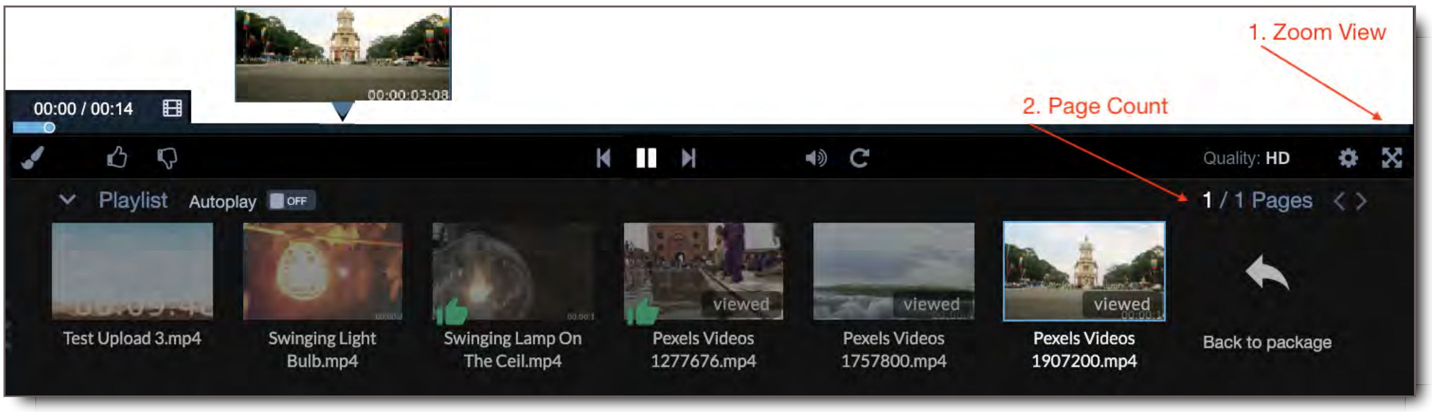
Asset Viewer Controls - Video & Audio Only



1. **Scrub Bar -** Drag and drop the bar cursor to anywhere in the video or audio file.
2. **Elapsed Time -** Shows elapsed and total run time of the file.

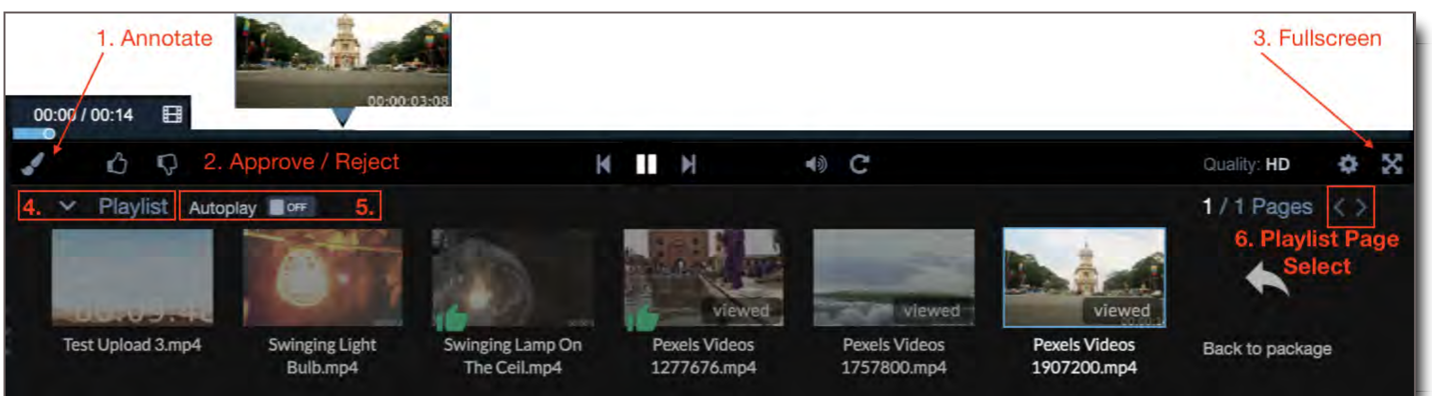
3. **Run Time / Frames Toggle -** Click on the 🎞 icon to toggle between time and frames.
4. **Playback Controls -** Controls the playback of the current file.4.
    a. ▶ / ⏸ Play or pause the current video.
    b. ⏮ / ⏭ Previous File / Next File
    c. 🔊 / 🔈 Mute / Unmute
    d. Loop Playback
5. **Quality -** Click the Gear icon ⚙ to toggle between HD and SD quality image in the Viewer.

Asset Viewer Controls - Documents



1. **Zoom View -** Zoom into and out of the document in the Viewer
2. **Page Count -** Shows the total number of pages in the document. Enter a number in the box of the first number to jump to that page.

Asset Viewer Controls - All Files



1. **Annotate -** Opens the annotation menu
2. **Approve / Reject -** Click 👍 / 👎 to Approve / Reject the current File.
3. **Fullscreen -** Click ✥ to view the playlist in Fullscreen Mode. To leave Fullscreen Mode, press the Esc Key.
4. **Playlist -** Shows the files in the current Playlist. Click a file to view it.
5. **Autoplay -** Sets your files to autoplay when turned ON
6. **Playlist Page Select -** If there are more files in the playlist than can fit on the current page, use the ❮ / ❯ controls to view more pages of files.

View & Play a File

Some Packages are set to automatically start playing when the recipient user opens it. If yours does not, select the File you wish to view. Document files scroll up and down. Video and audio files can be controlled via the player controls.

Scrub Through a Video or Audio File

Scrub through a video by dragging the cursor in the scrub bar to the location you desire. Frame thumbnails will appear as you drag the cursor to aid in your search.

Scrub Through a Large Package or Asset Group

In large packages where you have more than one page to your Package's Playlist, use the Pages arrows to find the File you want to open next.

NOTE: If you are playing a video while searching for a file and the next video starts, you will be bounced back to that file in the Playlist. To avoid this, turn off Autoplay and Pause the video or audio file, before scrolling through the Playlist.

Comment on a File

1. In a package, select the file you want to comment on.
2. Add your comment which will be sent to the other users on that package.
3. Send.

If the comment panel isn't open for whatever reason,

1. Select the Discussions icon if it's not selected.
2. Select the Discussion you want to comment on OR select New Discussion, if this is the first comment in this package. If it's new, select the discussion recipients.
3. Then comment on your file.
4. Send.

Approve a File

With the file you want to approve open in the Viewer, select the thumbs up or thumbs down icon.

Annotate a Video

1. With the selected video open, click the brush icon.
2. Select your desired annotation tool.
3. Your cursor will change to an editing tool icon.
4. Annotate as you desire.
5. Add the recipients to receive the annotation,
6. Change the subject if you like.
7. Add a message.
8. Send.

Change Play Quality of Video

Depending on your bandwidth, your video player quality will be automatically selected. However, if you wish to change it, select to the Gear icon. Choose HD or SD.

Enter & Exit Fullscreen Mode

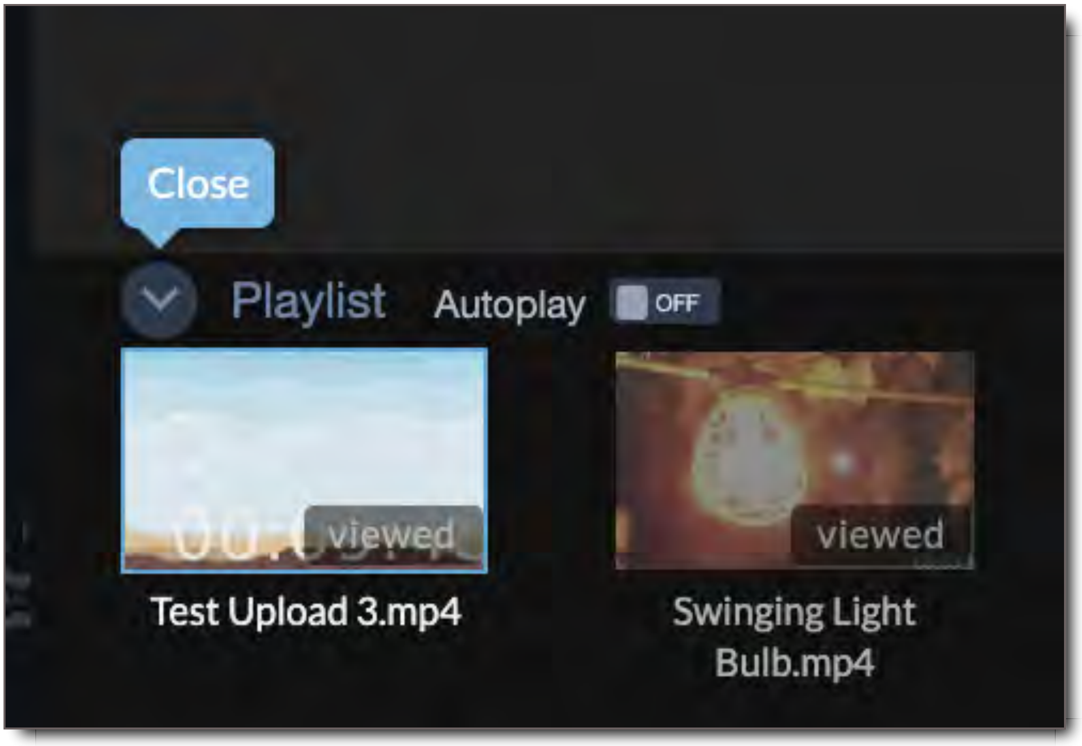
Select the Fullscreen icon to go into Fullscreen Mode. Hit esc (escape) to exit the mode.

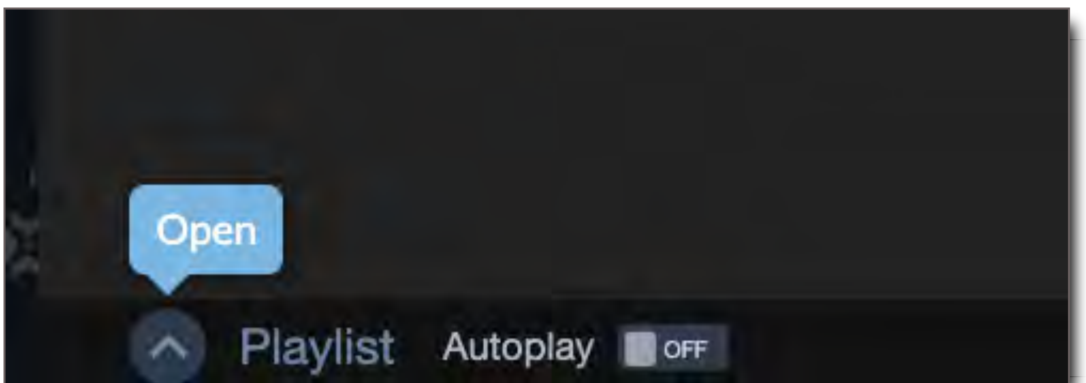
Turn Auto-Play On and Off

Flip the Autoplay toggle to turn it on, which will automatically play all items in the playlist one after the other until the end. Or toggle it off and you can manually choose which file you would like to view next.

Close or Open the Playlist at the Bottom of the Screen

Use the down and up arrows next to Playlist to collapse and expand the playlist.


Close
Playlist
Autoplay
OFF
viewed
viewed
Test Upload 3.mp4
Swinging Light Bulb.mp4


Open
Playlist
Autoplay
OFF

Asset & Package Viewer

The Asset Viewer Module is where you view and interact with your Packages and Files in CORE. It includes the viewer where a user views and controls the viewing of all files, as well as the various side panels that contain information about the Asset Group, Package, or File being reviewed. This section is about the Asset Viewer and the main components of the module. For more information about the different Side Panels and actions, please proceed to the following Panel sections in this chapter.

Accessing the Asset Viewer

There are different ways to access the Asset Viewer:

1. Via the Inbox when you click on a Package
2. Via an email notification link that takes you directly to the Package
3. Selecting an Asset Group or File in File Search

The Viewer display is slightly different between a Package View and an Asset Group, aka an Asset View. Both versions are listed below, depending on your workflow:

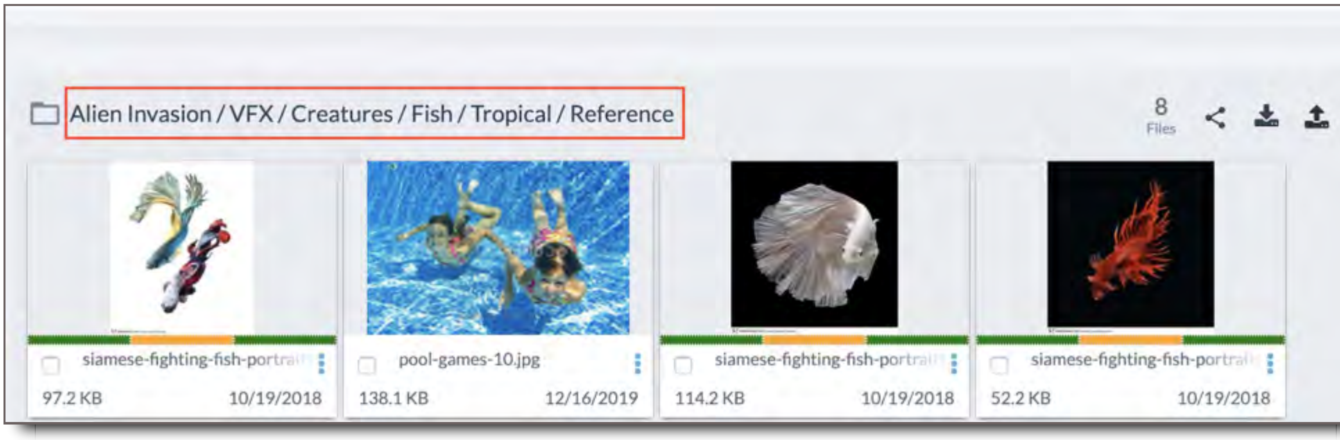
I work from my Inbox, take me to Package View

I work from File Search, take me to Asset View

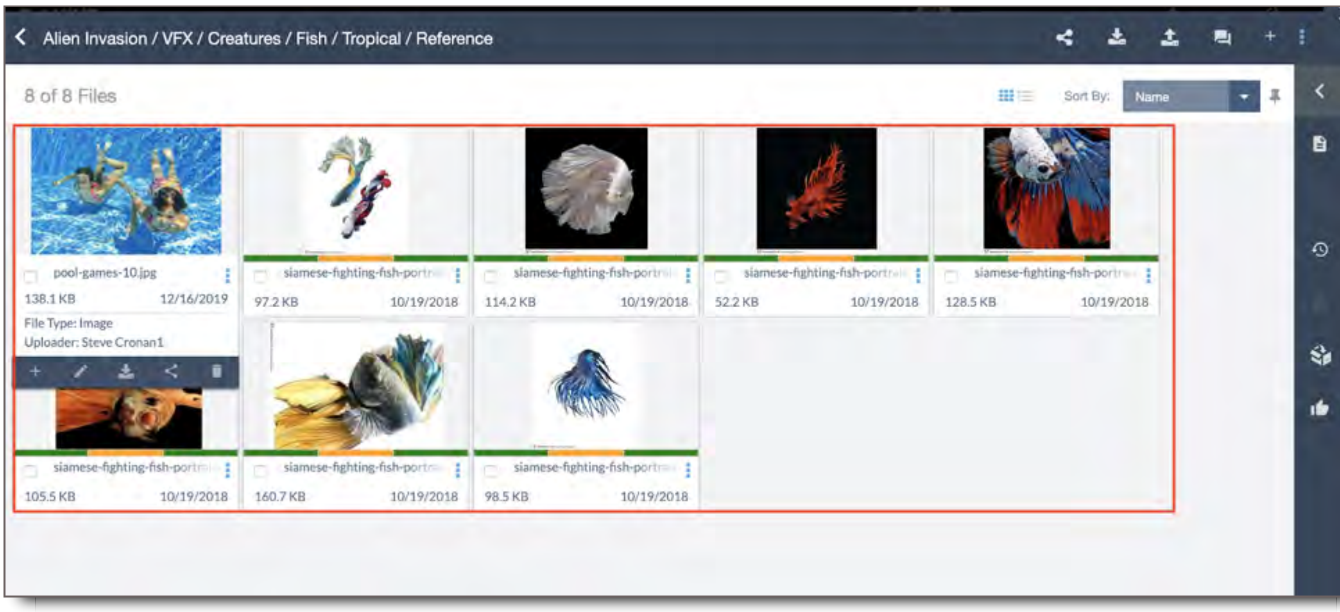
Access the Asset Viewer from File Search

To view Asset Groups from File Search,

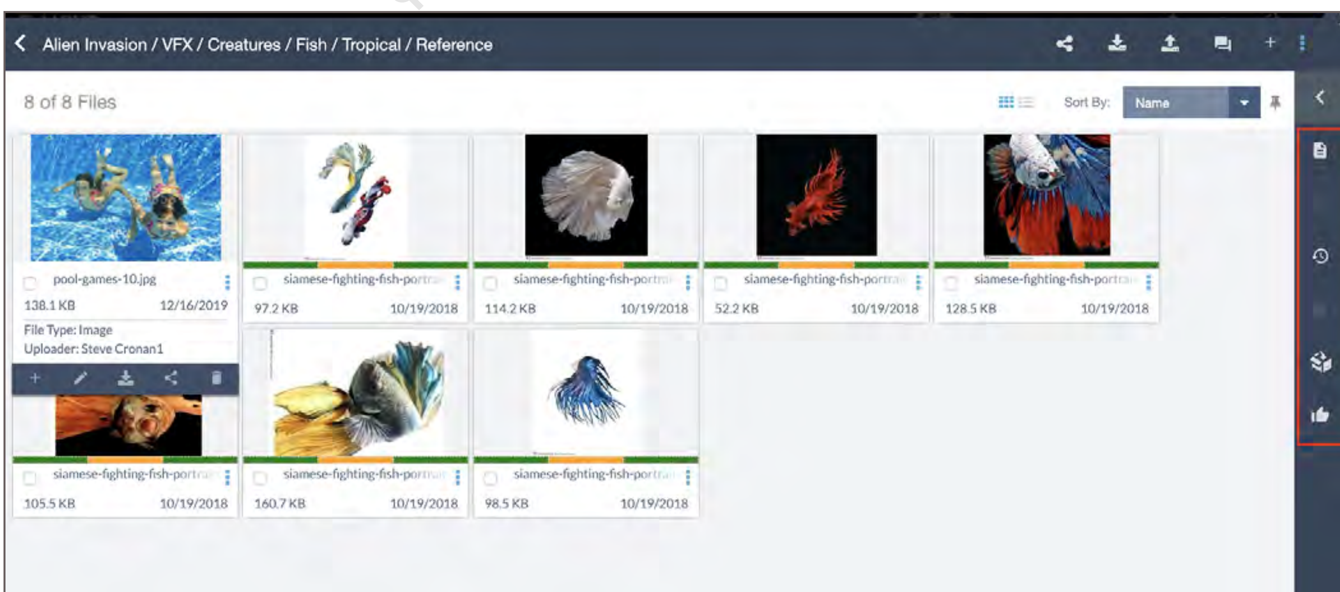
1. Select the Asset Group Title



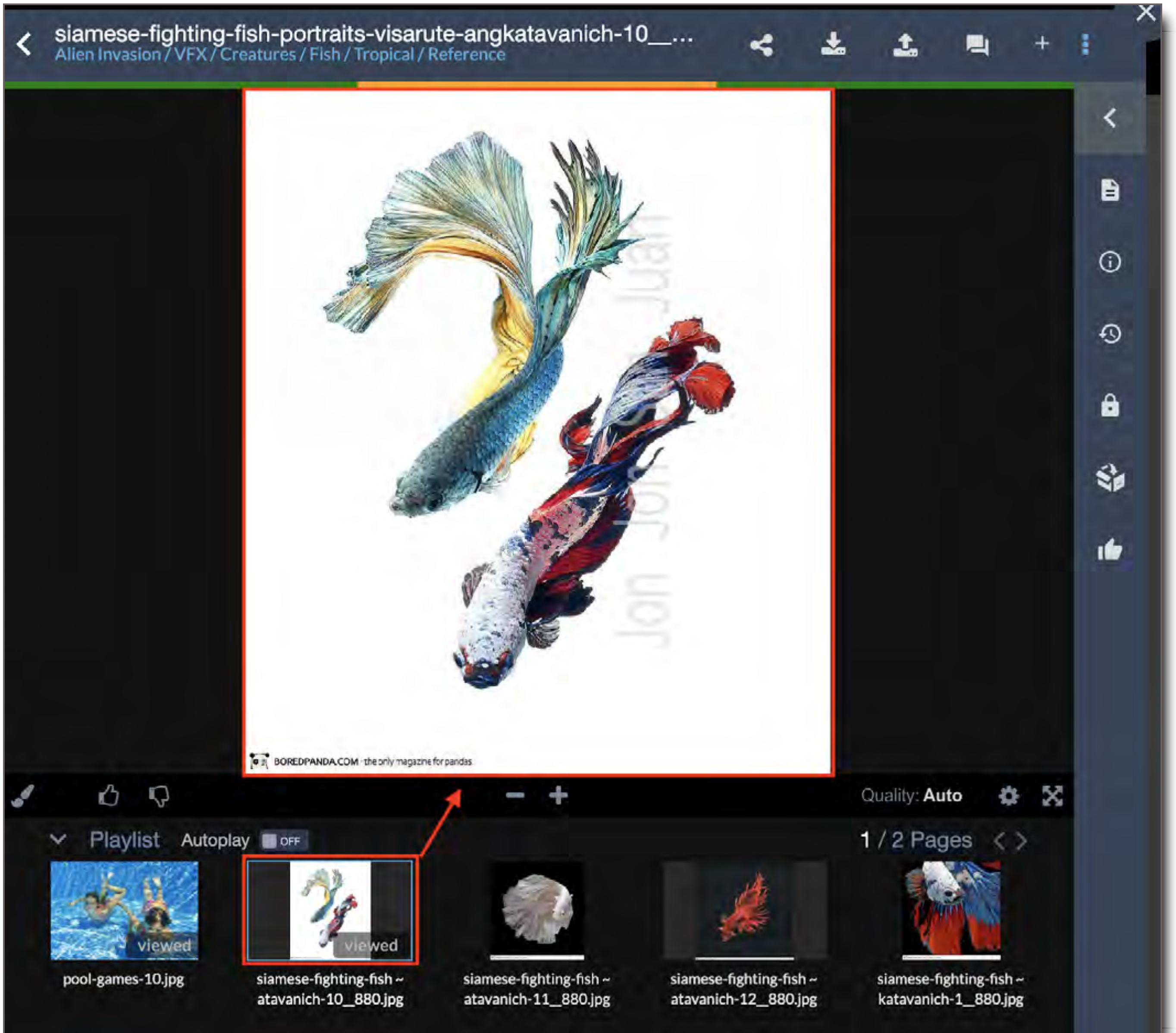
2. The Asset Viewer will pop up showing the files in the Asset Group.



3. From the Asset View you can interact with the Asset Group through the Side Tabs. See Elements of the Asset Viewer



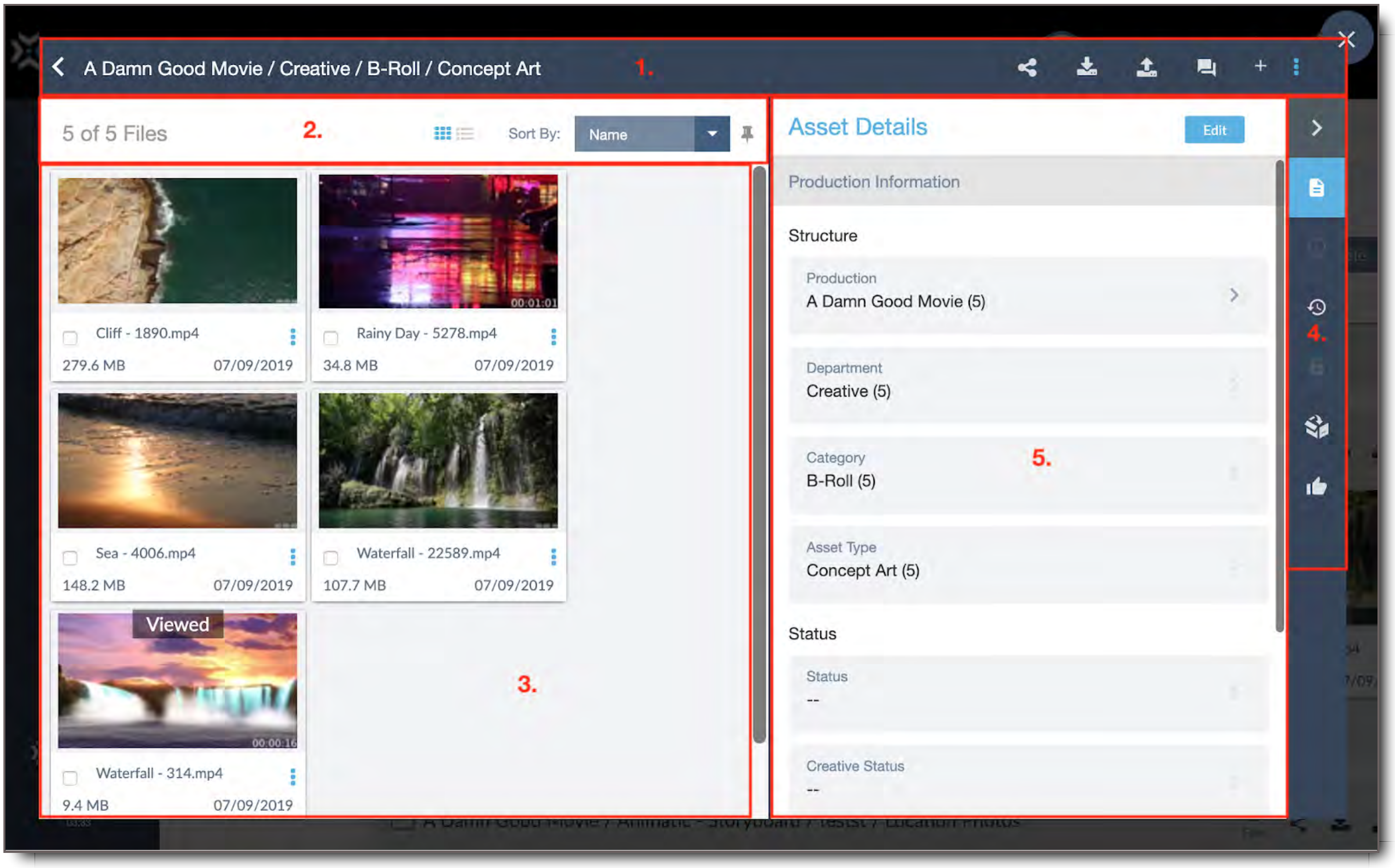
4. You can also select a File, and view it in the Asset Player. See Elements of the Asset Player or go to the Quick Guide to the Asset Player



Elements of the Asset Viewer

The Asset Viewer has five main parts:

1. **Top Bar**
2. **Asset Viewer Display Settings**
3. **Asset Viewer**
4. **Side Bar**
5. **Side Panel**



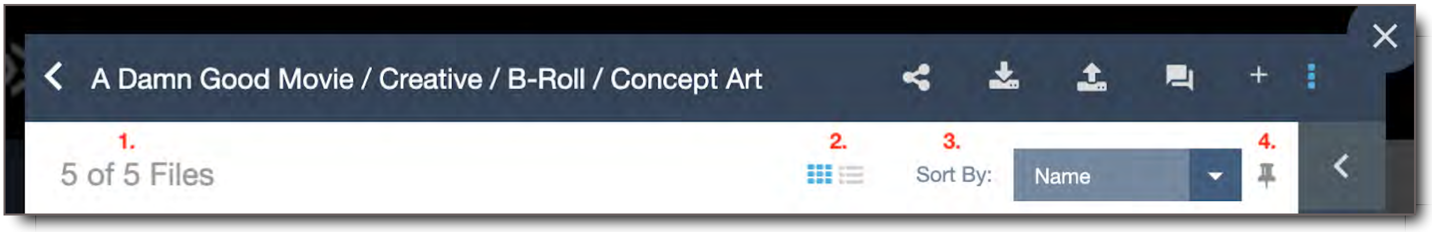
Asset Viewer Top Bar - Asset Group View

The Top Bar provides information about the Asset Group you are viewing along with key navigational controls. What controls you see are dependent upon your permissions or the settings.

1. **Return -** Click here to return to the Asset Group
2. **Asset Group Name / Structure**
3. **Options -** Each icon in this section will open the Side Panel to its respective section.
    a. **Share -** Share the contents of this Asset Group with other users.
    b. **Download -** Download Asset Group or selected Files.
    c. **Upload** - Upload additional files into this Asset Group.
    d. **Discussions** - Opens the Discussions and Commenting Panel.
    e. **Add to Package** - Adds selected Group or Files to an Active Package.
    f. **Additional Options** - Click this to reveal additional options.

Asset Viewer Display Settings - Asset Group View

The Asset Viewer also has a sub-bar area that changes how the Assets are displayed, like in File Search:



1. **File Count** - Shows number of Files in Group
2. **Thumbnail and List Modes -** Switches between the two modes
3. **Sort by Options -** Sorts Asset Group by Position, Name, File ID, Date, Size, Timecode
4. **Sorting Pin -** Saves the preferred Sort By option

Asset Viewer Side Bar

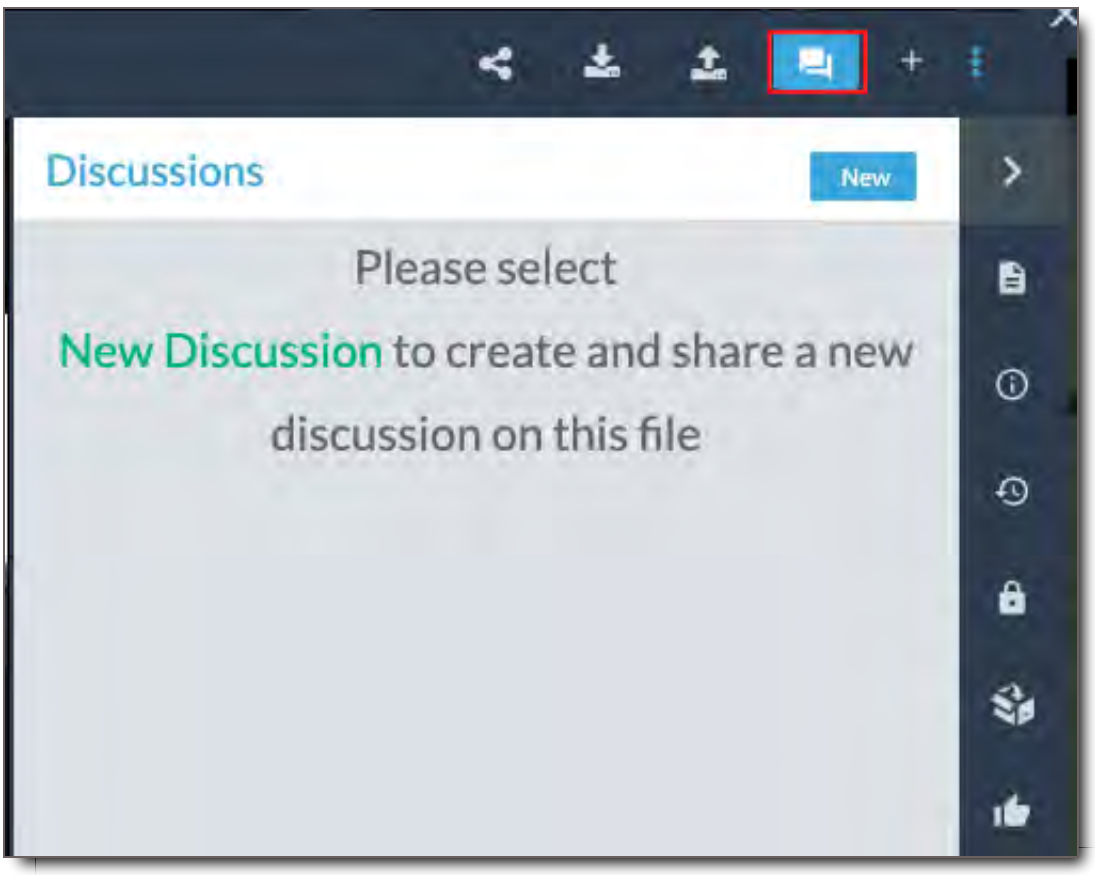
Access the different side panels for the Package, Asset Group, or File from the side bar. Depending on your user permissions, what you see in the Side Bar will vary.

1. **Collapse or Expand Side Panel**
2. **Asset Details** - Opens Asset Details panel
3. **Package or File Information** - Opens Info Panel on the File or Package
4. **History** - Opens Panel showing history of File or Package
5. **Files Access** - Opens Panel showing who has access to File and what Package Shares it's been included in.
6. **Recipients** - Shows who has received the File or Package
7. **Package Panel** - Opens the Package Panel enabling user to do any number of related actions.
8. **Export Package Report** - Lists reports available for download
9. **Screener App** - Enables user with Screener permissions to project File or Package to another device via the Screener app
10. **Approval History** - Shows who on the package or file has approved or rejected it.

Asset Viewer Side Panel

The Side Panel gives additional information and controls for the File or group of Files that you are viewing. Each of these Panels are accessible from the Asset Viewer Side Bar. For further details, please go to the corresponding Panel sections in this chapter.

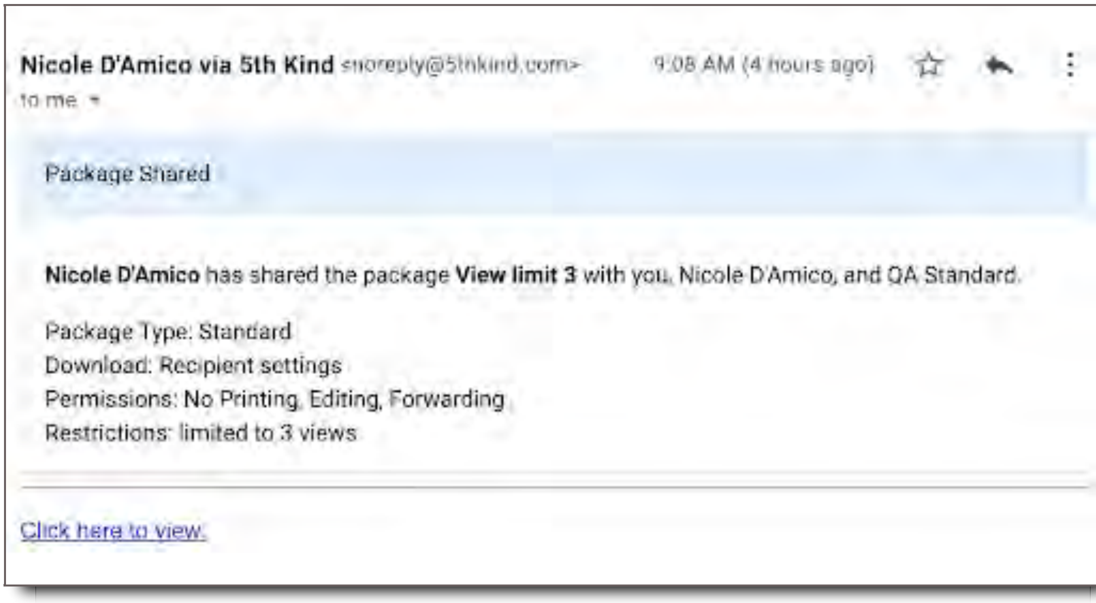
CORE Tip: Last Selected Side Panel is Cached When User Returns to Asset Viewer
Sometimes users are disoriented by the information they see in the Side Panel when they arrive in Asset Viewer. This is easily resolved. When leaving and returning to the Asset Viewer, the displayed Side Panel is the one that was last open when the user was previously in Asset Viewer. Therefore, if the view is not what you were expecting, be sure to check the Top and Side Bars to select the desired Panel. The selected Panel is highlighted in light blue:



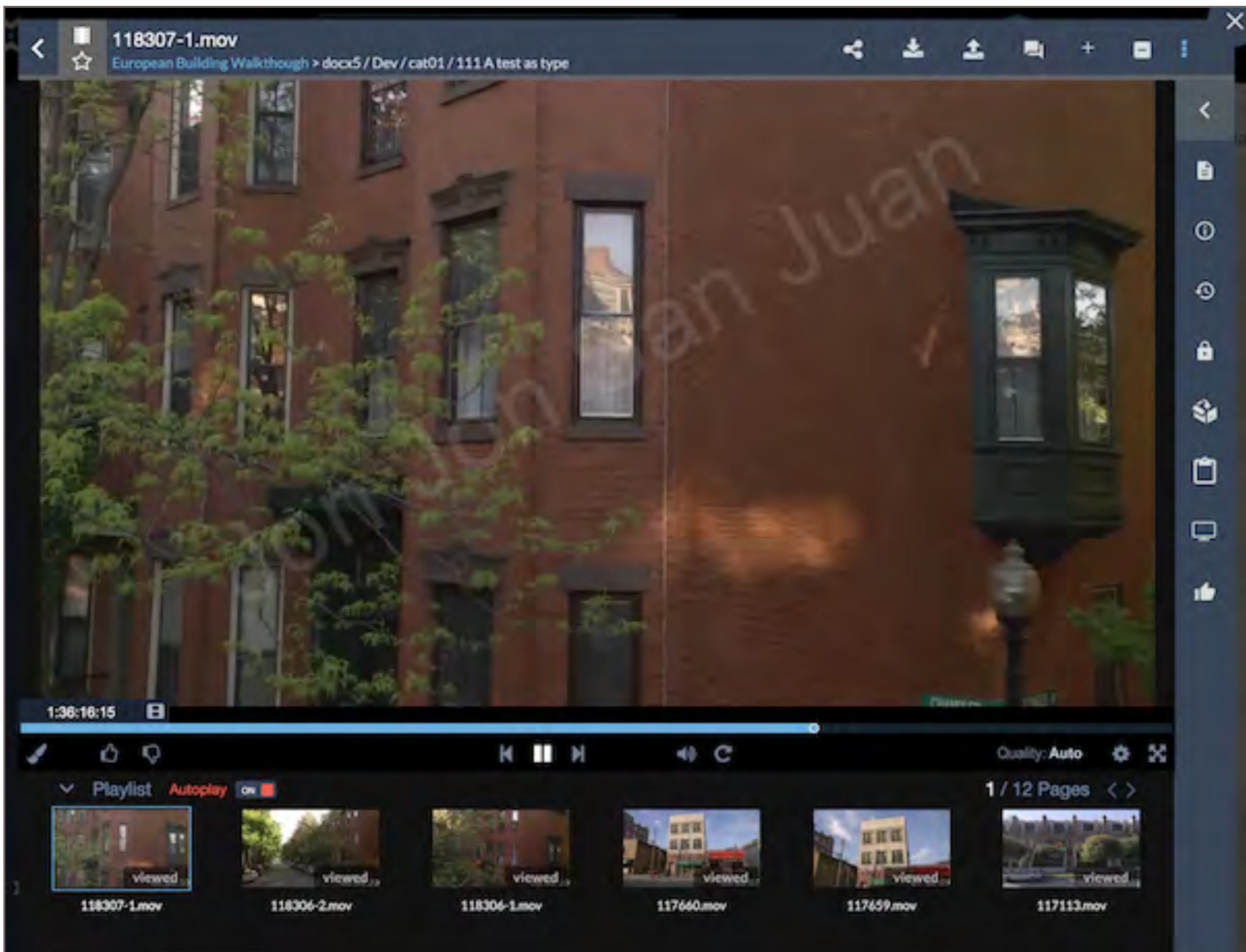
Access the Asset Viewer (aka Package Viewer) from Inbox or a Package Link

The Asset Viewer in the Inbox and when viewing packages is call the Package Viewer because of slight differences you'll see when viewing a package. To view a package,

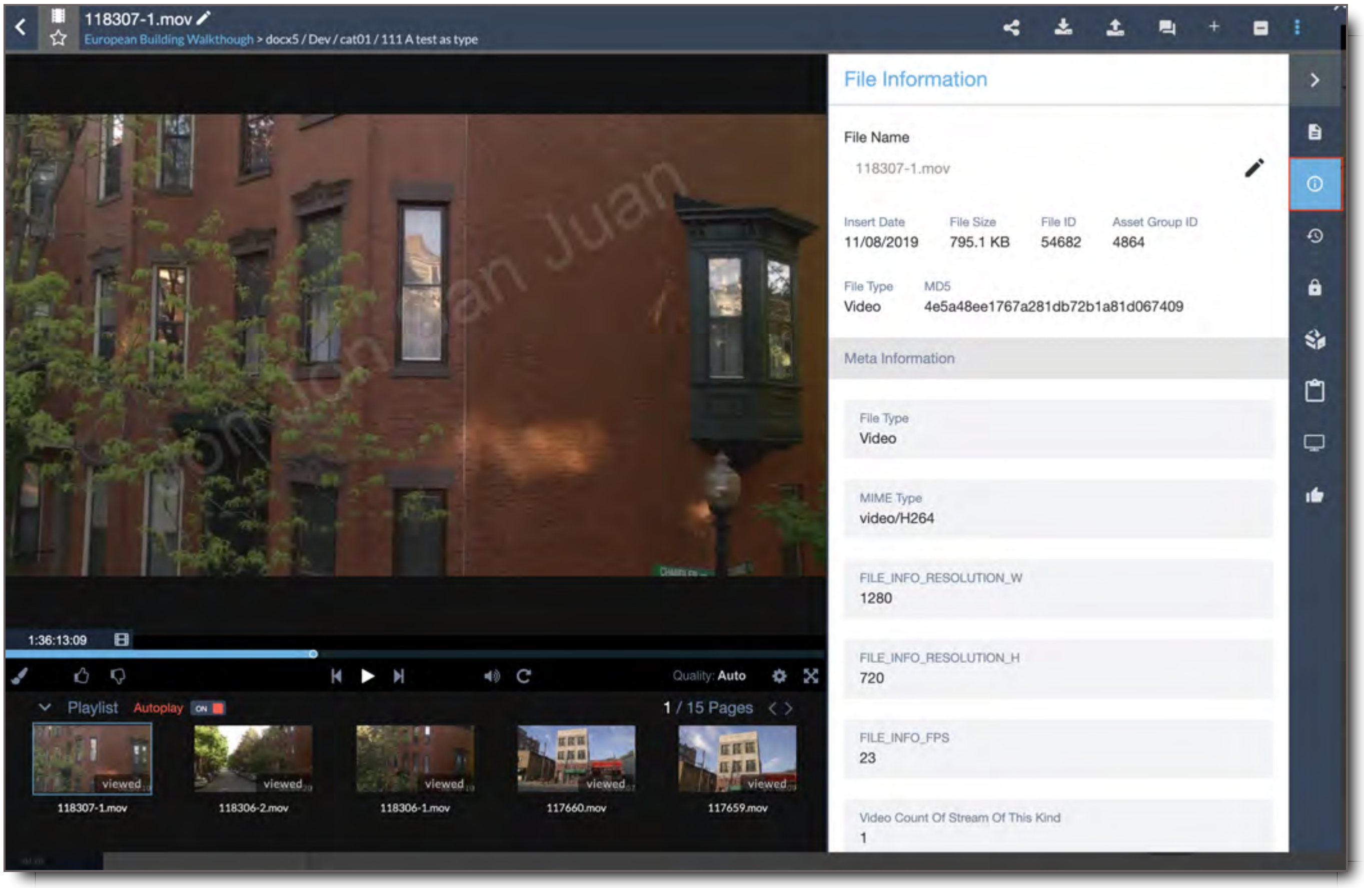
1. Select it from the Inbox or click on the link in your email.



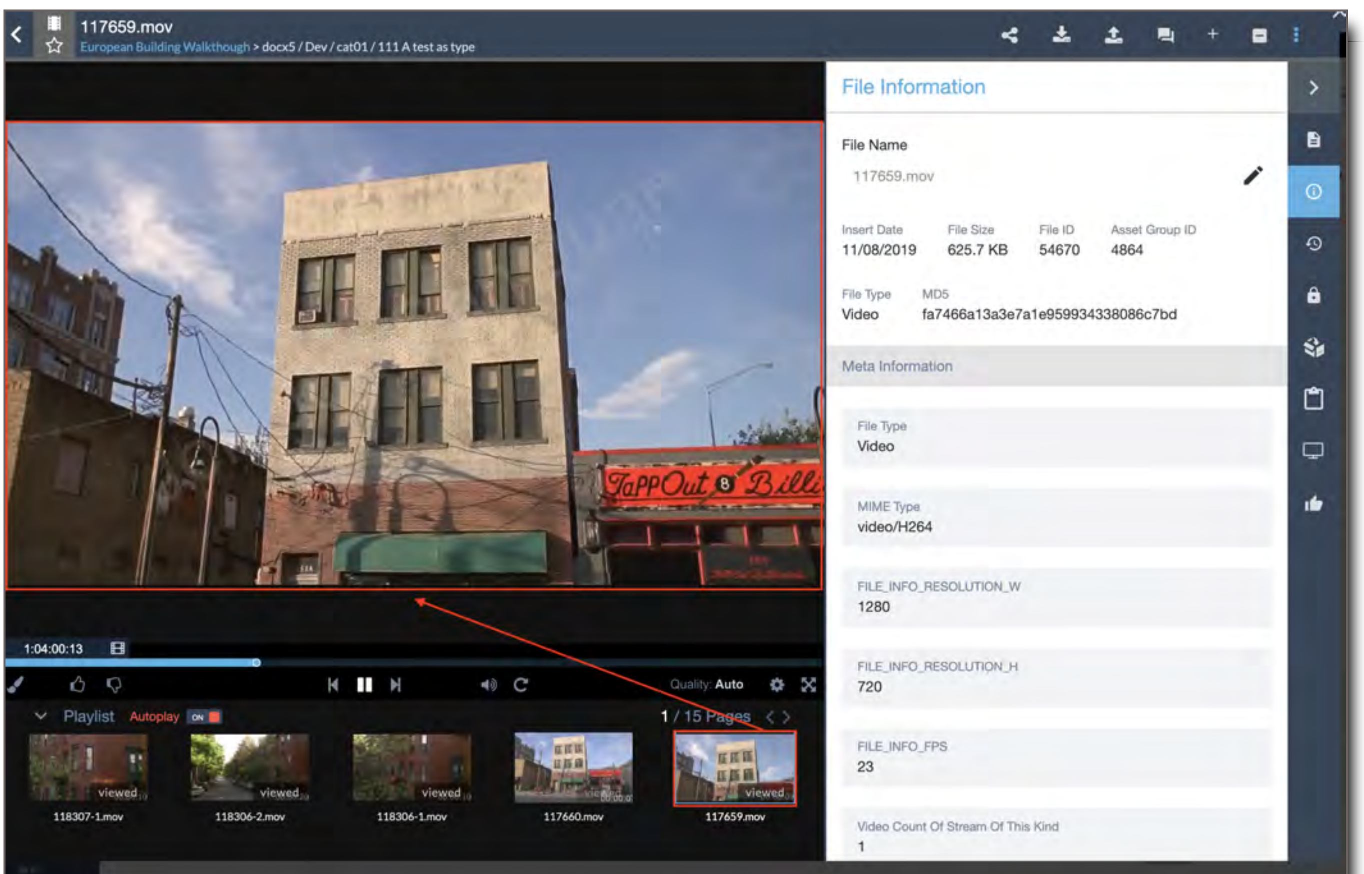
2. The Package Viewer will pop open.



3. From the Package View you can interact with the Package through the panels in the Side Panel. See Elements of the Package Viewer



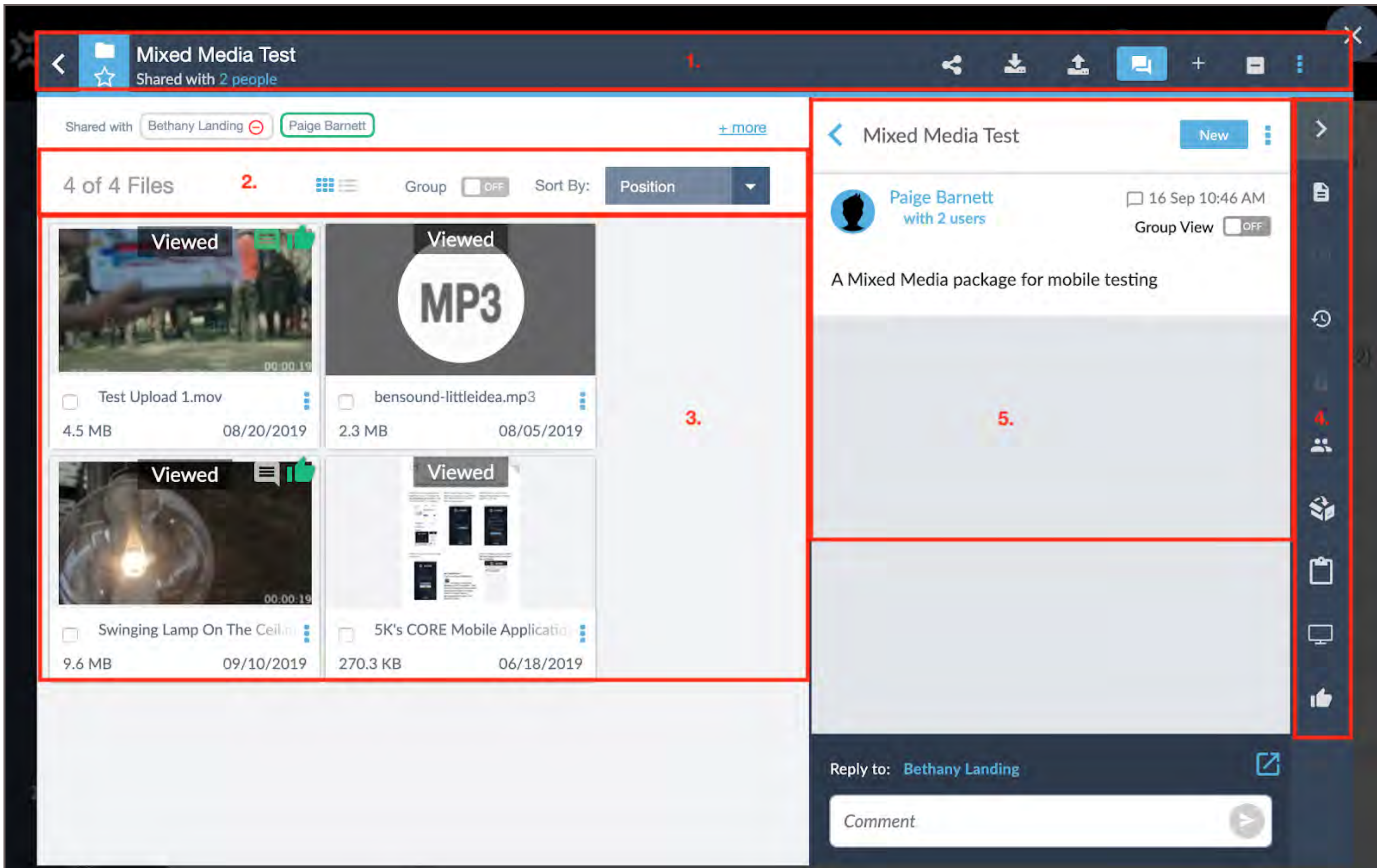
4. You can also select a File, and view it in the Asset Player. See Elements of the Asset Player or go to the Quick Guide to the Asset Player



Elements of the Package Viewer

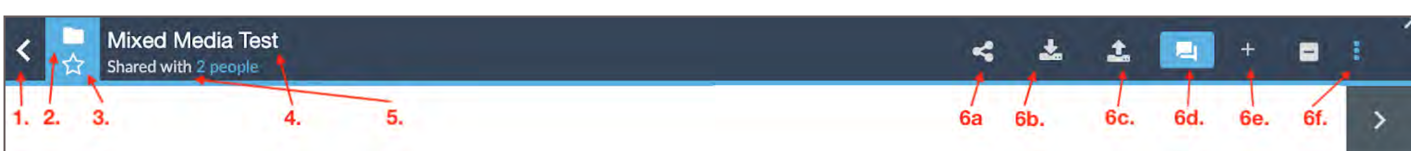
The Package Viewer has five main parts:

1. **Top Bar**
2. **Package Viewer Display Settings**
3. **Package Viewer**
4. **Side Bar**
5. **Side Panel**



Package Viewer Top Bar - Package View

The Top Bar provides information about the Package you are viewing along with key navigational controls. What controls you see are dependent on your permissions or the settings.



1. **Return** - Click here to return to the Package Inbox

2. **Package Icon**- Shows this is a Package. Icons denote the package type: Feedback (standard),

Dailies, Approvals, Sync Review and Download

3. **Favorite** - Click the ★ to set the Package as a Favorite. If a Package is set as Favorite, it will appear in the Favorites filter in the Package Inbox.

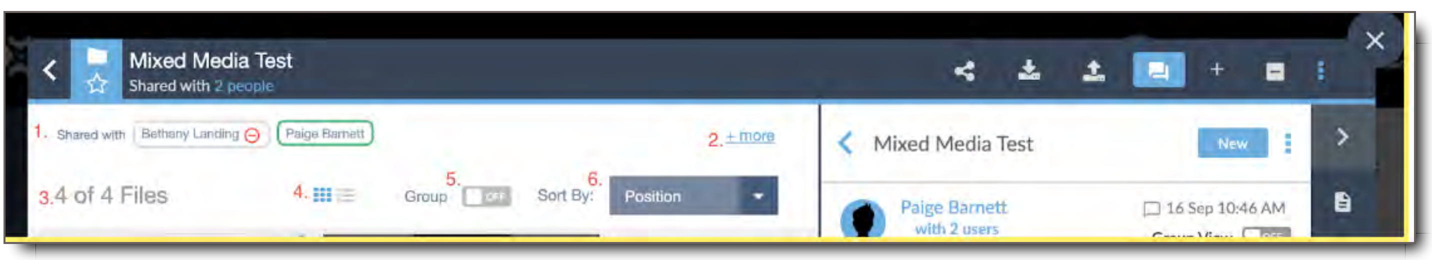
4. **Package Name** - Click this to view all contents of the Package in Asset View Mode .

5. **Shared with** - Shows the number of users on the Package. This is selectable on Standard Packages to show the other recipients on the Package.

6. **Options** - Each icon in this section will open the Side Panel to its respective section.
   a. **Share -** Share the contents of this Asset Group with other users.
   b. **Download -** Download Asset Group or selected Files.
   c. **Upload** - Upload additional files into this Package.Asset Group.
   d. **Discussions** - Opens the Discussions and Commenting Panel.
   e. **Add to Package** - Adds selected Group or Files to an Active Package.
   f. **Additional Options** - Click this to reveal additional options.

Package Viewer Display Settings - Package View

The Package Viewer also has a sub-bar area that changes how the Assets are displayed, like in File Search:



1. **Shared with** - Lists the users shared on the Package. A green outline indicates if they have yet to view the Package. The outline turns grey once the recipient has opened the Package.
2. **+more** - Opens a Recipients Side Panel showing who received the Package.
3. **File Count** - Shows number of Files in Package or number of Asset Groups in Package.
4. **Thumbnail and List Modes** - Switches between the two modes.
5. **Group Mode Toggle** - Switches Group Mode on and off.
6. **Sort by Options** - Sorts Asset Group by Position, Name, File ID, Date, Size Timecode

Package Viewer Side Bar

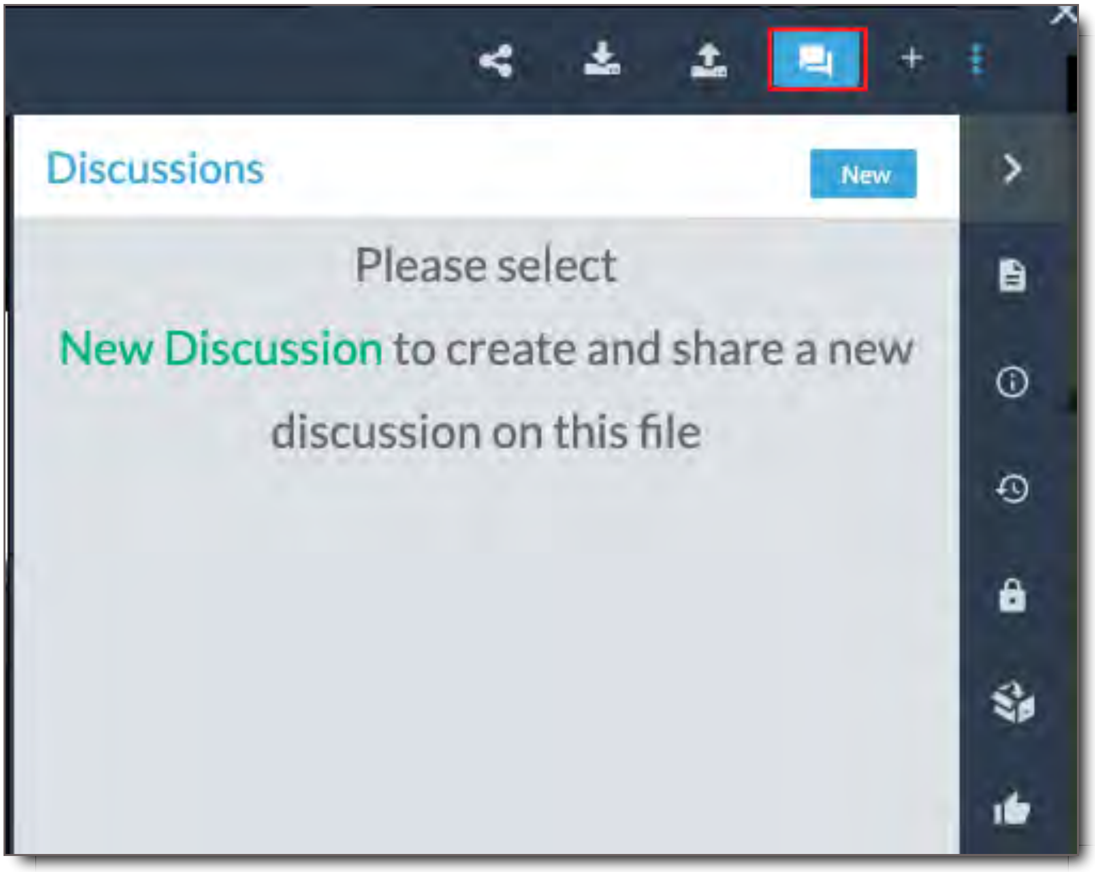
Access the different side panels for the Package, Asset Group, or File from the side bar. Depending on your user permissions, what you see in the Side Bar will vary.

Package Viewer Side Panel

1. **Collapse or Expand Side Panel**
2. **Asset Details** - Opens Asset Details panel
3. **Package or File Information** - Opens Info Panel on the File or Package
4. **History** - Opens Panel showing history of File or Package
5. **Files Access** - Opens Panel showing who has access to File and what Package Shares it's been included in.
6. **Recipients** - Shows who has received the File or Package
7. **Package Panel** - Opens the Package Panel enabling user to do any number of related actions.
8. **Export Package Report** - Lists reports available for download
9. **Screener App** - Enables user with Screener permissions to project File or Package to another device via the Screener app
10. **Approval History** - Shows who on the package or file has approved or rejected it.

The Side Panel gives additional information and controls for the File or group of Files that you are viewing. Each of these Panels are accessible from the Asset Viewer Side Bar. For further details, please go to the corresponding Panel sections in this chapter.

CORE Tip: Last Selected Side Panel is Cached When User Returns to Asset Viewer
Sometimes users are disoriented by the information they see in the Side Panel when they arrive in Asset Viewer. This is easily resolved. When leaving and returning to the Asset Viewer, the displayed Side Panel is the one that was last open when the user was previously in Asset Viewer. Therefore, if the view is not what you were expecting, be sure to check the Top and Side Bars to select the desired Panel. The selected Panel is highlighted in light blue:



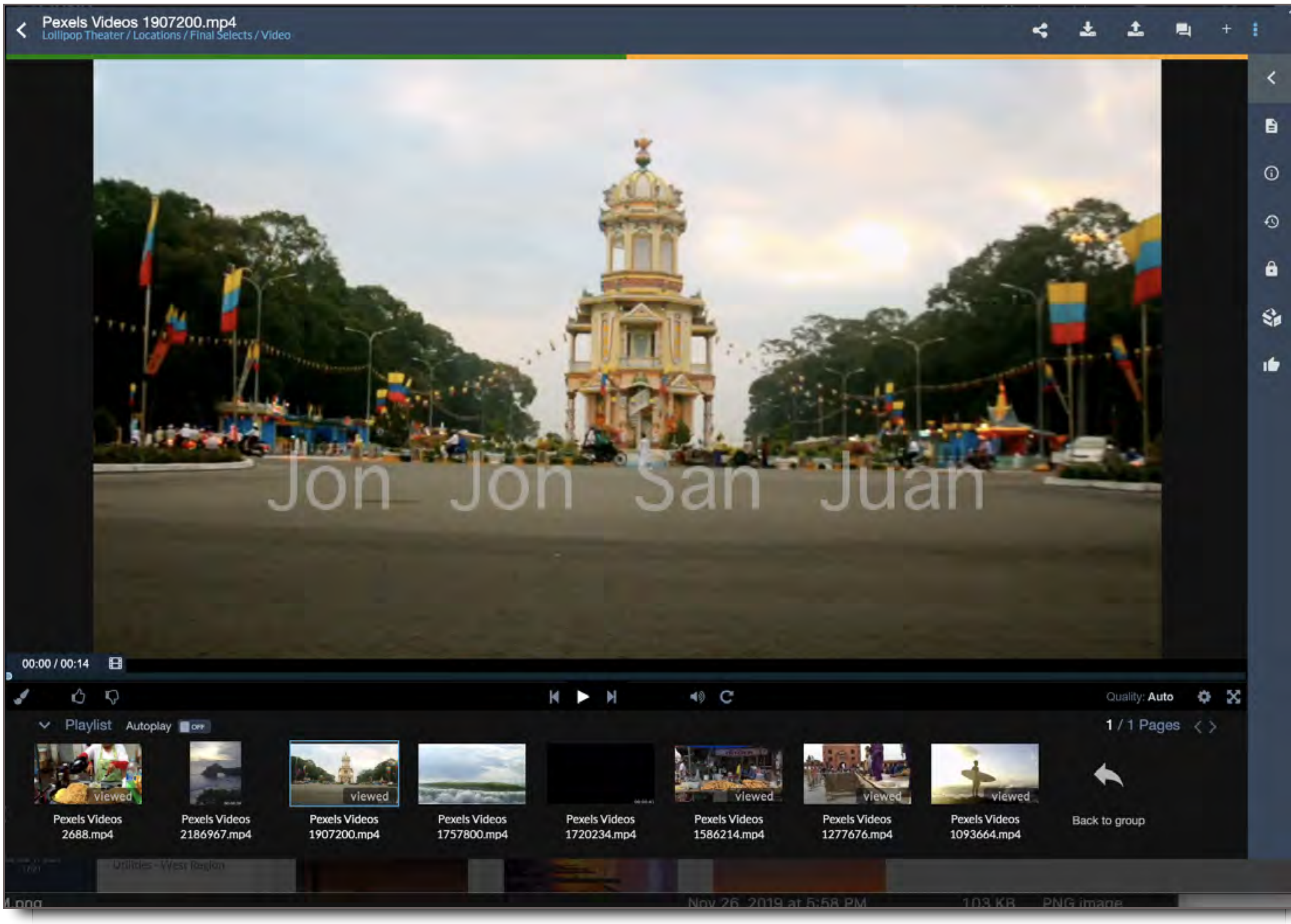
Package Viewer Package Types

Standard Package View Standard Packages display in the Package View with all Files and Asset Groups listed or shown as thumbnails. From this view, the user can play through the Files or select the File they want to view.

Dailies Package View Dailies Packages autoplay like a playlist moving through each file consecutively. Users can pause and jump around the playlist, as well as go back to a Package View, but they cannot see who else the Package has been shared with.

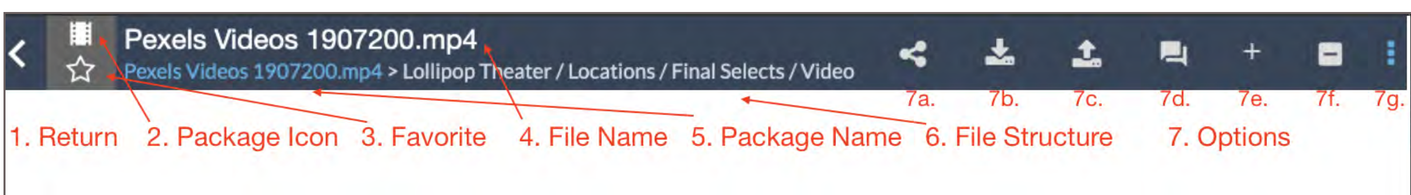
View Files in the Asset Player

When you select a File in an Asset Group or from the Asset or Package Viewer, that File opens in the Asset Player (sometimes called the Player or Viewer).



Asset Player Top Bar

File View in Package



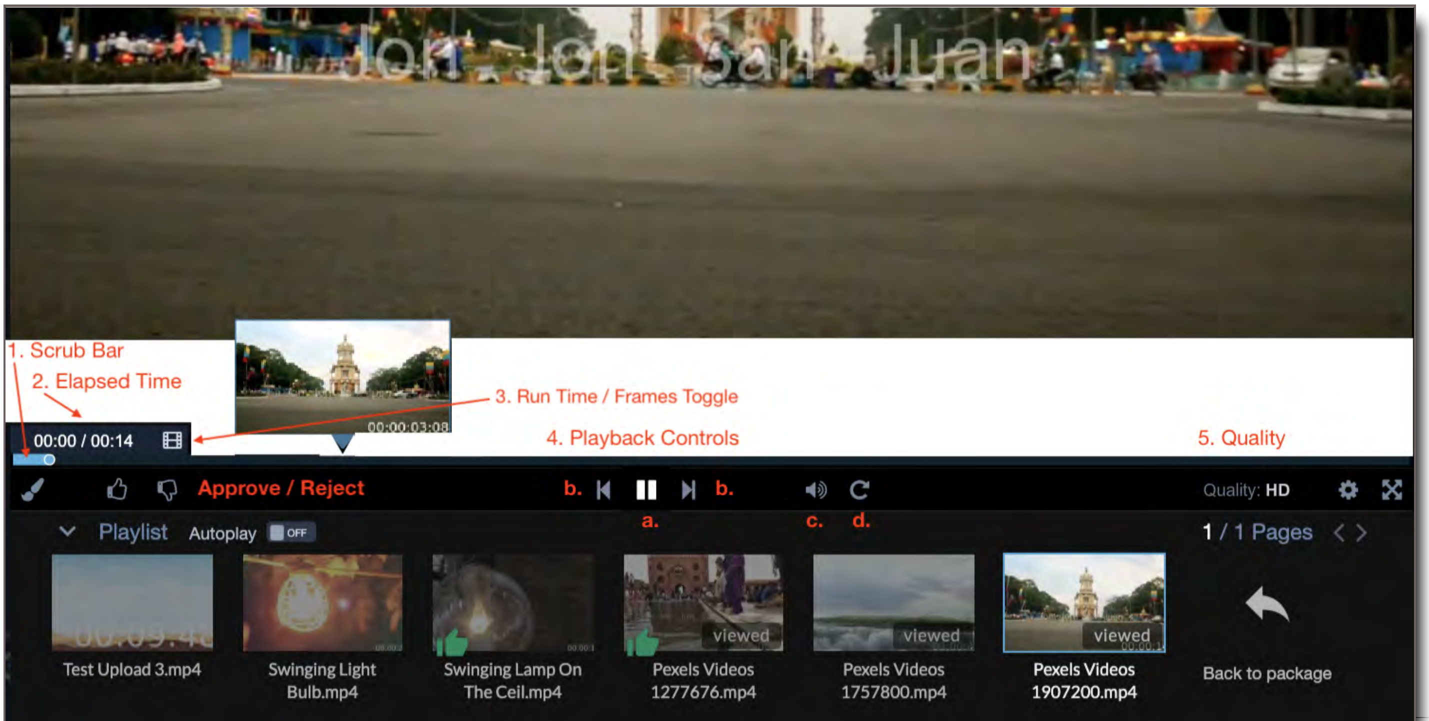
File View in an Asset Group or From File Search

1. Return - Click here to return to the Package Viewer or Asset Viewer
2. Package Icon - Shows this File belongs to a Package
3. Favorite - Select to add to your Inbox Favorites
4. File Name - Name of the File
5. Package Name - Name of the Package

6. File Structure - Structural File Path for this File
7. Options - Same as the Asset or Package Viewer
    a. **Share** - Share the contents of this Asset Group with other users.
    b. **Download** - Download Asset Group or selected Files.
    c. **Upload** - Upload additional files into this Package.
    d. **Discussions** - Opens the Discussions and Commenting Panel.
    e. **Add to Package** - Adds selected Group or Files to an Active Package.
    f. **Additional Options** - Click this to reveal additional options.

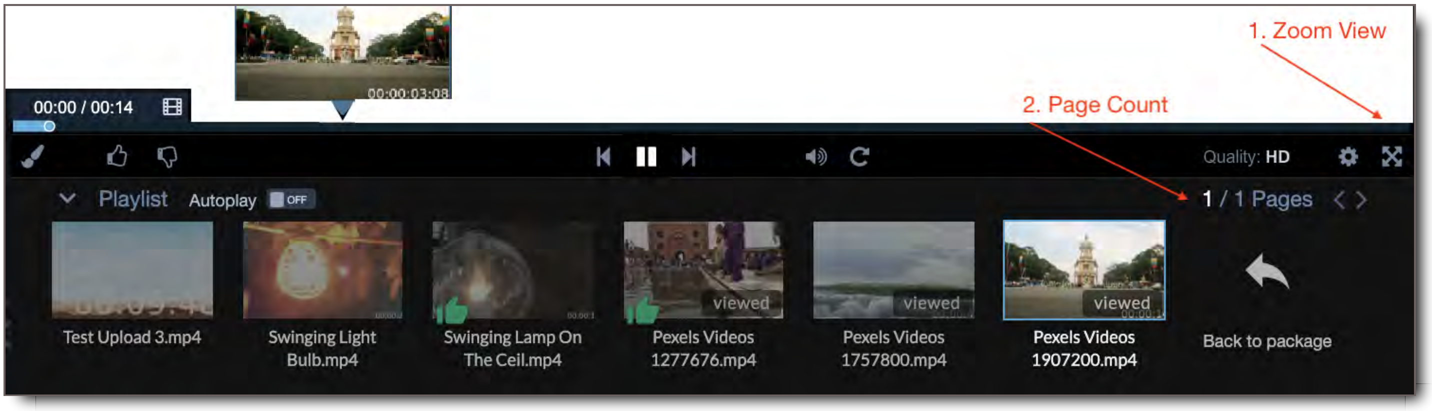
Asset Player Controls & Shortcuts

Asset Player Controls - Video & Audio Only



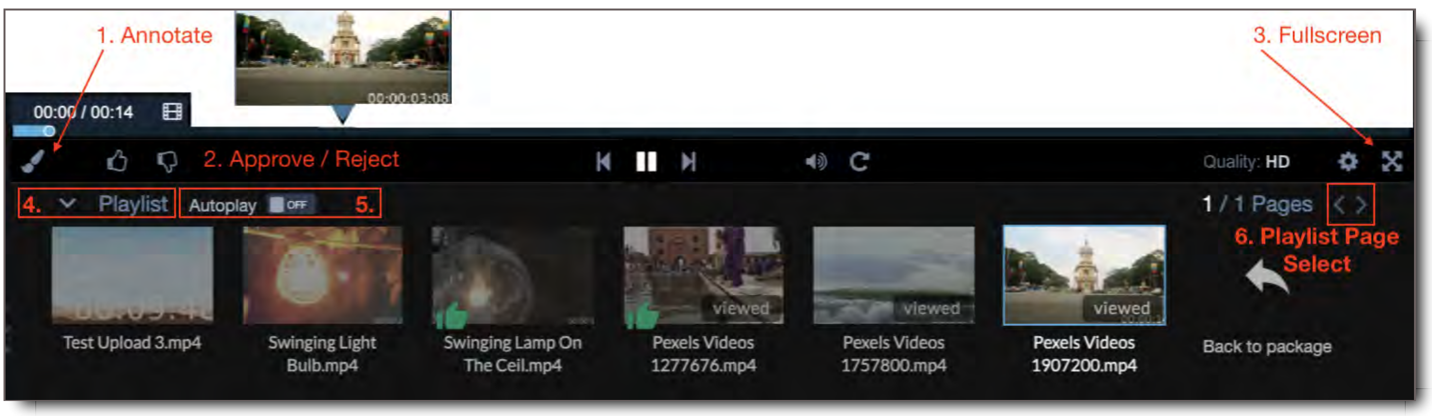
1. **Scrub Bar** - Drag and drop the bar cursor to anywhere in the video or audio file.
2. **Elapsed Time** - Shows elapsed and total run time of the file.
3. **Run Time / Frames Toggle** - Click on the 🎞 icon to toggle between time and frames.
4. **Playback Controls** - Controls the playback of the current file. a. / Play or pause the current video. b. / Previous File / Next File c. / Mute / Unmute d. Loop Playback
5. **Quality** - Click the Gear ⚙ icon to toggle between HD and SD quality image in the Viewer.

Asset Player Controls - Documents



1. **Zoom View** - Zoom into and out of the document in the Viewer
2. **Page Count** - Shows the total number of pages in the document. Enter a number in the box of the first number to jump to that page.

Asset Player Controls - All Files

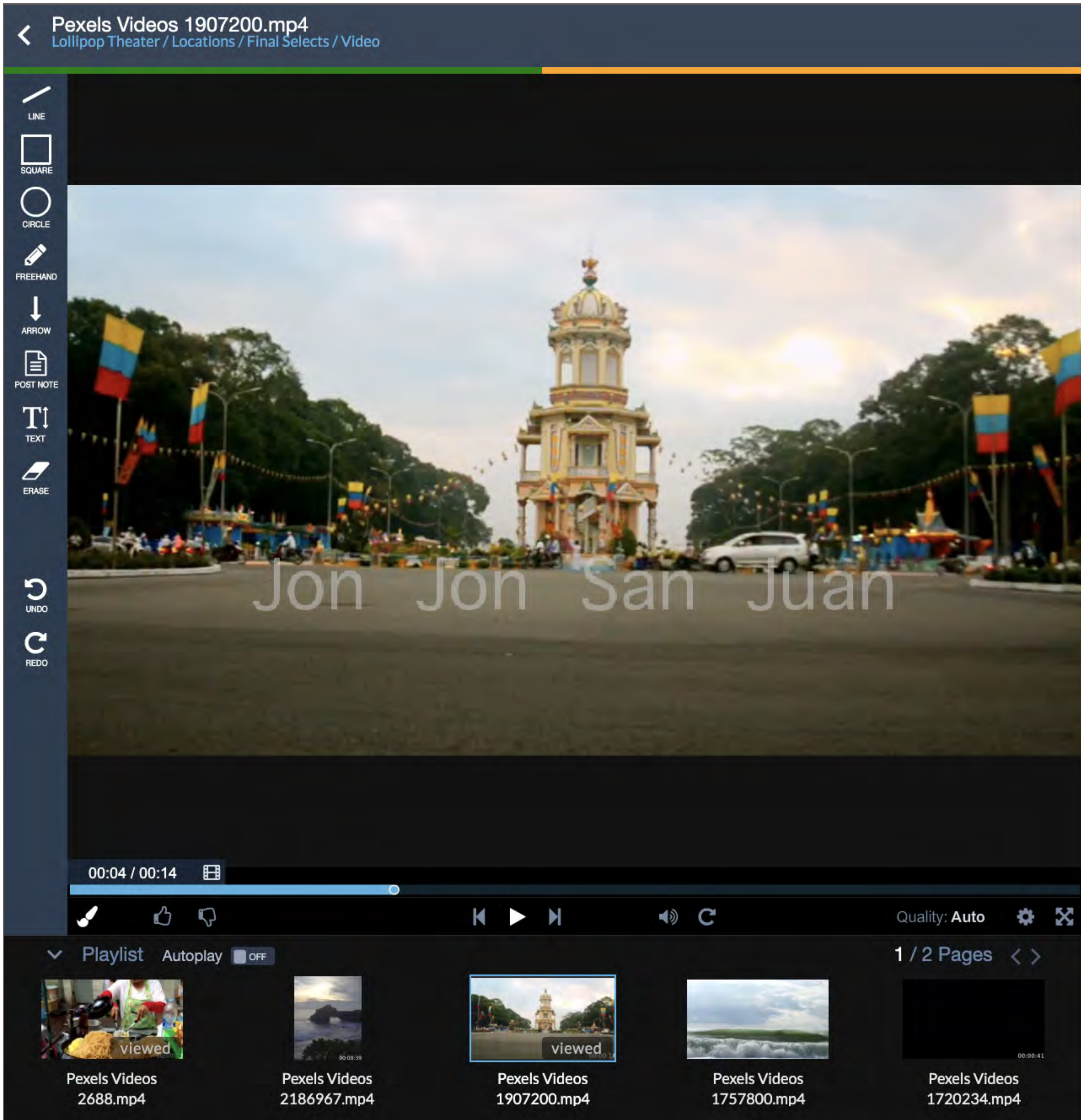


1. **Annotate** - Opens the annotation menu
2. **Approve / Reject** - Click / to Approve / Reject the current File.
3. **Fullscreen** - Click to view the playlist in Fullscreen Mode. To leave Fullscreen Mode, press the Esc Key.
4. **Playlist** - Shows the files in the current Playlist. Select / to expand or close the Playlist. Select a file in the Playlist to view it.
5. **Autoplay** - Sets your files to autoplay when turned ON
6. **Playlist Page Select** - If there are more files in the playlist than can fit on the current page, use the / controls to view more pages of files.

Asset Player Controls - Keyboard Shortcuts

1. **Space Bar button**- Play and stop selected video
2. **Right Arrow Button** - Click skip to the next asset
3. **Left Arrow Button** - Click to go to the previous asset

Annotation Controls



1. **Line** - Use this tool to add lines
2. **Square** - The Square tool allows users to create simple square shapes for highlighting information.
3. **Circle** -The Circle tool allows users to create simple circle shapes for highlighting information.
4. **Freehand** -The Freehand tool creates free-form drawing
5. **Arrow** - The Arrow tool allows users to create an arrow to connect point of interest/highlighted information.
6. **Post Note** - The most common type of comment is the Post note. The Post Note feature is a tool which creates a note attached to the image. Select the Post Note tool in the toolbar, and click where you want to place the note.

7. **Text** - Use the Text Comment tool to type text anywhere on the image
8. **Erase** - Use the Erase tool to erase any annotated tools on the image
9. **Undo** - Undo last function
10. **Redo** - Redo last function

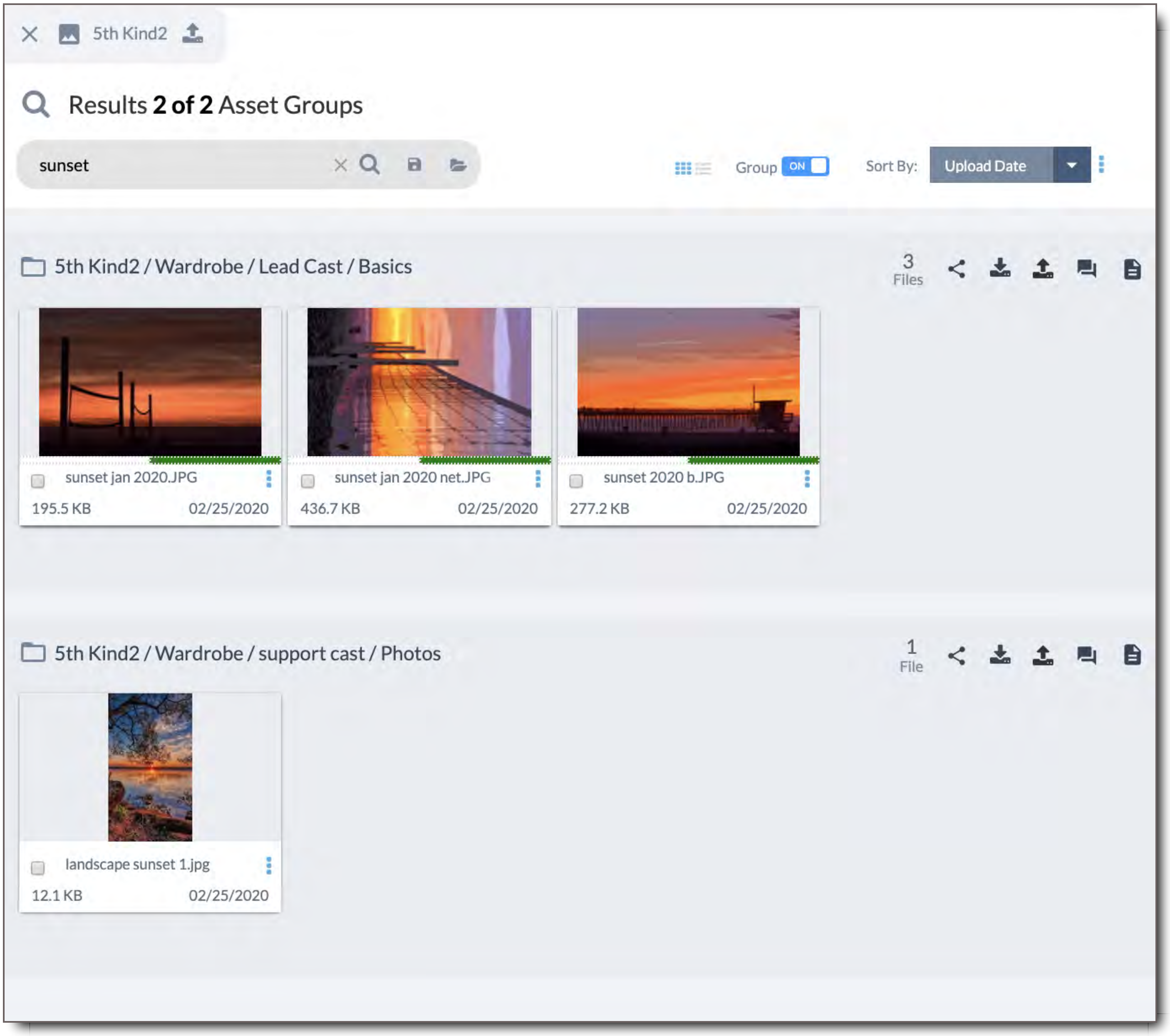
Quickly & Easily View Files

View Multiple Asset Groups in the Asset Viewer

To break out your Files by their Asset Group,

1. Turn on Group Mode in the Asset Viewer.

2. Files will appear in their Asset Groups



View a File Directly From File Search

To view a single file from File Search, select the File and it will open in the Asset Player.

Find Asset Details

All Tags for a File are listed in Asset Details. To find the Asset Details of a group of Assets or single Asset,

1. Select the Asset Group
2. Go to the Asset Details icon in the Side Bar and select it
3. The panel will open and show you the combined tags for all the Files in that Asset Group

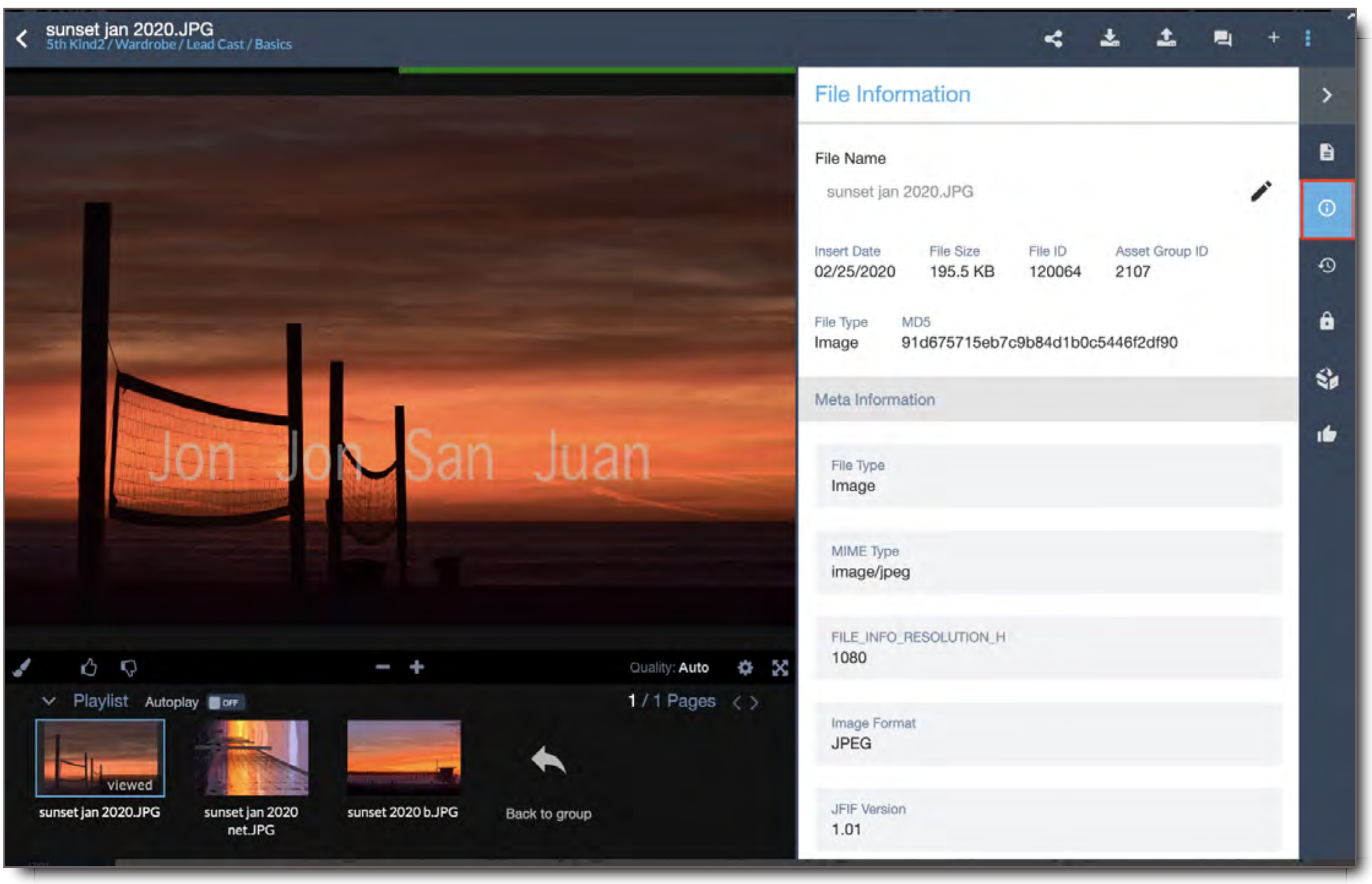
To see the Asset Details of a selection of Files,

1. Select the Files in Asset Viewer
2. Go to the Asset Details icon in the Side Bar and select it
3. The panel will open and show you the combined tags for all the selected Files

To see the Asset Details of a single File,

1. Select the File from File Search, you Search Results, or within the Asset Viewer / Package Viewer.
2. Go to the Asset Details icon in the Side Bar and select it
3. The panel will open to show you the Tag Values for your selected File

If you're looking for the native file specifications associated with the original source file, go to File Info icon.



Create a Subclip From a Video

To create a subclip,

1. Go to the ⚙ gear icon on the Asset Player controls
2. Select **Sub Clip** in the menu

3. An arrow marker will appear on either side of the Player’s Scrub Bar

4. Move the markers to your desired timecodes
5. Select the blue "Save Sub Clip" button

6. The Upload Viewer will open while your subclip is creating
7. Categorize the clip or Skip & Share it
8. Once it's categorized, the Sub Clip will now appear in your desired Asset Group and can be added to other Packages

See Who A File or Package Has Been Shared With

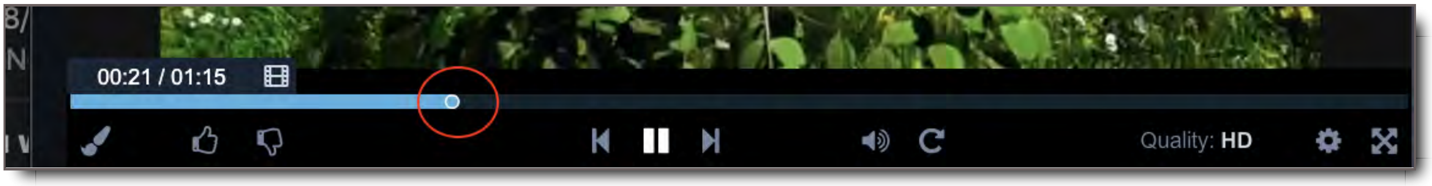
Go to the Recipients Panel, accessible via the Side Bar. If that icon is not available, you don't have user permissions to see the Recipients.

View & Play a File

Some Packages are set to automatically start playing when the recipient user opens it. If yours does not, select the File you wish to view. Document files scroll up and down. Video and audio files can be controlled via the player controls.

Scrub Through a Video or Audio File

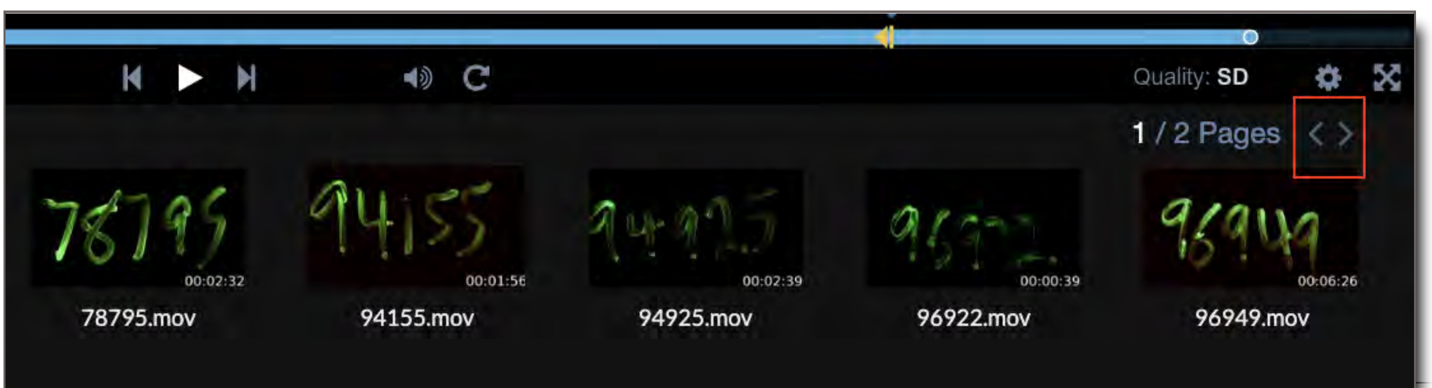
Scrub through a video by dragging the cursor in the scrub bar to the location you desire.



Frame thumbnails will appear as you drag the cursor to aid in your search.

Scrub Through a Large Package or Asset Group

In large packages where you have more than one page to your Package's Playlist, use the Pages arrows to find the File you want to open next.



NOTE: If you are playing a video while searching for a file and the next video starts, you will be bounced back to that file in the Playlist. To avoid this, turn off Autoplay and Pause the video or audio file, before scrolling through the Playlist.

Comment on a File

1. In a package, select the file you want to comment on.
2. Add your comment which will be sent to the other users on that package.
3. Send.

If the comment panel isn't open for whatever reason,

1. Select the Discussions icon if it's not selected.
2. Select the Discussion you want to comment on OR select New Discussion, if this is the first comment in this package. If it's new, select the discussion recipients.
3. Then comment on your file.
4. Send.

Approve a File

With the file you want to approve open in the Viewer, select the thumbs up or thumbs down icon.

NOTE: Currently, everyone is able to approve or reject files. You should be approving only the files you've been asked to review. In later phases of this module, when needed, you'll be granted permissions to approve certain files.

Annotate a Video or Audio File

To annotate a streaming file,

1. Click the brush icon on your paused or playing file.
2. Select your desired annotation tool.
3. Your cursor will change to an editing tool icon.
4. Annotate as you desire.
5. Add the recipients to receive the annotation,
6. Change the subject if you like.
7. Add a message.
8. Send.

Annotate an Image, PDF, or other Static Files

To annotate a static file,

1. Click the brush icon on your paused or playing file.
2. Select your desired annotation tool.
3. Your cursor will change to an editing tool icon.
4. Annotate as you desire.
5. Add the recipients to receive the annotation,

6. Change the subject if you like.
7. Add a message.
8. Send.

Change Play Quality of Video

Depending on your bandwidth, your video player quality will be automatically selected. However, if you wish to change it, select to the Gear ⚙ icon. Choose HD or SD.

Enter & Exit Fullscreen Mode

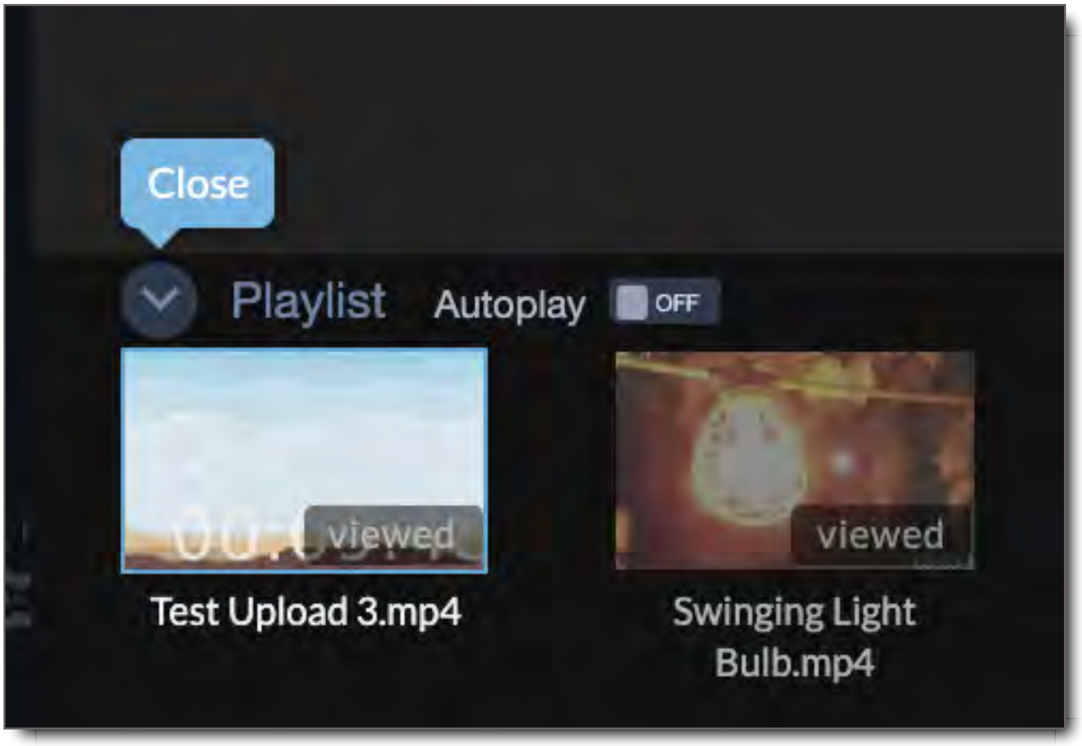
Select the Fullscreen icon to go into Fullscreen Mode. Hit esc (escape) to exit the mode.

Turn Auto-Play On & Off

Flip the Autoplay toggle to turn it on, which will automatically play all items in the playlist one after the other until the end. Or toggle it off and you can manually choose which file you would like to view next.

Close and Open the Playlist at the Bottom of the Screen

Use the down ⌄ and up ⌃ arrows next to Playlist to collapse and expand the playlist.



Media/File Specifications on Asset Viewer Proxy Viewing

Here are the specifications for the various proxy file/media types when viewing on CORE.

Proxy Media Specifications

Parameter	Specifications
Video	HD 1280 x 720 SD 480x360
Images	Print (HD) - 2000x2000 Web (SD) - 800x800 Thumbnails - 200x200 (thumbnails in JPG format)
Audio Playback	Playback in MP3 audio

Proxy Document File Specifications

Parameter	Specifications
Most document File Types (.doc, .xls, .ppt, .pdf, etc)	When viewing or downloading proxy file documents in CORE, these documents are converted to PDF on view/download

Troubleshooting

I Can Only See My Package as Playlist in the Player

If you received a Package that opens directly into the Asset Player, then that file was sent to you as a Dailies (also called Playlist) package. This means you won't be able to access the Package Viewer. You can, however, turn off the autoplay functionality to peruse the files at your own pace.

My Package Won't Open in Package Viewer

If your package opens, but only in the Player, see above. If your package won't open when you click on it from your Inbox, go to Troubleshooting in Package Inbox.

My File Won't Play or Open

There are many reasons why a video or other files won't play: slow internet, firewall issues, or the file hasn't processed yet. Here are a few items you can test on your own before escalating your issues to Support:

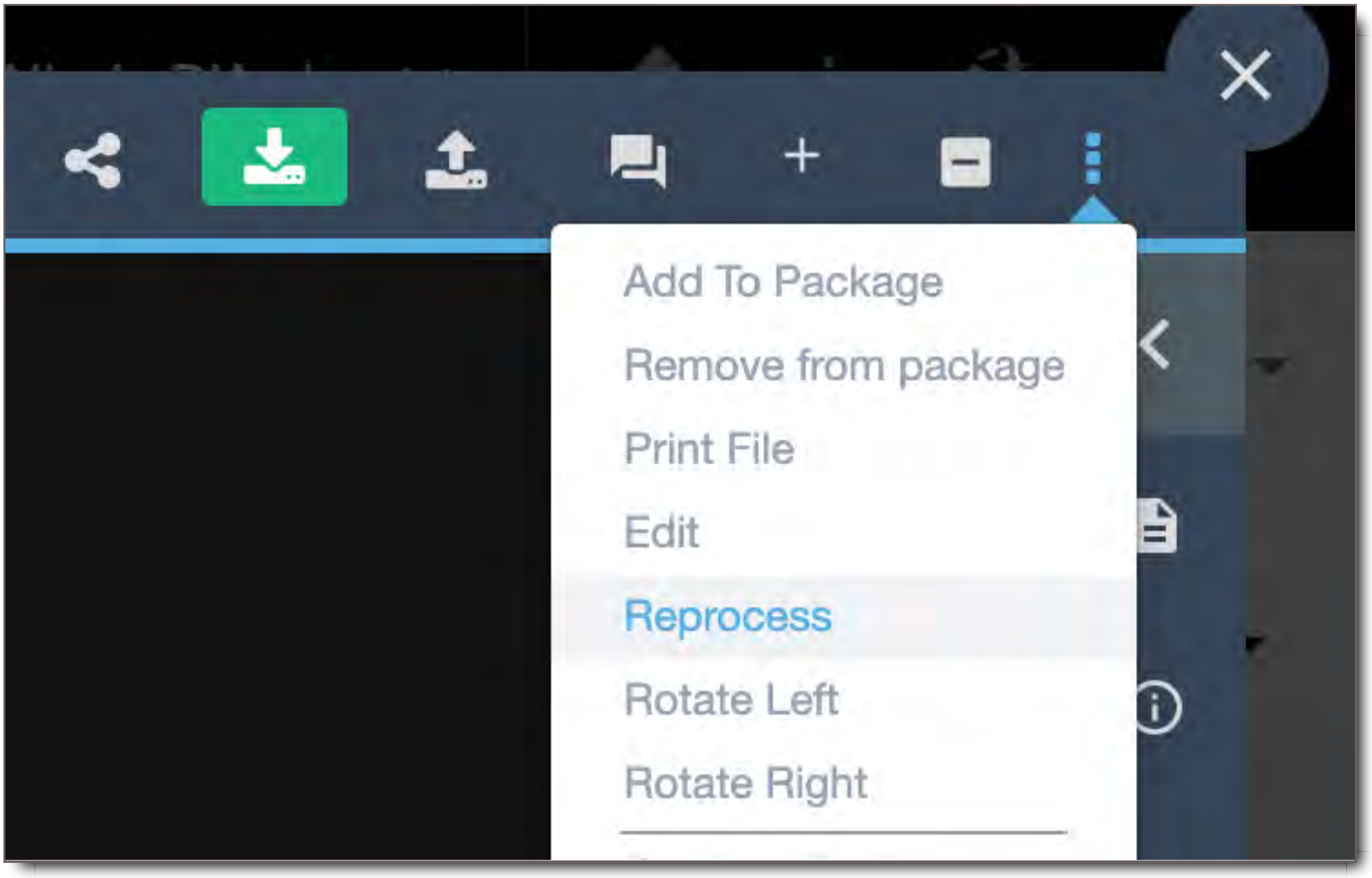
My Thumbnail Shows Uploading or Processing & Video Won't Play

If the thumbnail shows that it's still processing and the video won't play,

1. Check the size of your source file. File processing on CORE occurs at the rate of 6x-8x the length of a video file. Larger files could take 20 minutes or more to process.
2. If you didn't upload the file, select the History Panel icon to see what time the file was uploaded. You don't want to reprocess a recently uploaded file. It may need more time to complete.

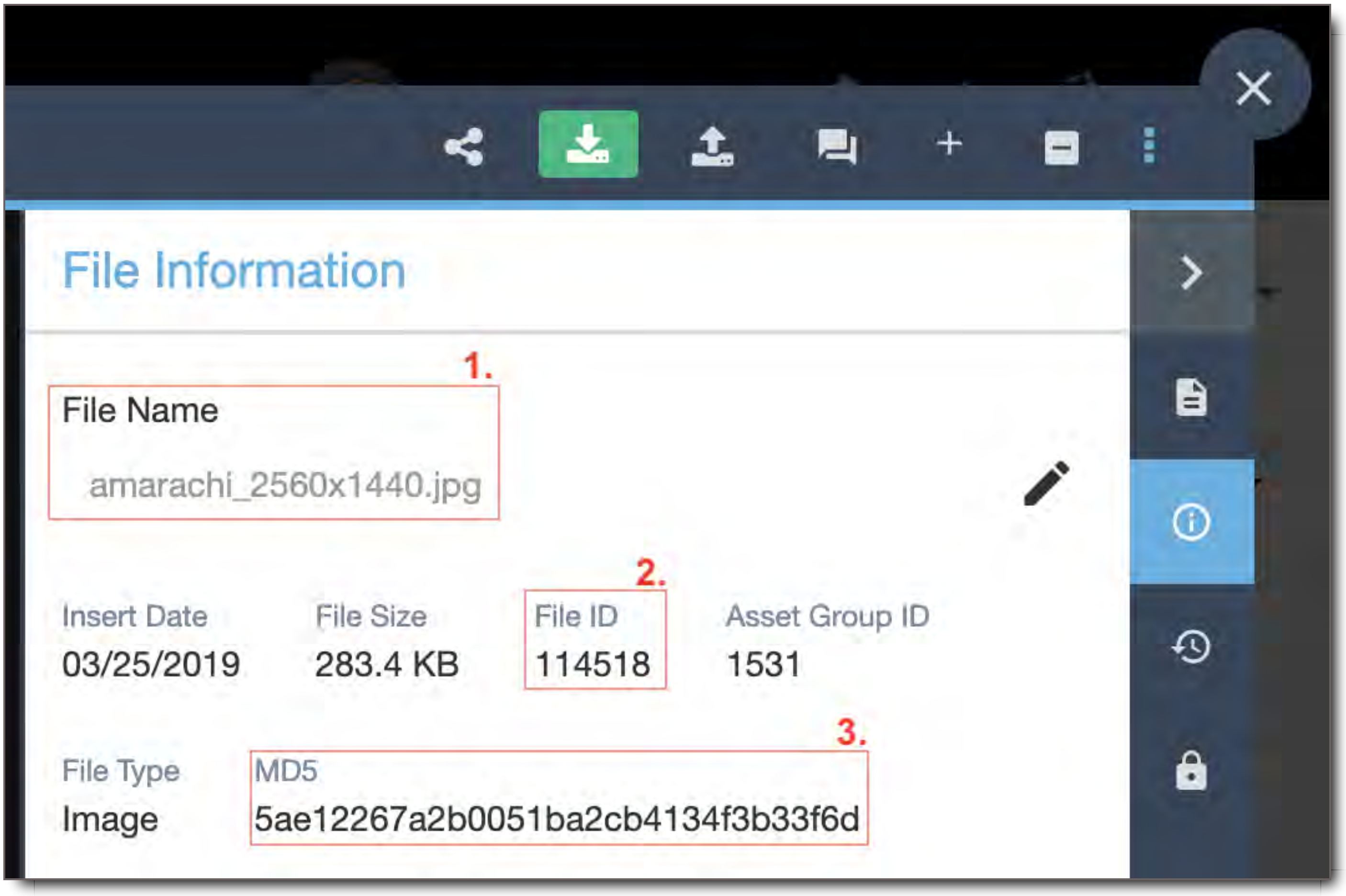
If it's been longer than what's reasonable for the size of your file, then first try to reprocess your file.

1. Select the File
2. Go to the Asset Player
3. Select the More / Three Dot icon ⋮ in right corner of the Top Bar
4. Select Reprocess Add Image
5. Once you reprocess the File, refresh the page. If the file is a long file, i.e. 2 hours, give it about 10 minutes to reprocess.



If Reprocess is not selectable, or the file doesn't still doesn't work after reprocessing, escalate the issue to your Tier 1 Support Team. Provide Support with the following information from File Info ℹ :

1. FileName
2. File ID
3. MD5 Checksum



NOTE: If there is no MD5 number, the file was interrupted in some way during the upload process, and did not complete uploading into the system. Re-upload your file, or contact the original uploader to alert them. If you continue to have this problem with the same file, alert your support team.

My Thumbnail Appears, but File Won't Play or Open

Try the same steps as above.

1. This time, first check if there's an MD5 number.
2. If there is, follow the reprocessing instructions. If there is no MD5 number, re-upload the file or alert the original uploader. My Thumbnail Appears, and File Opens / Plays, but Then It Stops Try reprocessing this File, per the instructions above. If that doesn't resolve the issue, escalate this to your support team who can provide additional assistance or investigate further.

My File Says It "Failed to Load Watermark"

In the CORE Asset Player, the browser may 'cache' a video that you tried to watch earlier that may have had an issue streaming. In this case, if you're in the player and you receive a black screen with red message saying, Failed to Load Watermark, do the following:

1. Logout

2. Clear your cache for the last day or 24 hours
3. Reboot your browser window
4. Log back in

If the issue persists, gather the File Name, File ID, and MD5 number per the instructions above and pass it along to your support team. Let them know you have already followed steps 1-4 here, and they can escalate the issue for further investigation.

My Video is Buffering a Long Time

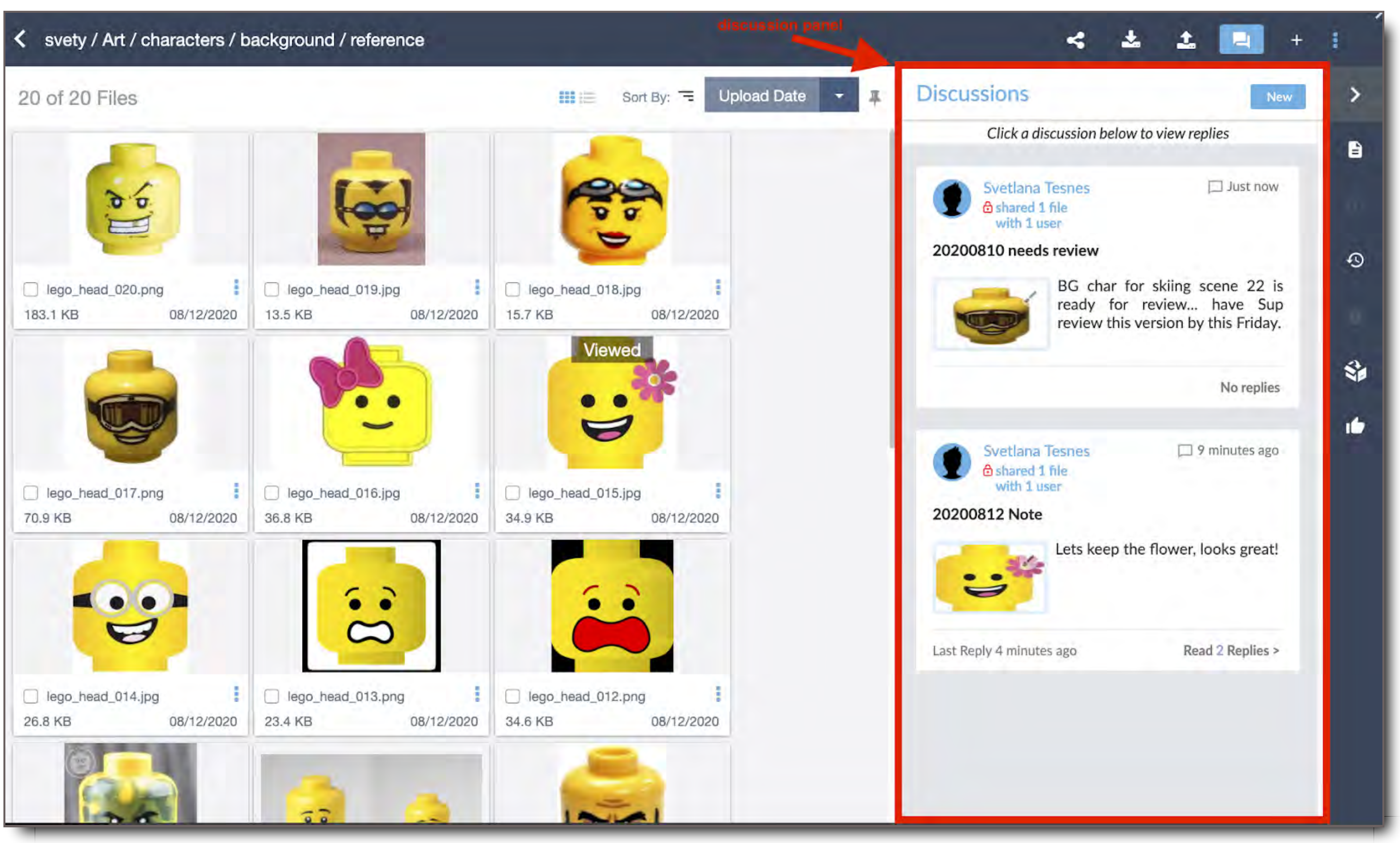
Slow video buffering can be worked around by switching between your File's high and low resolution proxies. To buffer your video more quickly, select the low res proxy by going to the Asset Player's controls.

1. Select the Gear icon ⚙
2. Select SD, the low res proxy.

If this solution doesn't work, contact your internal 5th Kind CORE Support contact.

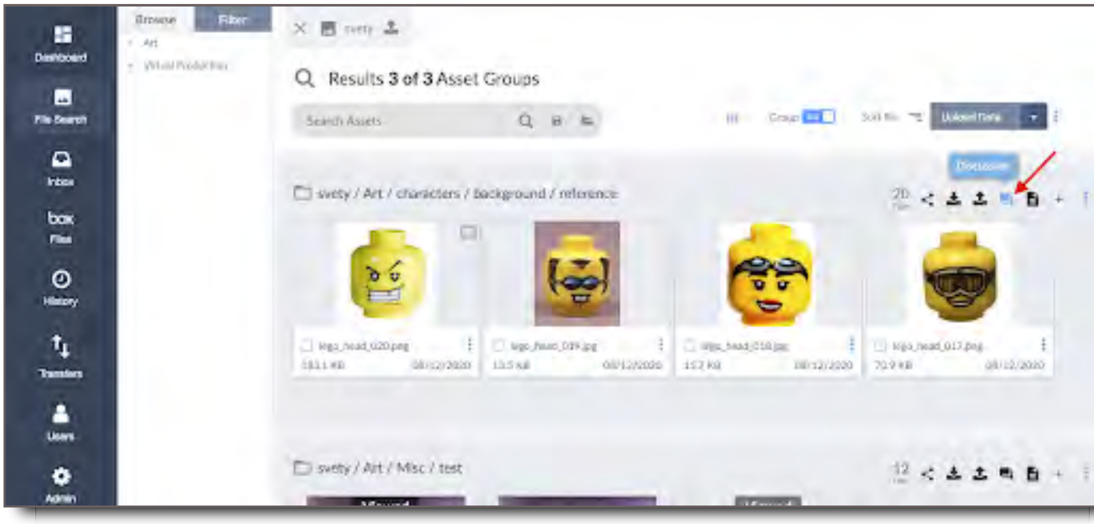
Commenting

You can share comments and have discussions about Files with other users in Core. All commenting can be found in the Discussion panel in Core. The benefits of commenting and having discussions around assets within the system keeps users from having separate, distanced and insecure email conversations that are disassociated from the assets. Using commenting and discussions within CORE is one of the most valuable features of the system.



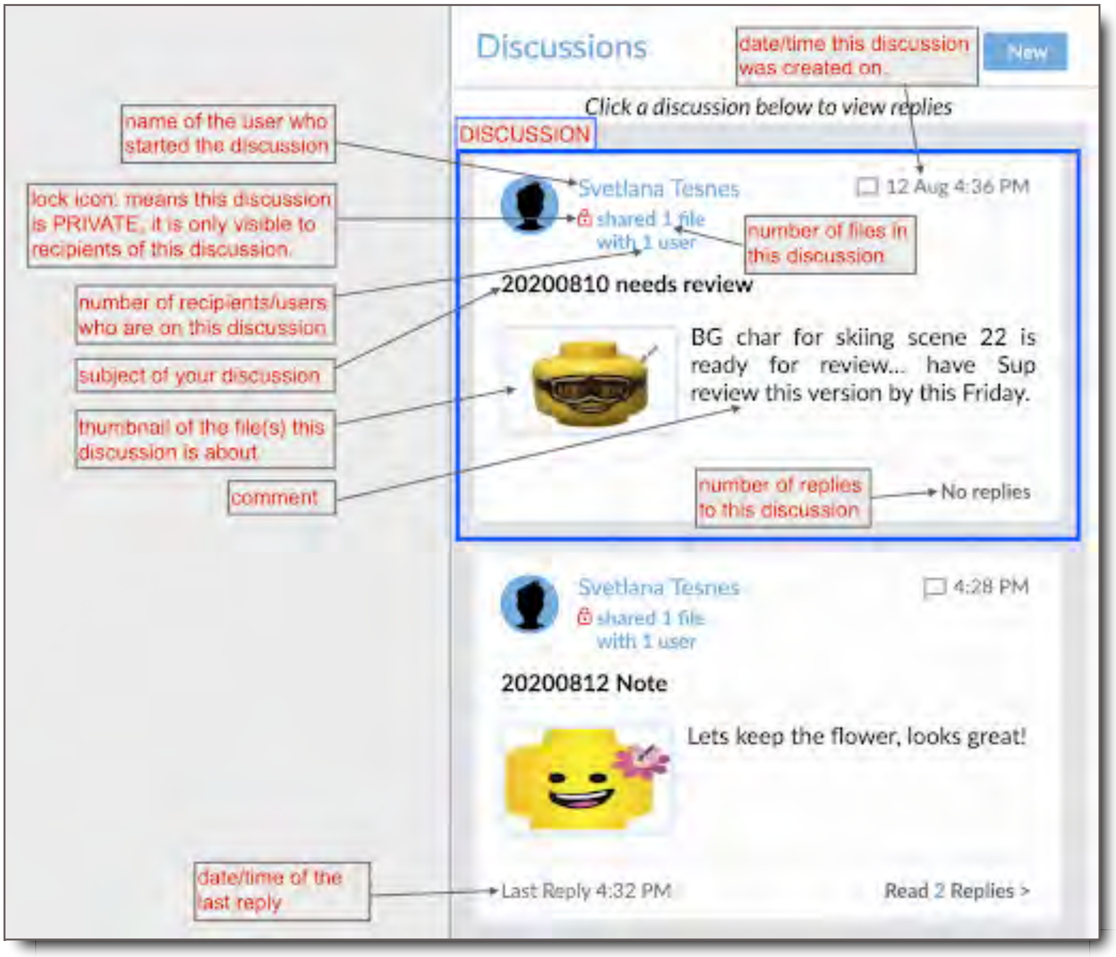
Discussion Panel

The Discussion panel can be accessed in various areas in Core: In File Search, click on the Discussion icon located at the top right of each Asset Group to open the Discussion panel.



In Asset Viewer, click on the Discussion icon located at the top right of the module to open the Discussion panel.

Anatomy of the Discussion Panel

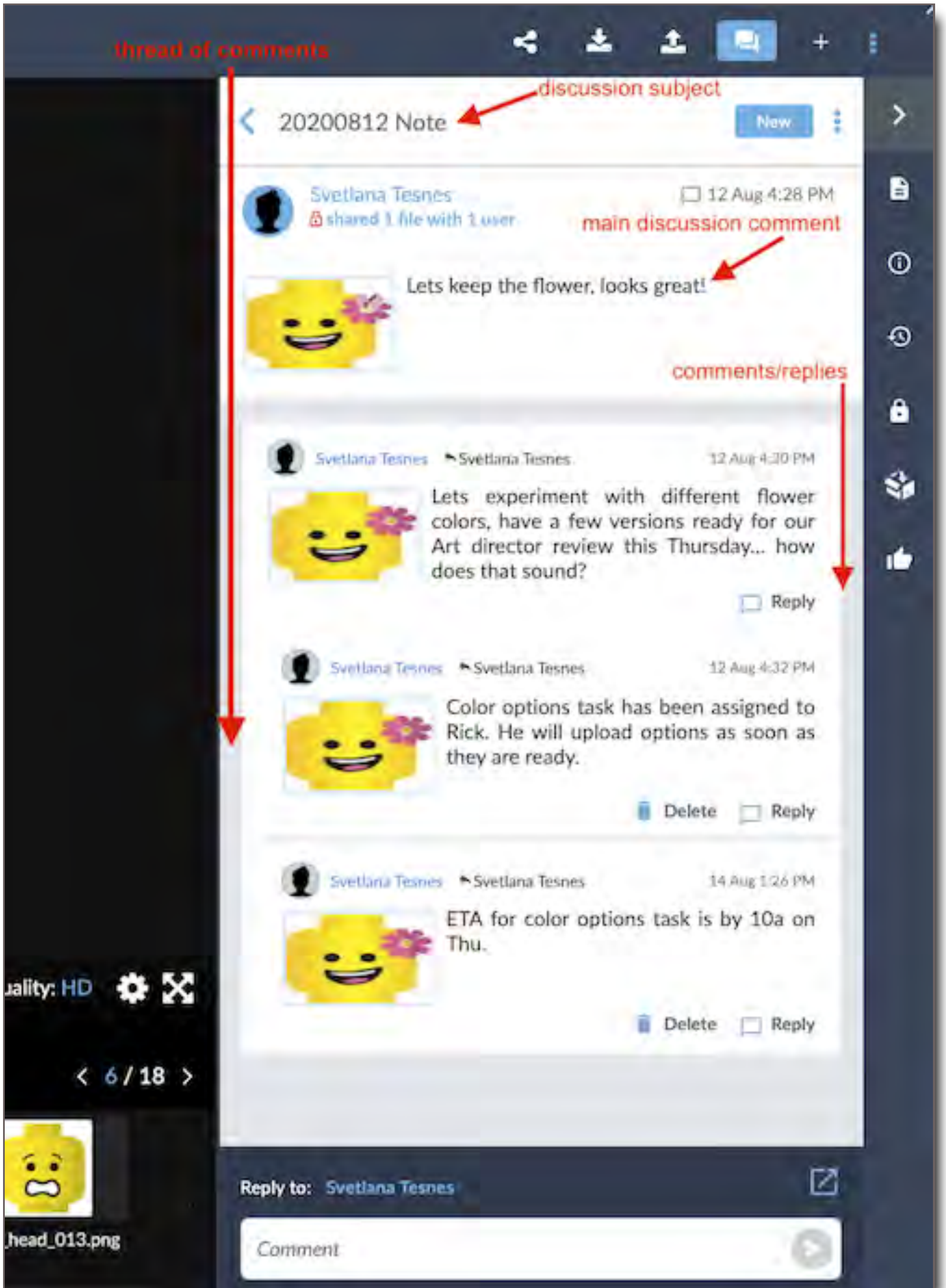


Notes:

- A **Discussion** is a thread of comments about a particular file(s).
- **New or updated discussions** will appear at the top of all previous discussions in the panel.
- **Replies/comments** to a discussion remain within their discussion topic. Replies/comments can be accessed by clicking on the ‘Replies’ text or by clicking anywhere in the discussion box, which will expand that discussion to show its full comments thread.

Viewing Discussions & Comments

When viewing a File, click on the Discussion icon to open & view comments in the Discussion panel. Select a Discussion you’d like to view by clicking directly on the discussion, and a thread of comments for your selected discussion will open in an expanded discussion menu. Here’s an example of what this comments thread looks like when you click on a discussion.

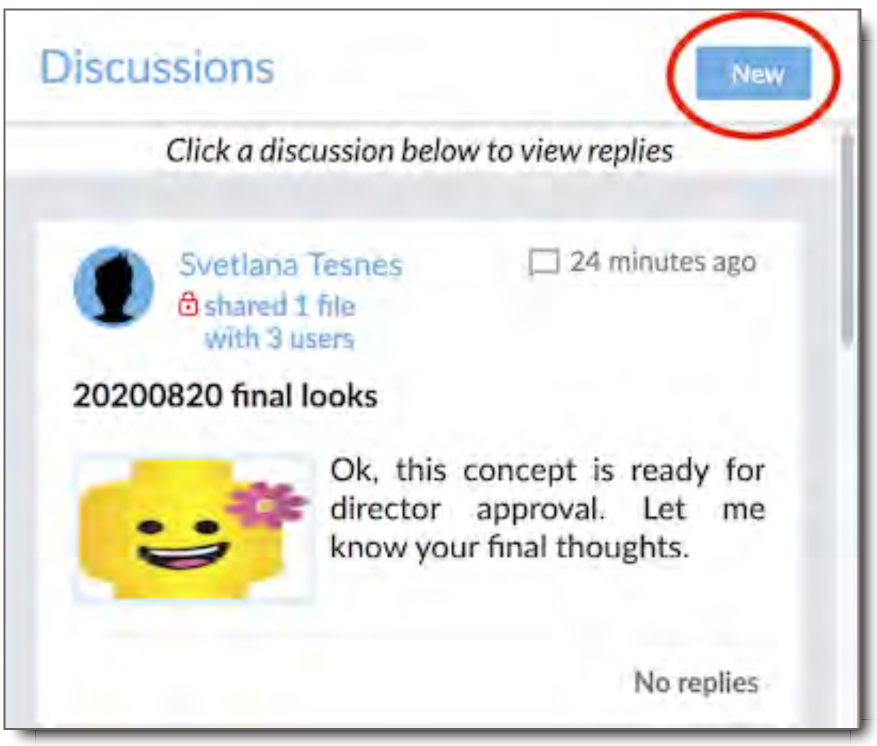


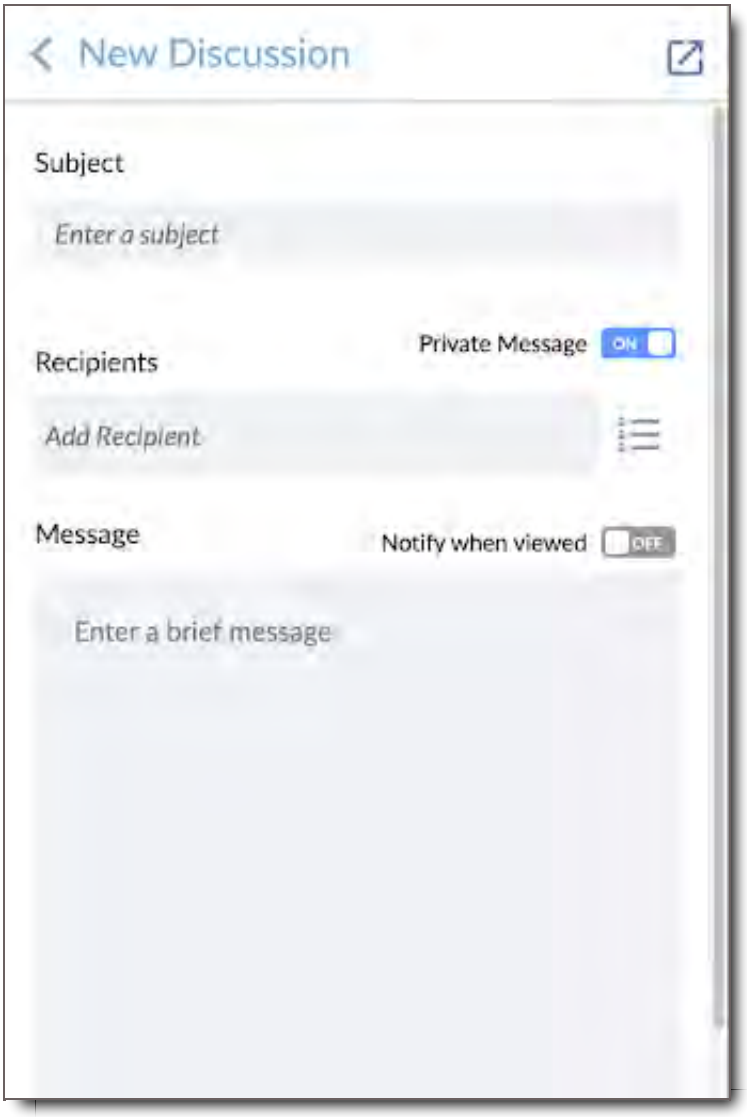
Viewing Discussion Participants

To see who can view a discussion, click the "Shared with X users" text. You'll be shown a list of who can view and participate in the discussion. You'll also be able to add or remove users in this list.

Starting a New Discussion

Click the New button to create a new Discussion. A New Discussion menu will open.





Subject

Enter the subject of your comment here. This is similar to the Subject field of an email.

Recipients

Enter one or more other Users to share the Comment with. Begin typing in the field to search for Users.

Message

Type your comment here. This is similar to the body of an email.

Private Message

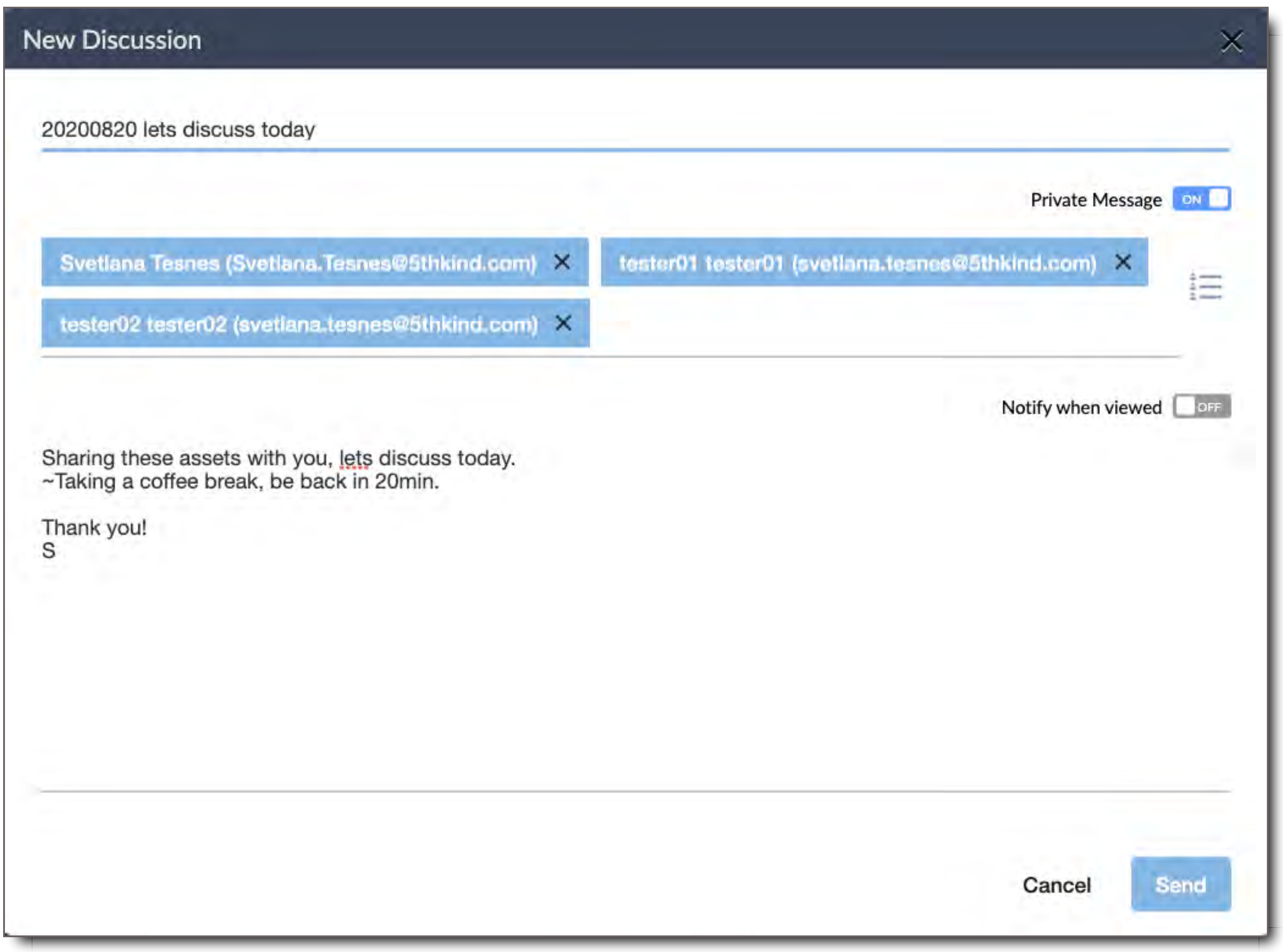
If this is set to On, only you and the Recipients will be able to view the discussion. If it's set to Off, the discussion will be public, and anyone with access to the File will be able to view it.

Notify when Viewed

If this is set to On, you will receive an email notification the first time that each of the Recipients views the comment.

Expand New Discussion menu

By clicking on the **Expand** icon, located at the top right corner of the New Discussion menu, will open an expanded discussion view. This option allows you to view more of your new discussion content.



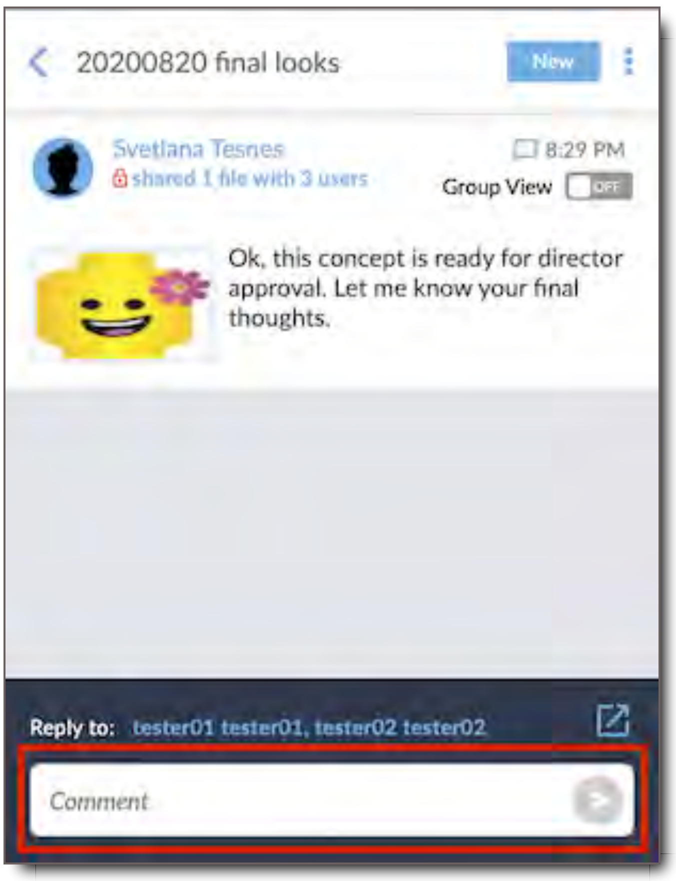
User Lists

To add a group of recipients to your new discussion, click on the **User Lists** icon and this will open a dropdown menu of User Lists for you to choose from. This feature is helpful when you want to share your discussion with many users & instead of entering each user individually, you can select a User List which those users belong to & all those users will be added to your discussion. Number next to each User List lets you know how many users belong to that list.

Replying to a Discussion

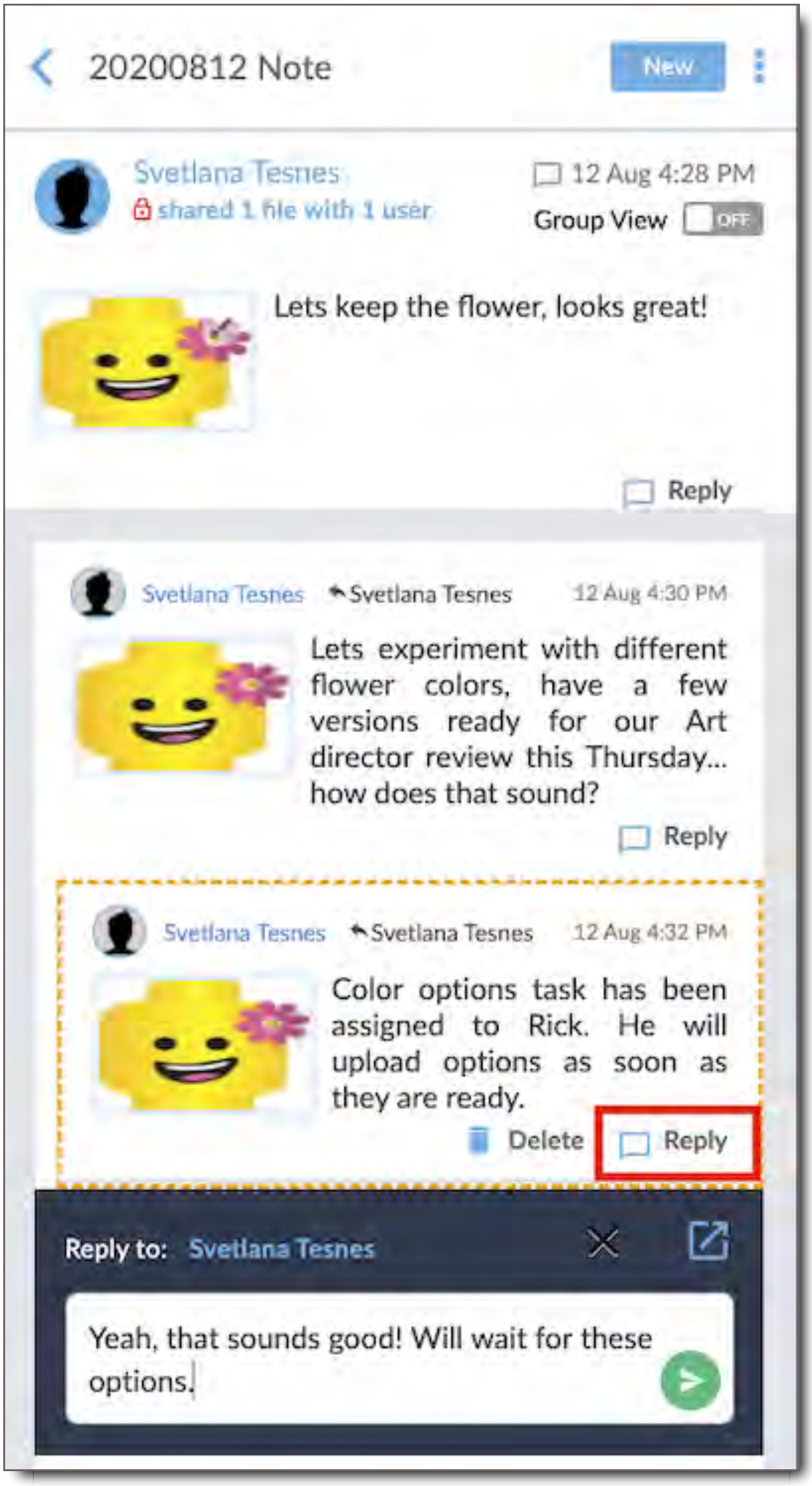
Replying to the Initial Comment

When viewing a Discussion, you can reply to the initial Comment. Just type your reply at the bottom and click the button to send it. Everyone who the Discussion is shared with will be able to view your reply.



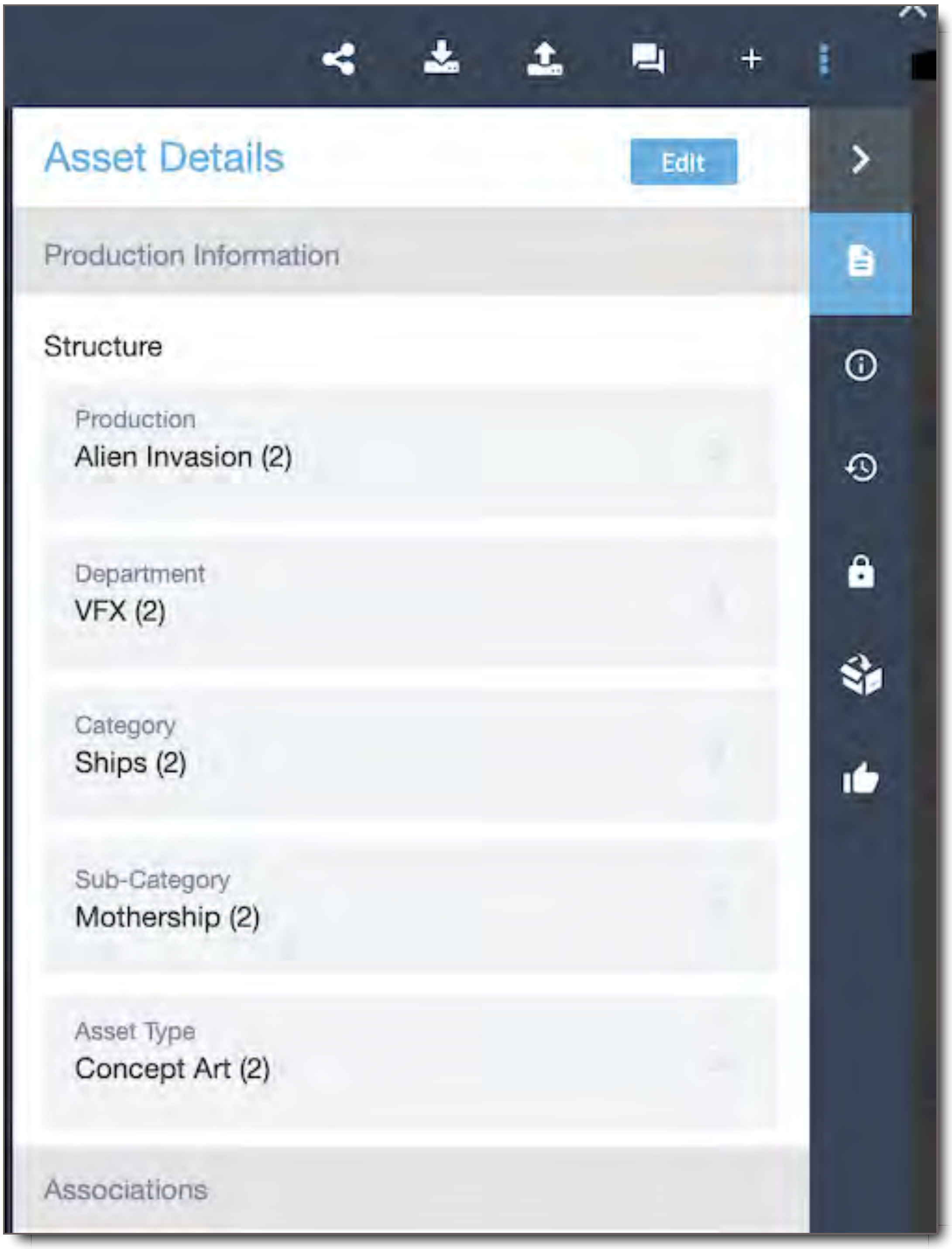
Replying to another Reply

To reply to another User's reply, and continue the Comment thread, click the Reply button on their comment. Your comment will appear after theirs.


20200812 Note
New
Svetlana Tesnes
shared 1 file with 1 user
12 Aug 4:28 PM
Group View
OFF
Lets keep the flower, looks great!
Reply
Svetlana Tesnes
Svetlana Tesnes
12 Aug 4:30 PM
Lets experiment with different flower colors, have a few versions ready for our Art director review this Thursday... how does that sound?
Reply
Svetlana Tesnes
Svetlana Tesnes
12 Aug 4:32 PM
Color options task has been assigned to Rick. He will upload options as soon as they are ready.
Delete
Reply
Reply to:
Svetlana Tesnes
Yeah, that sounds good! Will wait for these options.

Asset Details Panel

The Asset Details tab shows you the way your Files are categorized. If you've got the correct Permissions, you can also use this tab to change the categorization.



Access Asset Details (How to See Asset Details; How to See an Asset's/File's Tags)

To access the Asset Details tab, click the icon in the upper right hand corner of the Viewer. The tab will show you every Metadata field that has been set for the File or Files you are viewing, and the values that have been set. If you are viewing multiple Files, the fields have the same values will display those values, and fields that have multiple values will indicate that. If several Files are selected, the tab will show fields that apply to those Files.

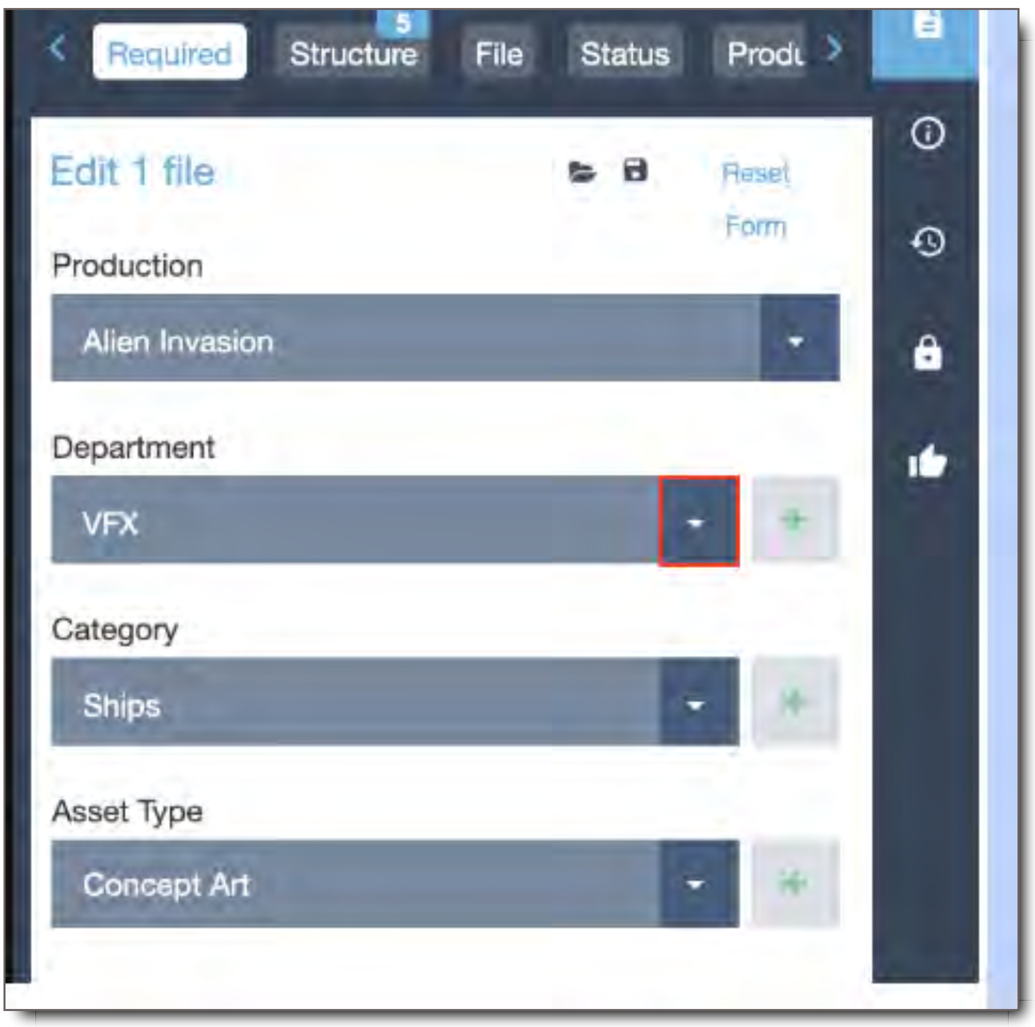
How Tags Are Displayed in the Asset Details Panel

Tags are listed first by Structural tags then by any Associated Tags. Codecs and embedded metadata can be found in File Info.

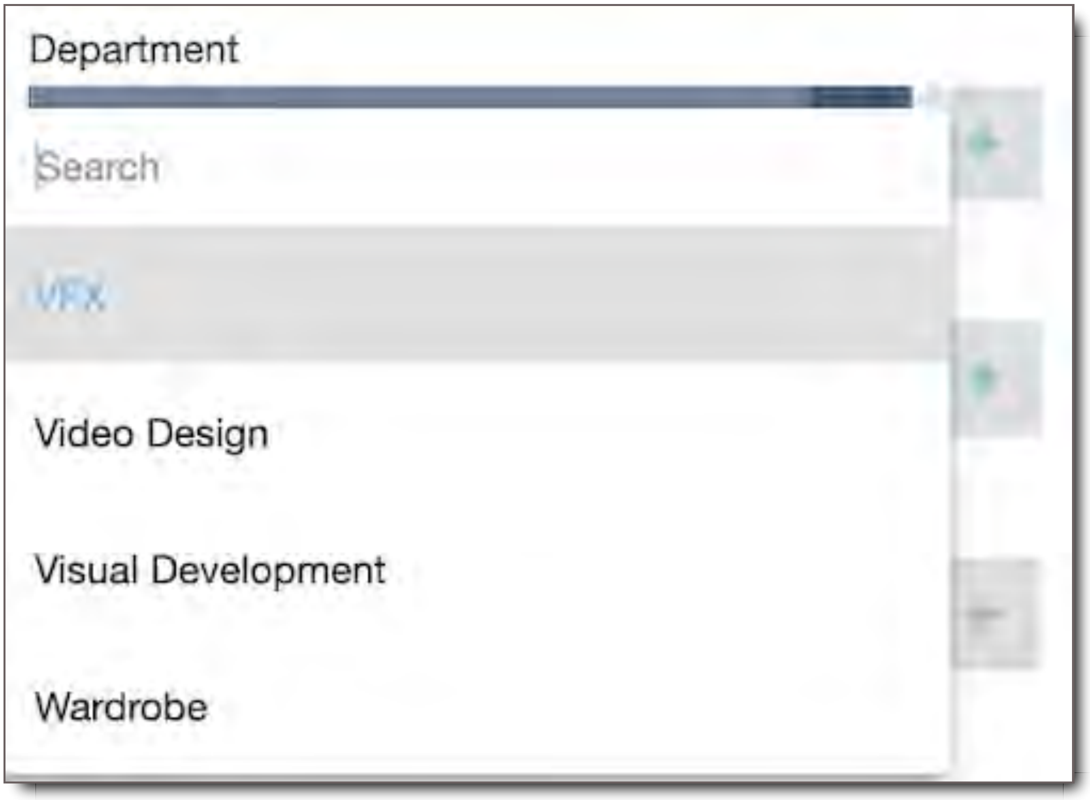
Structural tag fields and Status tag fields are system defaults and will always appear in the panel whether or not they are blank. Other tags will appear only if there is a value associated with them.

Access Descriptive Tags

Descriptive Tags are a secondary layer of metadata applied to a Tag Field that's typically imported from another associated system, such as Shotgun or Filemaker. When there is a secondary tag associated with a Tag Field and Tag Value, a dark grey arrow will appear to the right of that field.



To view or edit Descriptive Tags, select the dark grey arrow to the right of the desired Tag Field and Tag Value. The Descriptive Tags panel will open. To close the panel, select the arrow again.

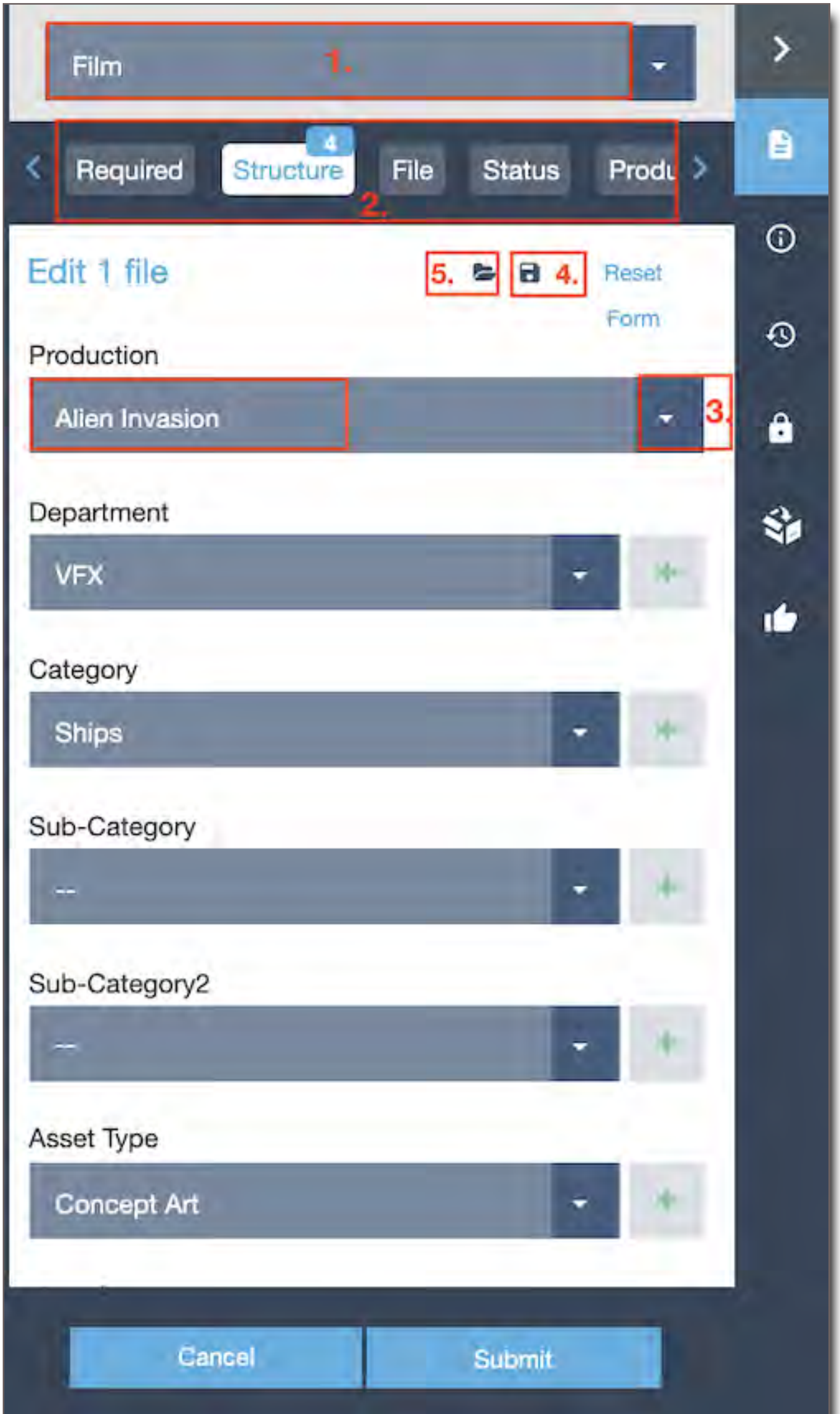


NOTE: Inherited tag information like file codecs, color profiles, camera, or frame rate that embedded information with the file can be found in the File Info Panel.

Editing Asset Details

To edit Asset Details, click the ✎ icon in the tab.

Important: the ability to edit the categorization of Files requires special Permissions. If you need the ability to edit File categorization, please contact your 5th Kind administrator. Changing the way Files are Categorized may cause them to move out of their current place in the system, and into a different Asset Group. It may also change who has access to them. Contact your 5th Kind administrator if you have questions regarding this.



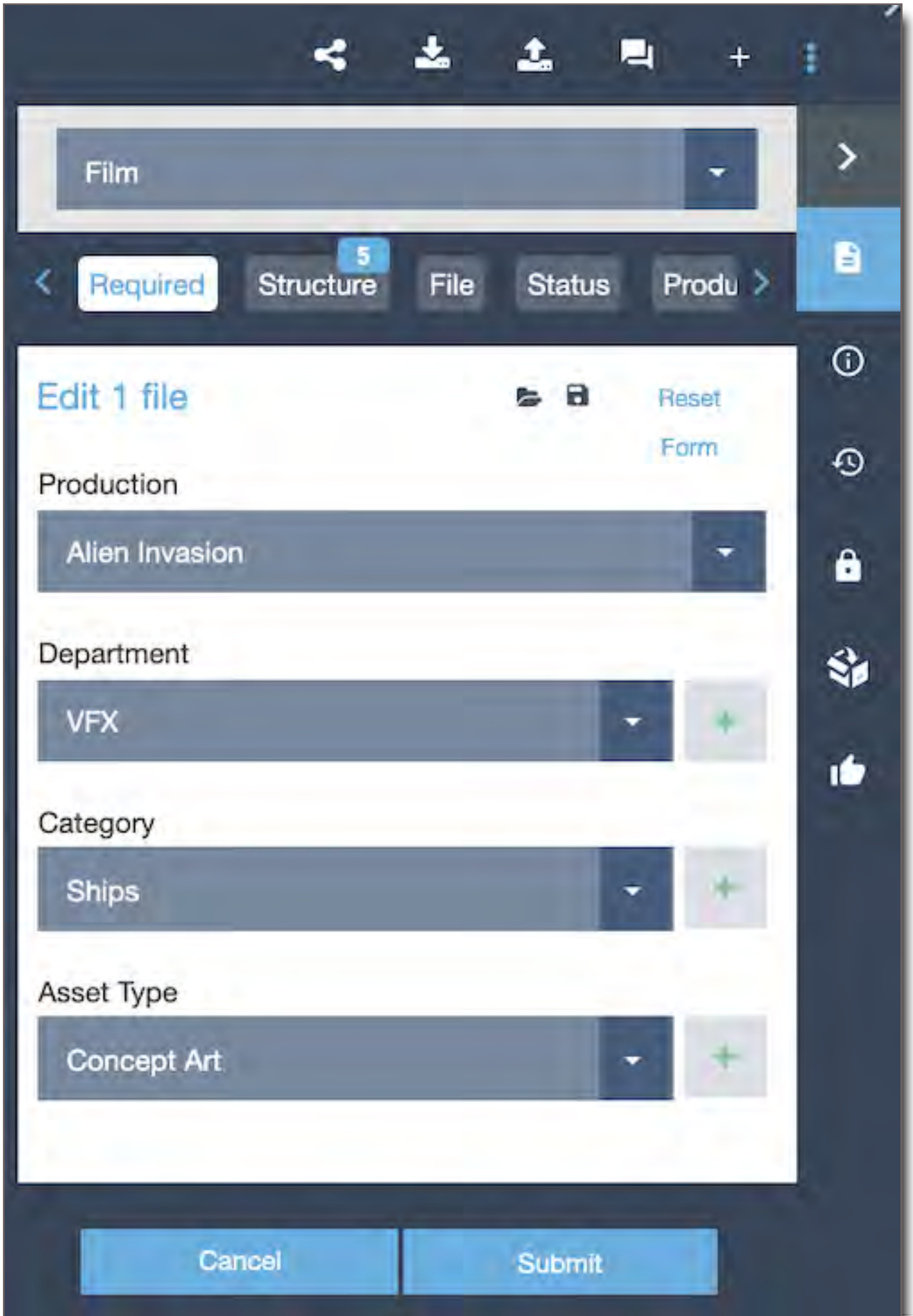
Domain Select

Select the Domain that the uploaded Files belong to. This must be selected in order to categorize your Files.

Tag Group Select

Each Tag Group contains a set of Tag Fields that can be used to categorize your uploads. Click any available Tag Group to view the Fields it contains.

Required Tags



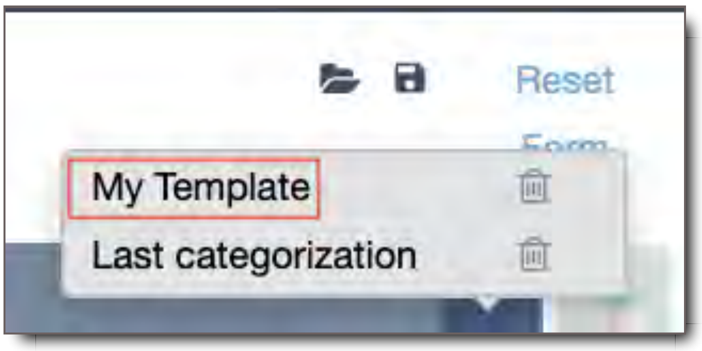
The Required Tag Group will always be available as an option, and contains the Tag Fields from all Tag Groups that have been designated as Required by your Administrator. These fields must be filled in order to submit the categorization.

Save Template

If you commonly use the same settings to categorize Files, you can save time by creating a template. When you create a template, it saves all current Field settings for later use. Click the icon, enter a name for your template, and click Ok to save.

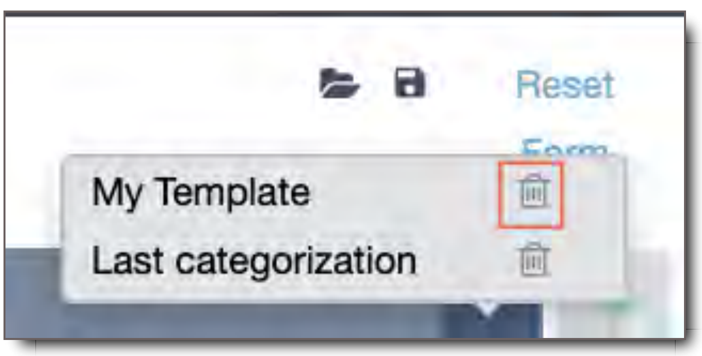
Load Template

Once you've saved a template, you can apply it to any other files. Click the icon, then select the template you would like to apply.



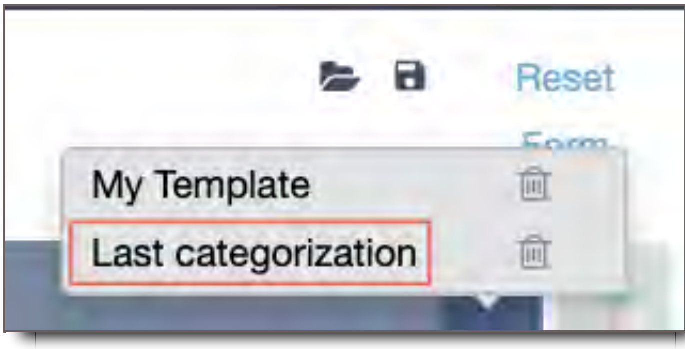
Delete Template

If you'd like to delete a saved template, click the icon to display your templates, then click the icon next to the unwanted template.



Last Categorization

5th Kind will automatically remember the last settings you used to categorize Files. If you'd like to repeat your previous settings, click the icon, and select Last Categorization.



Reset

Click Reset to clear all Fields.

Field

For each Field in the selected Tag Group, click the dropdown to select a value. Some Fields are dependent on another; if so, you must select a value for the other field first.

Add New Value

If there are no values in a Field, or if the value you want is not an option, click the button. Enter the new value, then click Save. To cancel adding a new value, click Cancel.

Submit

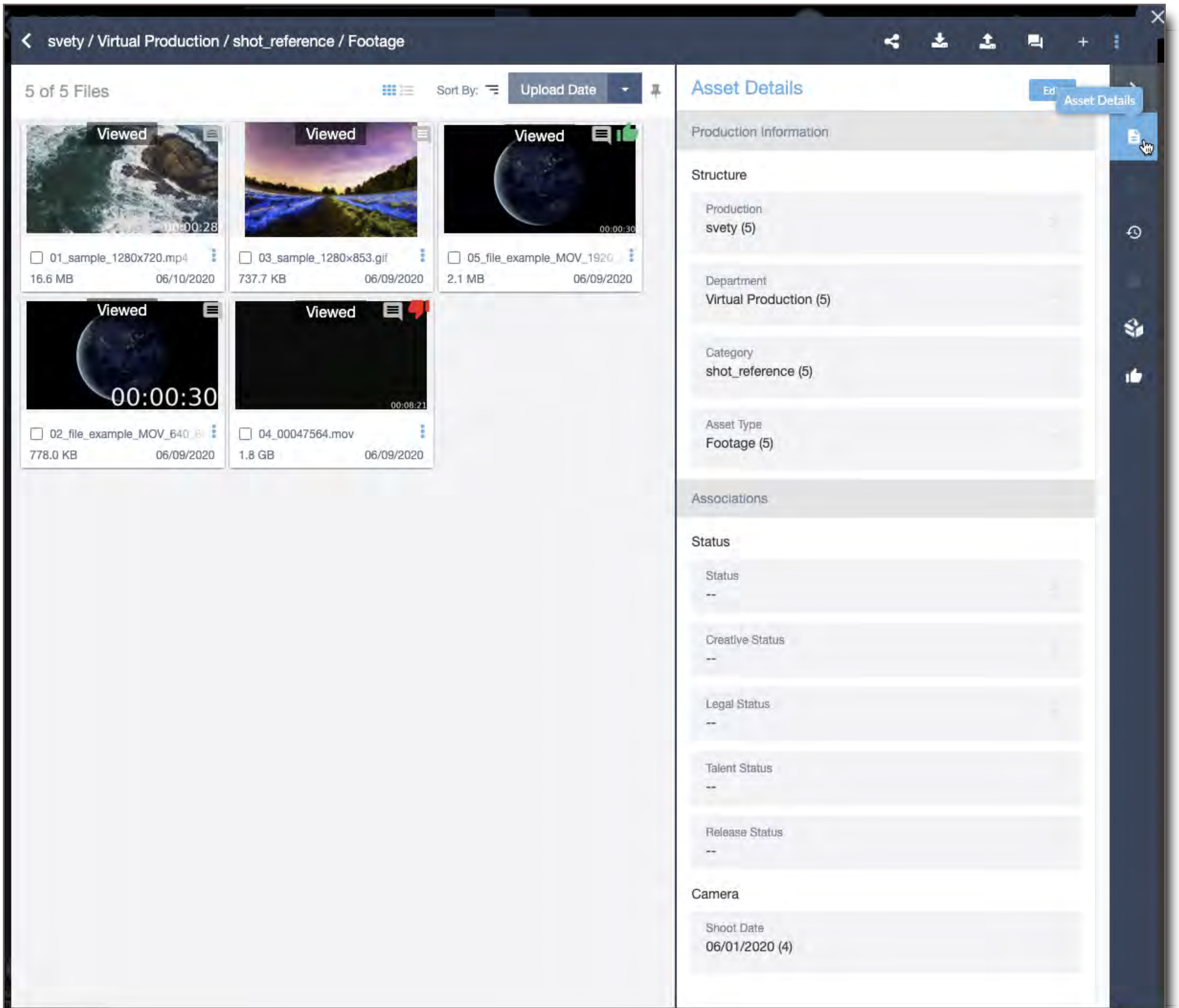
Click to submit your changes.

Cancel

Click to discard any changes you have made, and go back to the Asset Details view.

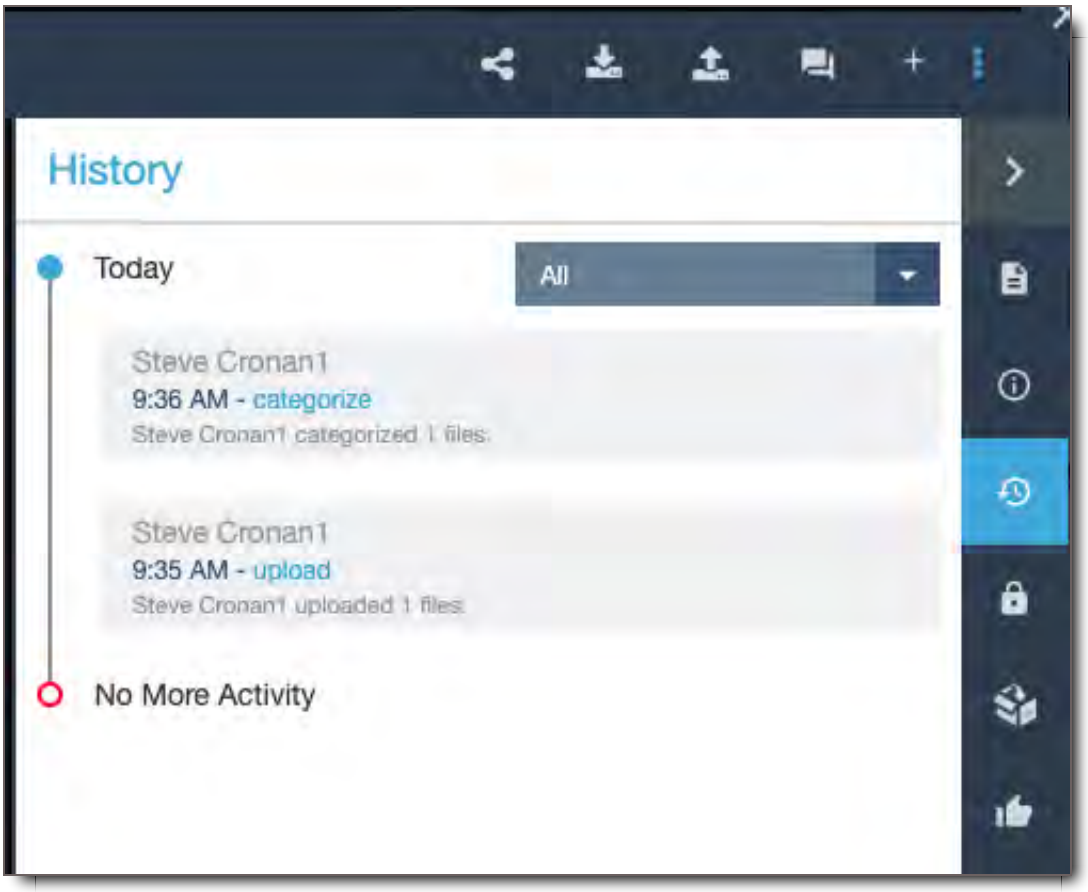
Asset Details

Asset details page allows you to view categorization information of your asset group or an individual asset. This is also where you could access the edit option to modify your asset details. You can access the Asset Details page from the Asset Viewer module when you go into your selected asset group.



Viewer History Panel

The History Tab lets you see every interaction that has been taken with the File you're viewing, including its original upload and every time a User has viewed it.



Filtering

Click the dropdown to filter by different categories of actions:

1. **Comment -** View who Commented on selected Files, and when.
2. **Download -** View who Downloaded selected Files, and when.
3. **Upload -** View who Uploaded selected Files, and when.

4. **Viewed -** View who Viewed selected Files, and when.
5. **Edited -** View who Edited selected Files, including adding them to Packages, and when.
6. **Categorized -** View who Categorized selected Files, and when.
7. **Updated -** View who Updated selected Files, and when.
8. **Deleted -** View who Deleted selected Files, and when.
9. **Created -** View who Created selected Files, and when.

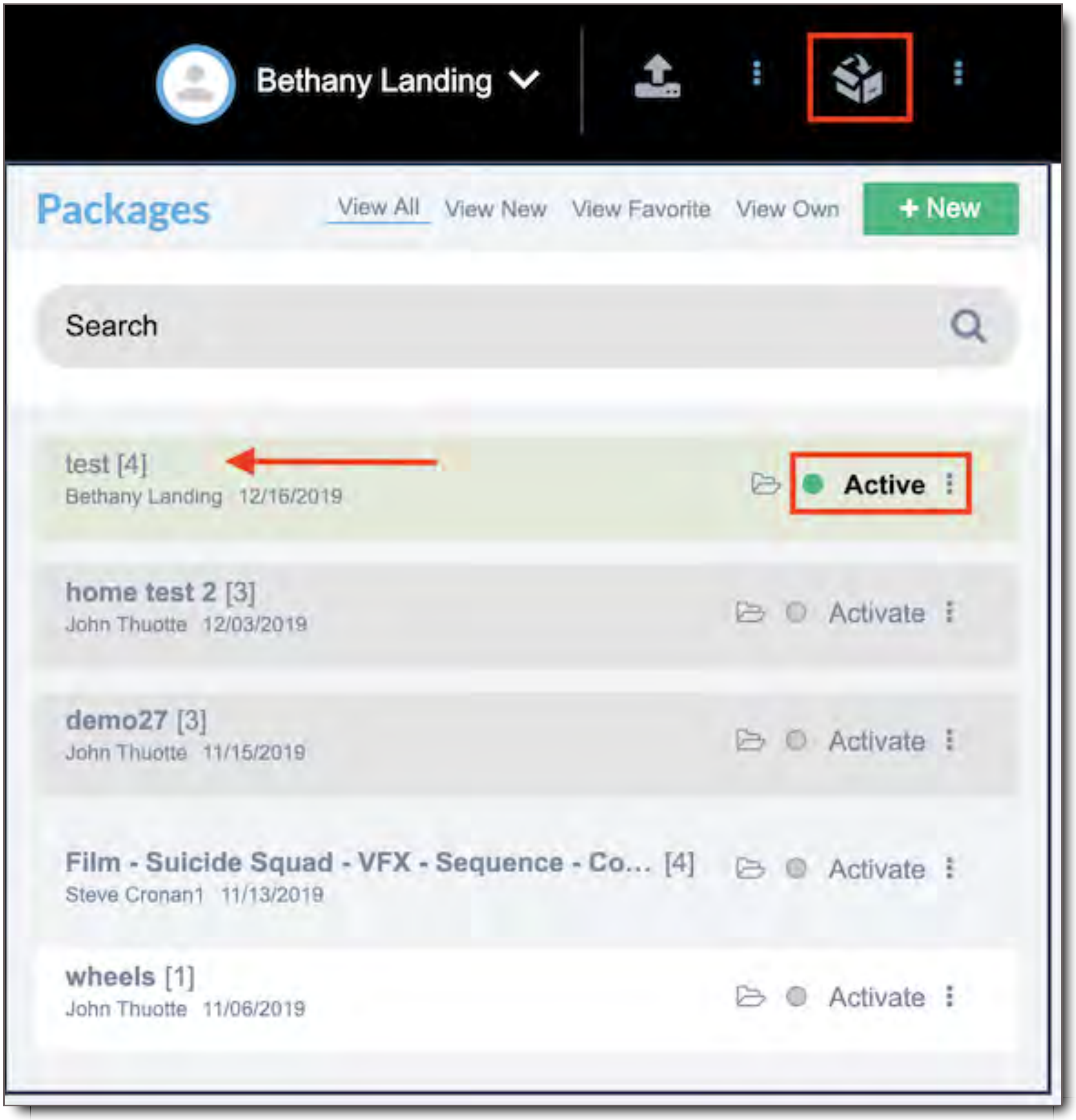
Active Package Panel

The Active Package Tab shows contents of your current Active Package. To activate a package is like turning it on so you can Edit its contents or Share it.

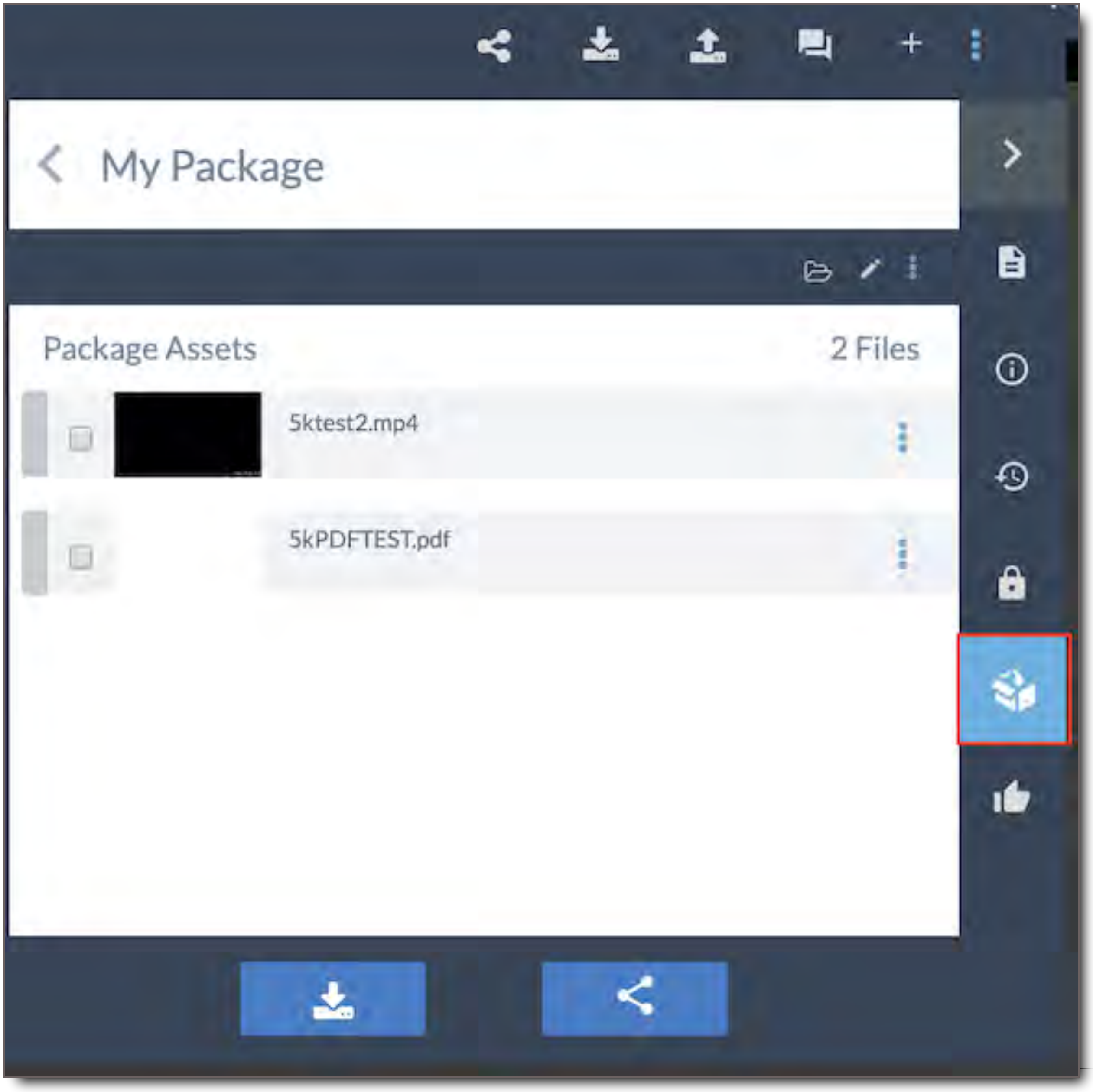
To Activate a package:

- Click on the package icon in the top right corner
- Click on a package from the list and the dot next the package will turn Green to show the package is active.

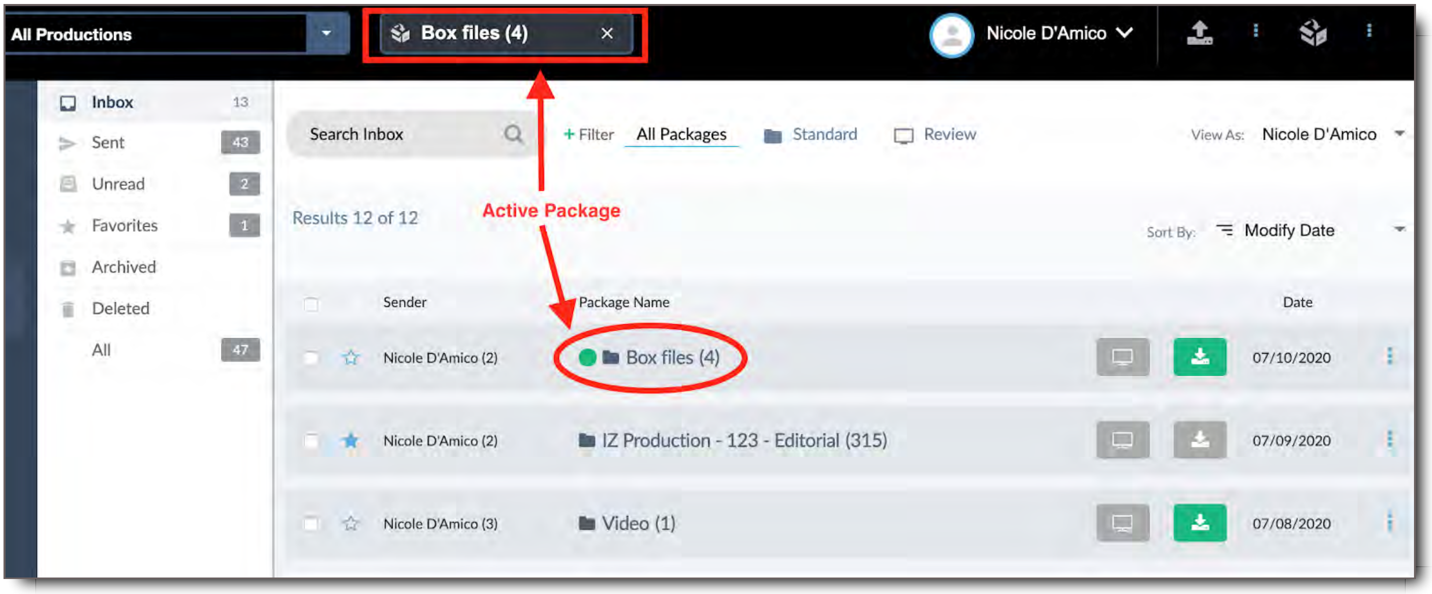
The green dot will also show up in your Inbox next to a previously sent package that you’ve chosen to activate.



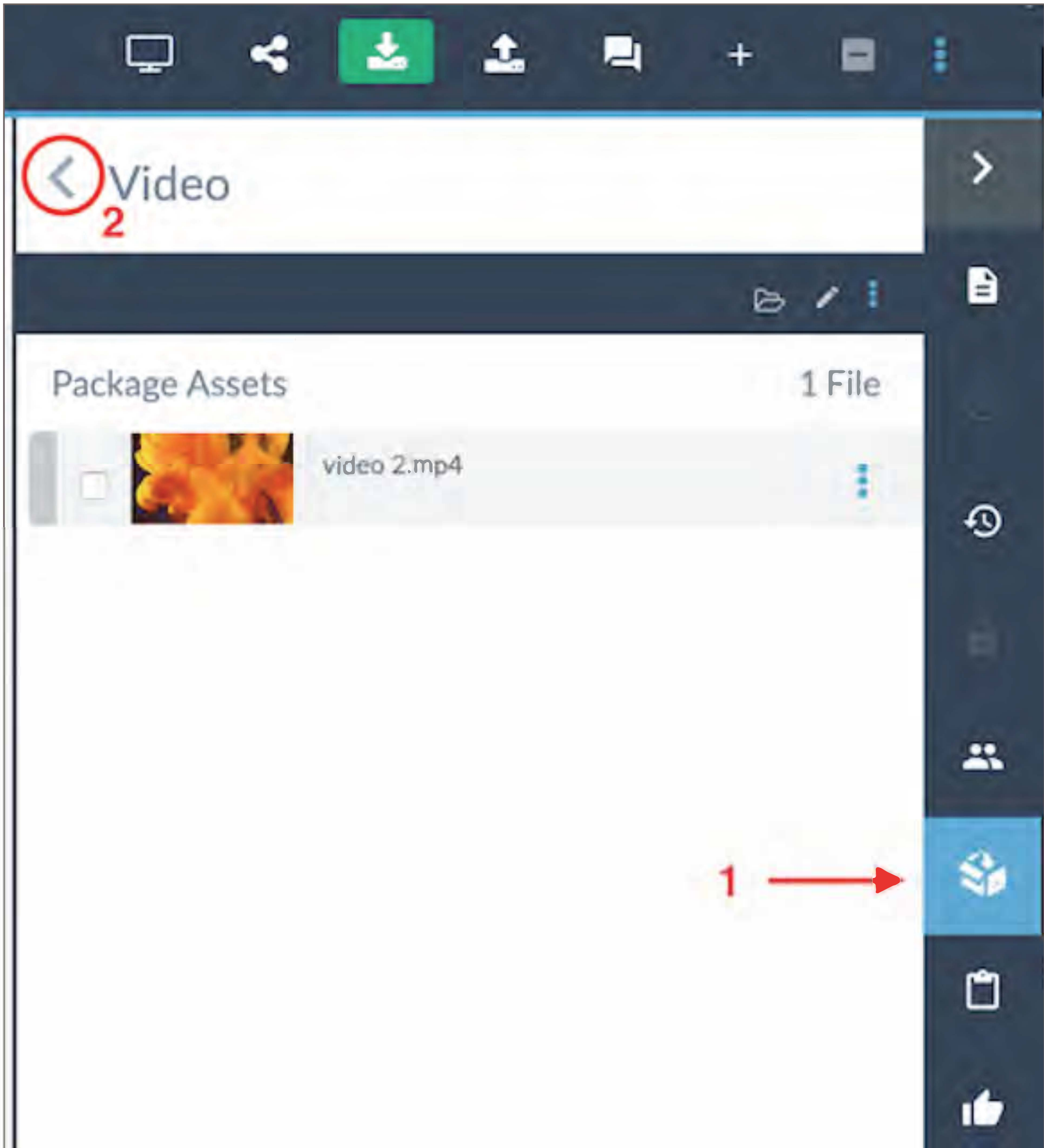
You can also click the package icon when in the asset viewer on the right panel. This will show the assets in the current active package in list mode. Assets in the package can then be edited as seen in this Help module, Modifying Packages .



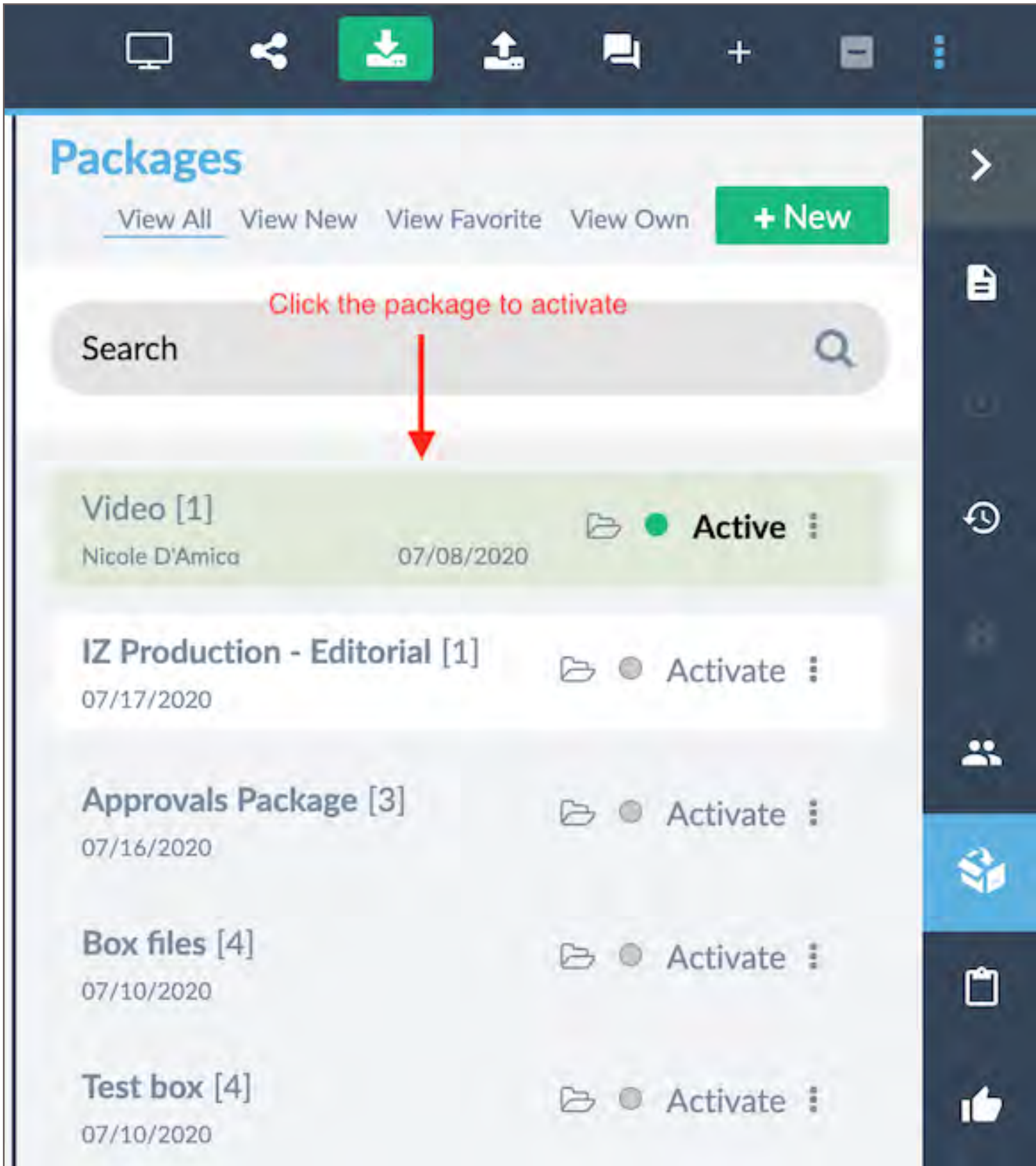
Another way to activate a package is by simply clicking on any package in your inbox. The active package will appear in the top banner as well as in your inbox with a green dot indicating that it is active. Any assets you upload and share via “skip and share” will also become active automatically.



If you are in the package viewer and want to activate a different package, open the package tab and click on the back button. You can then choose any package from the list to activate.

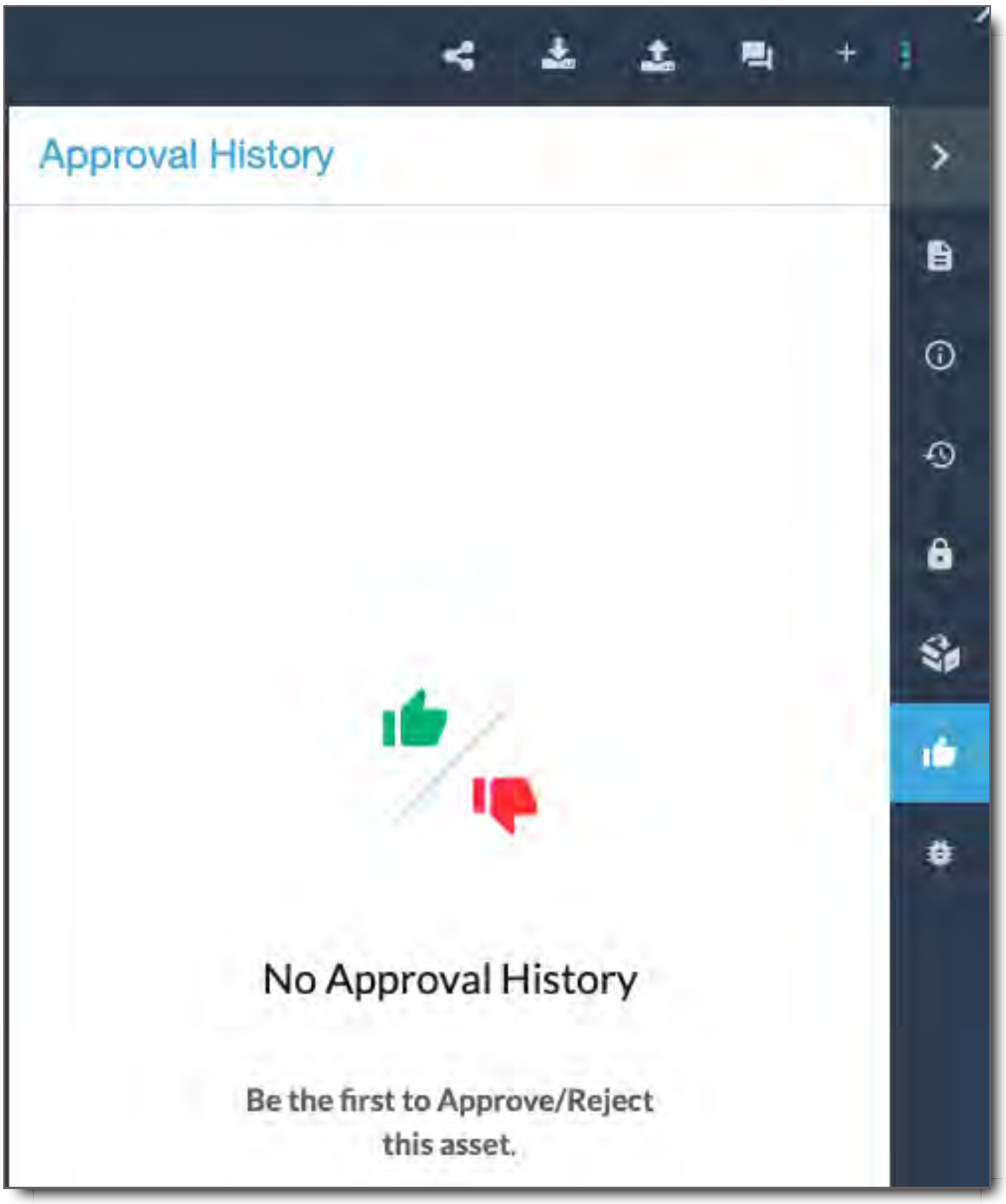


Video
2
Package Assets
1 File
video 2.mp4
1

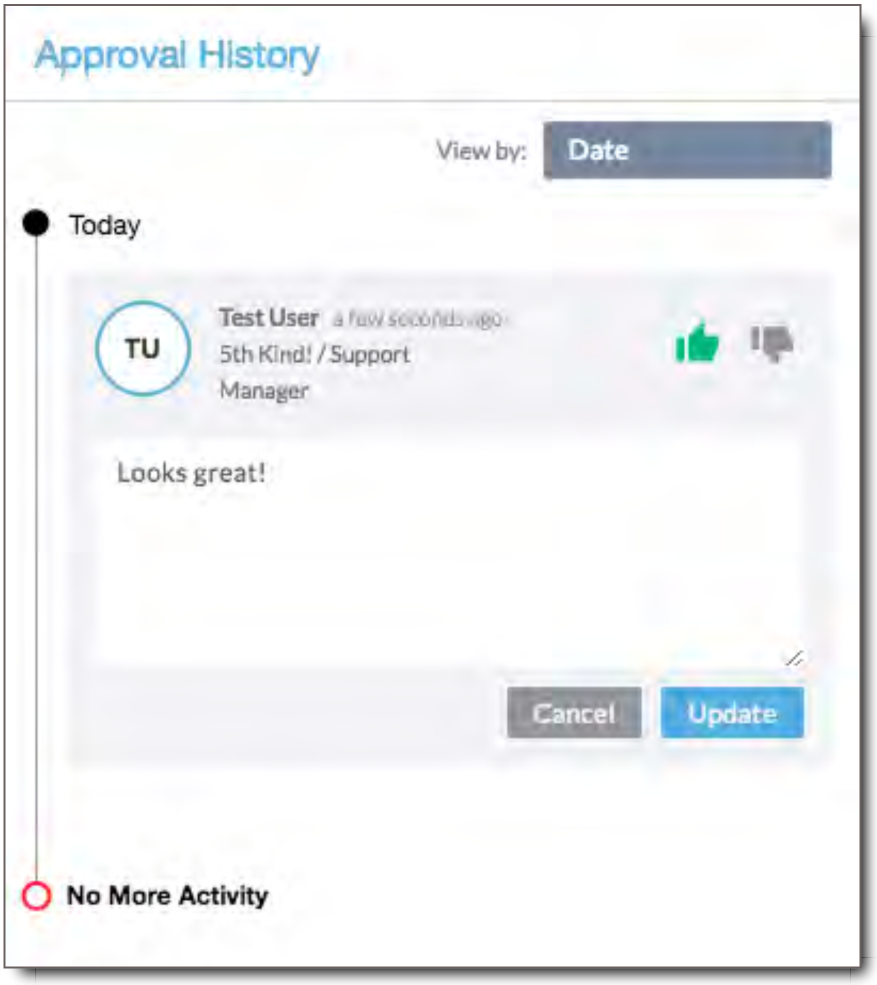

Packages
View All
View New
View Favorite
View Own
+ New
Click the package to activate
Search
Video [1]
Nicole D'Amico
07/08/2020
Active
IZ Production - Editorial [1]
07/17/2020
Activate
Approvals Package [3]
07/16/2020
Activate
Box files [4]
07/10/2020
Activate
Test box [4]
07/10/2020
Activate

Approval History Panel

The Approval History Tab lets you Approve or Reject Files, and lets you see who else has as well.



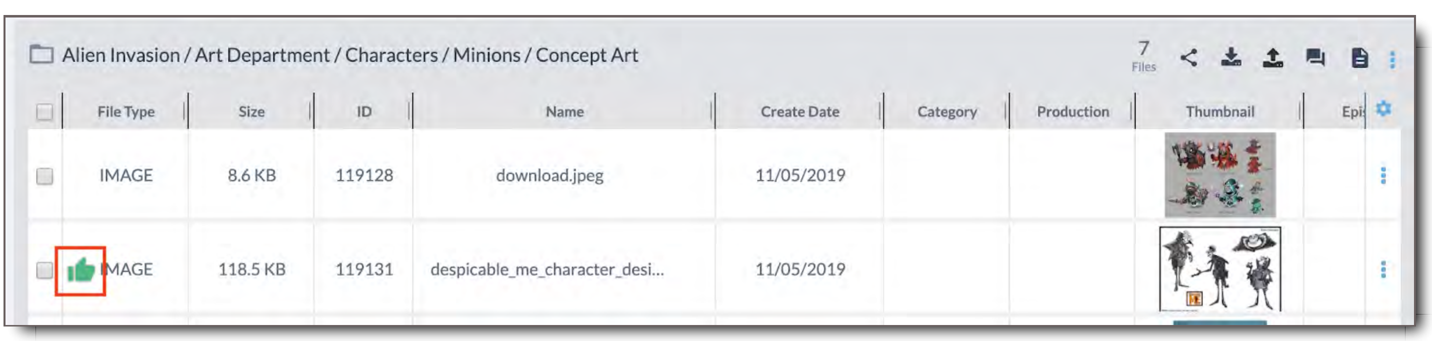
To Approve or Reject a File, just click on the Thumbs-up or Thumbs Down icon.



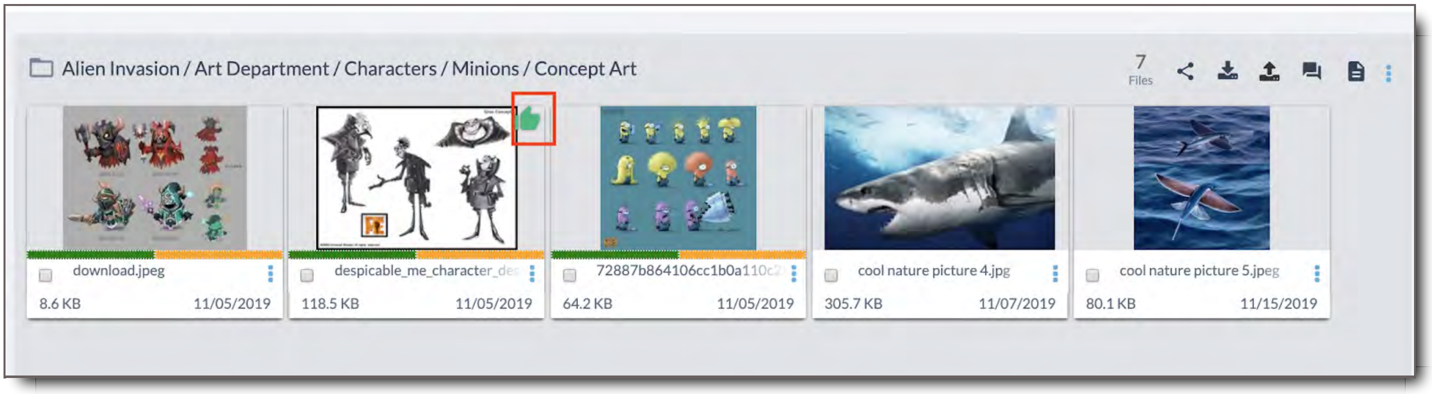
You can then leave a message along with your approval. Click the Update button to save your message.

A thumbs up or thumbs down icon will appear on the image in the asset viewer once approved or rejected.

An example of the thumbs up icon in List Mode:



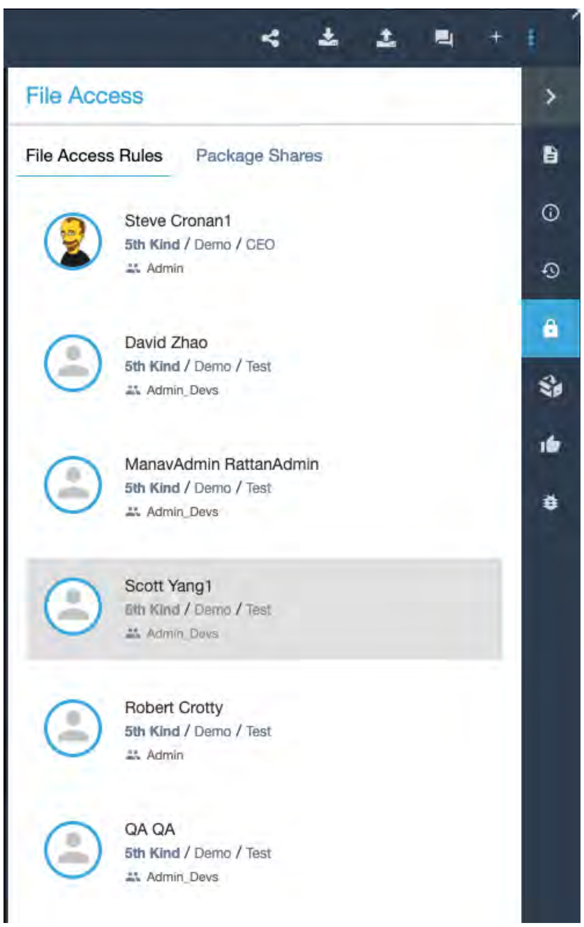
An example of the thumbs up icon in Thumbnail Mode:


Alien Invasion / Art Department / Characters / Minions / Concept Art
7
Files
download.jpeg
8.6 KB
11/05/2019
despicable_me_character_de
118.5 KB
11/05/2019
72887b864106cc1b0a110c
64.2 KB
11/05/2019
cool nature picture 4.jpg
305.7 KB
11/07/2019
cool nature picture 5.jpeg
80.1 KB
11/15/2019

Viewer Access Panel

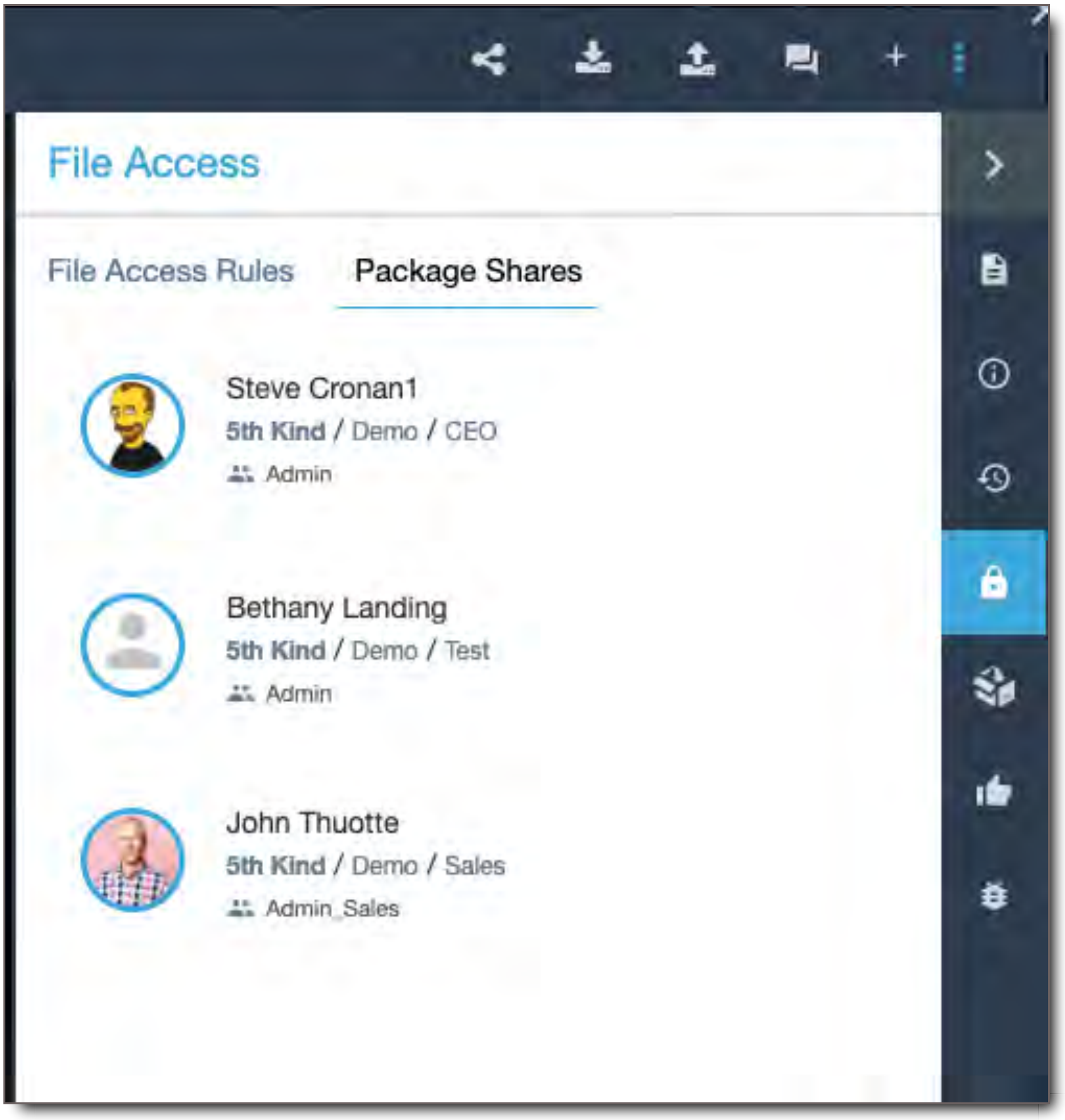
Access Rules

The Users listed in File Access Rules displays the Users who have access Permissions to the selected File or Files because it matches their File Access Rules. View User Roles to learn more about File Access Rules



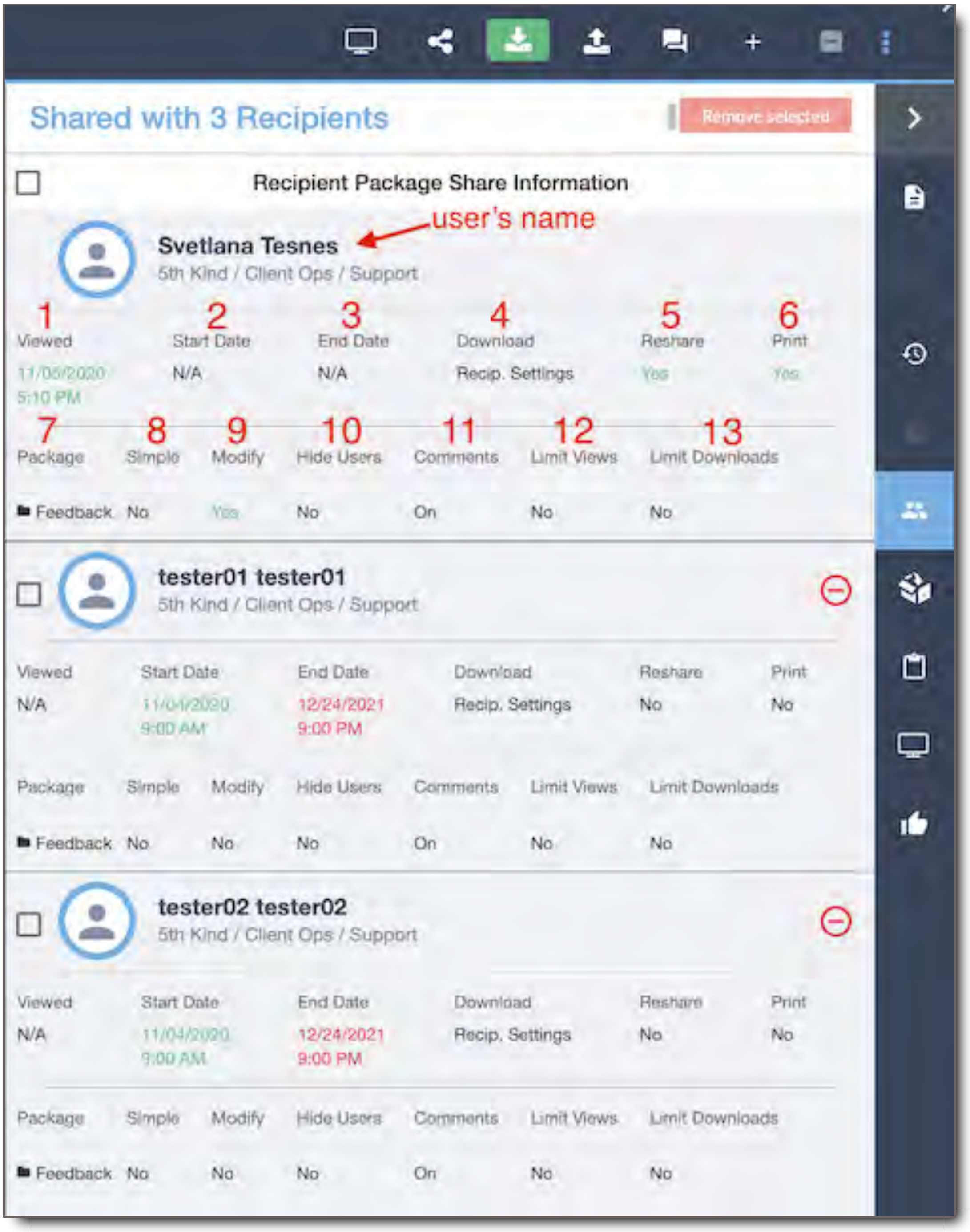
Package Shares

The Users listed in Package Shares displays the Users who are able to view the selected File or Files because they have been shared with them in a Package. Learn more about sharing Packages with other Users.



Package Recipients Panel

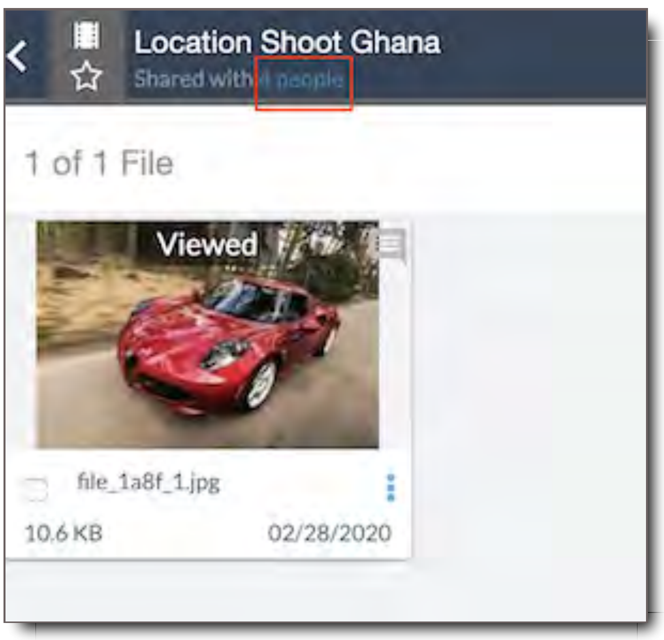
With the appropriate user permissions you will see this icon representing the Recipients that the package you are currently viewing has been shared with. Included in the information provided is the User's name, Department and Title from their User Profile, their latest view of the package as well as their permissions allowed during the share process (ie, if the user can forward, edit, download or print the contents).



1. **Viewed:** Shows the date and time of when a user last viewed this package share.
2. **Start Date:** Shows the start date and time of when a user will have permission to access this package. A user will not have access to the package before the listed start date. If N/A is listed here, a user can access the package at any time without time restrictions.
3. **End Date:** Shows the end date and time of when a user will no longer have permission to access this package. A user will not have access to the package after the listed end date. If N/A is listed here, a user can access the package at any time without time restrictions.
4. **Download:** Shows user's download permissions. The permissions here are: yes (user is allowed to download), no (user is not allowed to download), Recip. Settings (user will be allowed to download according to the permissions assigned to their User Role and set up by the System Administrator.)
5. **Reshare:** Shows if a user is allowed to reshare this package, yes or no.

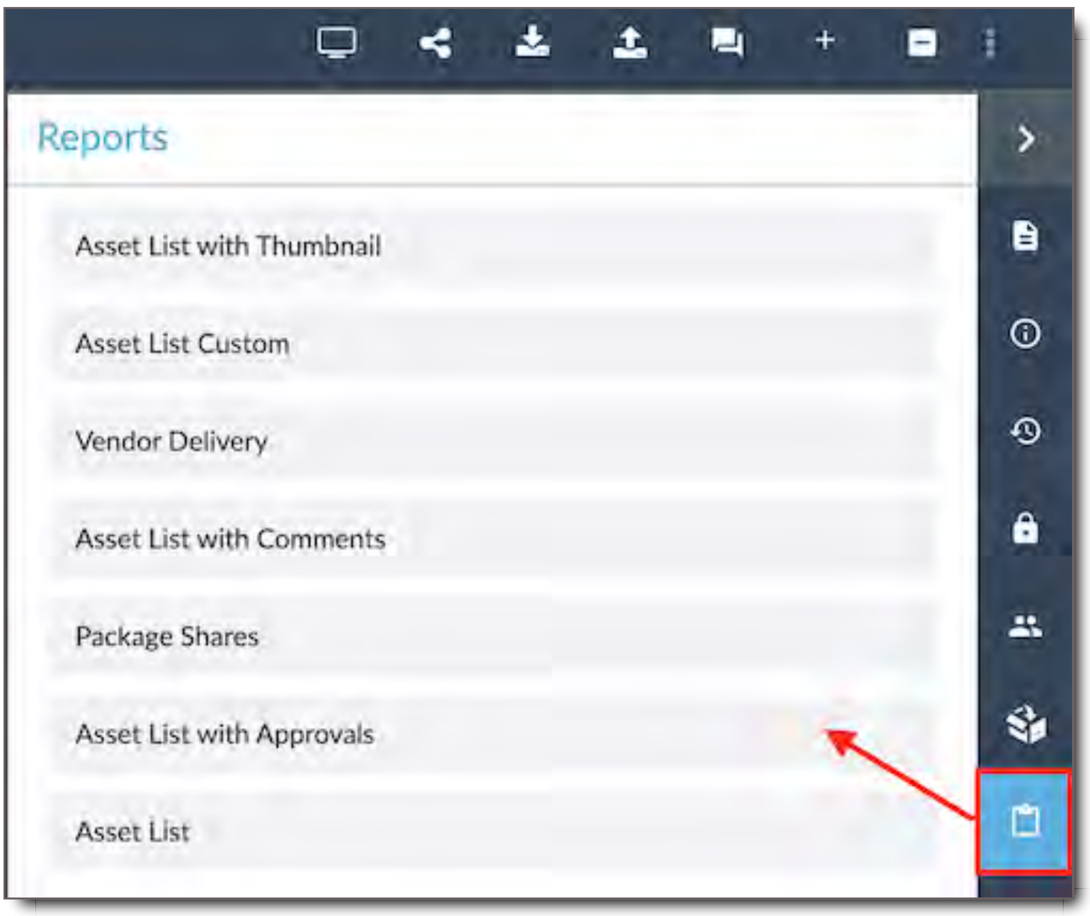
6. **Print:** If there is a document in the package that is allowed to be printed it will be reflected here.
7. **Package:** Shows the type of package being shared with you. Some of the types of packages you will see listed here are: Feedback (as illustrated above), Dailies, Approval, Sync Review, & Download.
8. **Simple:** Shows if this package will open in Simple Viewer for recipients.
9. **Modify:** Shows whether a user has a permission to modify this package.
10. **Hide Users:** Shows if this package is set with the permission to hide users.The permissions here are: yes (recipients cannot see each other on this package), no (recipients can see each other on the package).
11. **Comments:** Shows if a commenting option is enabled for recipients on this package.
12. **Limit Views:** Shows if a recipient has a limited amount of views set for this package. If 'no' is listed, it means a recipient has unlimited views for this package.
13. **Limit Downloads:** Shows if a recipient has a limited amount of downloads set for this package. If 'no' is listed, it means a recipient has unlimited downloads for this package.

You can get to the Recipient's panel by clicking on the '4 people.'

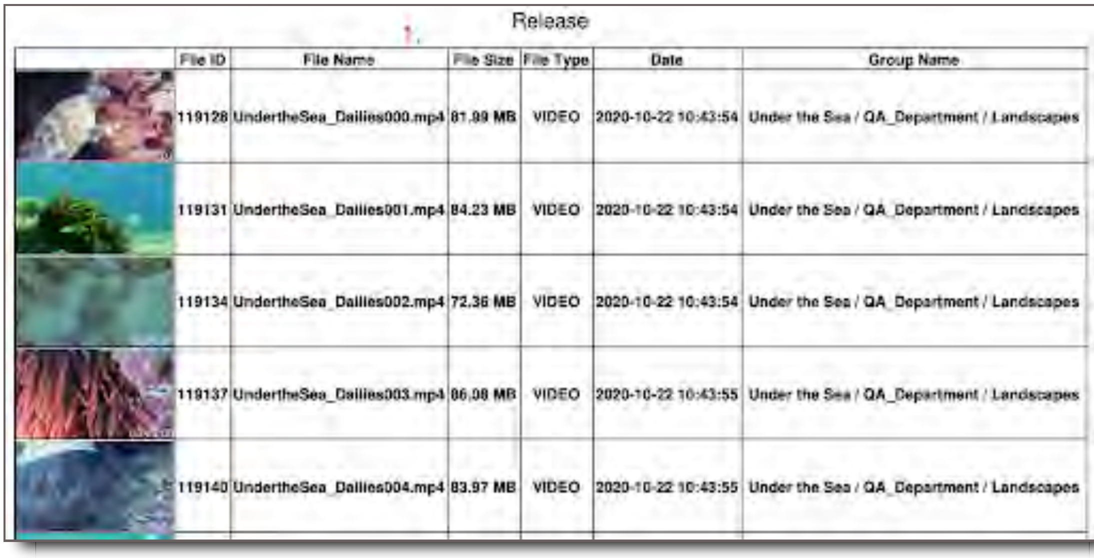


Export Report Panel

Export Report The Export Report tab lists package reports available for download.

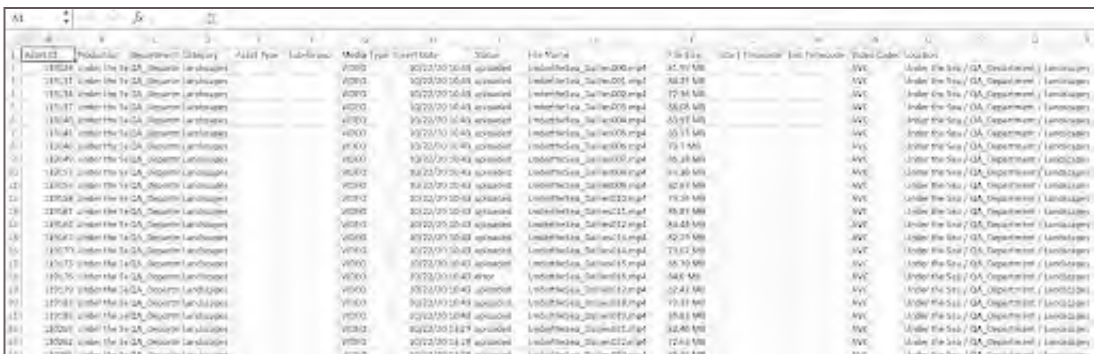


1. Asset List with Thumbnail - shows a list of all the assets in the package and includes an image of the thumbnail of each asset.

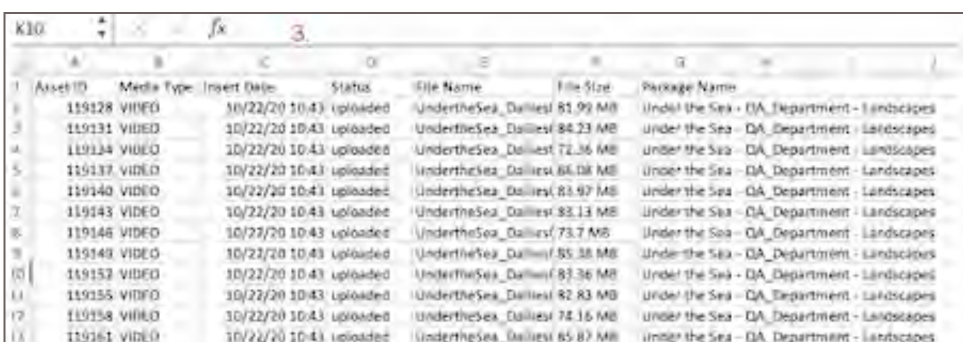


	File ID	File Name	File Size	File Type	Date	Group Name
	119128	UndertheSea_Dailies000.mp4	81.99 MB	VIDEO	2020-10-22 10:43:54	Under the Sea / QA_Department / Landscapes
	119131	UndertheSea_Dailies001.mp4	84.23 MB	VIDEO	2020-10-22 10:43:54	Under the Sea / QA_Department / Landscapes
	119134	UndertheSea_Dailies002.mp4	72.36 MB	VIDEO	2020-10-22 10:43:54	Under the Sea / QA_Department / Landscapes
	119137	UndertheSea_Dailies003.mp4	86.08 MB	VIDEO	2020-10-22 10:43:55	Under the Sea / QA_Department / Landscapes
	119140	UndertheSea_Dailies004.mp4	83.97 MB	VIDEO	2020-10-22 10:43:55	Under the Sea / QA_Department / Landscapes

2. Asset List Custom - Opens an Excel document containing various data about each asset in the package, including timecode information, if available.



3. Vendor Delivery - Opens an Excel document containing data about each asset in the package. Similar to Asset List report but with fewer details.



Asset ID	Media Type	Insert Date	Status	File Name	File Size	Package Name
119128	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	81.99 MB	Under the Sea - QA_Department - Landscapes
119131	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	84.23 MB	Under the Sea - QA_Department - Landscapes
119134	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	72.36 MB	Under the Sea - QA_Department - Landscapes
119137	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	86.08 MB	Under the Sea - QA_Department - Landscapes
119140	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	83.97 MB	Under the Sea - QA_Department - Landscapes
119143	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	83.13 MB	Under the Sea - QA_Department - Landscapes
119146	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	73.7 MB	Under the Sea - QA_Department - Landscapes
119149	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	85.38 MB	Under the Sea - QA_Department - Landscapes
119152	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	87.36 MB	Under the Sea - QA_Department - Landscapes
119155	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	82.83 MB	Under the Sea - QA_Department - Landscapes
119158	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	74.16 MB	Under the Sea - QA_Department - Landscapes
119161	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies	65.87 MB	Under the Sea - QA_Department - Landscapes

4. Asset List with Comments - Shows all the comments for each asset in the package. It shows the commenter as well as the time/date stamp of the comment and who the comment was in reply to if applicable.

	Asset ID	Media Type	Insert Date	Status	File Name	File Size	Comment ID	Comment	Commenter	Comment Dt	In Reply To
2	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	59344		Nicole D'Am	2020-12-11T23:12:32+00:00	
3	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	58255		Jon Jon San	2020-12-07T21:53:10+00:00	
4	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	58234	dailies review	Jon Jon San	2020-12-07T13:43:19+00:00	
5	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44599	123123123	Release1 Ad	2020-10-22T13:51:18+00:00	
6	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44596		AdminQA (S	2020-10-22T13:50:41+00:00	
7	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44482	123123123	Release1 Ad	2020-10-22T13:20:13+00:00	
8	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44479	12312312aaaaaaa	Release1 Ad	2020-10-22T13:19:14+00:00	
9	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44386	test	Jon Jon San	2020-10-22T13:04:38+00:00	
10	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44371	test	Jon Jon San	2020-10-22T13:02:40+00:00	
11	119128	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	85975852	44020	test	Jon Jon San	2020-10-22T10:46:50+00:00	
12	119131	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	88318028	59344		Nicole D'Am	2020-12-11T23:12:32+00:00	
13	119131	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	88318028	58255		Jon Jon San	2020-12-07T21:53:10+00:00	
14	119131	FILE_TYPE_V	2020-10-22T	uploaded	UndertheSea	88318028	58234	dailies review	Jon Jon San	2020-12-07T13:43:19+00:00	

5. Package Shares - Shows all of the users the package has been shared with. You can see when/if they viewed the package and when the package starts or expires if it had been set with a start and end date.

	Package Name	First Name	Last Name	Expiry	Viewed	Created
2	Under the Sea Dailies	Nicole	D'Amico		2020-12-15T03:35:40+00:00	2020-11-05T00:27:57+00:00
3	Under the Sea Dailies	Nicole	D'Amico			2020-11-05T00:27:57+00:00
4	Under the Sea Dailies	Qa	Standard		2020-12-02T19:01:52+00:00	2020-11-05T03:46:03+00:00
5	Under the Sea Dailies	test	mfa			2020-11-20T23:15:33+00:00
6	Under the Sea Dailies	Andy	Rosic			2020-11-24T19:03:34+00:00
7	Under the Sea Dailies	Igor	Zhukov		2020-12-14T17:25:35+00:00	2020-11-24T19:03:34+00:00
8	Under the Sea Dailies	Sergey	Galkin			2020-12-02T18:57:34+00:00

6. Asset List with Approvals - Shows the approval history for each asset in the package.

	Asset ID	Media Type	Insert Date	Status	File Name	File Size	Review User	Review	Date	Review Status
2	124804	FILE_TYPE_V	2020-10-26T	uploaded	UndertheSea	88078737	Jon Jon	San Juan	2020-10-28T	Approved

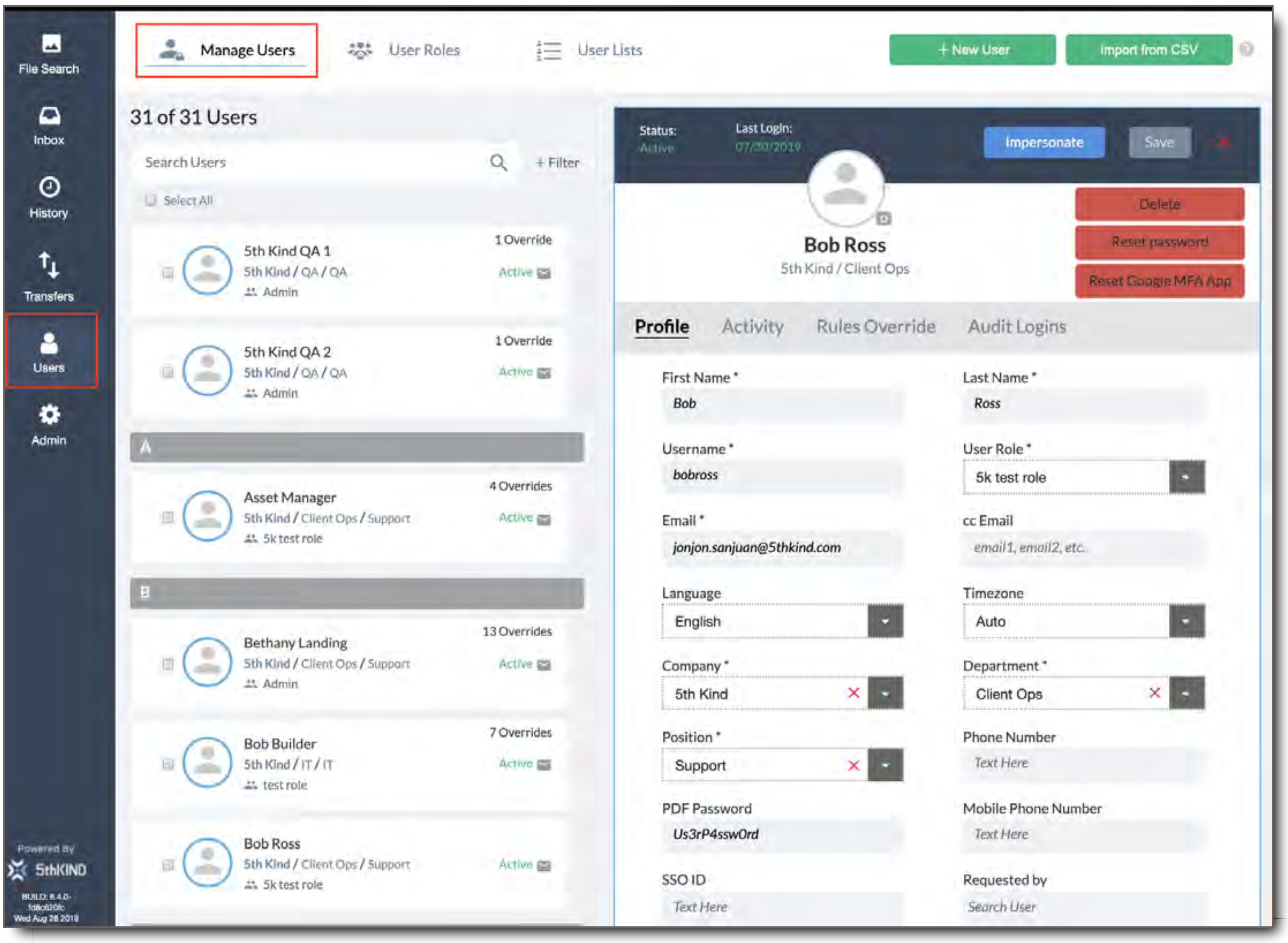
7. Asset List - Lists basic information for each asset in the package.

A1 fx Asset ID 7.

	A	B	C	D	E	F
1	Asset ID	Media Type	Insert Date	Status	File Name	File Size
2	119128	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies000.mp4	81.99 MB
3	119131	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies001.mp4	84.23 MB
4	119134	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies002.mp4	72.36 MB
5	119137	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies003.mp4	86.08 MB
6	119140	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies004.mp4	83.97 MB
7	119143	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies005.mp4	83.13 MB
8	119146	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies006.mp4	73.7 MB
9	119149	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies007.mp4	85.38 MB
10	119152	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies008.mp4	83.36 MB
11	119155	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies009.mp4	82.83 MB
12	119158	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies010.mp4	74.16 MB
13	119161	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies011.mp4	85.87 MB
14	119164	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies012.mp4	83.44 MB
15	119167	VIDEO	10/22/20 10:43	uploaded	UndertheSea_Dailies013.mp4	[illegible]

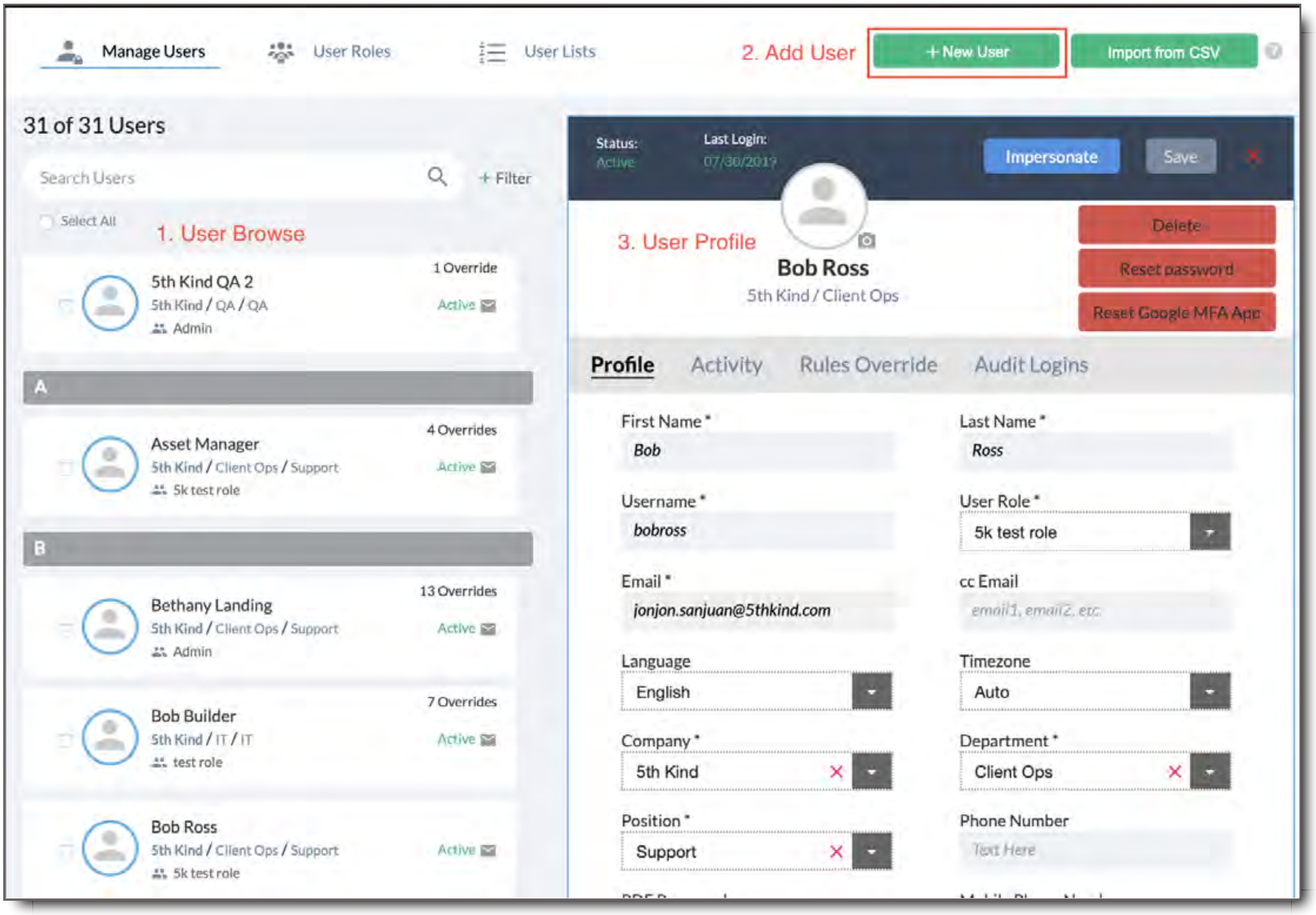
Manage Users

Use this section to view and modify User accounts in the system.



Note: The User accounts you have access to view and modify will depend on the permissions granted to you. If you feel you need to see additional User accounts, or need the ability to modify User accounts, please contact your system Administrator.

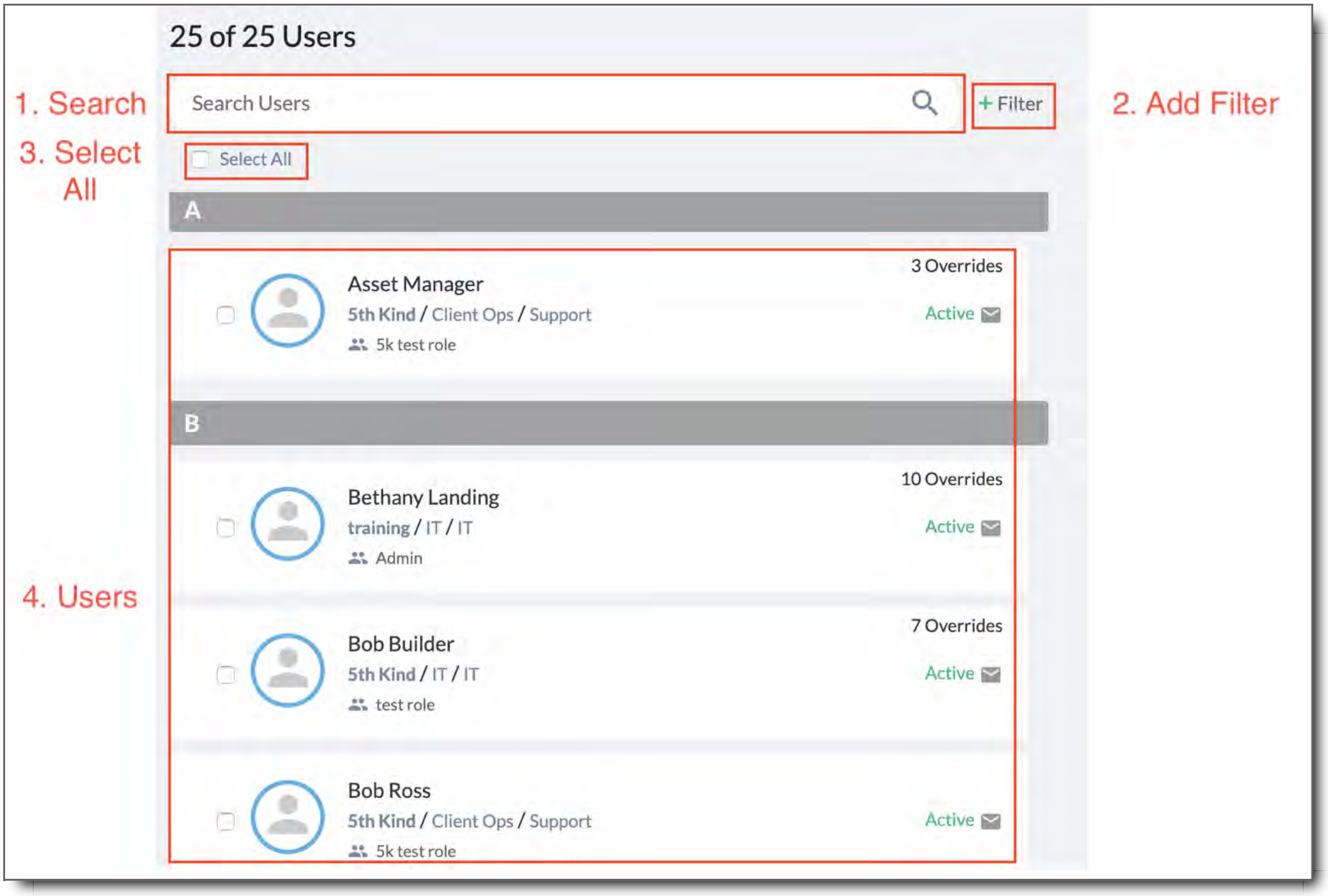
Manage User Elements



1. **User Browse** - Search and filter users
2. **Add User(s) Buttons** - Add a single user or group of users
3. **User Profile** - Profile details of a selected User

User Browse

This section shows all available User accounts, and lets you search and filter within them.



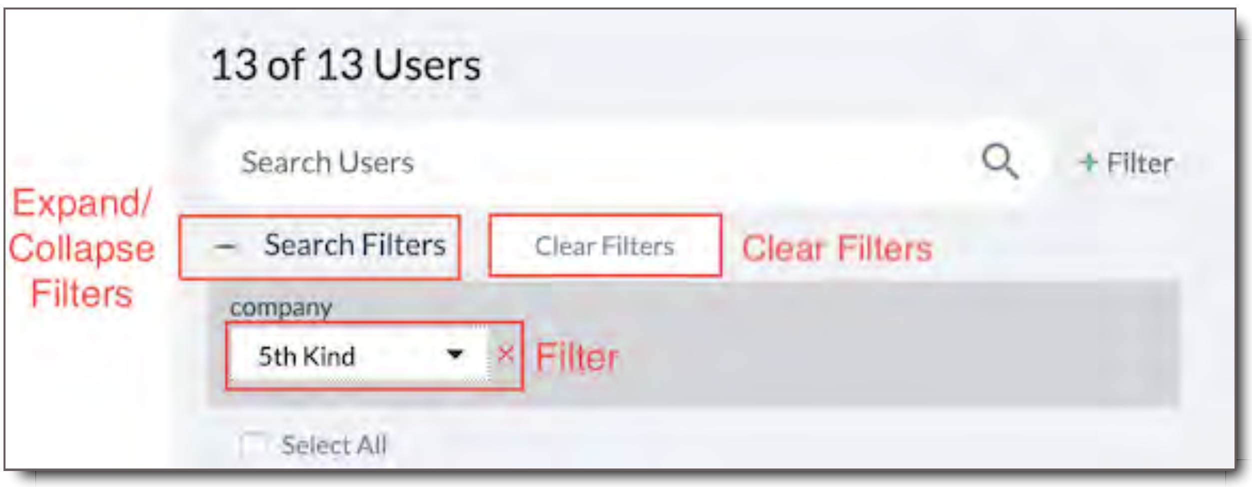
1. Search

Type a User's name to search by it, and click the 🔍 or press Enter to search. To clear a search, delete the name and search again.

2. Add Filter

Click the +Filter button filter User’s accounts by their Company, Department, User Access Role the user belongs to, Device Type user has access to and User’s current Status in the system (active, locked or expired). You can apply multiple filters when searching for users.

Select a parameter to filter by.



Filter

Select a value to filter by. You can add multiple filters at once. Click the (**—**) to remove a Filter.

Expand/Collapse Filters

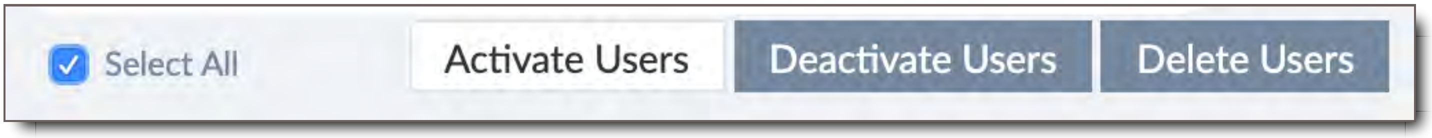
Click to hide the filters. Click again to show them.

Clear Filters

Remove all Filters to go back to the full list of Users.

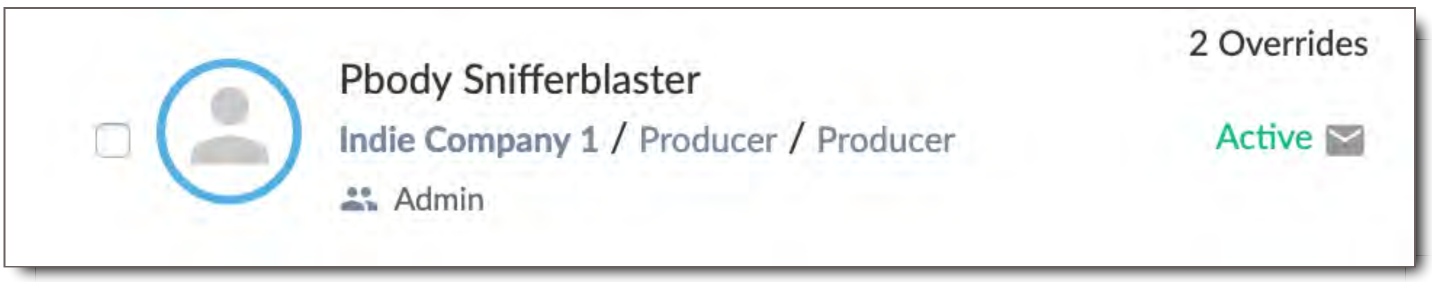
3. Select All

Check this to select all currently loaded User Accounts. Once you select all (or check individual boxes next to users) you can Activate, Deactivate or Delete Users in bulk.



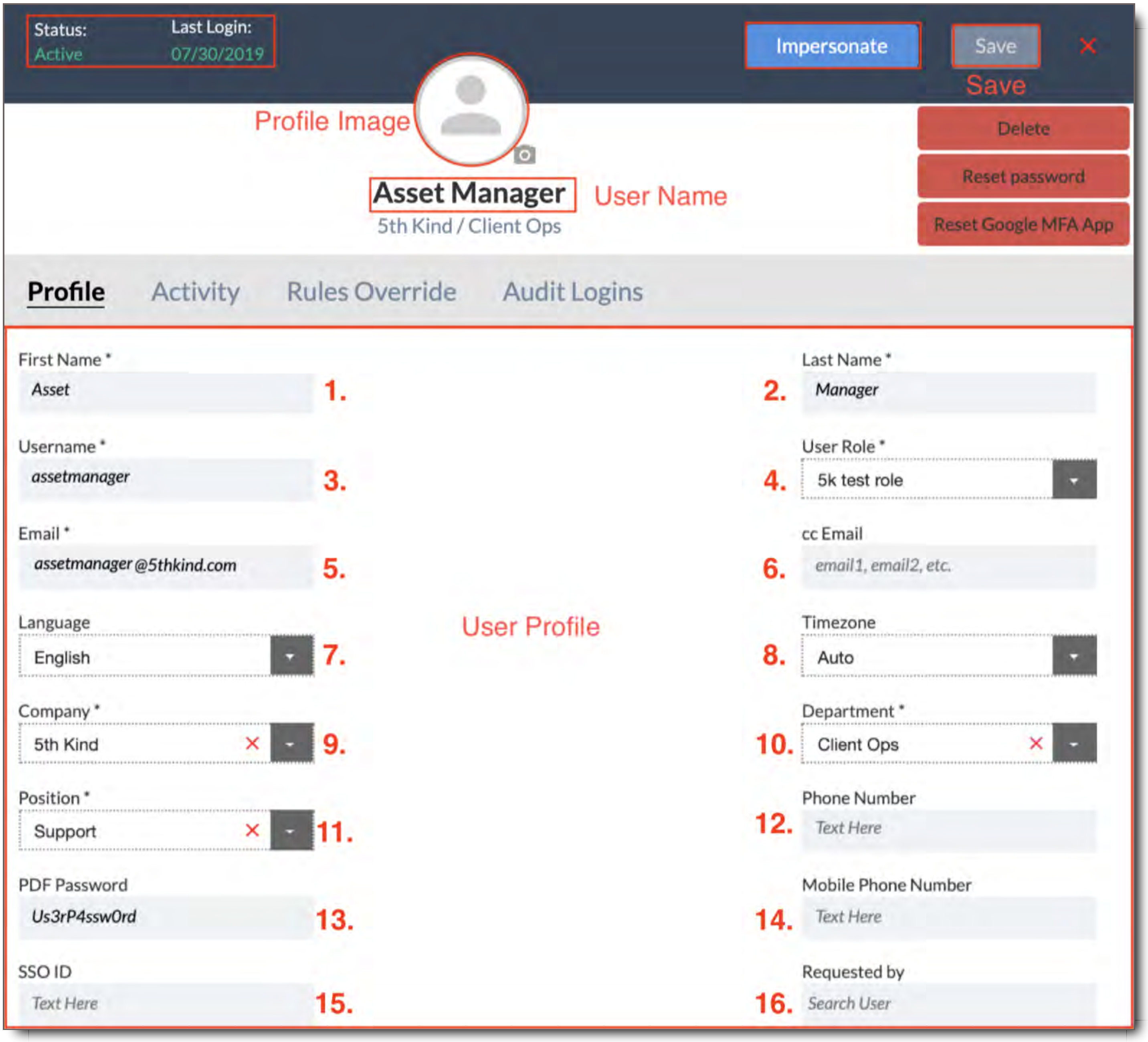
4. Users

Click on any User to view their profile. This box contains the User’s Name, an avatar if uploaded, the company, department, position and User Access Role that the user belongs to. In the top right are the number of Access Overrides for the user outside of their role. It also displays if the User is Active in the system and is set up for Email notifications.



User Profile

When you select a User in User Browse, the person’s User Profile will open on the right side. Here you can view it, or edit it, if you have the proper permissions.



Profile Tab

This is where a User's account is set up when adding a New User for the first time or when Editing an existing user.

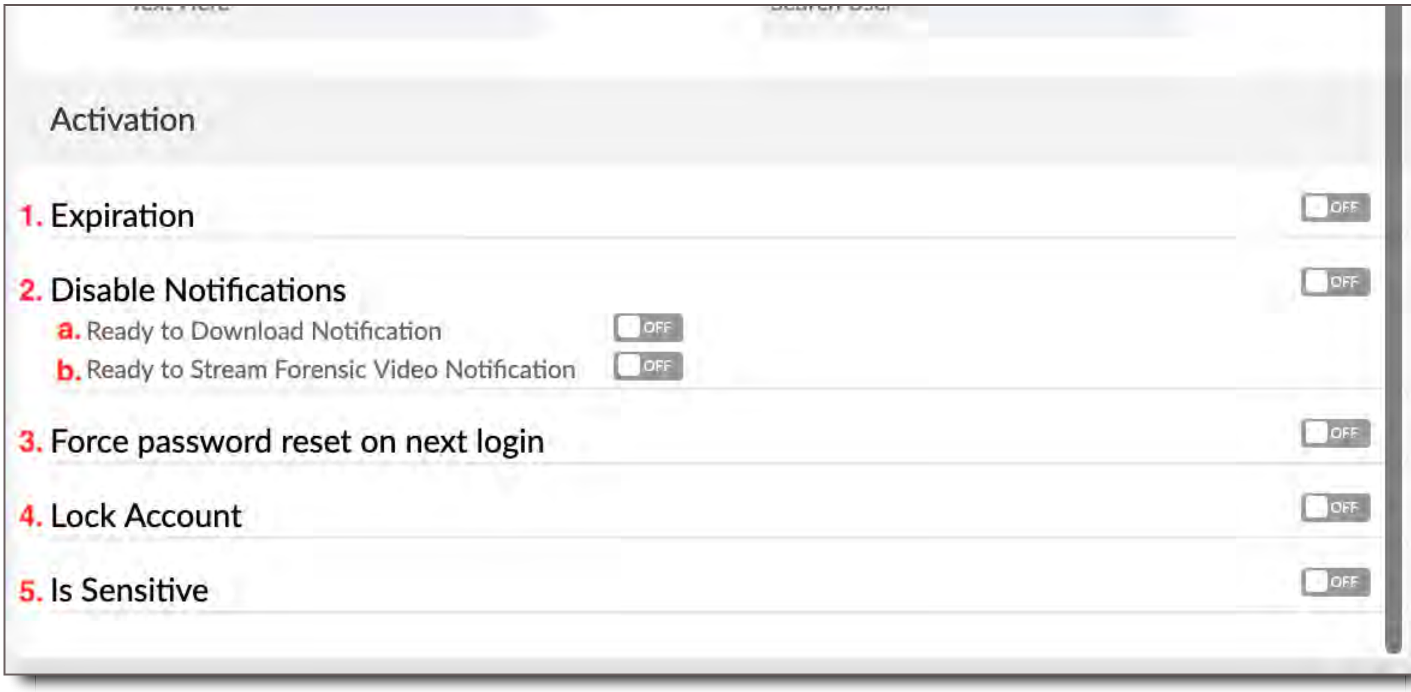
1. **First Name** - The User's First Name
2. **Last Name** - The User's Last Name
3. **Username** - The User's account name. This is what a user uses to log in, and must be unique.
4. **User Role** - What User Role the user is assigned to in CORE. User Roles determine what permissions a User has within the system, and which files, if any, they are allowed to access. User Roles must be created before they can be applied. If you do not know which Role to apply to a User, contact your system Administrator.
5. **Email** - The email address linked to the account. This is where notification emails from the system will

be sent, including welcome emails for a new account, password reset notifications, and notifications of received packages, ingest notifications etc.

6. **cc. Email Addresses** - cc.email addresses. This option is included so that another user can receive a CC of notifications that are sent to the main email addres associated with the account. Most often used by assistants.
7. **Language** - Currently English is the only language available. Future enhancements will allow the system to be displayed in other languages to the User.
   NOTE: Changing the language of the entire system requires additional Administrative adjustments.
8. **Timezone** -If the timezone is set to Auto, it is set to your browser timezone. Admins can adjust user's timezone if necessary. Timezone is set to UTC time. You can find your UTC timezone here.
9. **Company** - The Company the User works for. This field is used for filtering when searching for Users. If the User's Company does not exist in the list, type it into the space at the top of the list of companies and click Add New Value.
10. **Department** - The Department the User works in. This field is used for filtering when searching for Users. If the User's Department does not exist in the list, type it into the space at the top of the list of departments and click Add New Value.
11. **Position** - The Position or title of the User within the company. This field is used for filtering when searching for Users. If the User's position does not exist in the list, type it into the space at the top of the list of departments and click Add New Value.
12. **Phone Number** - The User's phone number
13. **PDF Password** - PDFs can be sent to a User with password protection. Set the password that will be able to unlock any of these PDFs here.
14. **Mobile Phone Number** - The User's mobile phone number.
15. **SSO ID** - If your organization uses Single Sign-On, enter the User's SSO ID here.
16. **Requested By** - If a User's account has been requested by another User, you can enter the Requesting User here.

Profile - Activation

Below the main profile is the Activation section, which contains settings related to the account itself.

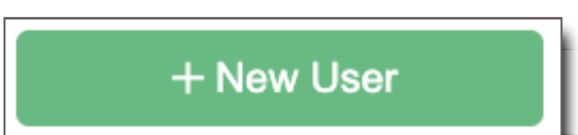


1. **Expiration** - When ON, administrators can set a date for a user's account to expire, which will deactivate the account. Accounts can be turned back on as needed. Especially good for contractors or temporary employees.
2. **Disable Notifications** - Activating this turns off all email notifications.
   a. Ready to Download - When ON, a user will not receive notifications that their package is ready to download
   b. Ready to Stream Forensic Video - Stops notification emails for forensically watermarked videos that are ready to stream
3. **Force password reset on next login** - User must reset their password the next time he, she, or they log in
4. **Lock Account** - Locks out the user of the account. Typically used when someone is terminated.
5. **Is Sensitive** - Marks the user's account as "Sensitive" which means other users cannot see them except for Administrators. Used notably for celebrities, well-known executives, etc.

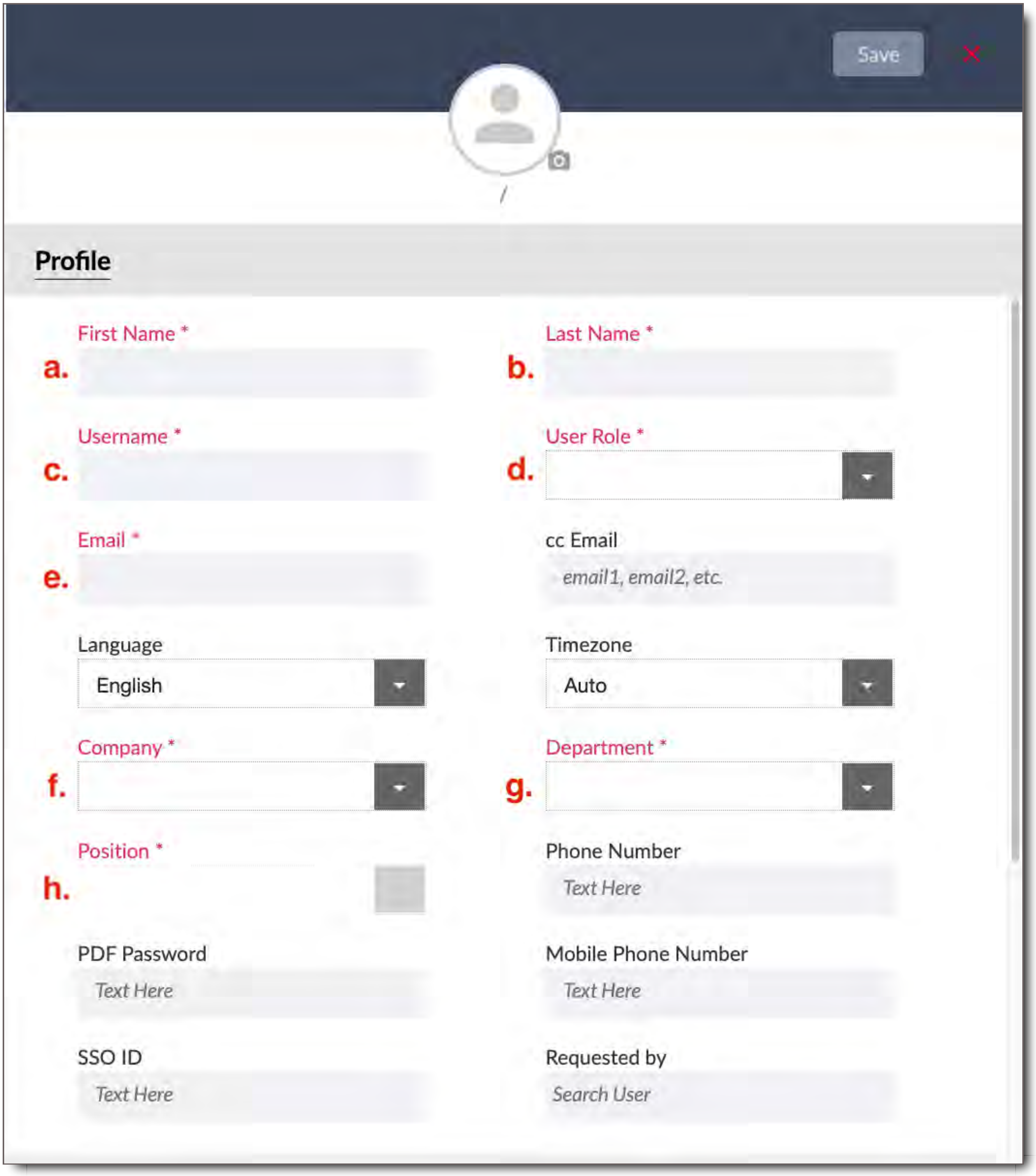
Add New User

To add an individual user,

1. Select +New User button.

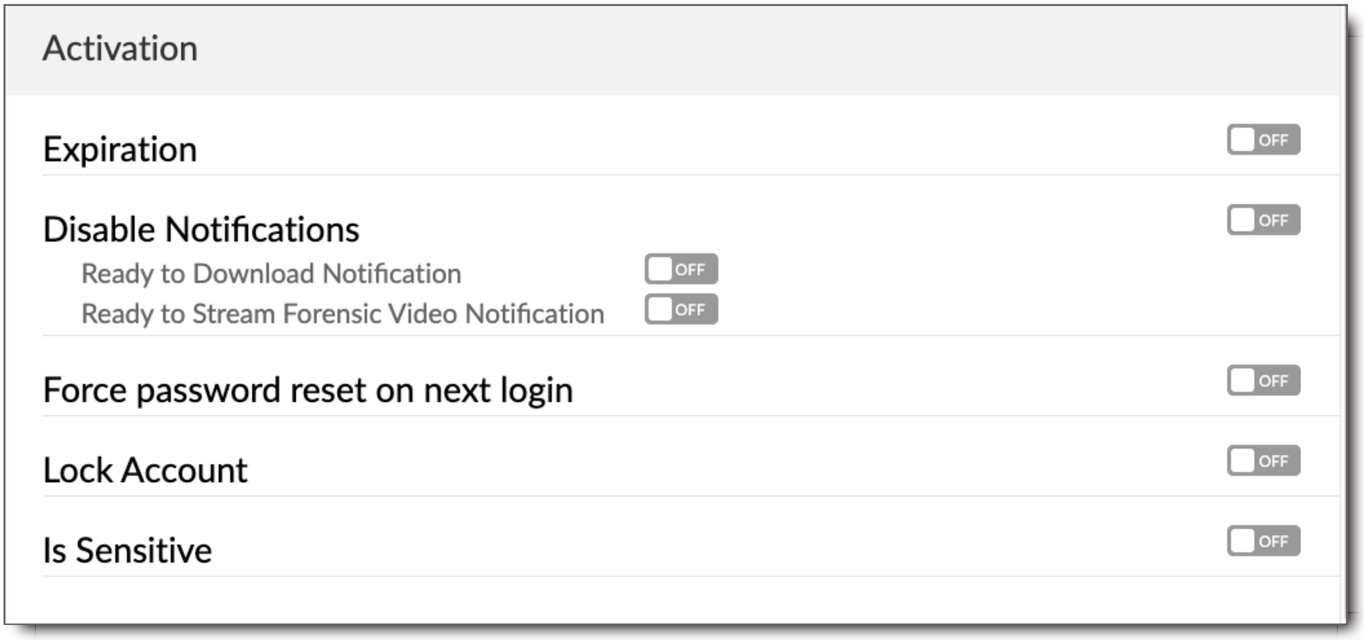


2. Enter at minimum the required fields which have red test*



a. First Name
b. Last Name
c. Username
d. User Role (Learn how to create User Roles)
e. Email
f. Company
g. Department
h. Position

3. Scroll to Activation, and turn on any requirements needed for the user.



4. Go back to the top, hit Save. Or Cancel if needed.

5. Page will refresh to an Existing User Profile

6. If your user needs additional access not provided by their user role or another role in the system, and the rules are unique such that another user won't need them via a new User Role, then go to Rules Override and make any needed changes. (Learn about overriding rules) or learn about creating User Roles)

7. Save before leaving any tab where changes are made, i.e. Access Override, View Access Override, Edit Access Override, etc.

8. When changes are complete hit Save again as a safety measure.

If you want to enter more than one new user at a time, you can upload them via CSV. Go to Adding Users via CSV .

Existing User Profiles

Status

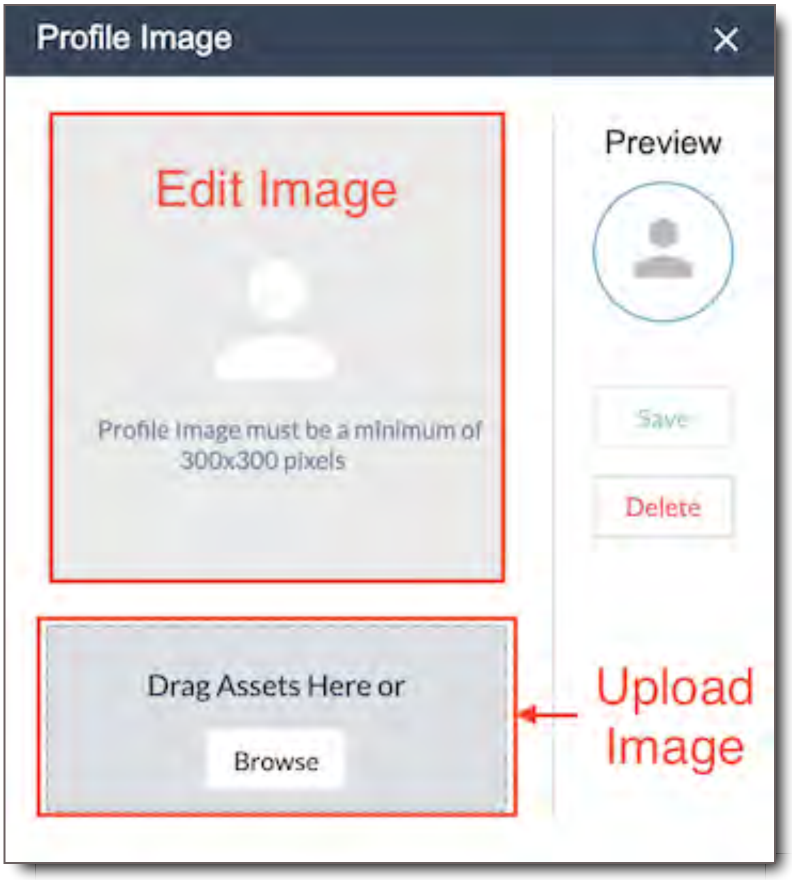
Whether the User's account is Active or not is displayed here, along with their most recent login date.

User’s Full Name

This displays the User's Full Name (First and Last) as well as their Company and Department.

Profile Image

Set an image for your profile. Select the blank avatar and the Profile Image Editor will open.

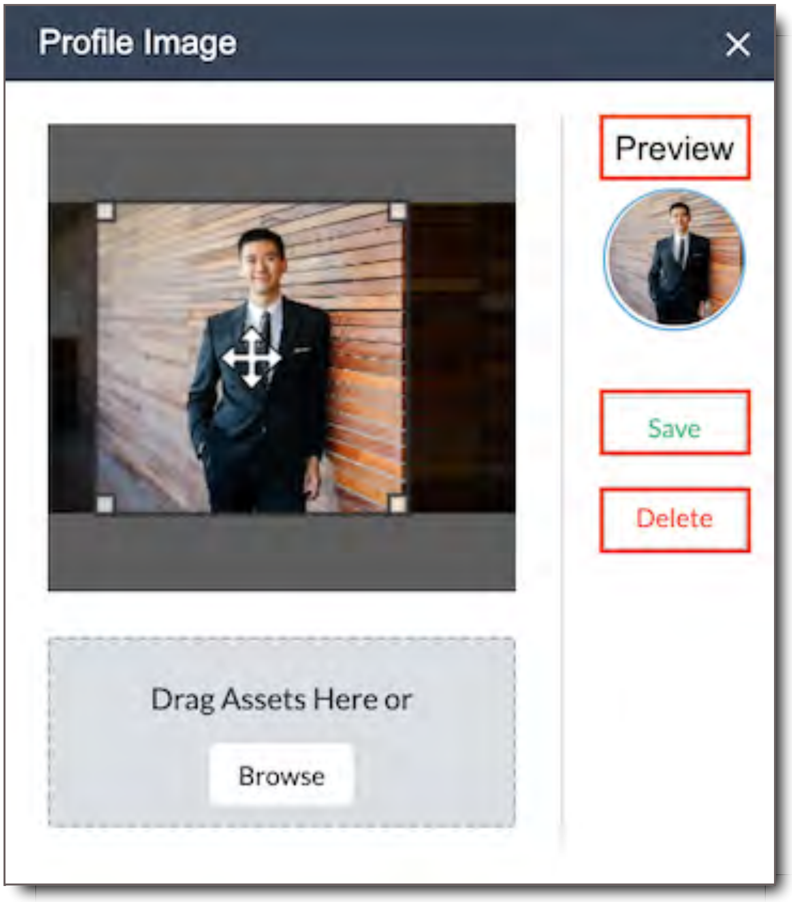


Upload Image

Click Browse to select an image, or drag an image onto this area to upload it.

Edit Image

Once an image is uploaded, click and drag the to position your image. Click and drag the corners to shrink or enlarge the area being used.



- **Preview** - A preview of your Profile Image will appear here.
- **Save** - Click to save changes to your Profile Image.
- **Delete** - Click to remove your profile image.

Once you've saved your image, the Profile Image Editor will close and your new avatar will appear. Your user profile does not need to be saved again in order to save the image.

Save

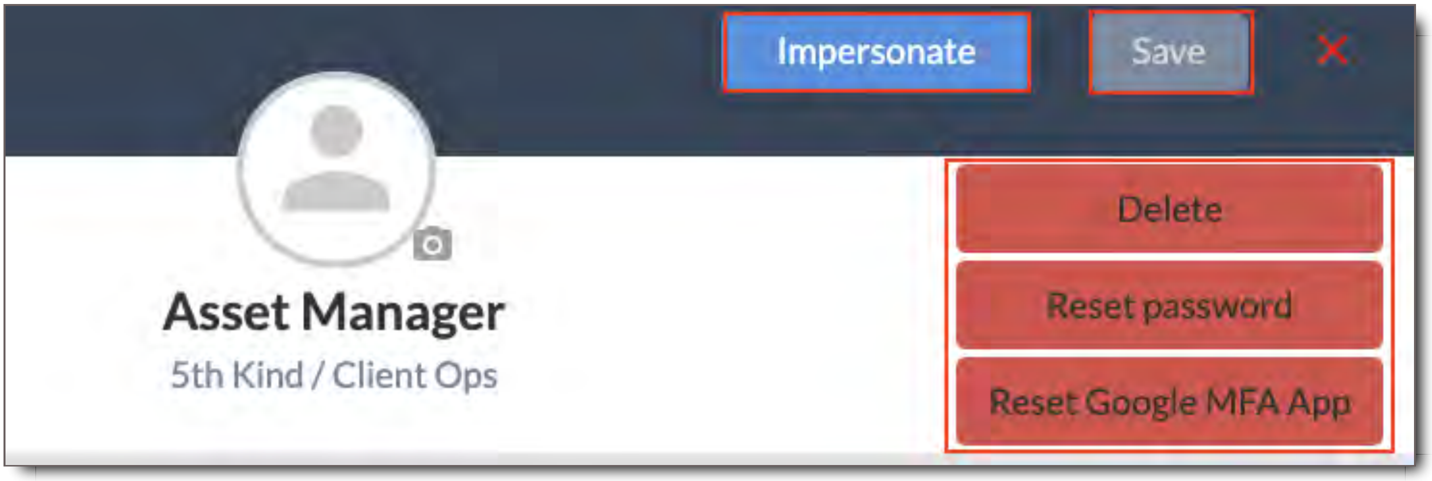
Click this to save changes to the profile. You may be asked to re-enter your password

Cancel / Close

The **X**. Close the Profile without saving.

Profile Admin Tools

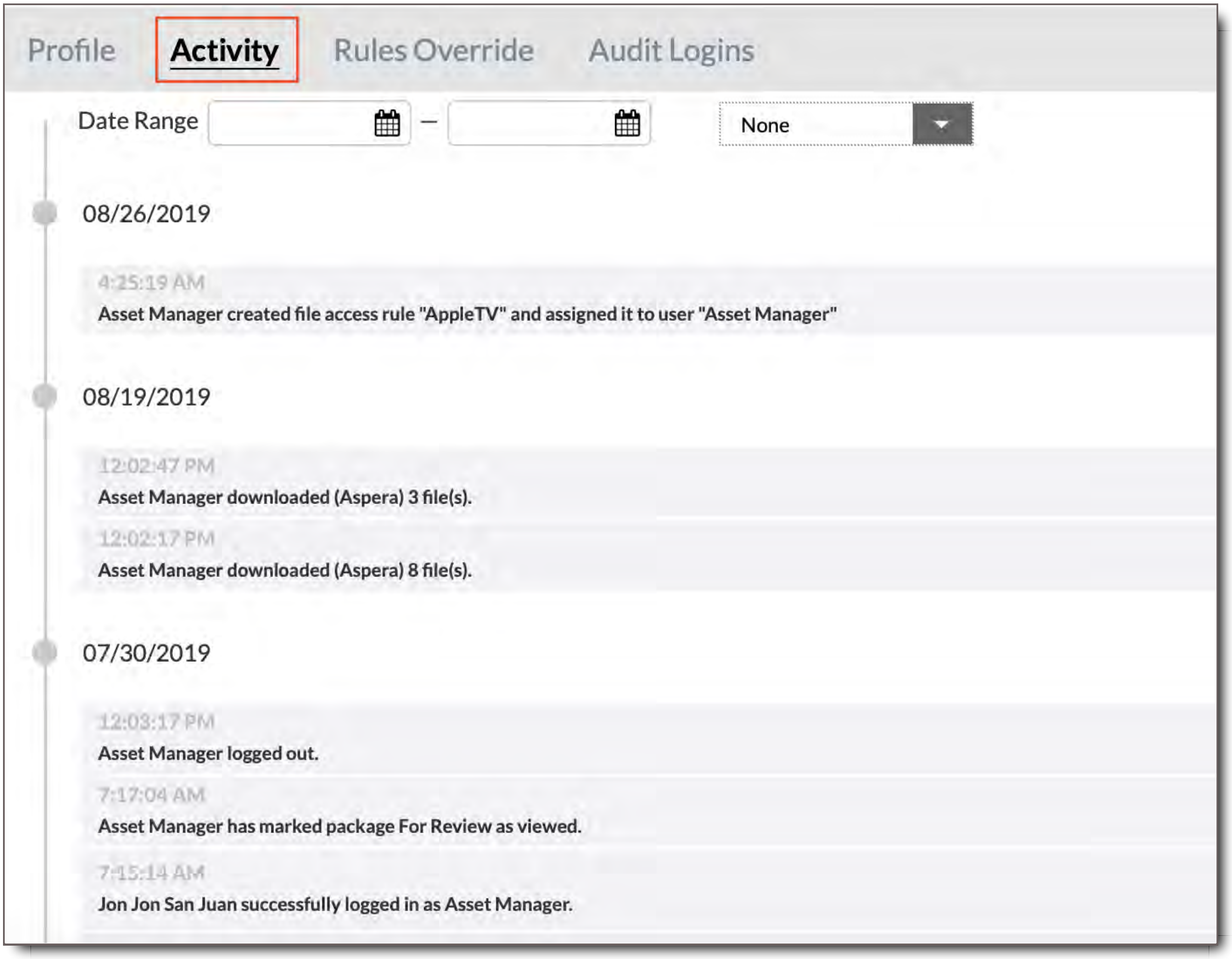
Impersonate, Delete, Reset Password, and reset Multi-Factor Authentication by using these tools. These options are available to Admins only.



- **Impersonate User** - Click this to view as selected CORE User. You will see exactly what the user would see in the CORE interface.
- **Delete** - Delete User
- **Reset Password** - Click this to reset the User's password, forcing them to create a new password the next time they try to log in. Close the Profile without saving.
- **Reset Google MFA App** - Reset the User's Google Multi-Factor Authentication code. The User will receive a new QR barcode from their Google Authenticator app and will need to scan the new QR code in order to log in again.
  NOTE: Users who get a new Mobile device will need their Google MFA app Reset.

Activity Tab

View activity of the User. Most actions taken by a User are logged in the system and displayed here. The actions can be filtered by the pull down on the right or limited by the date range.

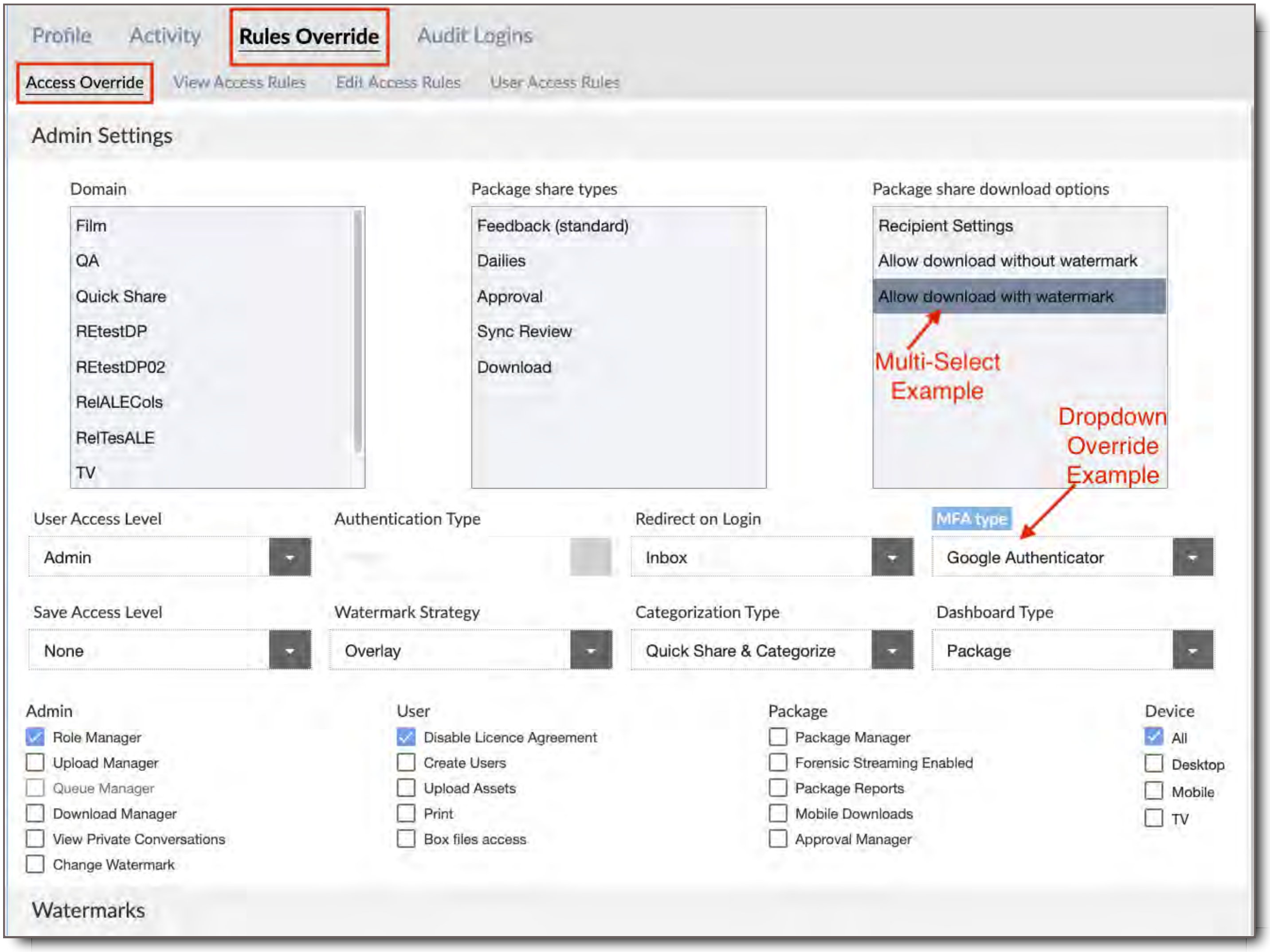


Rules Overide Tab

In some cases, you may wish to alter a User's Permissions, but not those of anyone else in their User Role. Rather than create a unique User Role just for them, you can override permissions in their role, which will apply just to them

Access Override

Access Overrides are general permissions overrides, such as edits to Administrative Settings, Device modifications, how users can send and receive packages, or what Productions they can navigate.



Dropdown Override Example - MFA Type

In the example shown above, the MFA type (highlighted in blue) has been changed to Google Multi-factor authentication , overriding the User's original login settings, which were None.

Multi-Select Example - Allow Download With Watermark

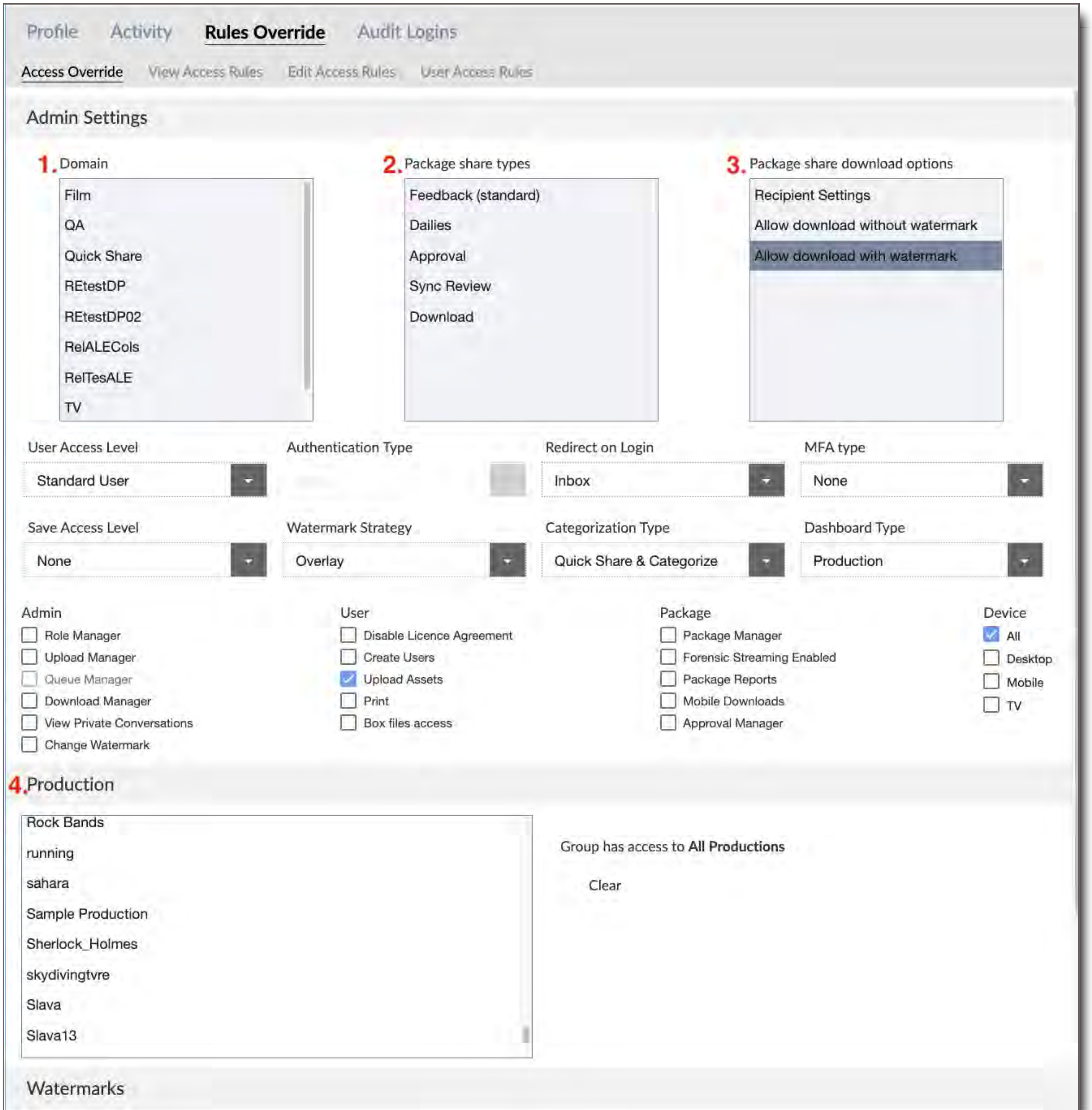
When an edit is made to the Multi-Select fields, red dotted lines show up around the item that has been added as an override.

Note: You cannot change another User's Permissions to give greater access than what you already have. This means if you are an Asset Manager with limited Administrative overrides, you can't give yourself or anyone else full Administrator capabilities. See User Roles topic for more information.

Multi-Select Fields

In these boxes, you can multi-select fields to override the user's original access to these fields granted in their User Role.

Available Multi-select field options for Overrides:

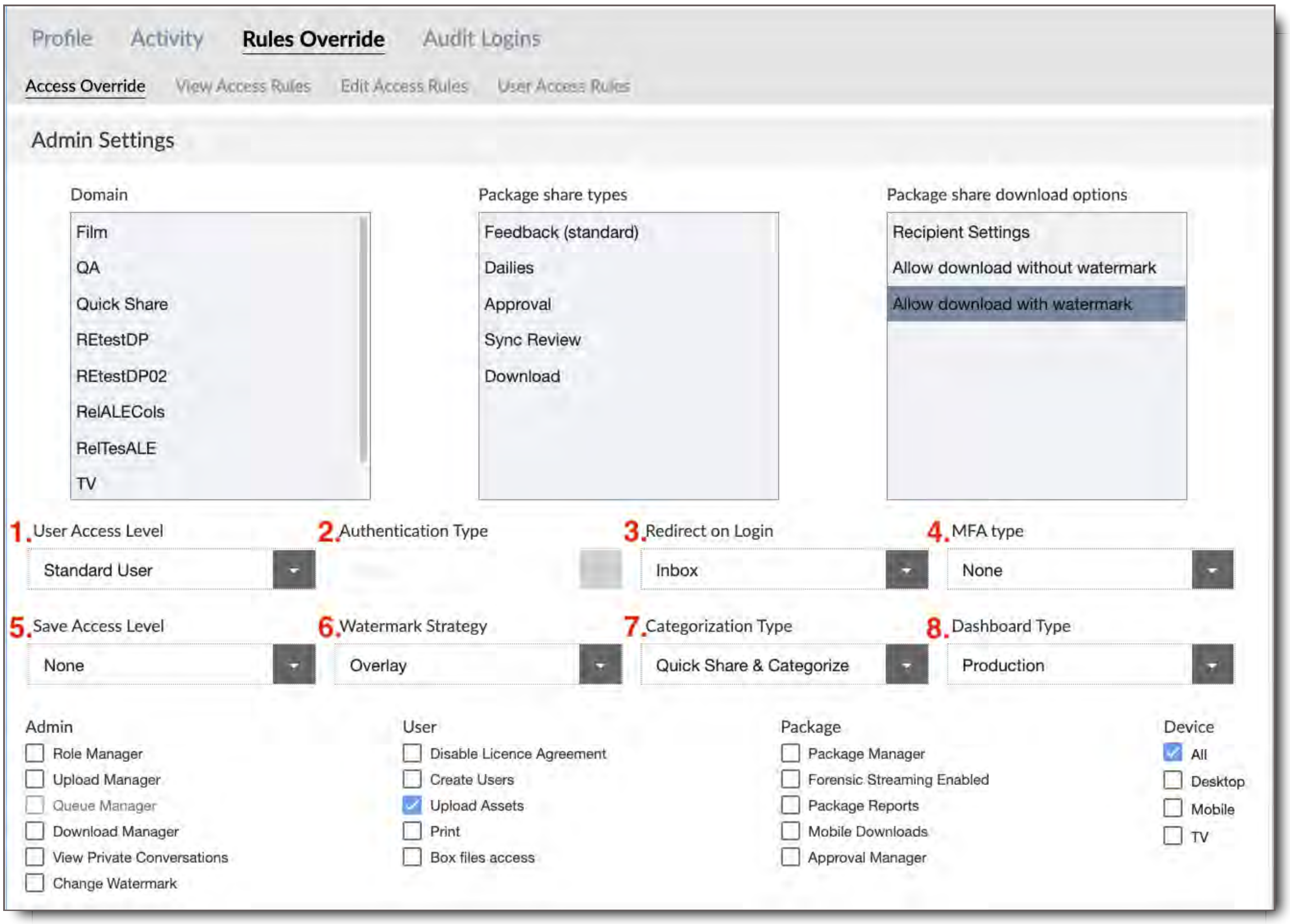


- **Domain -** Select which Domains will be available to the user when categorizing files
- **Package share types -** Select which package share types will be available to the user: Feedback (standard), Dailies, Approval, Sync Review, and/or Download options
- **Package share download options -** Choosing Recipient settings, view only and/or allowing download with or without watermarks
- **Production -** Select which Productions will be available for User

Dropdown Fields

The Override options available in these fields will be those you have permission to assign. If the option selected is different from that of the User's Role, the name of the field will be highlighted in blue, to indicate that you have made a change and overridden that user's User Role.

Available Dropdown Fields for Overrides:



1. **User Access Level -** The primary determinant of what permissions and abilities the User has in the system

   - **Important:** All users are Standard Users with additional permissions added from there. The Admin choice is only able to be chosen by other Admins. Admins do not need additional permissions added as overrides as they have access to all domains, productions and assets in the system. Exception to this rule is Mobile Download which must be enabled as an option for any user level.

2. **Authentication Type - -** If your organization uses Single Sign On, select it here

3. **Redirect on Login -** Select which view the User will see when they first log in either their Inbox or if File Search is an option for the user they can be directed to either.

4. **MFA Type -** If you would like to Override the setting in the User's role regarding Google Authenticator for Multi-Factor Authentication you can adjust it here.

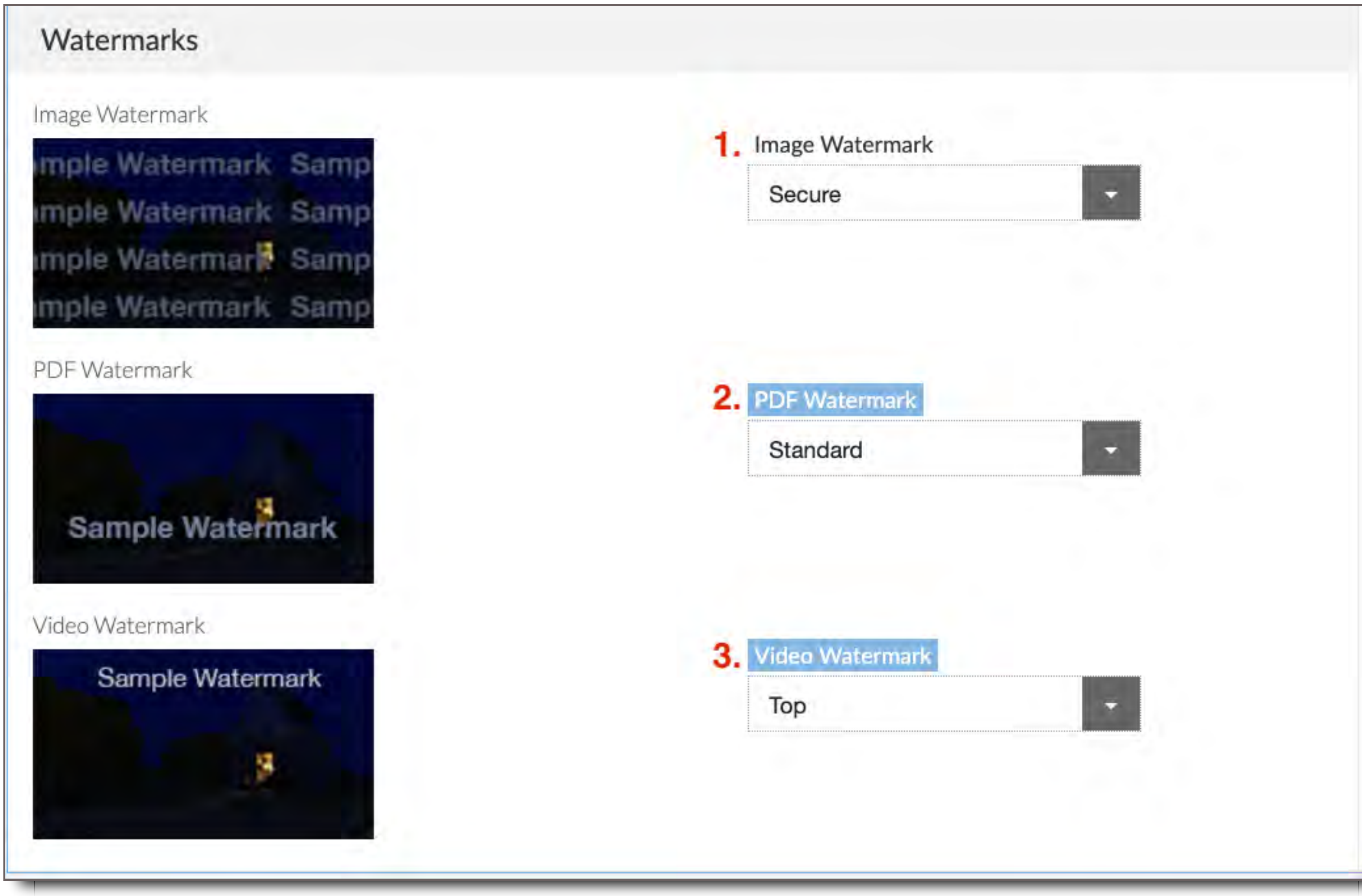
5. **Save Access Level - Important:** *Controls whether the User can download files from the system.* Proxy, which are duplicate files of the original source that are lower in resolution and smaller in file size. Or Source and Proxy where the original source file and proxy are both available.

6. **Watermark Strategy -** For trusted Users choose Overlay option, and for non-trusted Users choose burn-in option. Categorization Type - Select which type of asset categorization the User will be allowed to perform when uploading assets into CORE, if User will be allowed to Quick Share & Categorize, Categorize Only, Quick Share Only, or None.

7. **Dashboard Type** - Select which Dashboard type the User will see when they first log in, either Production or Package. **Categorization Type** - Select which type of asset categorization the User will be allowed to perform when uploading assets into CORE, if User will be allowed to Quick Share & Categorize, Categorize Only, Quick Share Only, or None.

8. **Dashboard Type** - Select which Dashboard type the User will see when they first log in, either Production or Package.

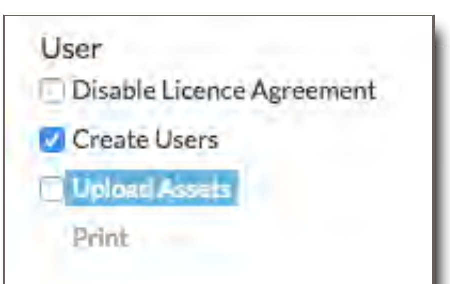
Available Dropdown Fields for Watermarks



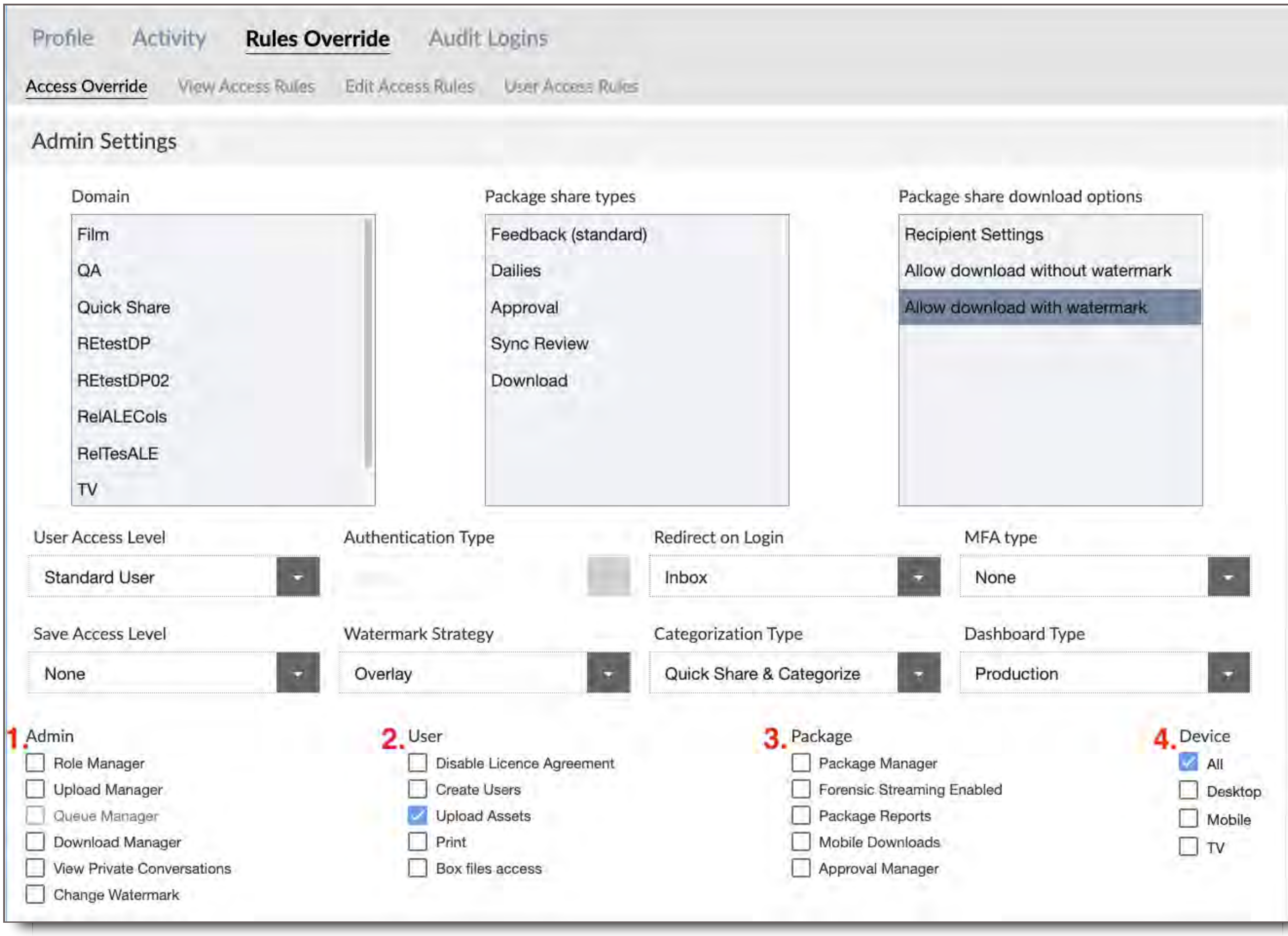
1. **Image Watermark -** Toggle between standard or no watermark. Custom watermarks are available upon request to CORE from the system Administrator.
2. **PDF Watermark -** Toggle between standard or no watermark. Custom watermarks are available upon request to CORE from the system Administrator.
3. **Video Watermark -** Toggle between standard or no watermark. Custom watermarks are available upon request to CORE from the system Administrator.

Checkbox Fields

You can change any fields in this section that you have permission to access. If you change the default, the name of the field will be highlighted in blue. If you do not have permission to change a field, it will be grayed out.



Available Checkbox Fields

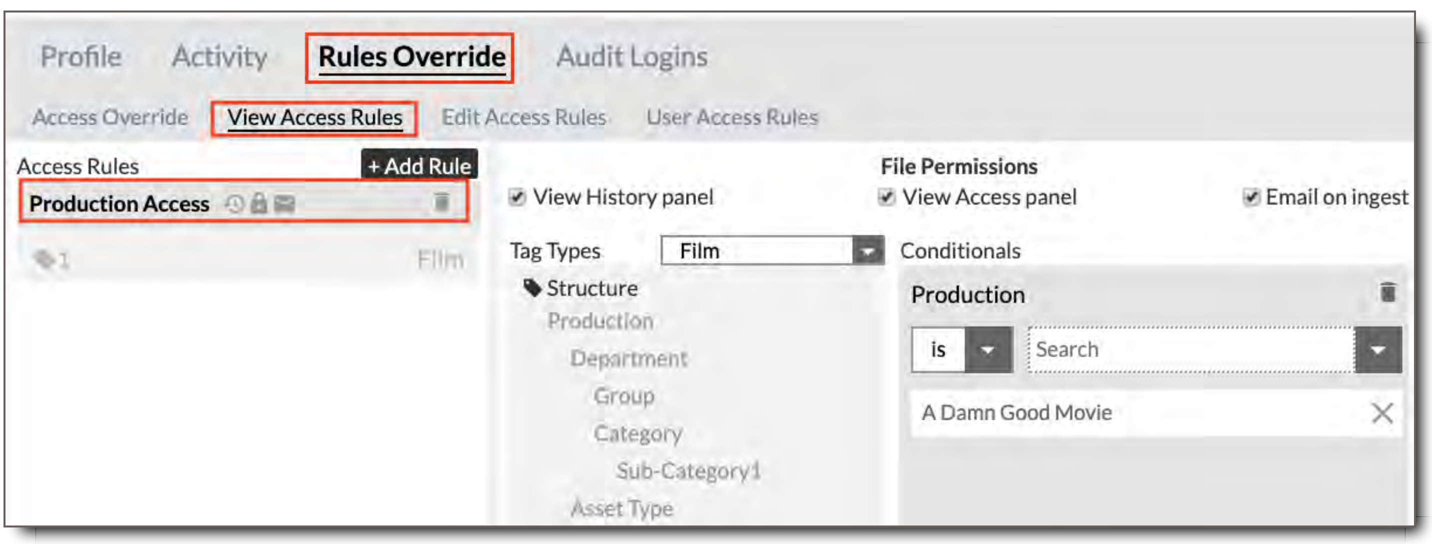


1. **Admin -**
   - **Role Manager -** Create new Roles, and modify existing Roles. A user can never create another account or Role with higher permission that they themselves have
   - **Upload Manager -** View and categorize uploads made by other Users
   - **Queue Manager -** View and re-prioritize jobs in the Processing Queues. (not yet available)
   - **Download Manager -** View and download items assigned to other users
   - **View Private Conversations -** View all Comments on files that you have access to, even if they are marked private
   - **Change Watermark -** Ability to change the watermark when downloading ffiles. With this enabled, Users can change the watermark style, and also the Username on the watermark.
2. **User -**
   - **Disable License Agreement** - Users are required to agree a License agreement when logging in but clicking this box can disable this option for a user.
   - **Create Users -** Allows user to see the + New User button in the Manage User area. User will be able to add new Users for the same permission level or below that they are in the system. Additional User Access Rules are necessary to limit the user further.
   - **Upload Assets -** Allows users to upload assets into the system. Additional Edit Access Rules are necessary to limit the user further.
   - **Print -** Allows users to print assets in the system that are printable like PDFs.

3. **Package -**
   - **Package Manager -** Packages shared with a Standard User who has this additional permission do not have any restrictions that a sender may have put on the package. The exception to this rule is expiration dates or views allowed for the package.
   - **Forensic Streaming Enabled** - Forensic watermarking is only offered through a 3rd party integration and will require a license for users to enable this option. Forensic watermarking places an 'invisible' watermark on assets in order to track their location and provides the highest level of trackable security available for assets being shared outside of CORE. Forensic watermarking can work in conjunction with visible watermarks in the CORE system.
   - **Package Reports -** Allows user to run reports on package access, views, downloads etc.
   - **Mobile Downloads -** Allows users who are sent a package, with download with or without watermark permissions, to store packages/files offline on their mobile device for viewing with no wifi access.
4. **Device -**
   - **All -** Allows user to access CORE from Desktop browser, iOS app or AppleTV app.
   - **Desktop -** Allows user to access CORE from Desktop only.
   - **TV -** Allows user to access CORE from the AppleTV app only.

View Access Rules

View Access Rules control what Files a User can view, and optionally, what additional information about them they can view.
Important: If you make overrides to the View Access Rules in this section you will be overriding the Rules set up for the user in their assigned User Role. For steps on how to edit 'View Access Rules' see: View Access Rules



Edit Access Rules

Edit Access Rules control what Files a User can edit. Files matching an Edit Access Rule will be both viewable and editable by Users assigned to the Role.

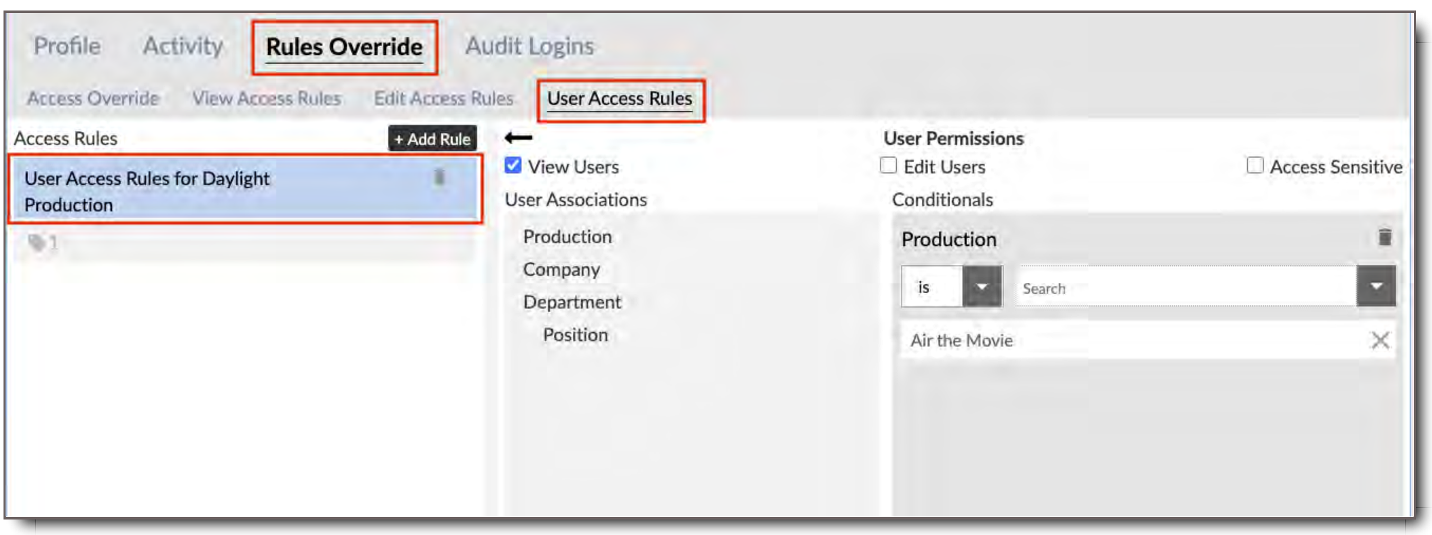
Important: If you make overrides to the Edit Access Rules in this section you will be overriding the Rules set up for the user in their assigned User Role.

For steps on how to edit 'Edit Access Rules' see: Edit Access Rules

User Access Rules

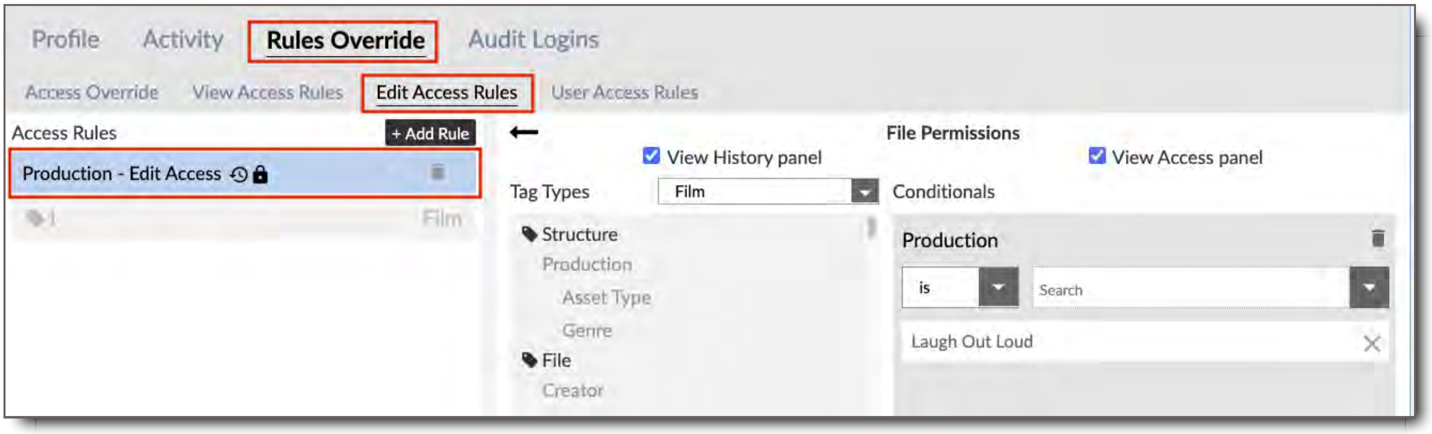
User Access Rules control which other Users in the system a User will be able to see and/or modify. They allow you to make it so that a User may only see others in their own department, for instance.
Important: If you make overrides to the User Access Rules in this section you will be overriding the Rules set up for the user in their assigned User Role.

For steps on how to edit 'User Access Rules' see: User Access Rules



Audit Login

Audit and monitor detailed user sessions with this tool



Adding Users via CSV

To batch import Users, you can use the Import from CSV option. This feature allows you to create a CSV file containing the important details of multiple Users at once, and add them simultaneously.

Creating a CSV

The CSV file you upload must contain the correct field names, and must be encoded as comma-delimited.

Click here to download the CSV template.

Fields

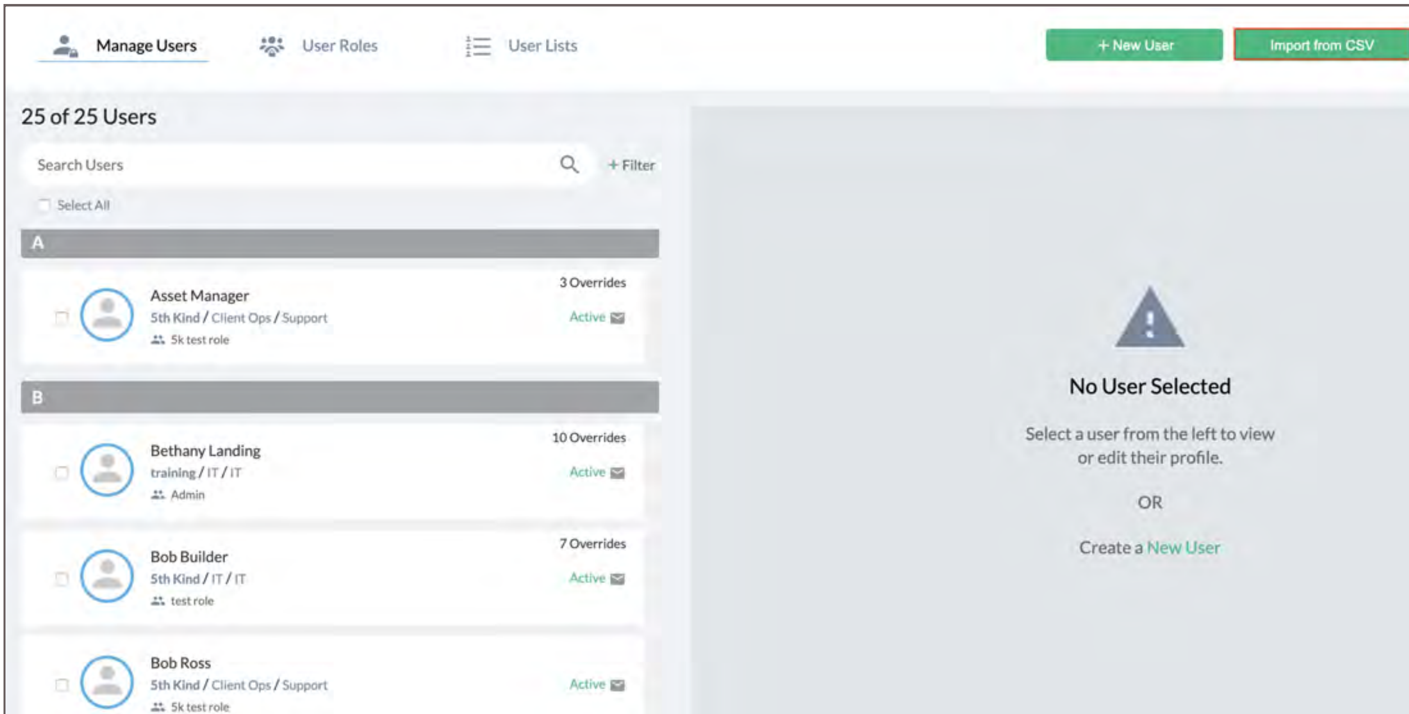
Fill out the fields below for each user you would like to add. ***Indicates mandatory field**

- ***username** - The User's name in the system. This must be unique.
- ***firstName** - The User's first name.
- ***lastName** - The User's last name.
- ***email** - The User's email address.
- ***company** - The company the User works for.
- ***department** - The department the User works in.

- ***position** - The User's position in their company.
- ***role** - The User's Role in the system. See User Roles topic for more information. **This must match the name of an existing role EXACTLY, and is case-sensitive.**

Importing from CSV

Click the **Import from CSV button** and select the CSV file from your file system.



Editing Existing Users via CSV

You can use the Import from CSV option to batch edit account information for existing Users in CORE. For example, you can batch edit Department, Company, or Roles for your Users.

1. Fill out the CSV template with the existing Users whose information you want to change. a. The username should match an existing user.
   b. Make sure all the fields are filled out completely and correctly, including any changes you've made.

	A	B	C	D	E	F	G	H
1	username	firstName	lastName	email	company	department	position	role
2	tester01	tester01	tester01	tester01@meh.net	5th Kind	Distribution	Support	AssetViewer
3	tester05	tester05	tester05	tester05@meh.net	5th Kind	Distribution	Support	AssetViewer
4	tester10	tester10	tester10	tester10@meh.net	5th Kind	Distribution	Support	AssetViewer
5	tester15	tester15	tester15	tester15@meh.net	5th Kind	Distribution	Support	AssetViewer

Click here to download the CSV template.

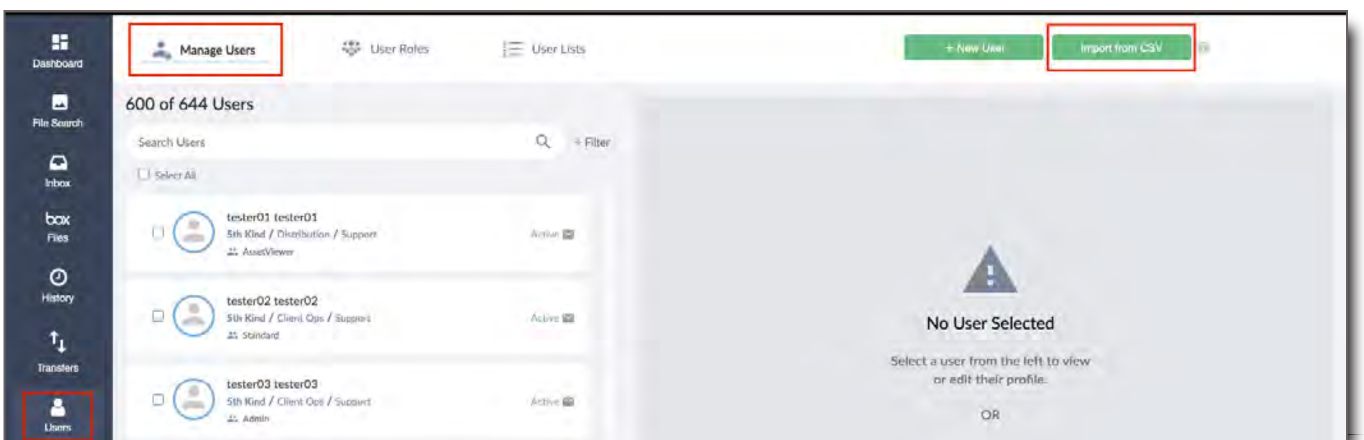
Fields

Fill out the fields below for each existing User you would like to update. ***Indicates mandatory field**

- *username - The User's name in the system. This must be unique.
- *firstName - The User's first name.
- *lastName - The User's last name.
- *email - The User's email address.
- *company - The company the User works for.
- *department - The department the User works in.
- *position - The User's position in their company.
- *role - The User's Role in the system. See User Roles topic for more information. **This must match the name of an existing role EXACTLY, and is case-sensitive. Please make sure to remove any unnecessary spaces in all of your filled-out fields.**

2. Once your CSV template is completely filled out including new or changed information for your Users, navigate to the Manage Users page

3. Click on **'Import from CSV'** button located at the top right corner of the page.

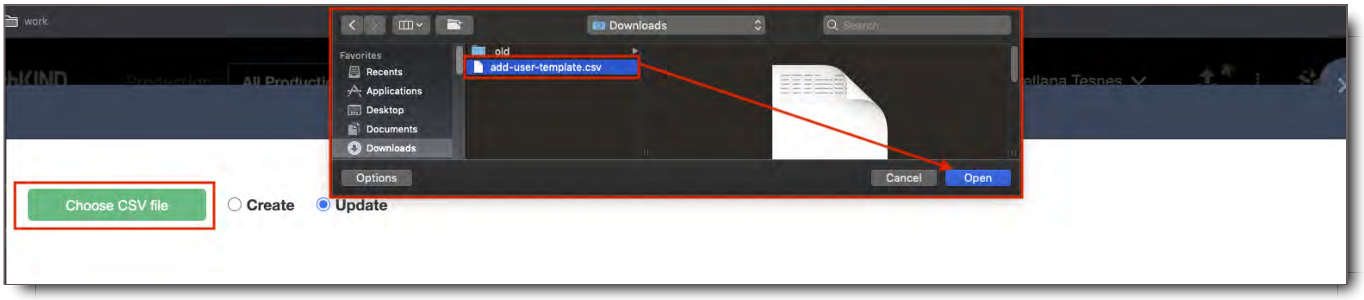


4. In the CSV Import menu, select the **Update** option by clicking in the circle next to the option. **Update** option means that you will be updating existing Users in the system and not creating new Users.

5. Click on the green 'Choose CSV file' button.

6. Select your filled-out CSV from the file window that will appear

7. Click on Open. The system will start the import as soon as you click on Open.



8. Lastly, once the import completes, the system will confirm how many Users it has imported successfully.

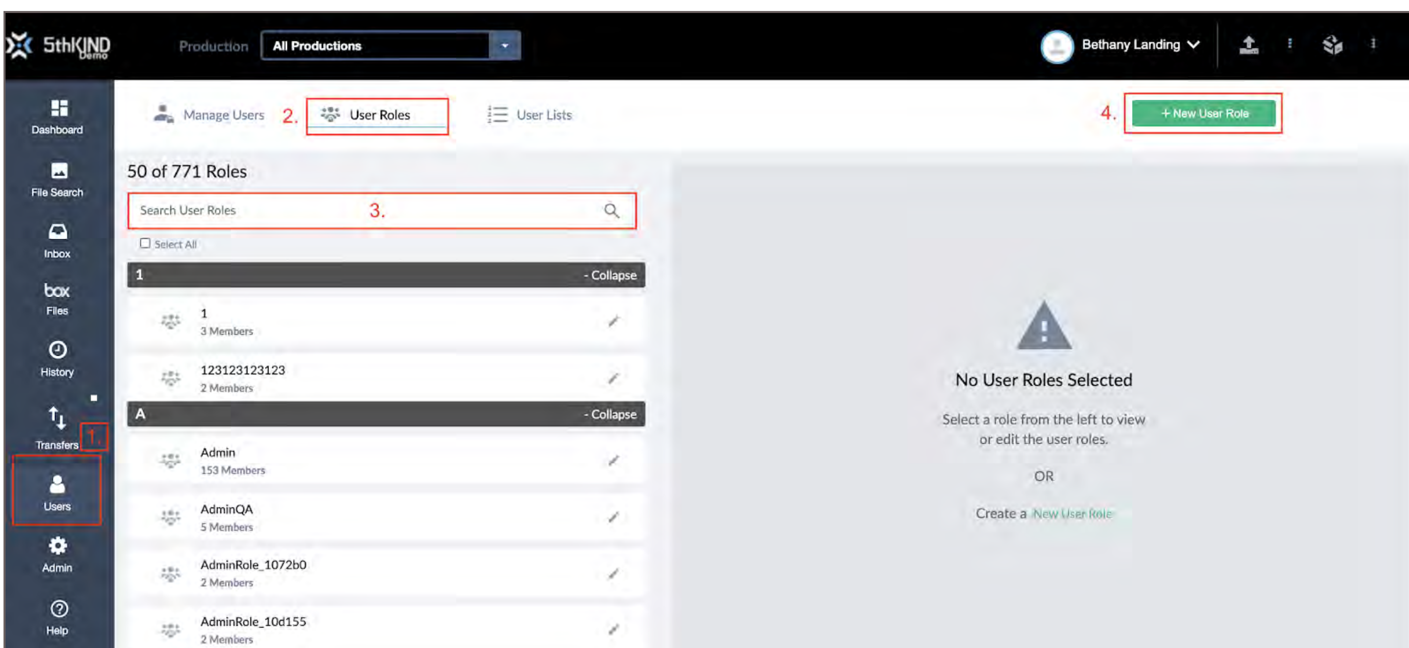
   a. Also, if there were errors with the import, the system will show those as well. In that case, you should review your list to ensure all fields are properly formatted.
   b. After checking your document, re-import the CSV.
   c. The successful confirmation will reflect only the number of those names whose information didn't update during the first import.

User Roles

User Roles control what permissions Core users have and what assets they can see and interact with in the system. Each User is assigned to one Role but there can be overrides added to a User's individual Profile that make special allowances for that user outside of the Role they are assigned to.

User Role Elements

After clicking on the Users module in the left navigation panel choose User Roles in the top panel. Here you can browse and search User Roles that you have access to as well as view and manage existing User Roles and create new User Roles.



1. **Users Tab -** You will find this tab in the Left Navigation panel
   NOTE: You will only see your own profile if you do not have permission to add/edit other users.

2. **User Roles -** This tab allows you to see a list of existing User Roles
3. **Search Bar -** This allows you to query a search of existing User Roles
4. **+ New User Role** - Allows you to create a new User Role

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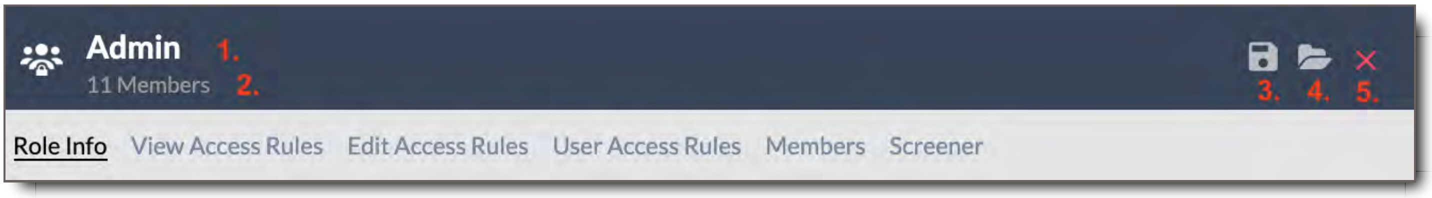
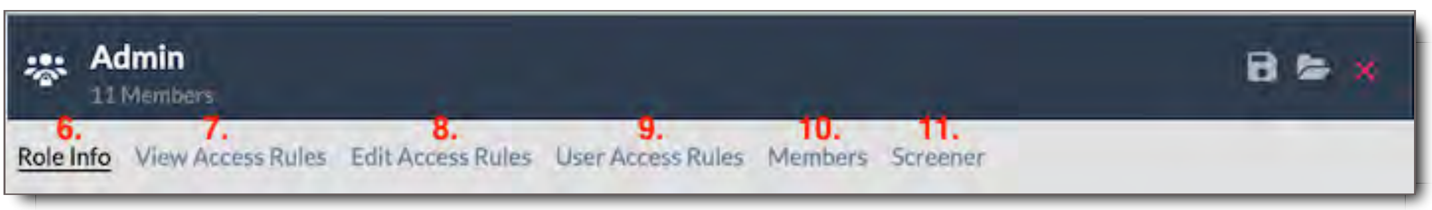
The Anatomy of User Roles

The top bar of the User Role includes:



1. **User Role Name**
2. **Number** of Members Assigned to the Role
3. **Save Role** as a Template
4. **Load a Template** for the User Role
5. **Close** the Role detail

There are also six tabs that make up a user role:



6. **Role Info -** Defines the role and it's primary capabilities and limitations
7. **View Access Rules -** Defines what the role can view
8. **Edit Access Rules -** Defines what the role can edit
9. **User Access Rules -** Defines who else in the system can be seen by this role
10. **Members -** Lists who the role is applied to
11. **Screener -** Defines what Screener devices the role has access to

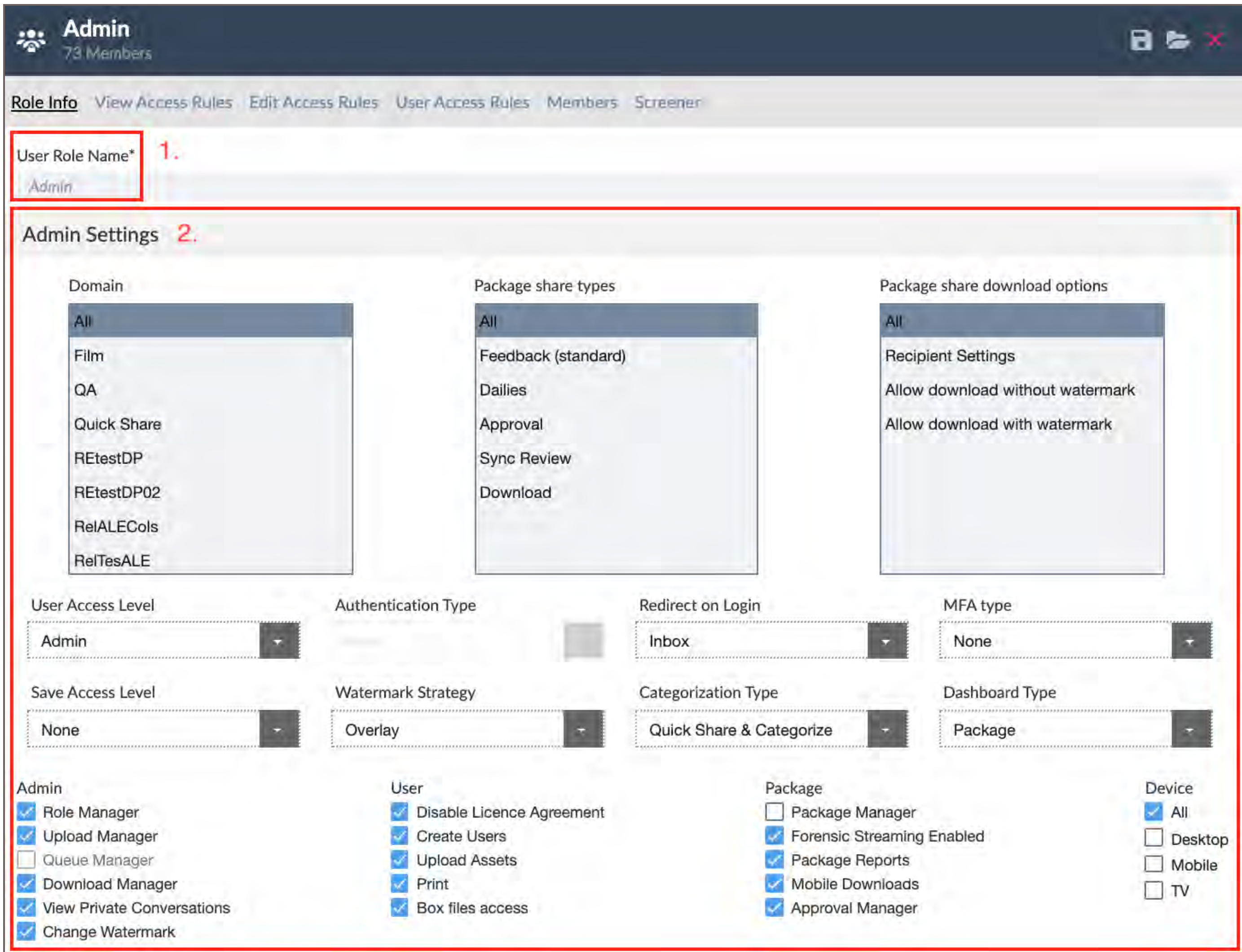
Role Info

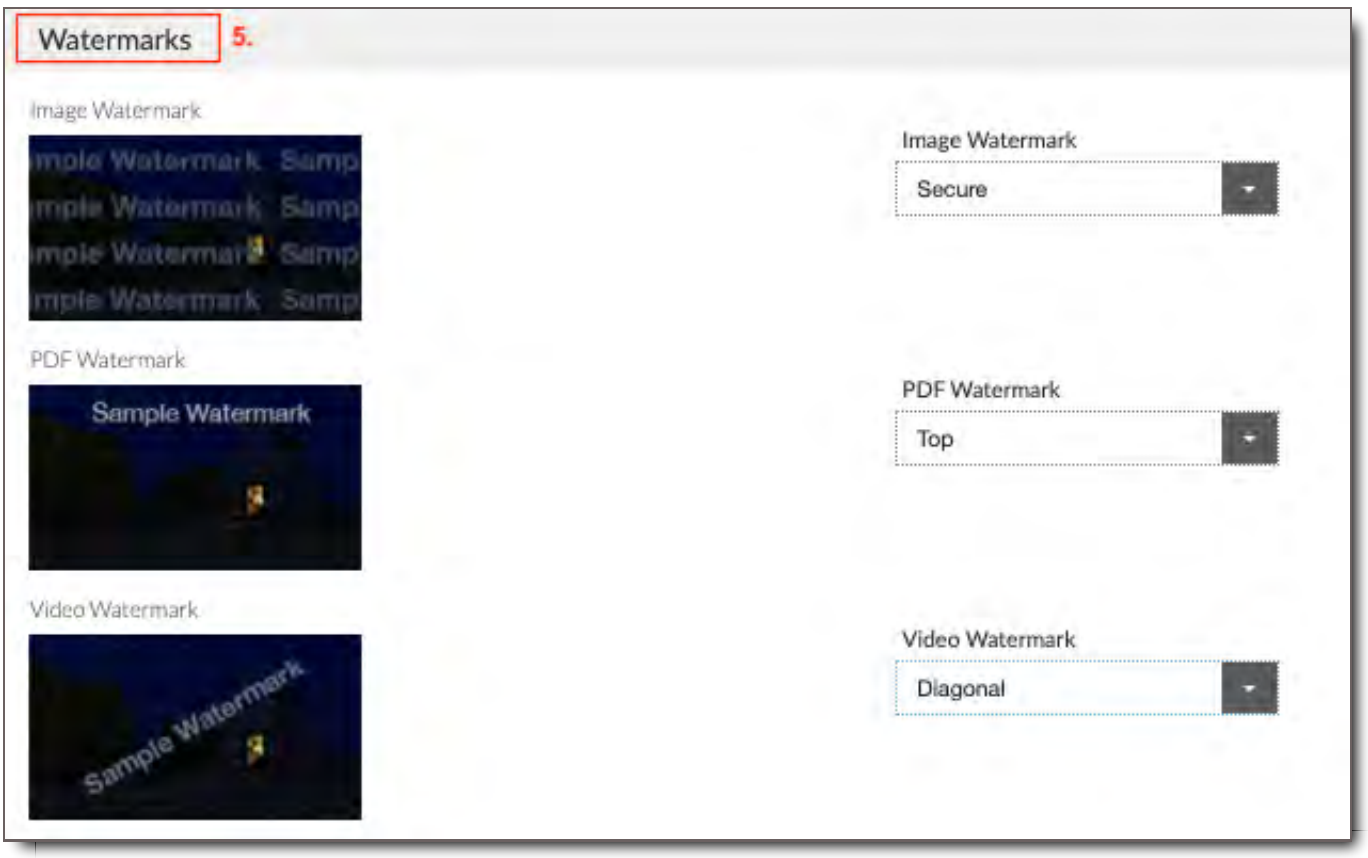
The Role Info Screen has five main parts:

1. **User Role Name -** The name of a User Role usually contains key words to make it easier for admins to distinguish the role while looking at the list. For example, a user role like Editorial Uploader for 'The Great Movie' may be called TGM - Editorial - Uploader so that the film abbreviation leads to the Role

name. However, Roles can be titled however your Admins determine works best for your system.

2. **Admin Settings -** This section determines certain (but not all) permission choices for the role. * Each of these settings will be detailed below.
3. **Role Restrictions -** This section only applies to Standard Users who are able to add other users. In this section you will choose which roles the standard user will be able to choose from when creating a new user.
4. **Production -** This section determines which Productions the user has access to.
5. **Watermarks -** This section determines the look of the watermark for the User Role for Images, PDFs and for Videos.

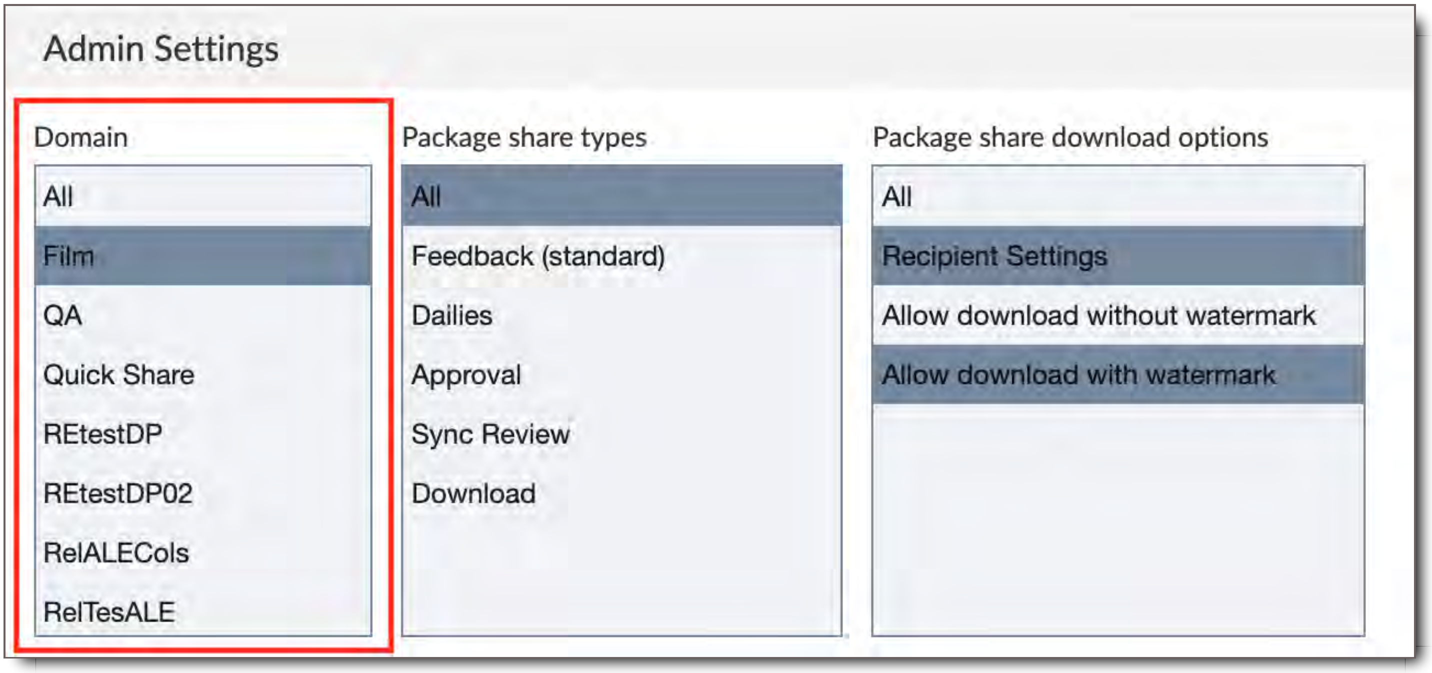




Admin Settings

Domain

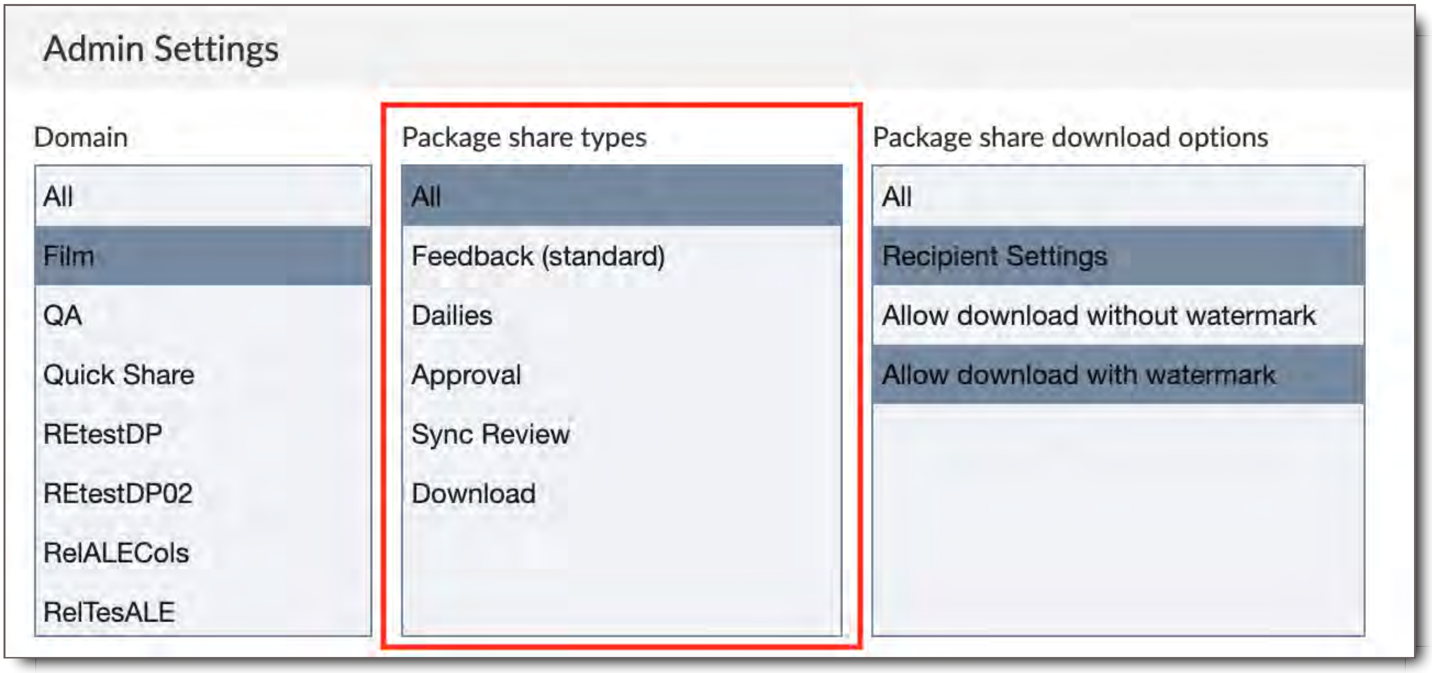
In CORE the Domain is the highest level of a meta data hierarchy structure. For example, in a M&E structure Film or TV are Domains. Each Domain has a single meta data structure that applies to it, and that structure is the way users categorize (tag) files when they are added to the system. In the Admin Settings area, choosing a Domain determines the meta data tag structure that the user will have to choose from when they categorize files or browse in File Search.



Package Share Types

This determines which types of Packages the User will be able to send.

- **Feedback (standard):** Feedback (standard) package opens to a view of all files with the comment panel enabled. Everyone on this share type can collaborate. If simple viewer is on, recipients will launch into a simple file player with no extra clutter.
- **Dailies:** Opens the recipient directly into the player with the first file open. Recipients are hidden by default and simple viewer is on by default.
- **Approval:** Opens to a view of all files with the approval panel enabled. Everyone on the share can collaborate, but each person can only see approvals based on their role. If simple viewer is on, recipients will launch into a simple file player with no extra clutter.
- **Sync Review:** Opens a real-time hosted review. Recipients can not see or access the files except when guided by the host (sender of the package).
- **Download:** Opens a simple, web-based download page. This type of package is best for when recipients only need to download the files.



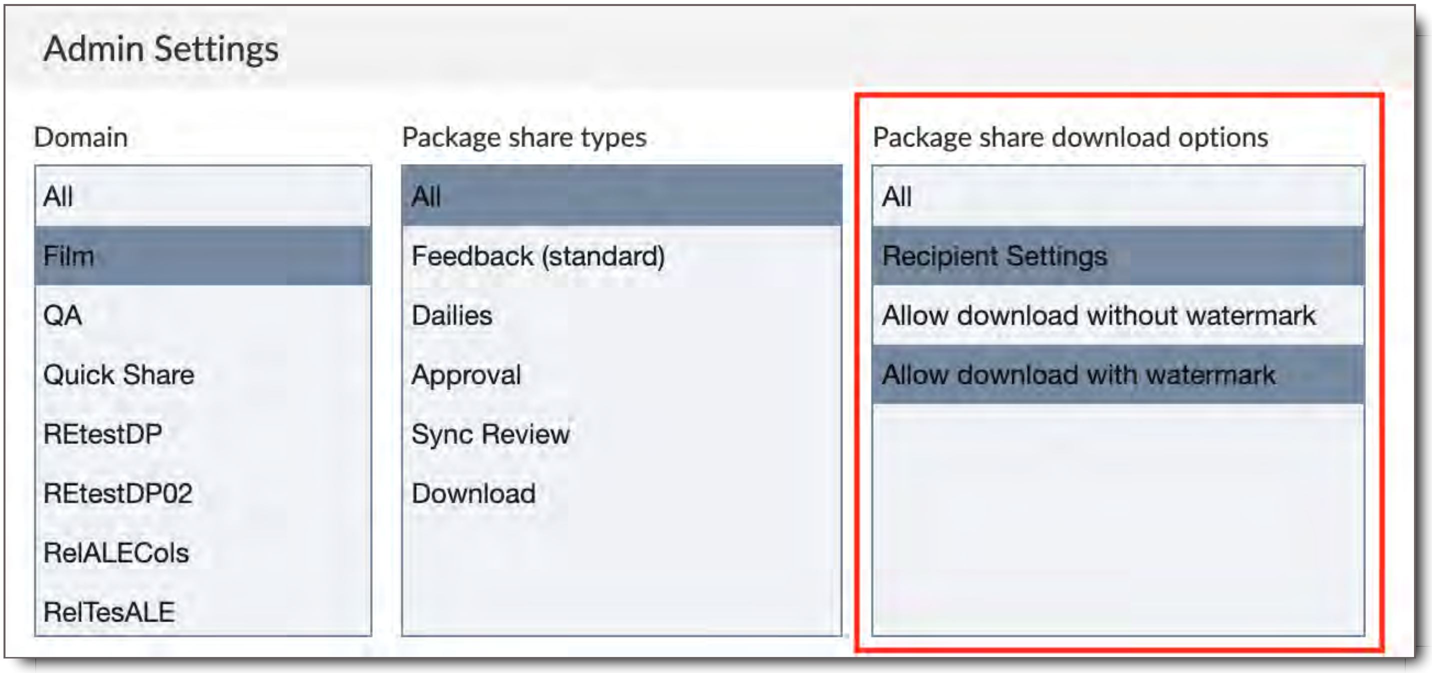
Package share download options

The package share download options are the options the user role will see when sharing a package for download.

- **Recipient Settings:** This option means that the user/sender will default to the user permissions set up by the Administrators for the recipients they are sending the package to.

- **Allow download without watermark:** This option allows the user/sender to grant the recipients the permission to download the files without a watermark.

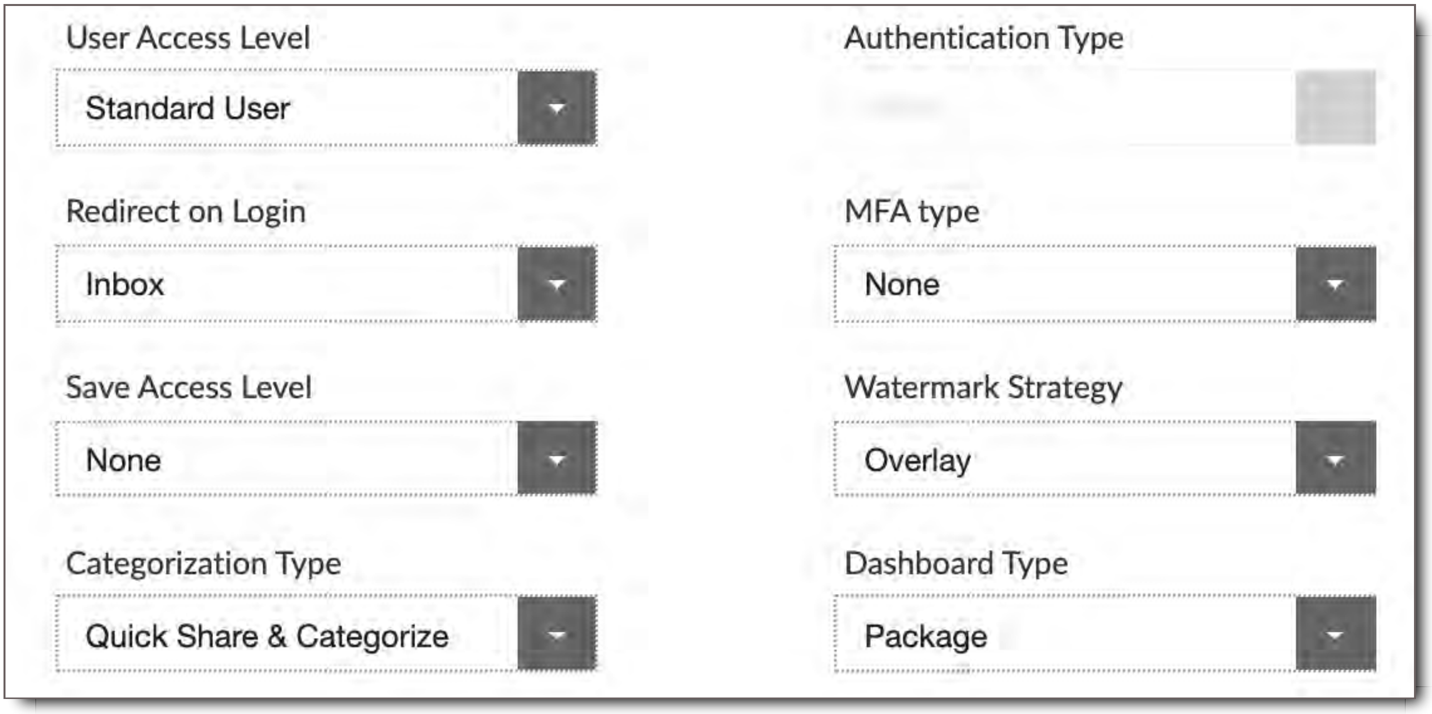
- **Allow download with watermark:** This option allows the user/sender to grant the recipients the permission to download files with a watermark. The watermark can be the one chosen in the user's role or can be a custom watermark determined at the time of the share.



User Access Level

The user access level is the primary determinant of what permissions the User has in the system. In CORE, a permission is the ability to view, download, or edit files, or to perform other actions within the system. Choose between the following:

- **Standard User:** Standard users start with no permissions in the system. A Standard User can log in to CORE and view packages that are shared with them. All additional permissions are granted in the User Role they are assigned to or in Access Overrides.
- **Admin:** User with full permissions and all abilities in CORE. Can view, modify, and download any file in the system, regardless of other permissions. Can create projects, add users, user roles, domains, meta structures and any other functions in the Admin panel.



Authentication Type

If your company has Active Directory integration enabled, this will allow you to configure Single Sign On. CORE supports SAML, Okta, and OneLogin and can support custom integrations with other providers.

Redirect on Login

Select which module the User will see when they first log in. Choose between Dashboard, File Search and Inbox.
NOTE: Not all systems will have the Dashboard option.

MFA (Multi-Factor Authentication) Type

If you would like to require the role to have another layer of security you can enable MFA here. If Google Authenticator is enabled the User must install the Google Authenticator app on their mobile device and enter a 6-digit code each time they log in.

Save Access Level

This option controls a User's download settings both for Files they search for in the system, as well as those sent to them in Packages when they are set to Recipient Settings. If Files are shared with a user in a Package set to Download or View Only, however, then that setting will override this user role setting.

- **None:** The user role can not download any Files from the system unless they are shared in a package set to be Downloadable.

- **Proxy:** The User can download the proxy of any File that they can view from the File Search page. They can also download the proxy of any File that was shared with them in a Package set to Recipient Settings.
- **Source and Proxy:** The user role can download the source of any File that they can view from the File Search page, or that was shared with them in a Package set to Recipient Settings. They can also download the proxy if they choose, and may download them without a watermark.

Watermark Strategy

Controls how assets will be watermarked.

- **Overlay:** Add watermark as a text overlay which can be disabled.
- **Burn-in:** Burn-in, or digitally "bake", the watermark on top of the image, video, or document so the watermark shows up no matter if you're viewing the file in a system player or downloading it.

Categorization Type

This controls the user's categorization options.

- **Quick Share & Categorize:** Allows the user to categorize the asset or "Quick Share" without categorizing the file. (if a file is not categorized, it cannot be found via searching All Files)
- **Categorize Only:** Asset must be categorized before it is shared.
- **Quick Share:** User cannot categorize but can share without categorizing the asset.
- **None:** User cannot categorize or share the file. The asset must be categorized and/or shared by another user.

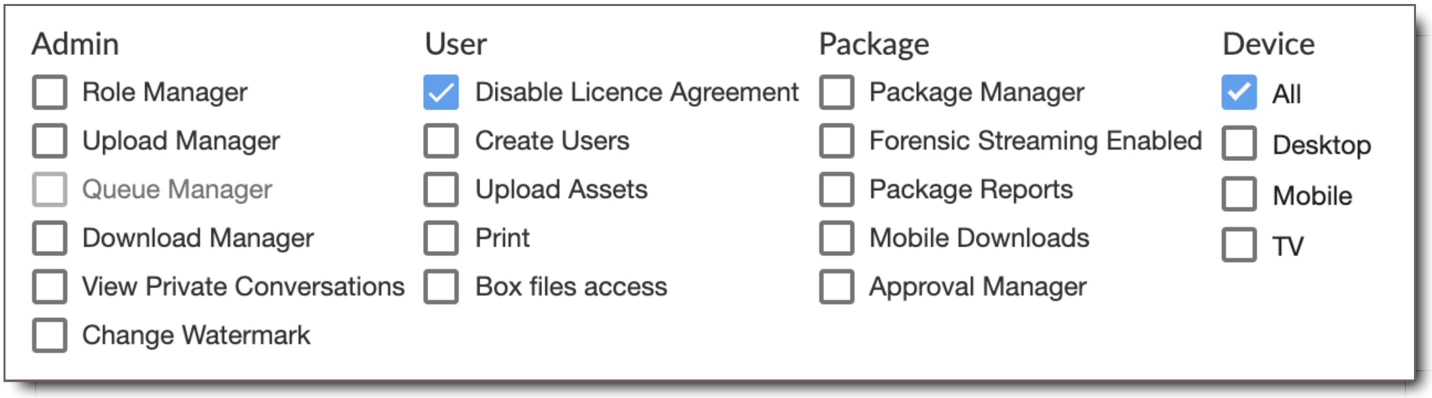
Dashboard Type

Controls how the Dashboard module will function. (Note: Not all CORE systems have Dashboard enabled)

- **Package:** The Dashboard displays a list of Productions contained in Packages that have been shared with you. In this mode, a Production will not appear on the Dashboard until someone has sent you a Package containing at least one File from it.
- **Production:** The Dashboard displays a list of Productions you've been assigned to.

Admin Settings - Granular Permissions

These settings enable additional abilities for Standard Users. Note that Admin Users always have all of these permissions.



Admin

- **Role Manager:** Create new User Roles, and edit Roles that the User has been given access to through the Role Restrictions field. A user can never create another Role with higher permissions than they themselves have.
- **Upload Manager:** View and categorize uploads made by other Users.
- **Queue Manager:** View and re-prioritize jobs in the Processing Queues. (currently disabled)
- **Download Manager:** View list of downloads made by other Users.
- **View Private Conversations:** View all Comments on files that you have access to, even if they are marked Private.
- **Change Watermark:** Ability to change the watermark when downloading files. With this enabled, Users can change the watermark style, and also the User's name on the watermark.

User

- **Disable License Agreement:** If your system has a License Agreement that Users must agree to before logging in, checking this setting will allow a User to bypass it.
- **Create Users:** Create User accounts for others. With this permission, you can also edit Users you've created, as well as those which you're granted Edit access to through your User Access Rules. The Roles which are available to assign are those granted through the Role Restrictions field.
- **Upload Assets:** Gives Users the ability to upload files into CORE.
- **Print:** Gives Users the option in the interface to print images and documents.
- **Box** files access: Allows users to access Box files.

Package

- **Package Manager -** Standard User who has this additional permission does not have any restrictions on any package that is sent to them. The exception to this rule is expiration dates or views allowed for the package.
- **Forensic Streaming Enabled -** Forensic watermarking is only offered through a 3rd party integration and will require a license for users to enable this option. Forensic watermarking places an ‘invisible’ watermark on assets in order to track their location and provides the highest level of trackable security available for assets being shared outside of CORE. Forensic watermarking can work in conjunction with

visible watermarks in the CORE system.

- **Package Reports -** Allows Users to run reports on package access, views, downloads etc.
- **Mobile Downloads -** Allows Users who are sent a package to download files within the CORE mobile app for offline viewing with no wifi access. (For example, viewing an asset while in airplane mode while travelling.)
- **Approval Manager -** Allows Users to see all of the approvals (thumbs up, thumbs down) for approval type packages.

Device

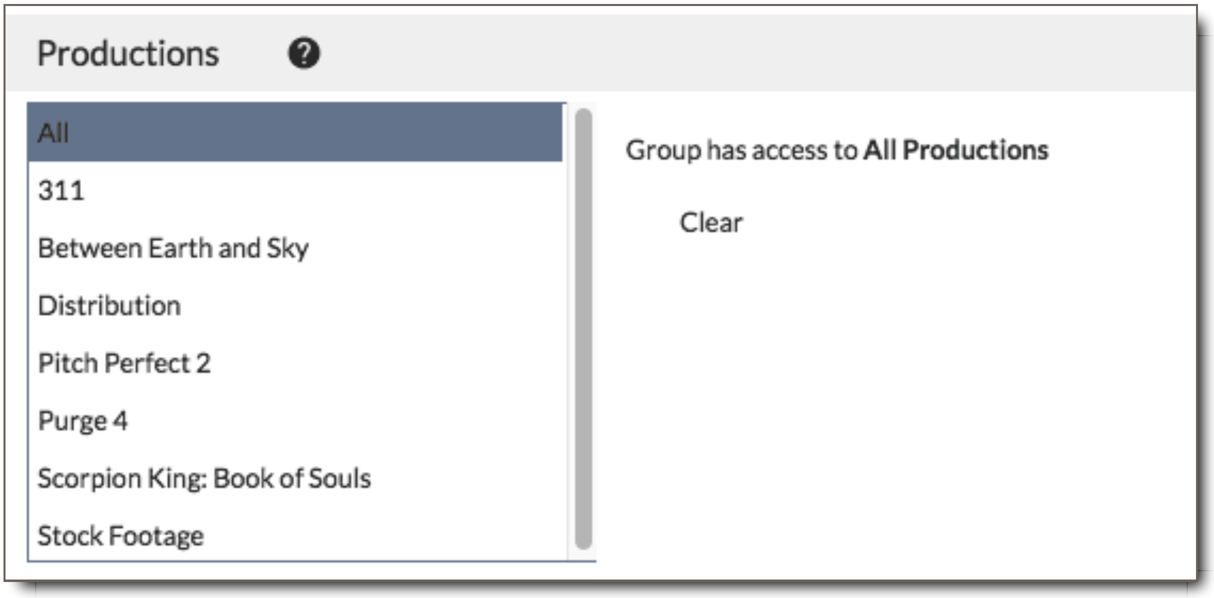
Select which device(s) the User may log in from. Choose from Desktop, Mobile, AppleTV, or any combination of the above.

Role Restrictions

This field appears if the Role has either Role Manager or Create Users permissions. If the User has the Role Manager permission, the Roles selected here will be available for them to view and modify in the User Roles section. If the User has the Create Users permission, the Roles selected here will be available for them to assign to other Users.

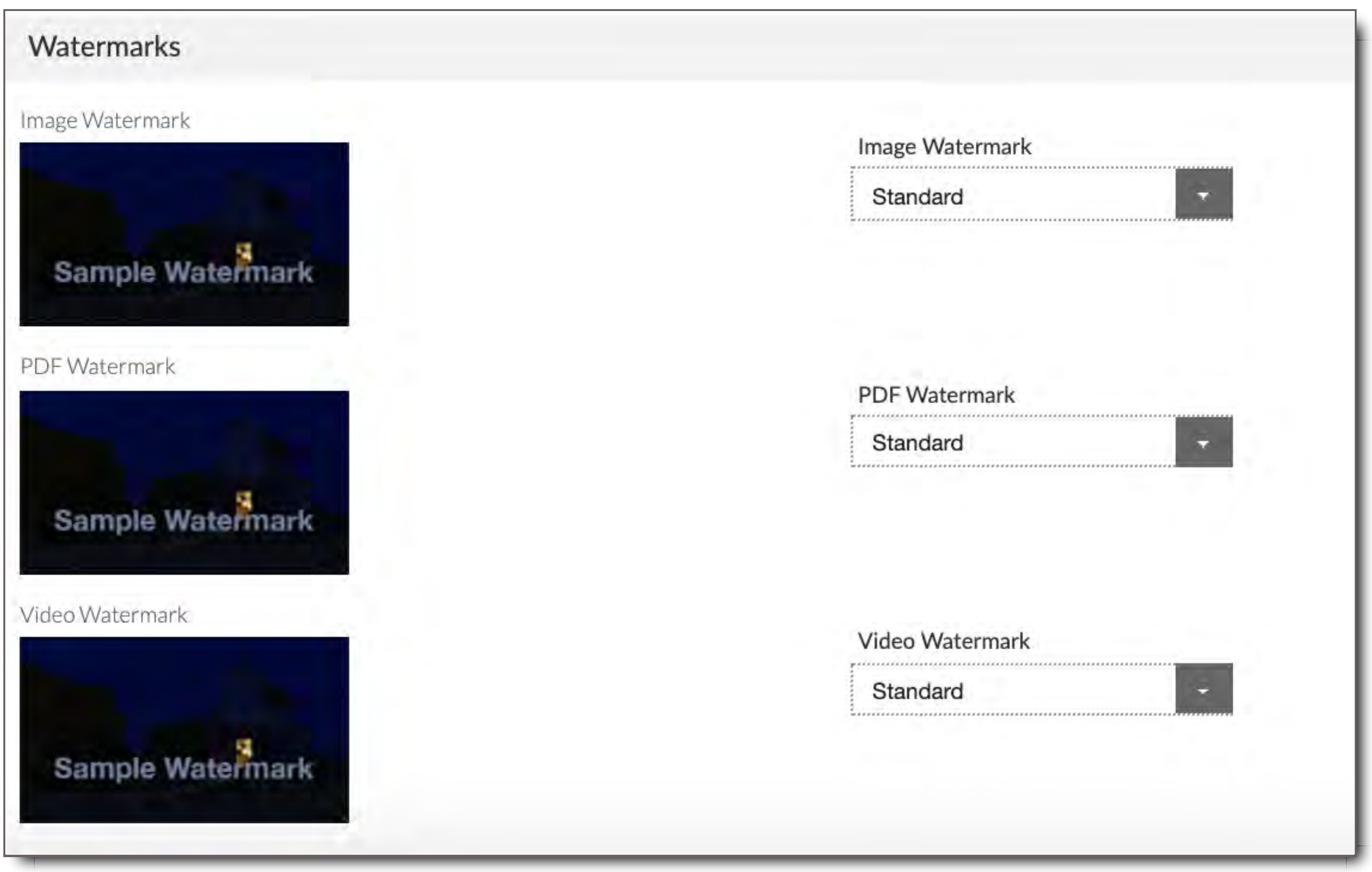
Productions

Select which Productions the User has access to. Productions selected here will be available in the User's dashboard and top selector dropdown, and will be available to them when categorizing Files (if they are able to do so). Additionally, if the User has the Role Manager permission, the Productions selected here must be part of any File Access Rules they create (see below).



Watermarks

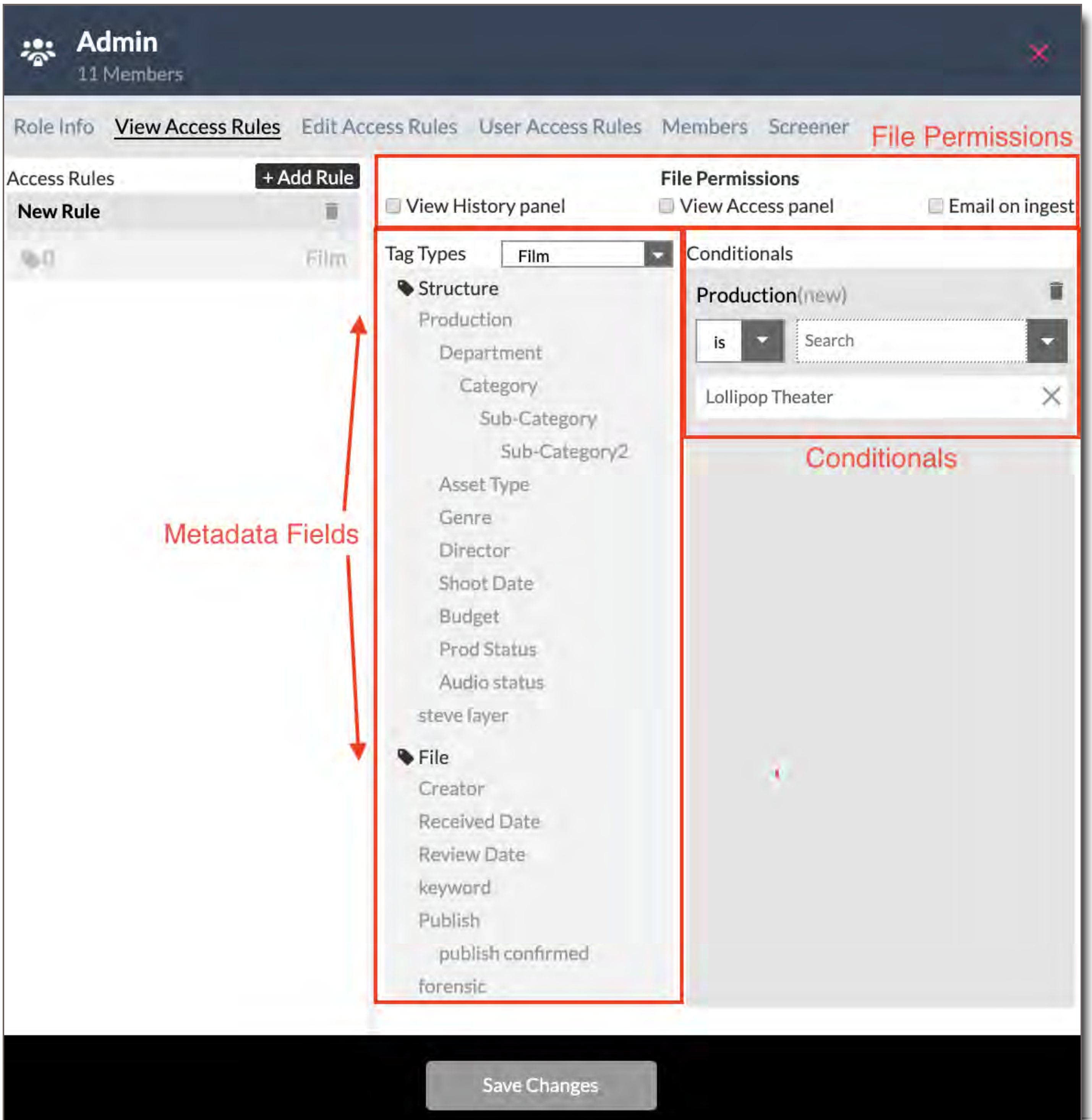
Set the style of watermarks that users in this role will receive by default when viewing or downloading files. You can set different watermark styles for images, pdfs, and videos. This setting may be overridden if the User has the Change Watermark permission, or if someone sends them a Package with a custom watermark. Additionally, this setting may be overridden globally in certain cases by the Production Watermarks Admin section.



View Access Rules

File Access Rules govern what files a User can see, whether they can interact with them, and if so, how.

- View Access Rules control what Files a User can view, and optionally, what additional information about them they can view.
- Each User Role can have as many File Access Rules as needed.
  NOTE: To learn how to create a View Access Rule see Create a New User Role: A Step-By-Step Guide



Access Rules

List of the rules you create within the User Role. A User Role can have multiple rules.

File Permissions

By checking the File Permissions boxes, permission can be granted to view additional info for the files you have access to view.

View History

View the history panel for the Files you have access to. See here for information about the History Panel.

View Access

View who else has access to the Files you have access to. See here for information about the Access Panel.

Email on Ingest

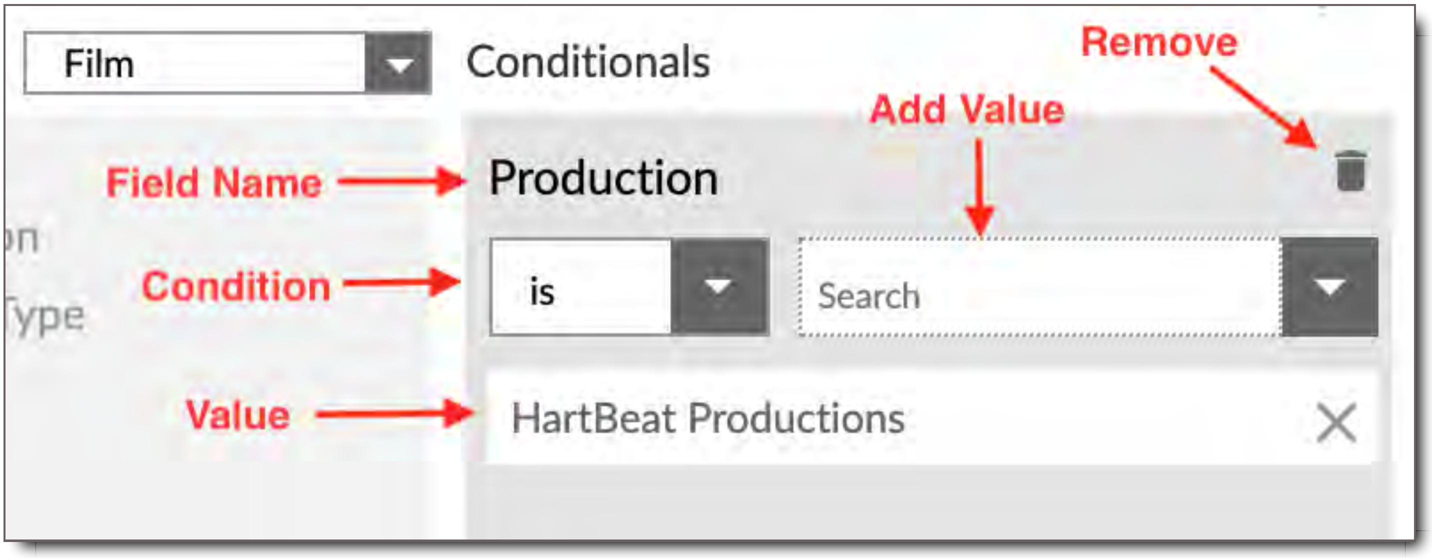
Users assigned to the role will receive an email notification whenever Files matching the Rule are ingested into CORE.

Metadata Fields

The fields shown here will match those in the Tag Structure for the selected Domain. Click on a field to add a conditional rule for that field.

Conditionals

Each Conditional is simply a filter. You can add as many conditionals to a Rule as you'd like. All Conditionals in a rule are ANDed together. Files that match the Rule will become available (or be hidden) if they satisfy all of the listed conditionals. For each Field, choose at least one Value to match.



Field Name

The field you are using to filter values.

Condition

Select either "Is", "Is Not." or “Is All”.

Value

The Value that a File must have in order to match. You can add multiple Values to each conditional. Click the X to remove a Value.

Add Value

Click to select existing Values from a dropdown, and add them to the Conditional.

Remove Conditional

Click the trash icon to Remove the entire Conditional.

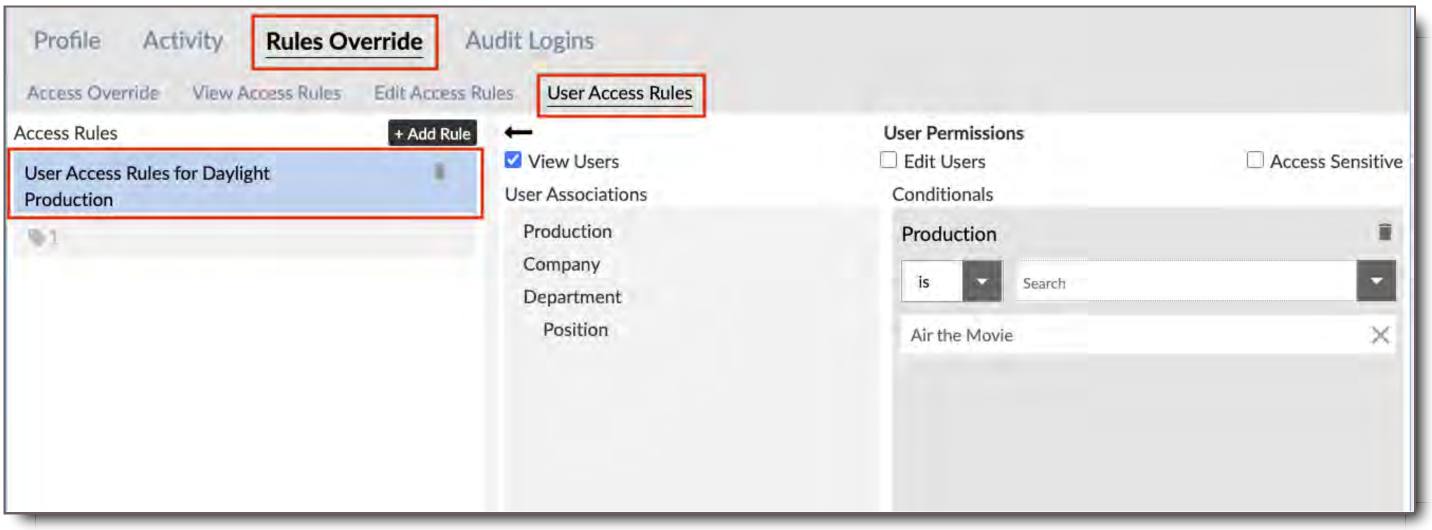
Edit Access Rules

Edit Access Rules control what Files a User can edit. Files matching an Edit Access Rule will be both viewable and editable by Users assigned to the Role. The anatomy of Edit Access Rules is the same as View Access Rules with one exception, it does not include Email on Ingest. That rule is applied only in View Access Rules.

Important: If you make overrides to the Edit Access Rules in this section you will be overriding the Rules set up for the user in their assigned User Role.

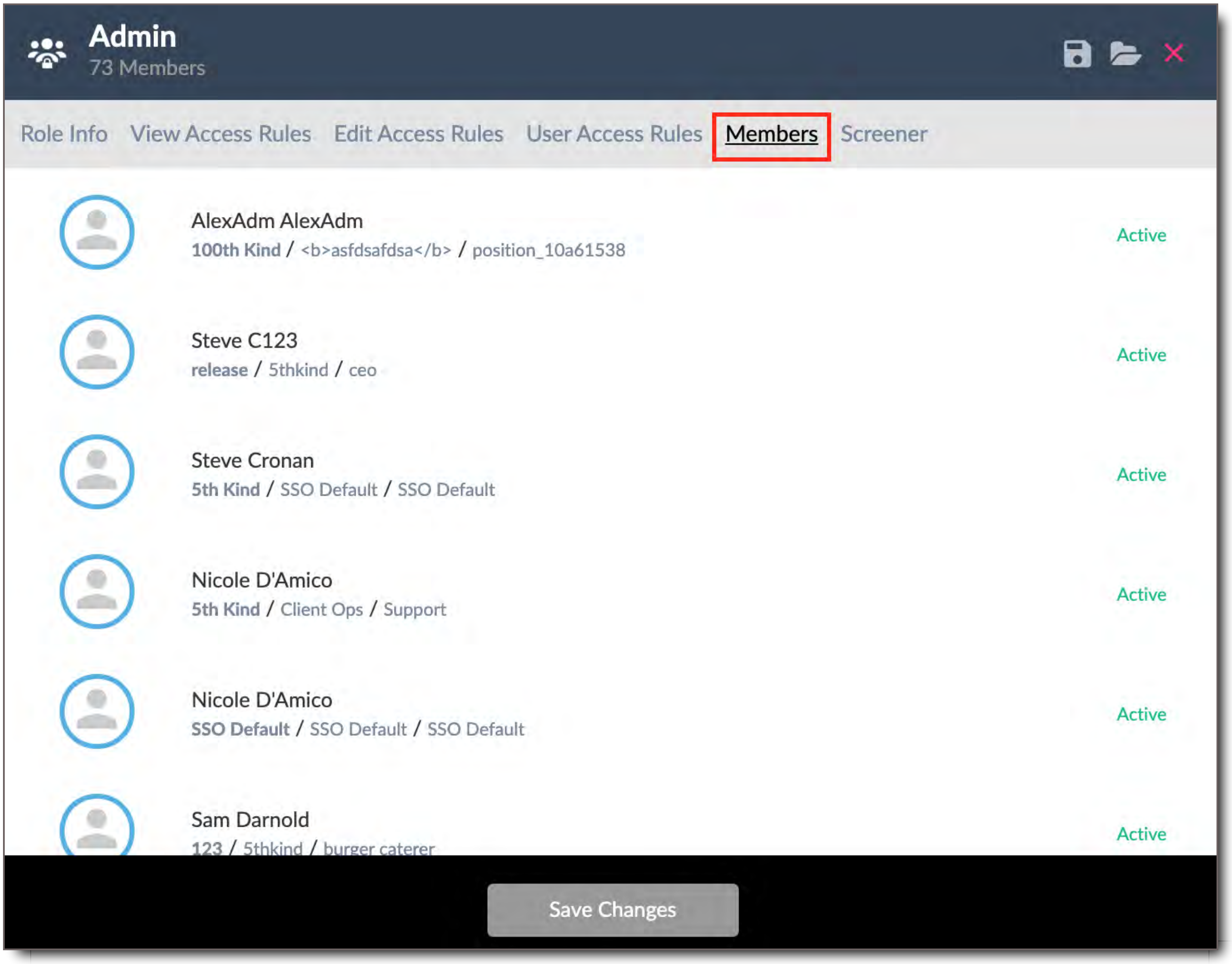
User Access Rules

User Access Rules control which other Users in the system a User will be able to see and/or modify. The rule allows Users to view other users within selected Production, Company, Department or Position.
Important: If you make overrides to the User Access Rules in this section you will be overriding the Rules set up for the user in their assigned User Role.



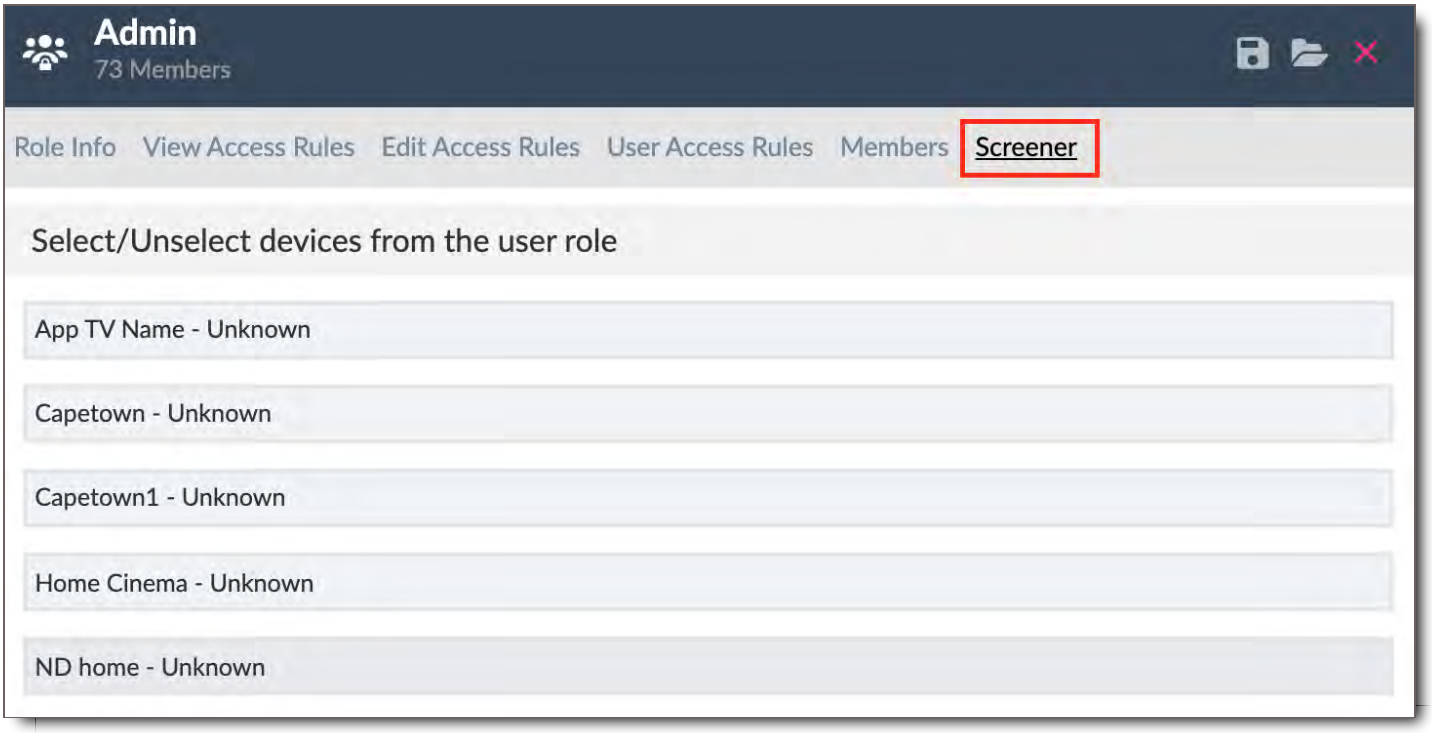
Members

A list of Active and Inactive users who have been assigned to that User Role.



Screener

A selectable list of devices to which the given User Role can broadcast Screeners via the Projection Room App.



Before Creating New User Roles

Creating a new User Role is the first step to setting up users for a production. Find below a few tips and insight to help you better plan and prepare for User Role creation in CORE.

Naming Conventions Tips

Use a convention that can be applied across projects. For instance:

- Start each Role with the name of a project, business group or workflow that is most appropriate for your needs.
- Use numbers for easy identification of role type or complexity. For instance, if you know that every project has seven roles, scale them from 01 to 07 with 01 being the most basic user with limited access and 07 as your Admin.
- Use keywords that indicate the role type, such as Inbox Only, Upload, Download, Distribution, etc.
- Examples:
    - PROJECT A_01_Inbox Only
    - PROJECT B_01m_Inbox_Mobile Only

- BUSINESS GRP_03_Upload-Download
- BUSINESS GRP_05_Package Mgr_Distro
- SYSTEM_07_Admin

Craft User Role Templates

Create a template for each role type you've identified.

Go to Create User Role Templates for more specific instructions.

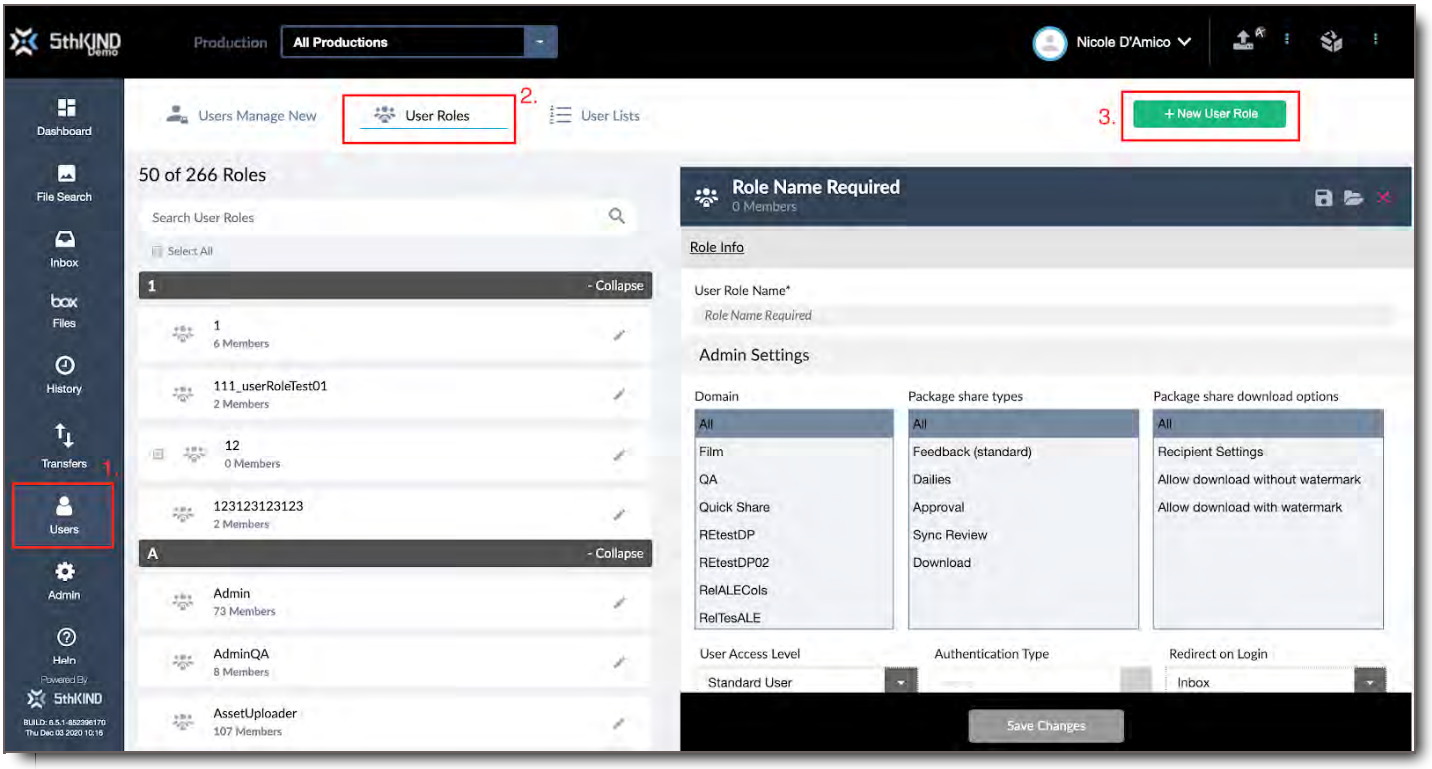
Create a New User Role: A Step-By-Step Guide

Creating a User Role is done in multiple parts:

- **Step 1:** You must first create the basic user role in the Role Info tab
- **Step 2:** If any, add Viewer Access Rules
- **Step 3:** If any, add Edit Access Rules
- **Step 4:** Finally, you create User Access Rules Some users will also manage your company's Projection Room App. In that case, there is a Step 5.

To create a new User Role,

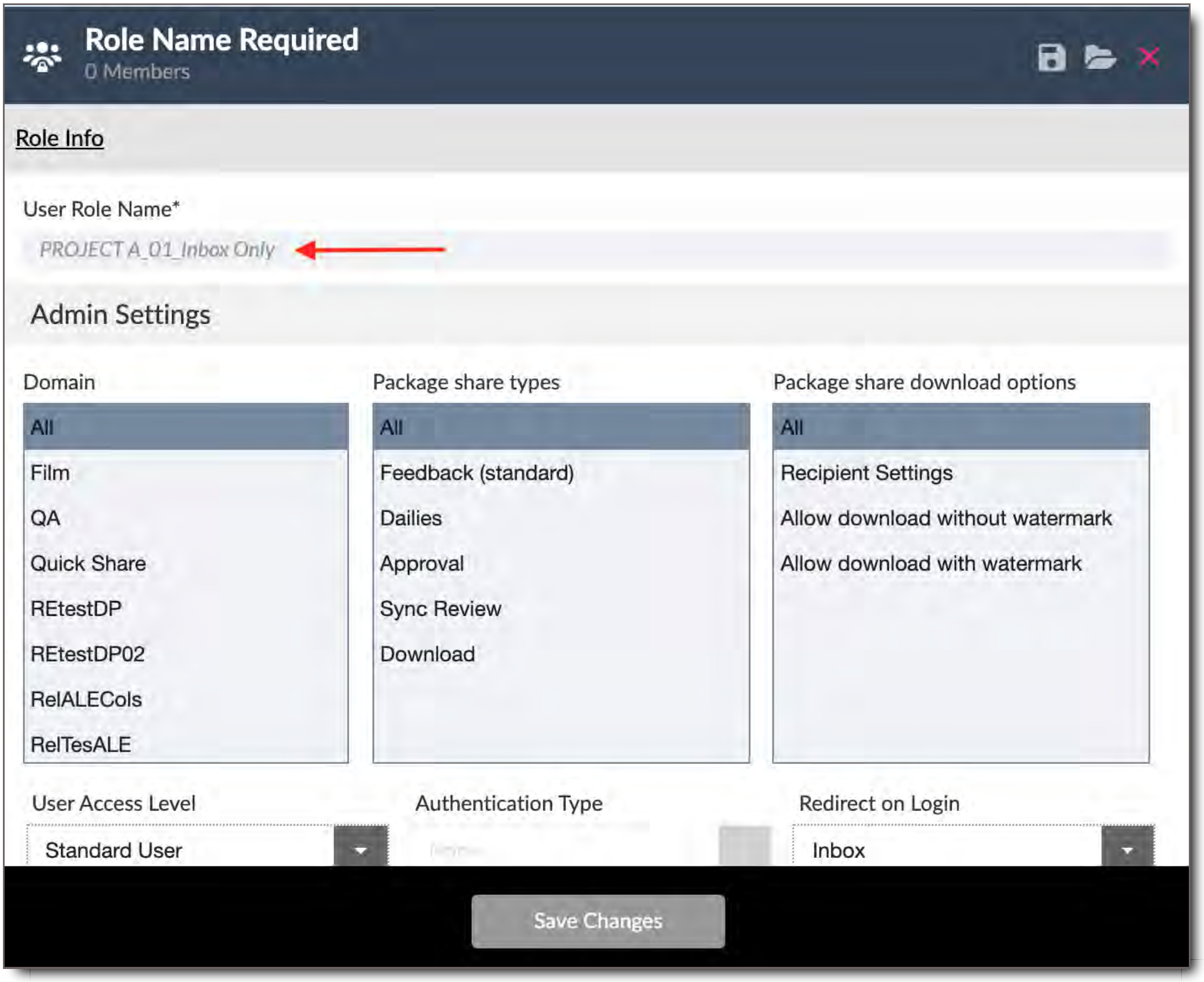
1. Navigate to the Users module
2. Click User Roles.
3. Click New User Role
4. Add basic User Role info in the Role Info tab



Add Basic User Role Info (Step 1)

1. Start by entering the User Role name.

CORE Tip: Create a standardized naming convention for your User Roles based on the general user types you will need for each of your projects or divisions. This way you can save roles as a template, and reuse them by simply changing the name of the User Role to the current project, etc. Make the names descriptive enough so you know what they include, or maintain a chart of your different role types that you create.



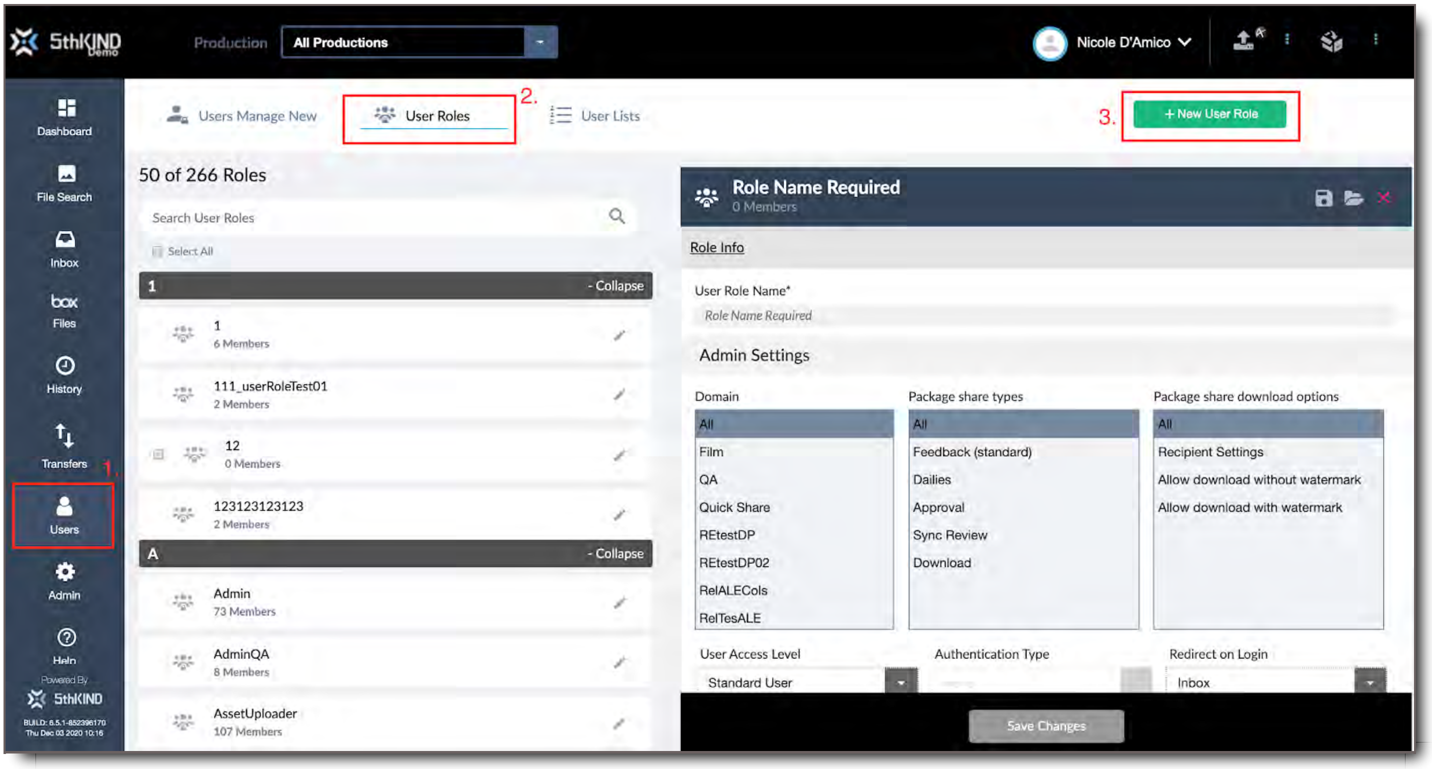
Your base role is created. You can now personalize the permissions and access based on the needs of the specific role. See examples below for steps to create specific user roles such as Department Admin, Viewer and Uploader.

Example 1: Department Admin

The Department Admin will have the basic Permissions of a Standard User with additional access added to allow them to have Admin permissions for a specific department and production only.

Step 1: Create a new role and assign the new Role a name by entering it under User Role Name. For our department admin, we will name the role 100 - Editorial Admin.

2. Click on the Users tab on the left panel.
3. Click User Roles.
4. Click + User Role.

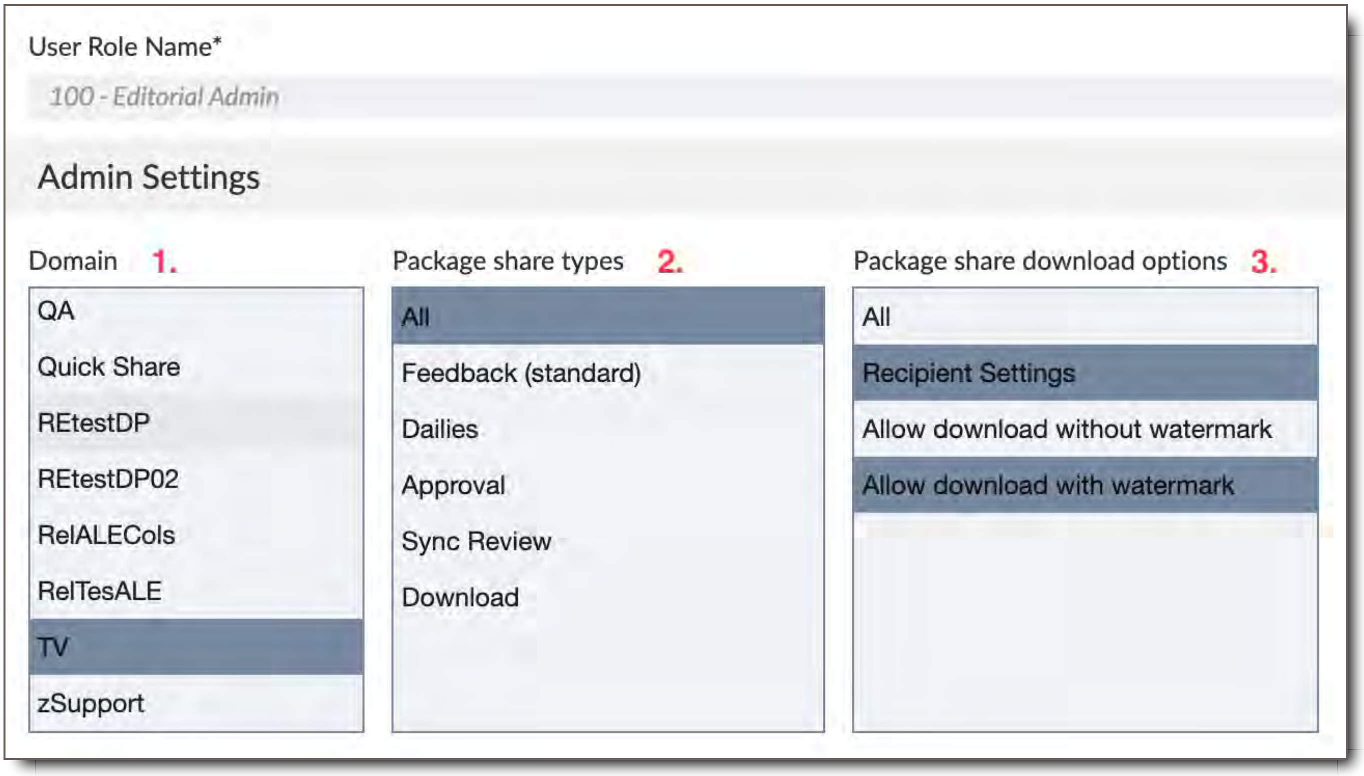


Step 2: Assign the specific settings in Role info. In our example, the Editorial Admin:

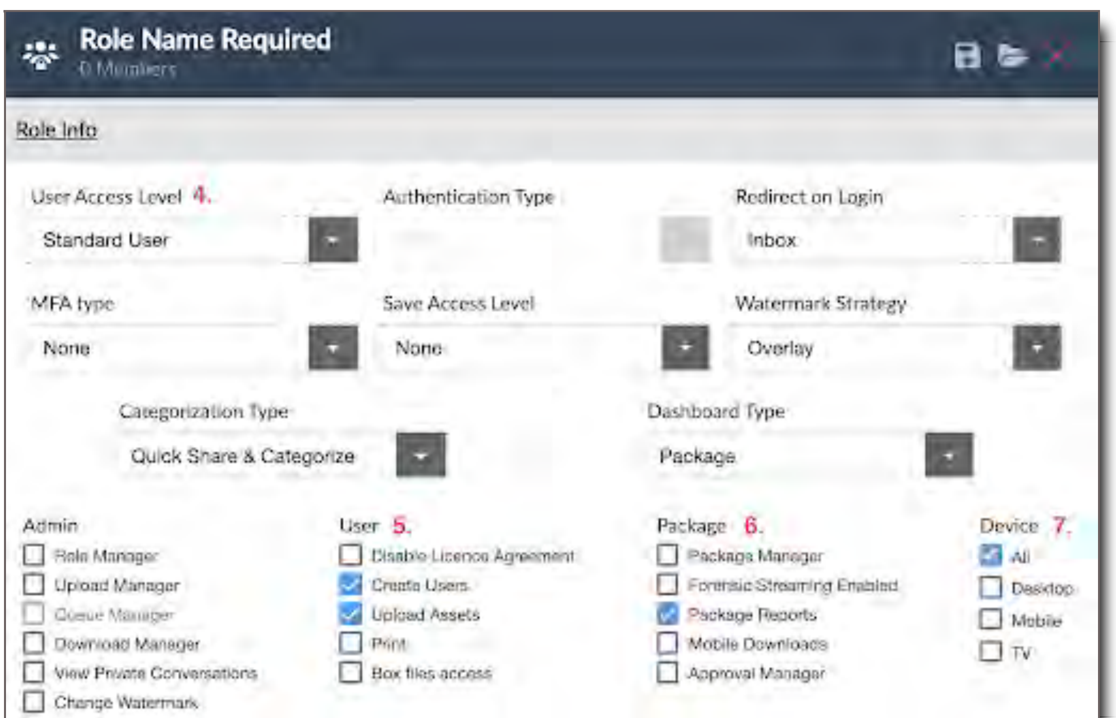
1. Has access to the TV Domain.

2. Can share all package types.

3. Can share packages to be downloaded with a watermark or without a watermark if the specific user has that permission based on their role.



4. Since our Editorial Admin will not be an Admin for the entire CORE app, we will assign The User Access Level as Standard User. (We will add additional access later by adding Access Rules to the role.)



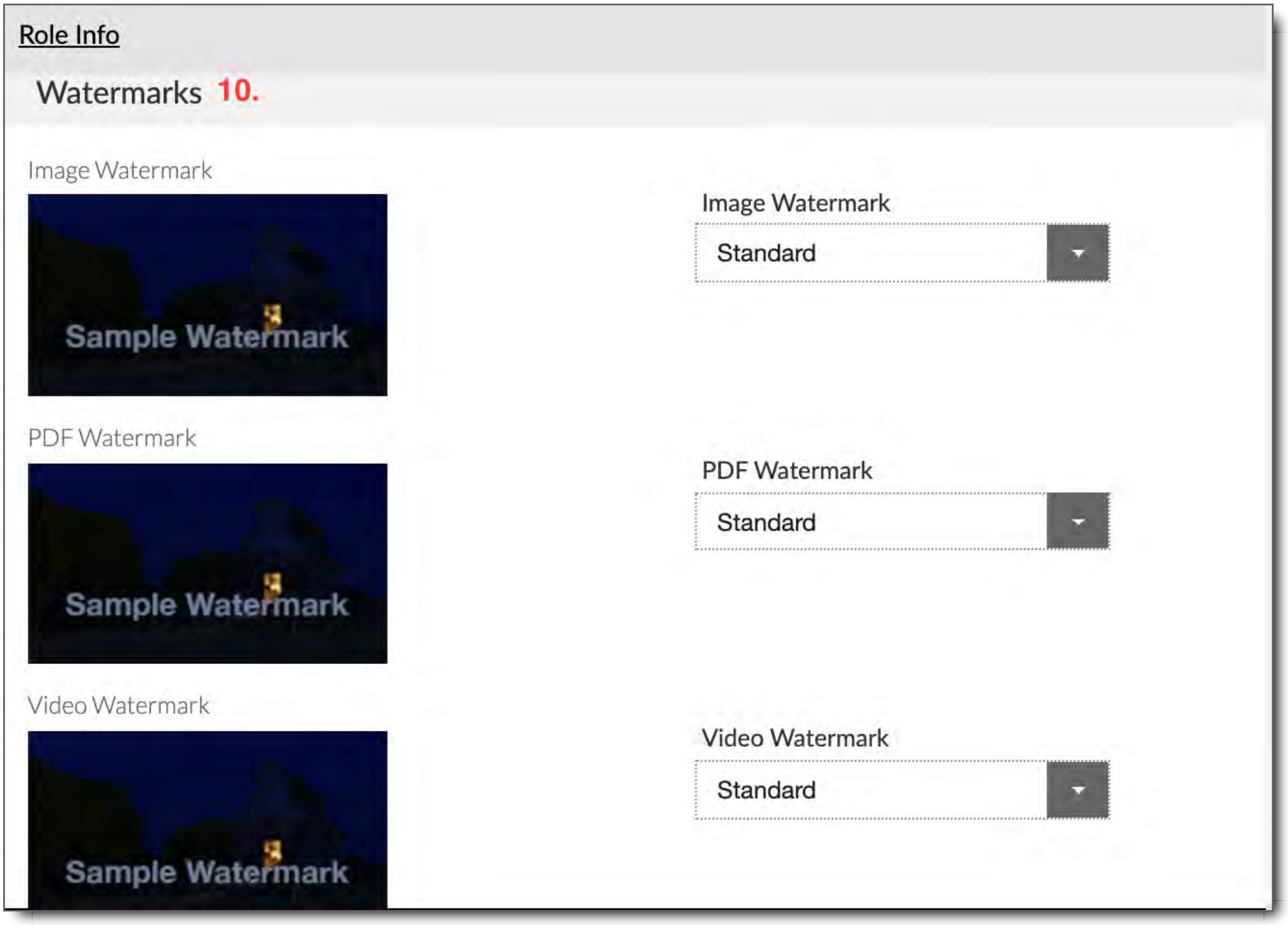
5. Users with this role will have the ability to Create Users and Upload Assets for the department and production they have access to (we will specify which Department and Production our Editorial Admin has access to later).
6. Users under this role will be able to view Package Reports.
7. This role allows its users to access CORE from the mobile and AppleTV apps in addition to the Desktop

version.

8. In the Roles Restriction section, you control what roles you can choose when you create new users. In our example below, the Editorial Admin can create new users with the Asset Uploader or Asset Viewer roles.

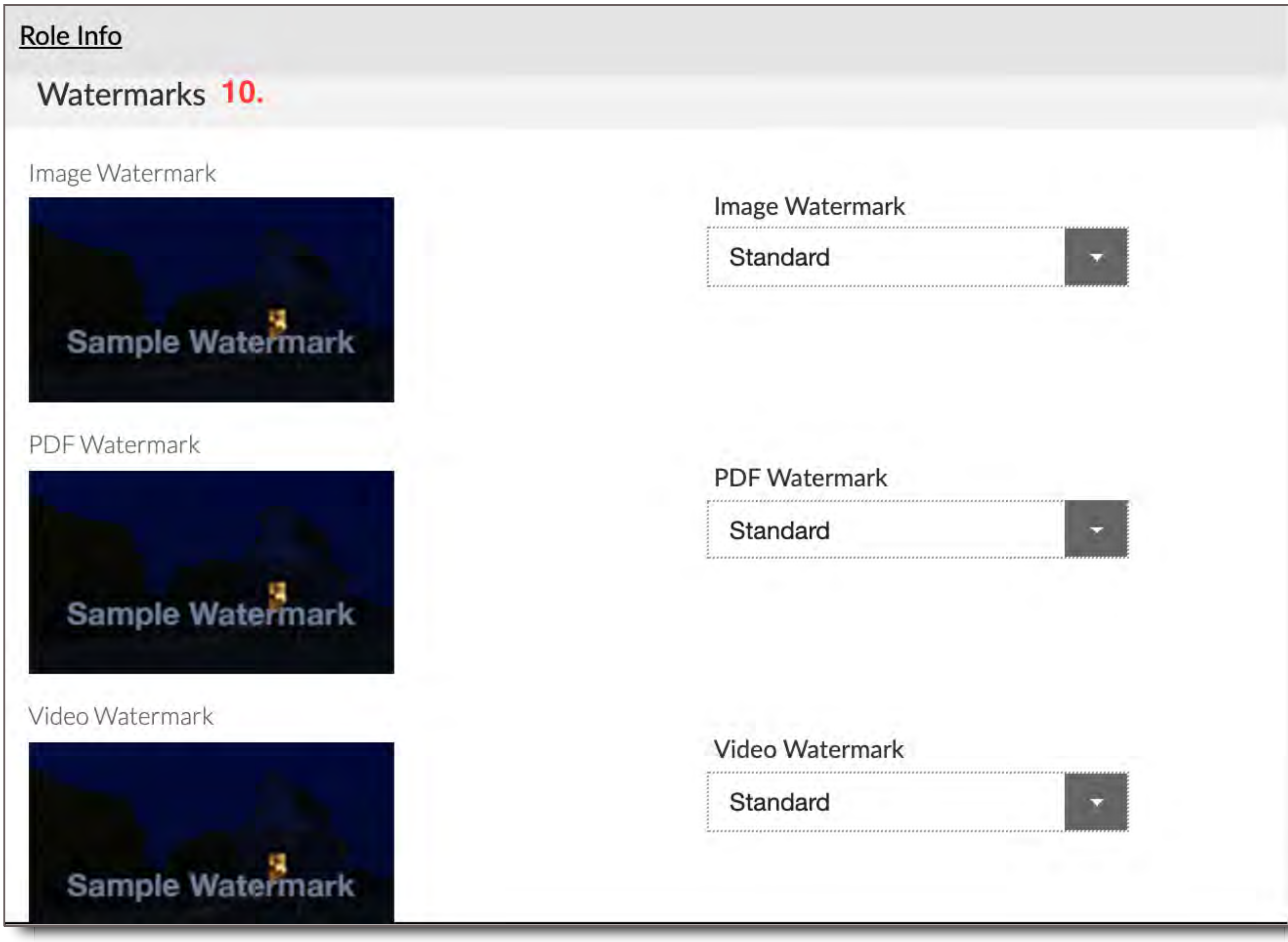
9. Under Production, we can assign which Productions the users in this role have access to. In this example, the Editorial Admin will only have access to 1 Production - 100. Click on any additional productions to add more.

10. Under the Watermark section, assign the watermark style that the Editorial Admin will see when they view video, image or PDF document. In our example, we chose the standard watermark styles.



Step 3: Create an Access Rule that gives the 100 - Editorial Admin access to the Editorial Department only.

1. To ensure the Editorial Admin only has access to the Editorial Department, we need to create an Access Rule. To do so click:
   i. View Access Rules
   ii. Add Rule, name the rule (in this case View 100)
   iii. Choose your Tag Type (Example TV Domain)
   iv. Choose Department under the Structure
   v. Choose Conditional value, in this case, we want the Editorial Admin to have access to View Editorial Dept. Click the IS option and then choose Editorial in the pull down showing all the Departments available.

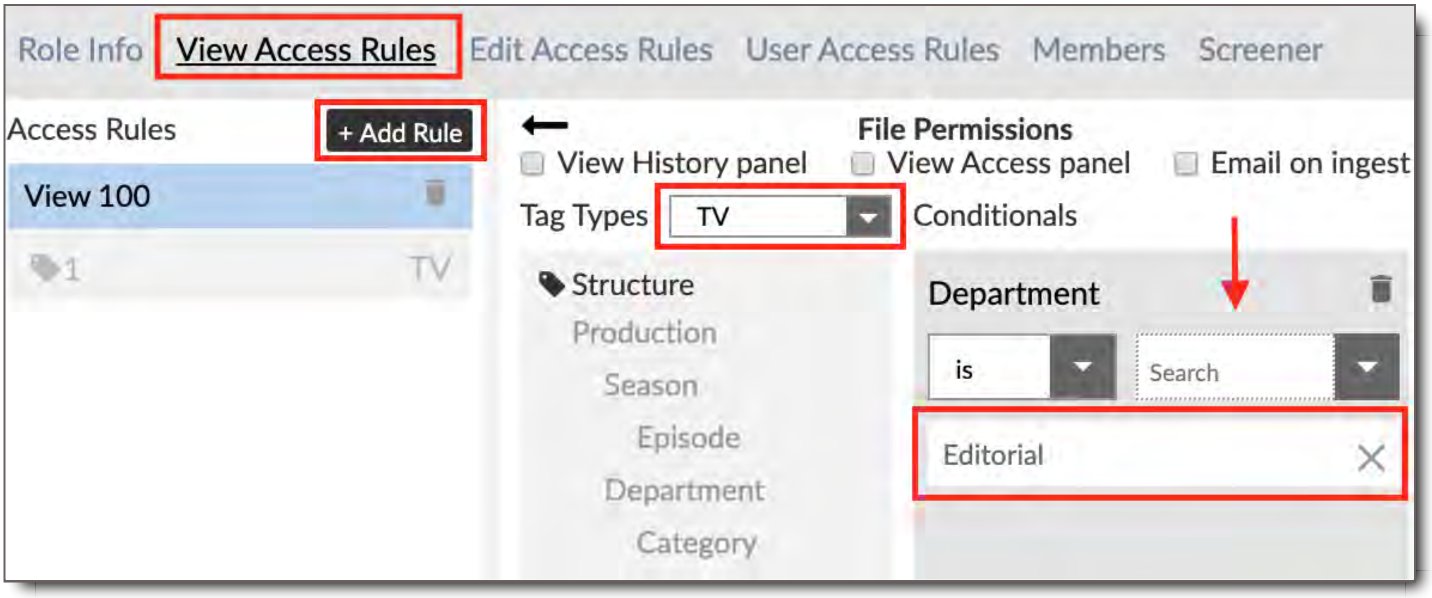


Example 2: Viewer Role

The Viewer Role gives users permission to view assets within a particular production (no uploading, downloading or sharing options).

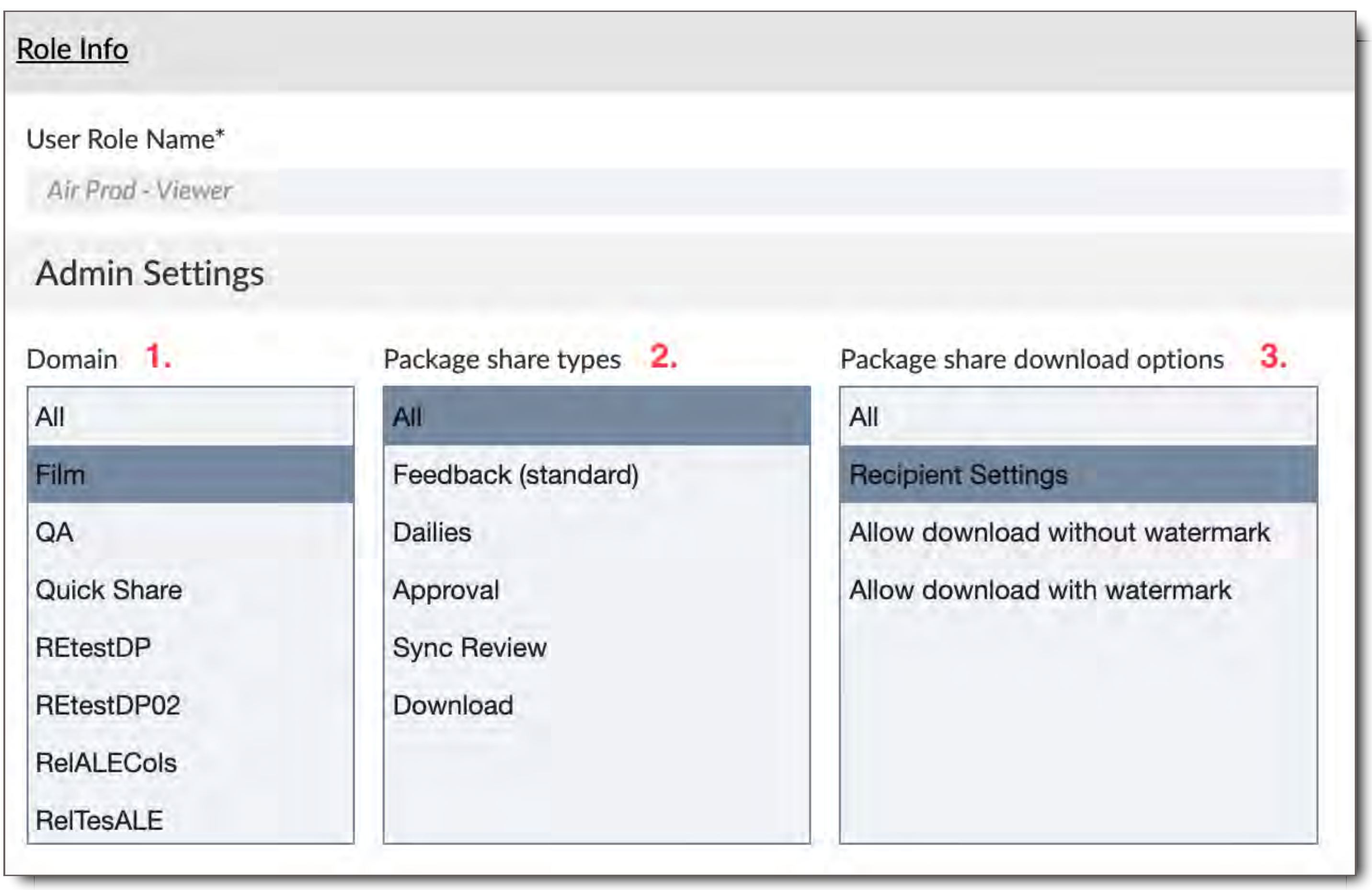
Step 1: Create a new role and assign the new Role a name by entering it under User Role Name. For our viewer role, we will call it Air Prod - Viewer.

2. Click on the Users tab on the left panel.
3. Click User Roles.
4. Click + User Role.

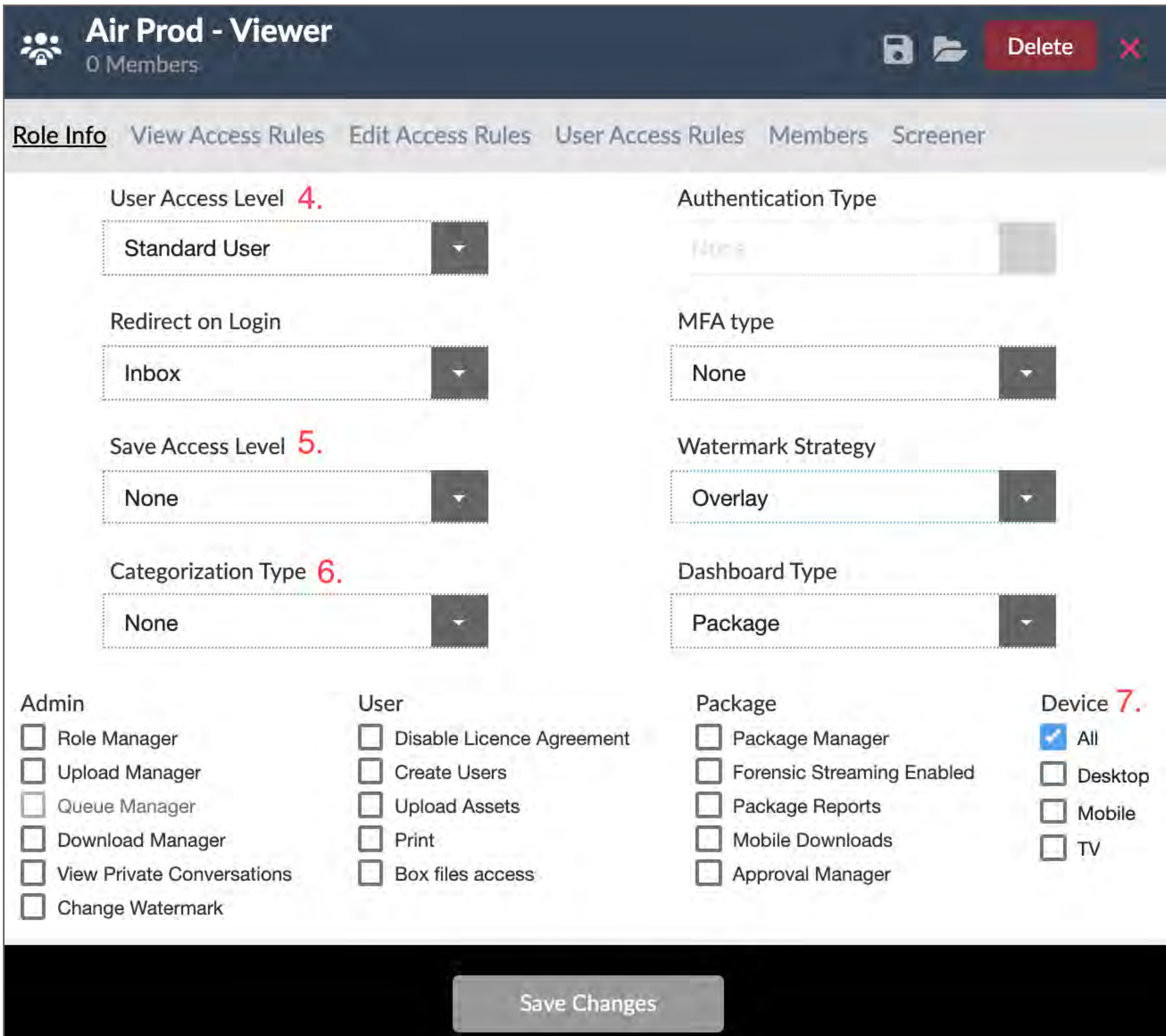


Step 2: Assign the specific settings in Role info. In our example, the Air Prod - Viewer:

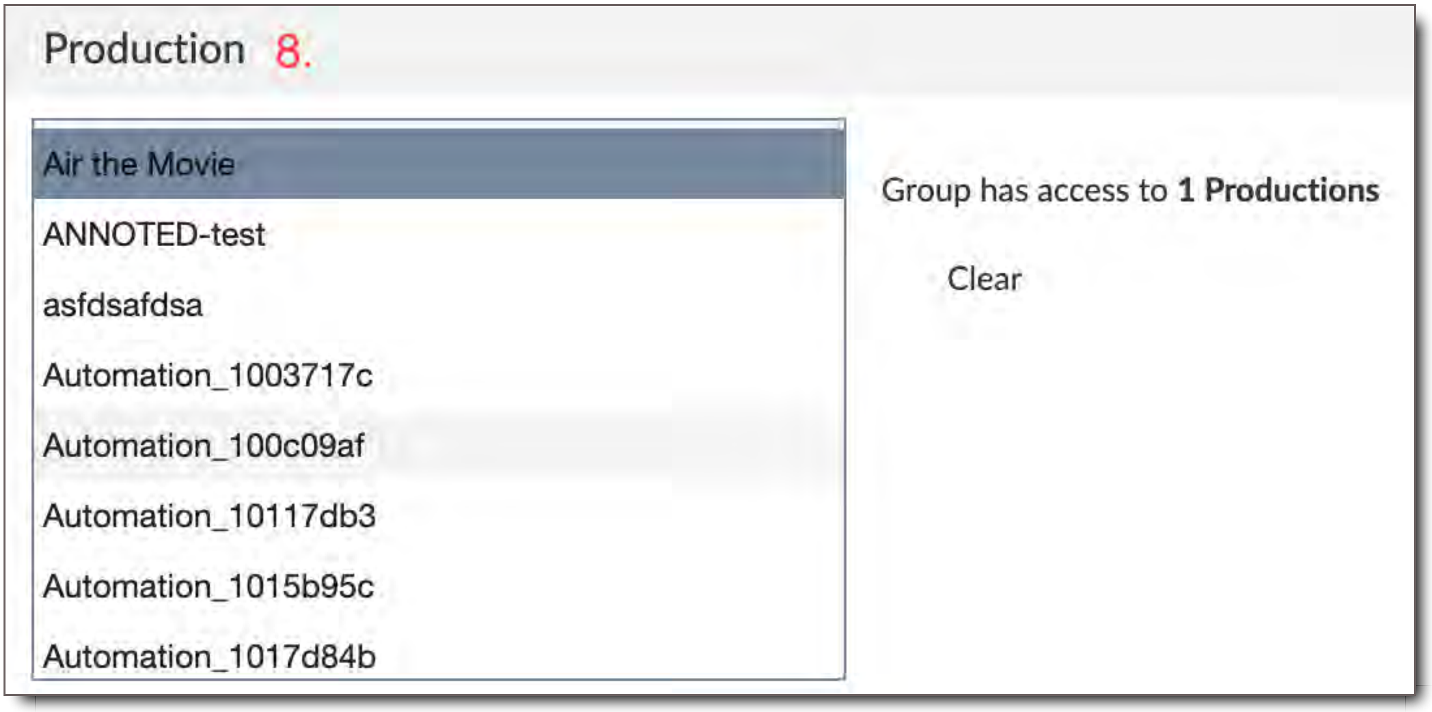
5. Has access to the Film Domain.
6. Can share all package types.
7. We will set the Package share download options to Recipient Settings. That way the package can be shared with a watermark or without a watermark if the specific user has that permission based on their role.



8. Our Air Prod - Viewer should not have any Admin permissions so we will assign the User Access Level as Standard User.
9. The Air Prod - Viewer should not have the ability to download any assets, so we will choose None under Save Access level.
10. The users with this role will not be responsible for Categorizing or sharing assets, so we choose None for Categorization Type.
11. The only additional permission we want to give this viewer role is the ability to view assets on the AppleTV or mobile ios device. Under Device, choose All to accomplish this.



12. Our Air Prod - Viewer should only have access to see other users in Air the movie production. We will choose Air the Movie under Production.

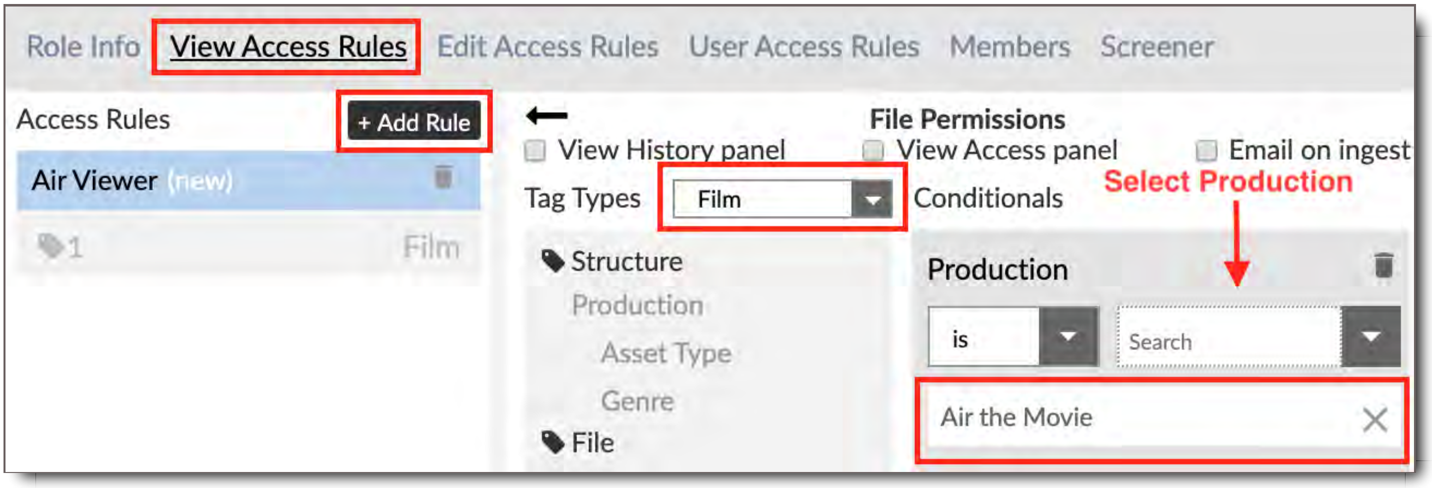


13. Under the watermarks section, assign the watermark style that the Air Prod - Viewer will see. In our example, we will assign the Secure watermark to be shown for images, ScriptStyle for PDFs and Low Center Light for video.

Step 3: Create an Access Rule that gives the Air Prod - Viewer access to only the Air project.

14. To ensure that the Air Prod - Viewer only has access to the Air project we need to create an Access Rule. To do so click:
    i. View Access Rules
    ii. Add Rule
    iii. Choose your Tag Type (Example Film as the Domain)
    iv. Choose Conditional value, in this case, we want the viewer to see the project Air. Click the IS option

and then choose Production Air the Movie in the pull down menu.

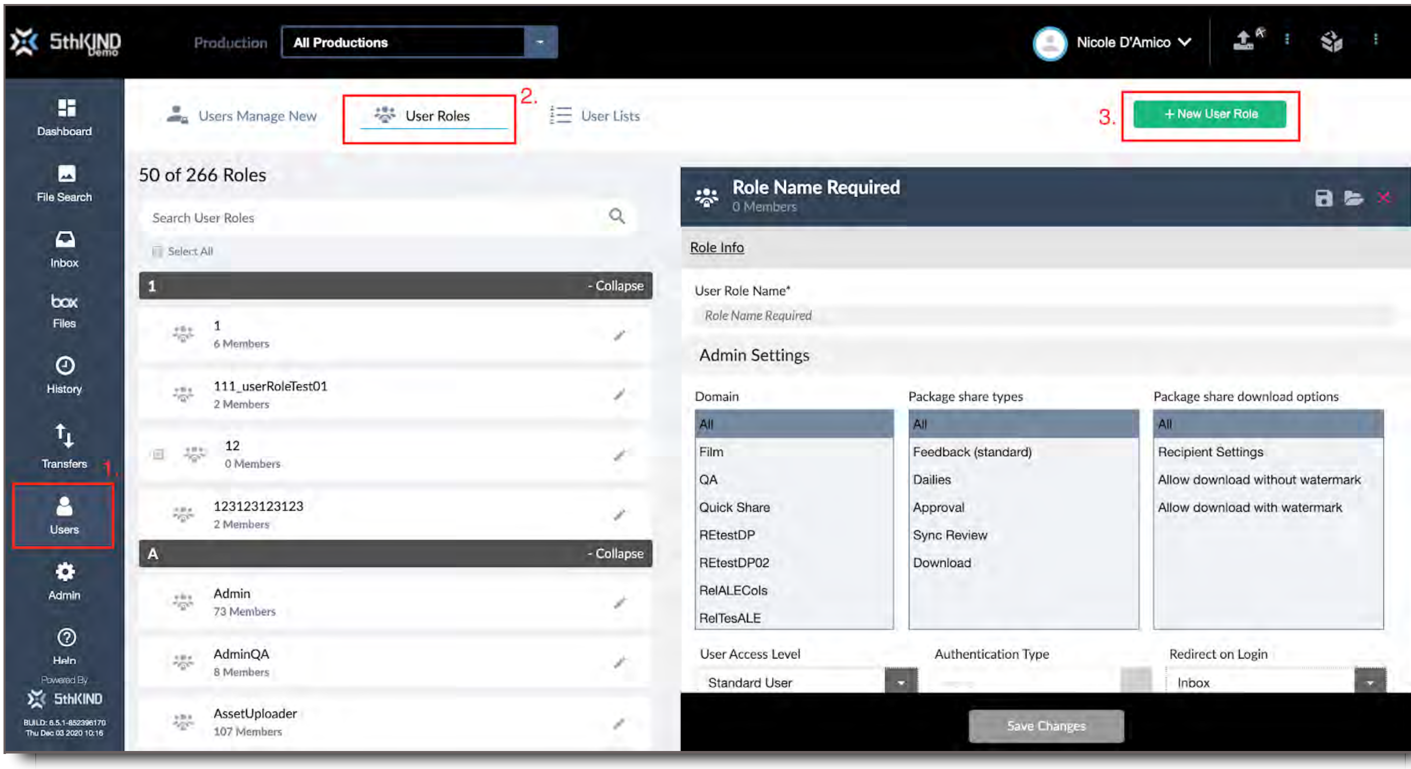


Example 3: Uploader Role

The Uploader Role gives users permission to upload and share assets within a particular production (no downloading options).

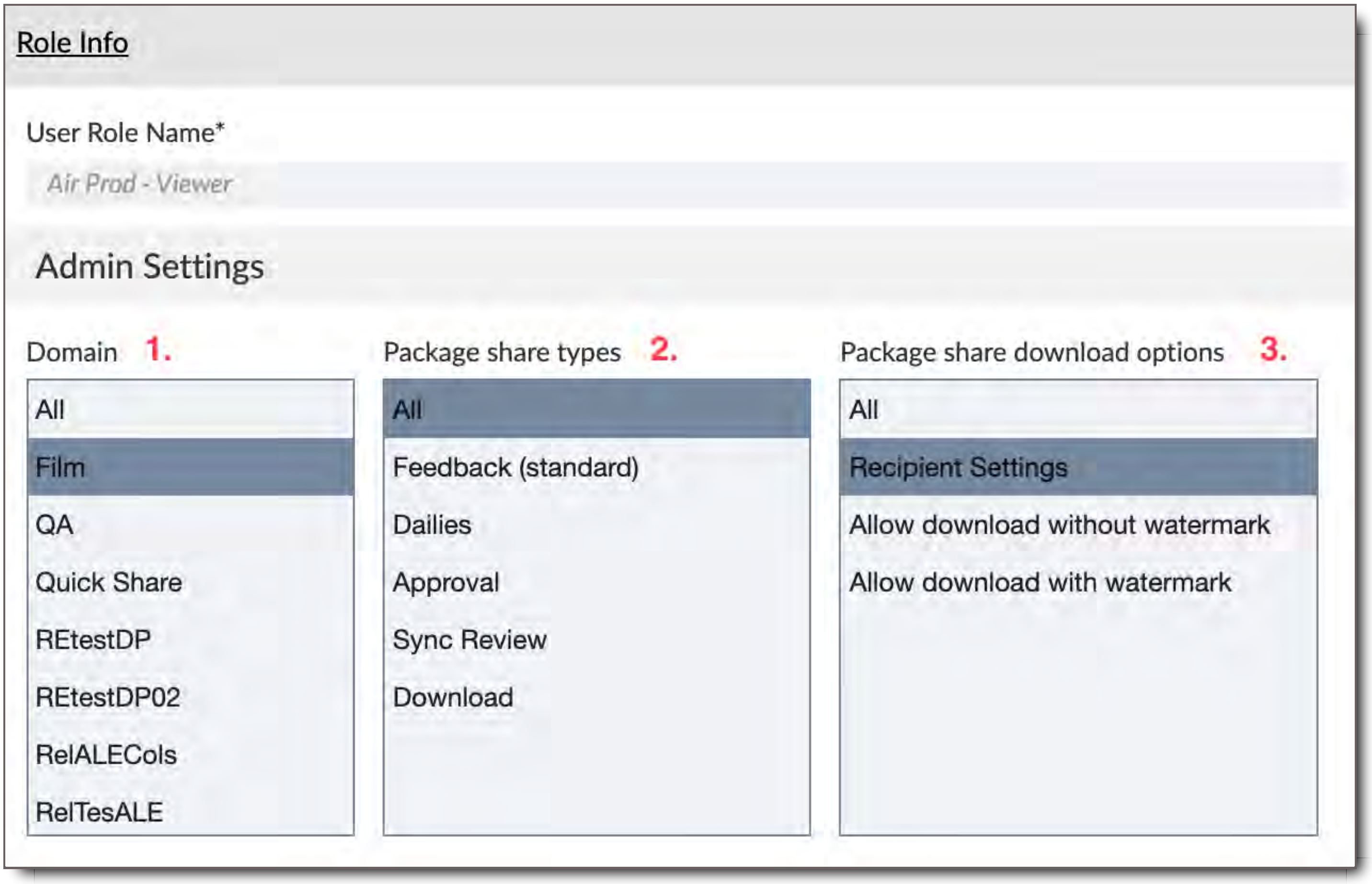
Step 1: Create a new role and assign the new Role a name by entering it under User Role Name. For our production uploader, we will name the role Air - Uploader.

1. Click on the Users tab on the left panel.
2. Click User Roles.
3. Click + User Role.

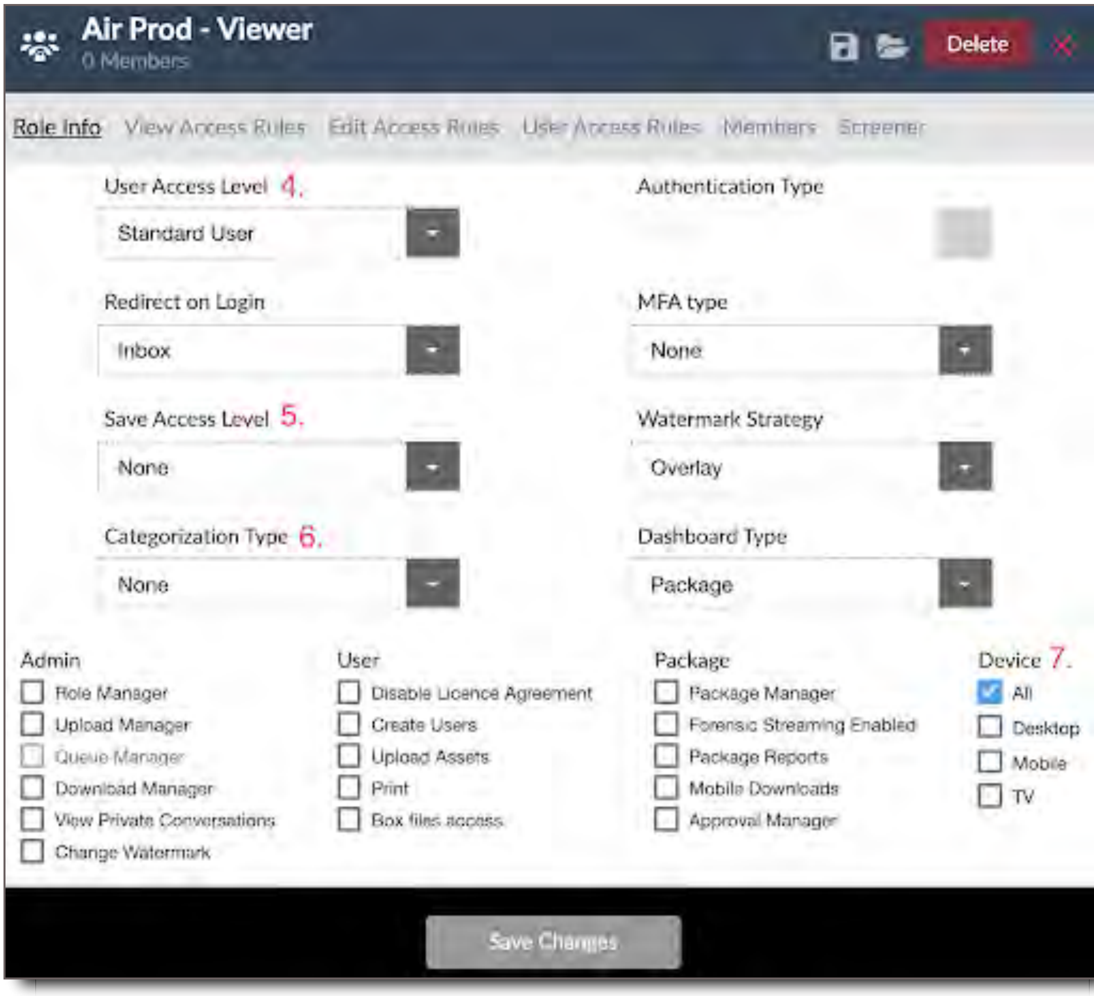


Step 2: Assign the specific settings in Role info. In our example, the Air - Uploader:

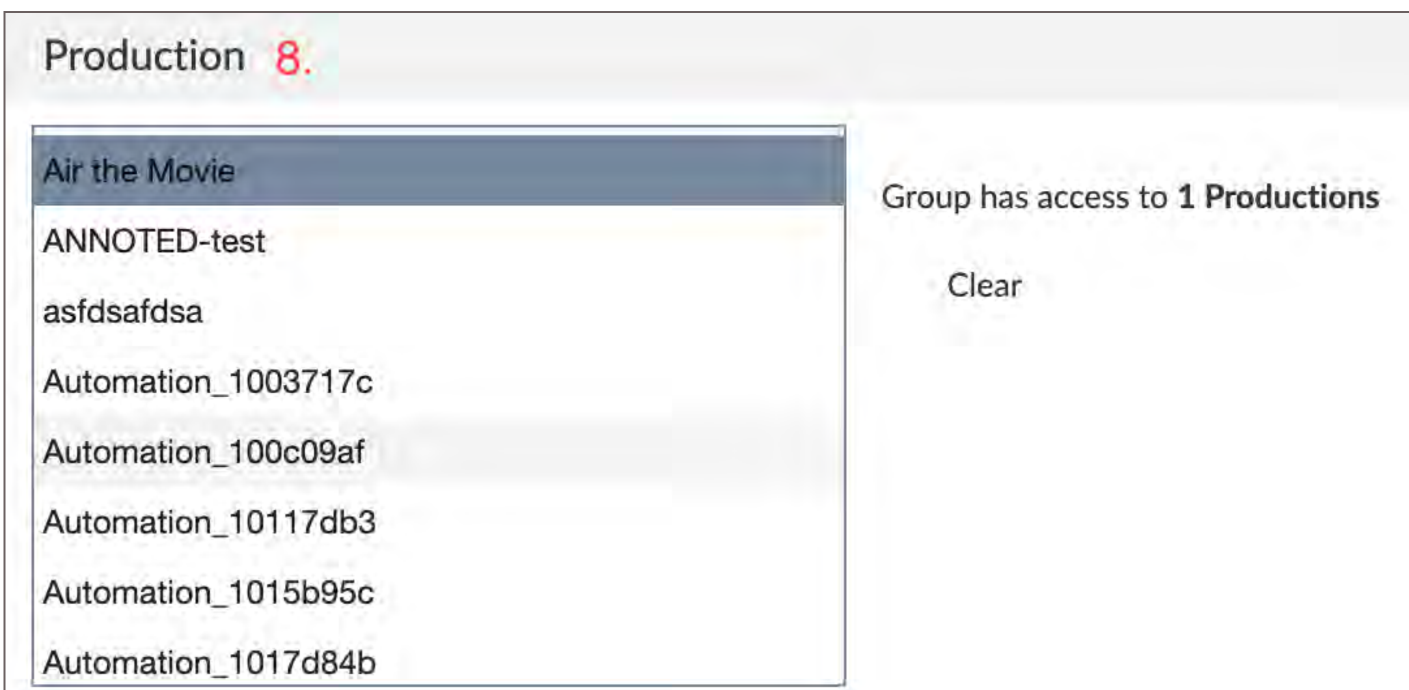
1. Has access to the Film Domain.
2. Can share all package types.
3. We will set the Package share download options to Recipient Settings. That way the package can be shared with a watermark or without a watermark based on the recipient's permission.



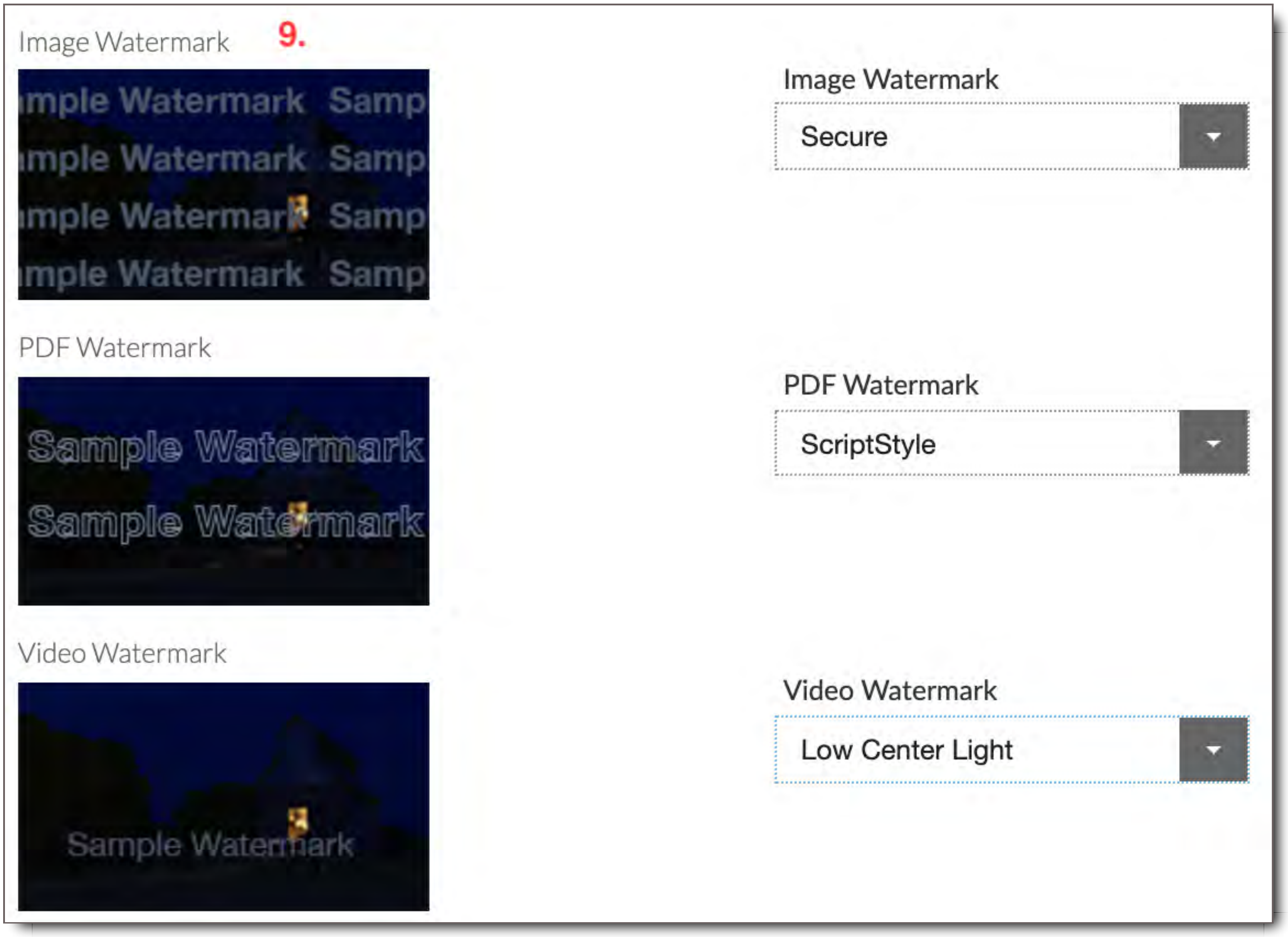
4. Our Air - Uploader should not have Admin permissions so we will assign the User Access Level as Standard User.
5. The Air -Uploader should not have the ability to download any assets, so we will choose None under Save Access level.
6. The users with this role will not be responsible for Categorizing or sharing assets, so we choose None for Categorization Type.
7. The Uploader role only needs to access the Desktop so we will choose that option.



8. Our Air - Uploader should only have access to see other users in the Air project. We will choose Air the Movie under Production.

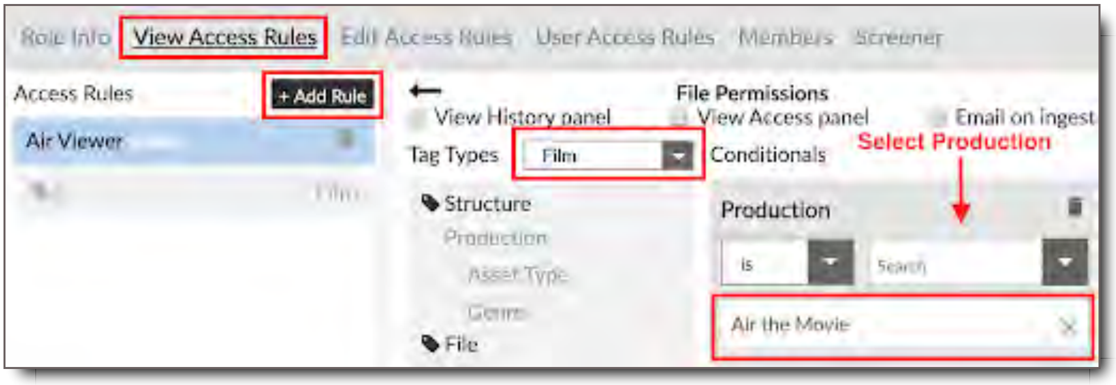


9. Under the watermarks section, assign the watermark style that the Air - Uploader will see. In our example, we will assign the Secure watermark to be shown for images, ScriptStyle for PDFs and Low Center Light for video.



Step 3: Create an Access Rule that gives the Air -Uploader access to the Air project only.

4. To ensure that the Air - Uploader only has access to the Air project, we need to create an Access Rule. To do so click:
   i. View Access Rules
   ii. Add Rule
   iii. Choose your Tag Type (Example Film Domain)
   iv. Choose Production under Structure
   v. Choose Conditional value, in this case, we want the Air - Uploader to have access to the production Air the Movie. Click the IS option and then Air the Movie from the pull down menu.



To create more specificity, limitations, or access, add rules to your role. Add and manage rules following the instructions in the below sections:

1. View Access Rules
2. Edit Access Rules
3. User Access Rules

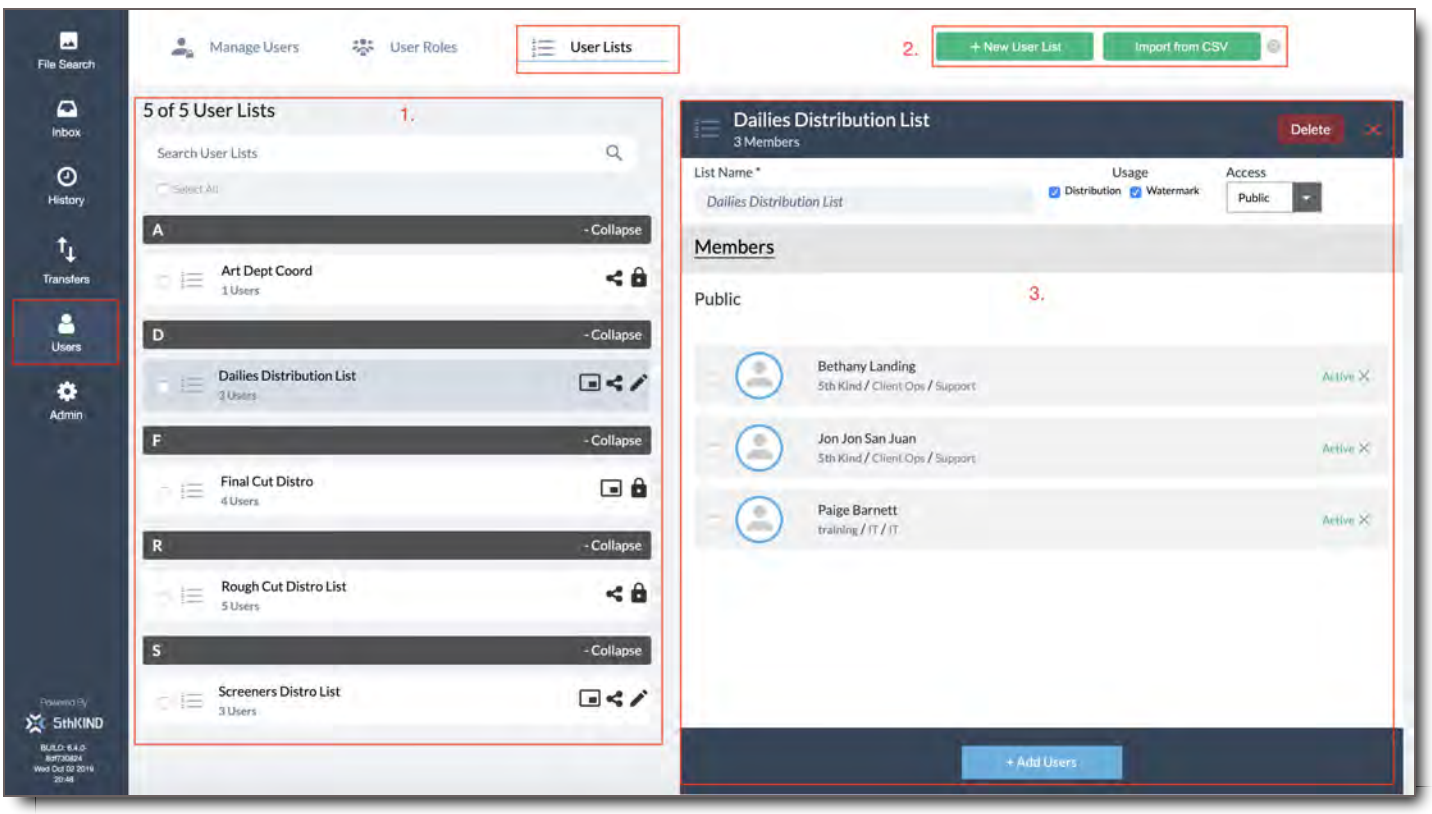
CORE

› Users

User Lists

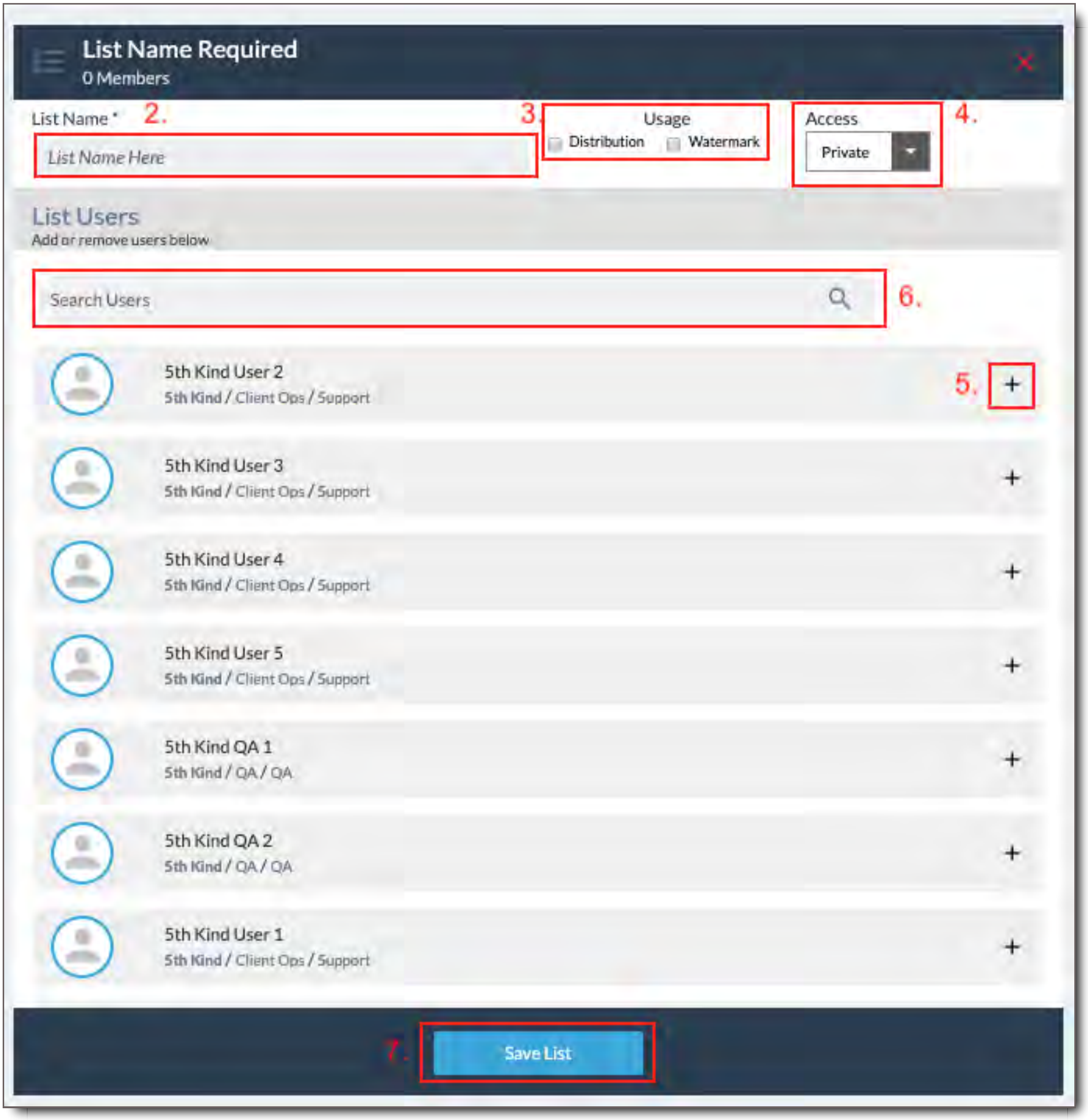
User Lists are customizable groups of Users that you can use to streamline the process of sharing Packages and downloading multiple watermarked Files.

To access User Lists, click on Users in the Left Nav Bar, then click User Lists at the top of the screen.



1. **Browse User Lists**
2. **Add User Lists Buttons**
3. **User List Display**

Create a New User List



To create a new user list,

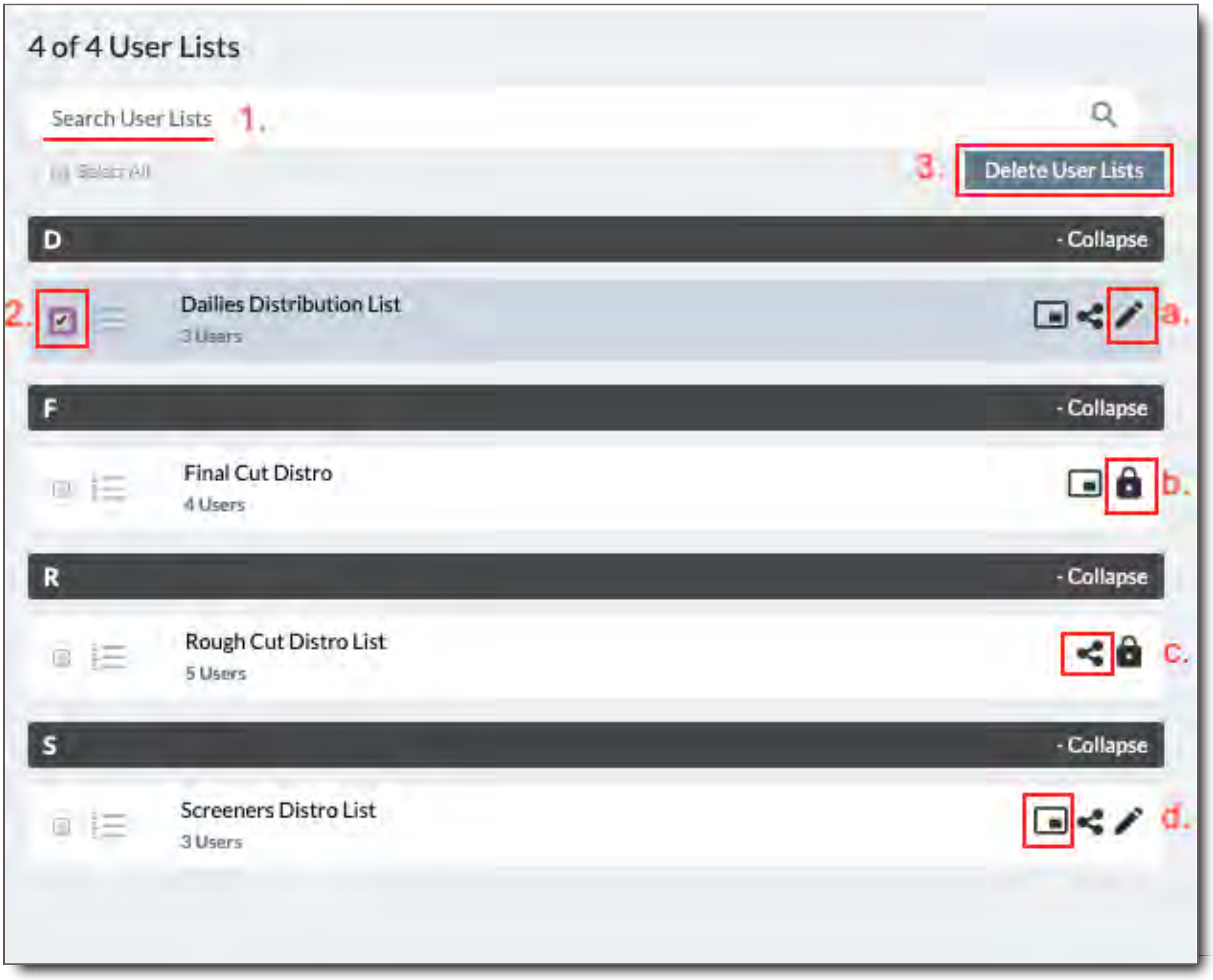
1. Click the green ✚ New User List button to create a new User List.
2. Name the List. It's recommended to name it something descriptive, so that it's easy to identify later.
3. Choose the check boxes for Usage.
    - **Distribution:** If this is checked, the list will be available in Recipients when sending a Package or a Comment, allowing you to quickly share Files or Comments to multiple people at once.
    - **Watermark:** If this is checked, the list will be available when downloading a File with a User's

watermark. You must have the appropriate permissions to do so. This allows you to quickly and easily download multiple versions of watermarked Files, such as a script, each with a user's name on them from the selected user list.

4. Choose Access
    - **Private:** This choice means when you are selecting your Recipients for a Package or Comment no one will see the List but you and those you share the list with.
    - **Public:** This choice means everyone who has sharing permissions will see the User List when they share. Only Admins can create public lists.
5. Add individual Users to your User List by clicking the **+** button until you have everyone on the list you need. Remove someone from the list by clicking the - button.
6. You can also Search for names by typing in either first or last name of the User.
7. Click Save List and your List will show up on the left side in the View User Lists area.

Browse User Lists

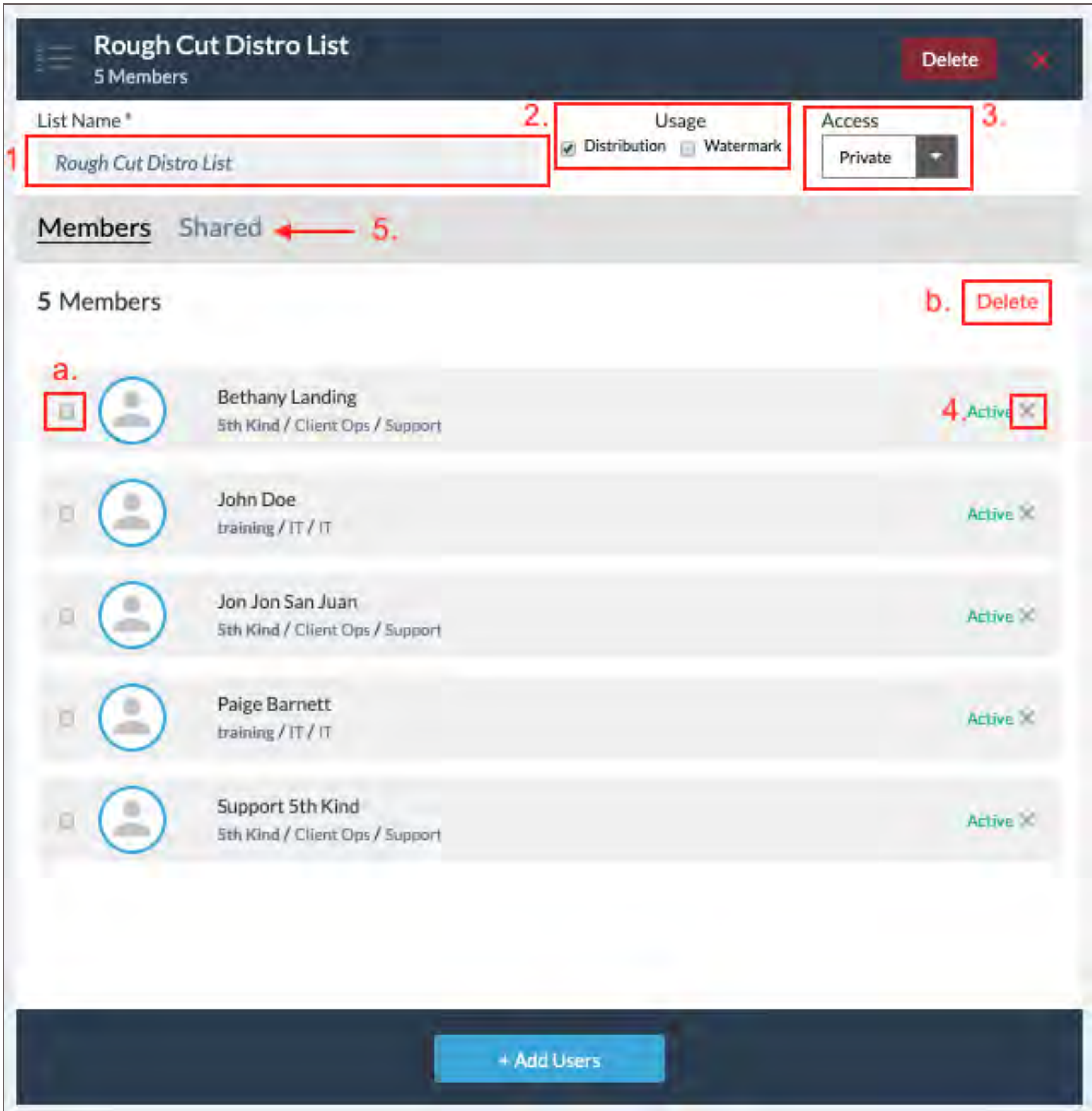
The list of User Lists in the system that you have access to are displayed on the left side of the screen. Click a List to view and edit it.



1. **Search User Lists -** Type the name of a User List to find User Lists with that name.
2. **Select List -** Check a User List to select it.
3. **Delete User Lists -** Once one or more lists have been selected, a button labeled Delete User Lists appears. Click Delete User Lists to remove the list from the system. This will remove the list for all Users.
4. **List Settings Icons -** These icons let you see the settings of a list at a glance.
    a. User List is Public
    b. User List is Private
    c. User List is for Distribution
    d. User List is for Watermarking

Edit User List

Once you've clicked on a User List, you can view its details, and if you have been granted the appropriate permissions you can edit the list.



With the correct permissions, once you've clicked on the list to get the List details you can:

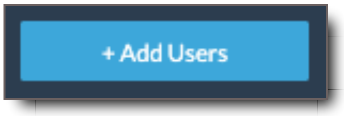
1. Edit List Name
2. Edit Usage Type (see further description above)
3. Edit Access (see further description above)
4. Edit Members by clicking the ✕ next to Active to remove the user from the list or

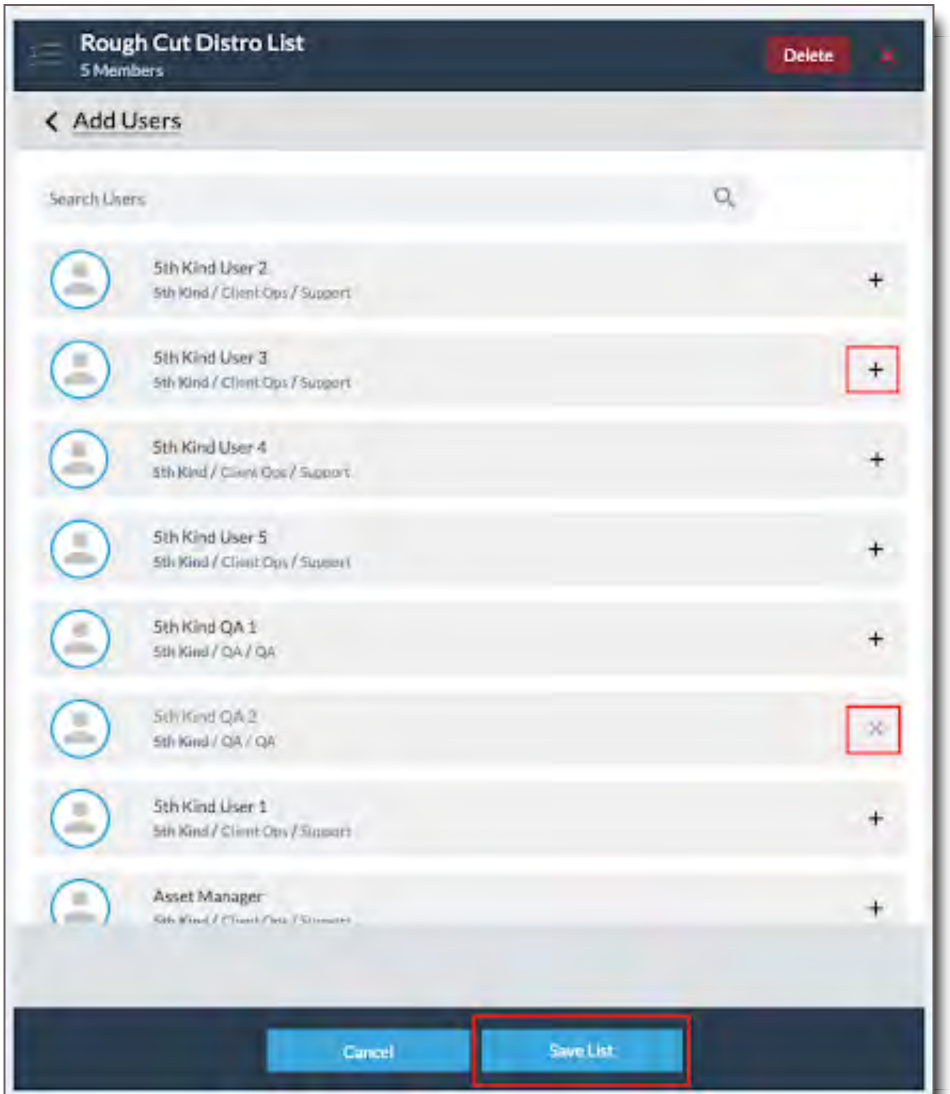
   a. Click the check box to the left of the user's name and
   b. Click Delete when it appears in the right corner of the member's list.

5. Share and Unshare List with other Users. See Shared section below for further detail.

Add Users to List

Add Users by clicking on the ✚ Add Users button located at the bottom of the screen.





1. Click the ✚ button to add more Users to the User List.
2. Click the ✖ to remove an added User from the list.
3. Click Save List to save your changes, or Cancel to cancel them.

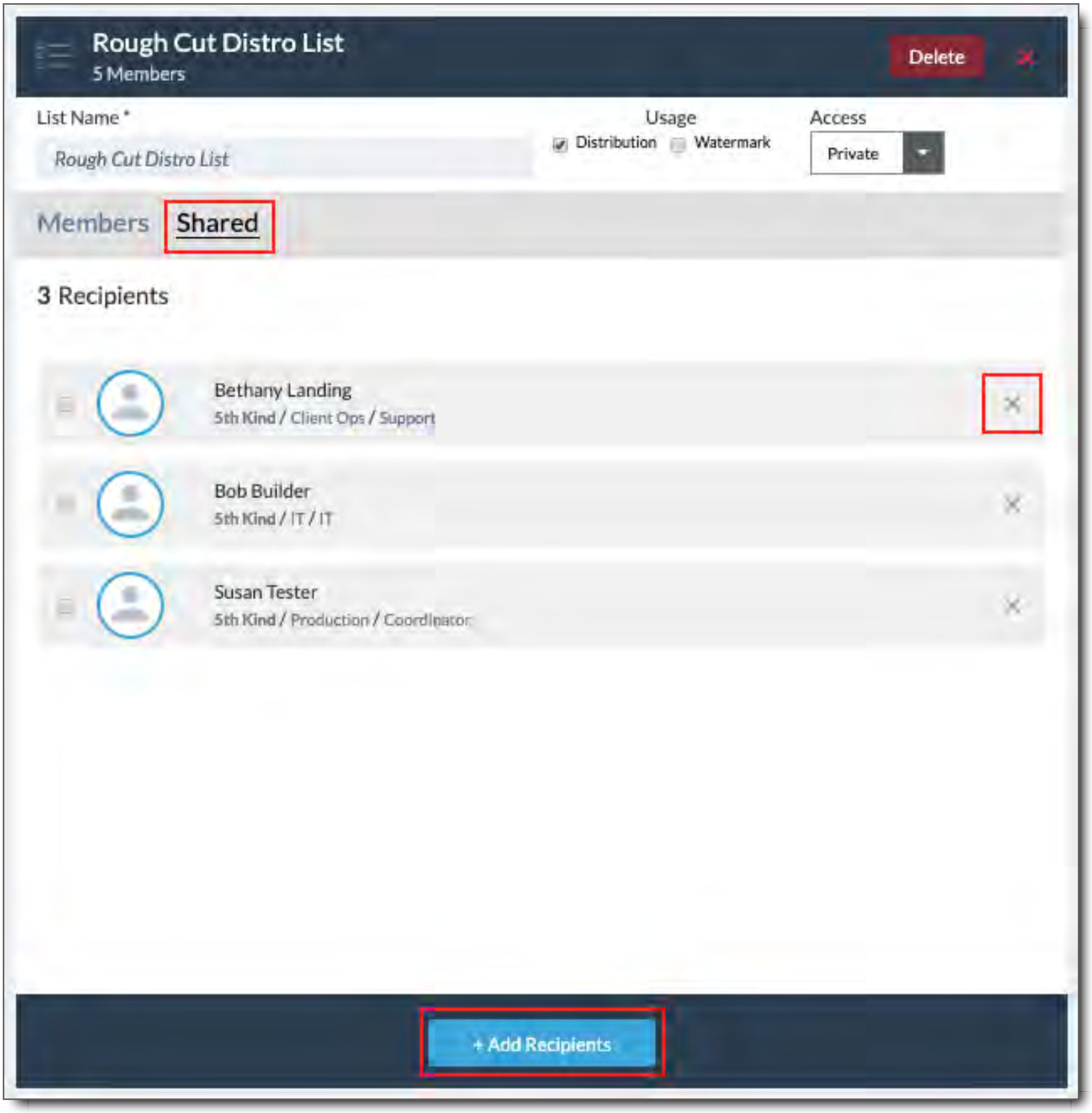
Important: Only Users you have Permission to access will be available to you in this list. If you believe you need access to additional Users, please reach out to your system administrator.

Remove User From List

Click the ✕ to remove a User from the User List. To remove multiple Users at once, check the boxes next to their names, then click Delete.

Shared

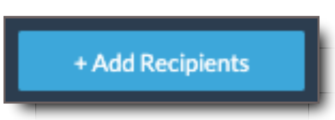
When you share your User List with others the “Shared” tab appears on your User List info page. You can access the list of users you’ve shared the User List with here. When you share a User List with another User, you allow them to use it as well for either Distribution, Watermarking or Both. Users who have a User List shared with them are not able to Edit the list.

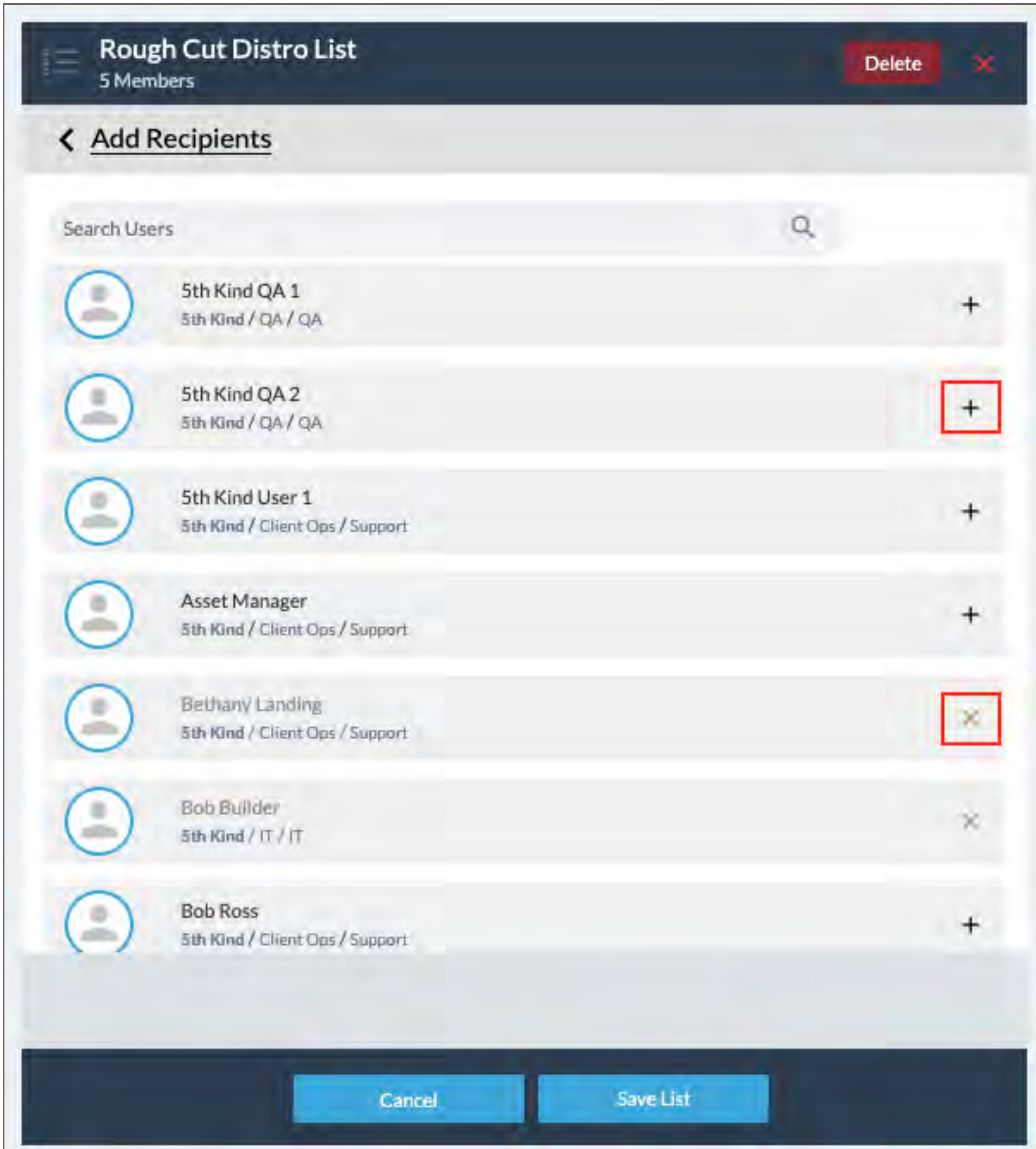


Share User List With Other Users

To share your list with others,

1. Click the ✚ Add Recipients button to add other Users that you'd like to share the User List with.

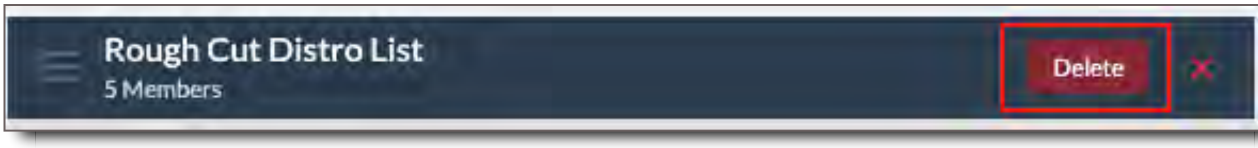




2. Click the ✚ to share the list with a User.
3. Continue clicking ✚ to add all users you'd like to Share the List with.
4. Click the ✕ to remove a User's access to the User List.
5. Click Save List or Cancel if you want to cancel your changes.

Delete a User List

Click the red Delete button to delete the User List from the system.



Create a User List From a CSV

You can make a new User List and add people to it automatically by uploading a CSV.

Simply create a CSV File containing each username or email address that you want in your User List. The file should be formatted like this:

username	email
{username1}	{email_address1}
{username2}	{email_address2}
{username3}	{email_address3}
etc...	

Click here to download the CSV template.

1. The first row must contain the word "username" in the first column, and "email" in the second column. Important **The CSV file you upload must contain the correct field names, and must be encoded as comma-delimited.**
2. In subsequent columns, add either a Username, an email address, or both.
   - **Username -** If you enter a Username, it must match an existing Username already in the system. If you enter an email address, you may leave this blank.
   - **Email -** If you enter an email address, it will find any Users with that email address, and add them to the list. Entering a Username as well will cause the email address to be ignored.

3. Click the "Import from CSV" button in the upper-right corner
4. Then click "Choose CSV file" to select the file from your computer.

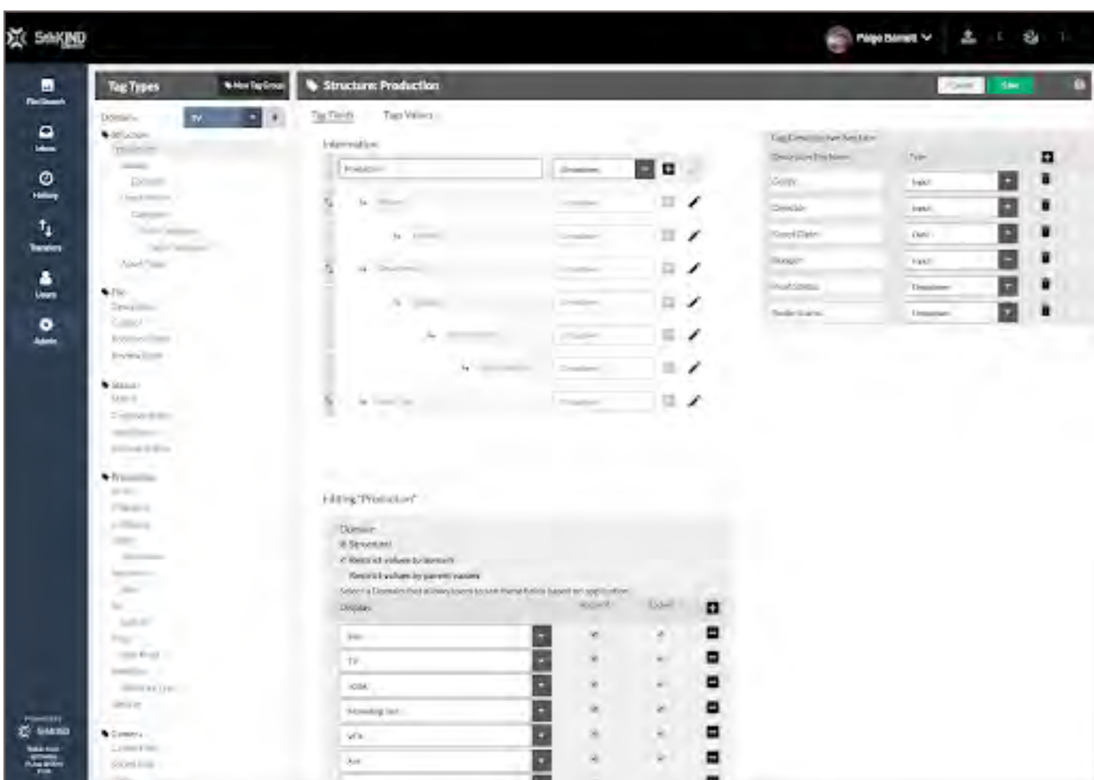
Once your CSV import is complete, a confirmation message will appear showing how many Users were added to your new User List. The User List will now be in the left hand side of the User List screen, and you may edit it as needed.

Tag Structure

The Tag Structure module is the heart of CORE's metadata management. This is where you define the metadata (aka tag) structures that will determine how your Files are categorized.

Overview

5th Kind’s CORE does not use traditional folder structures for organizing, categorizing, and controlling access to Files. Instead, those tasks are based solely on how Files are tagged. The Tag Structure module is where system Administrators define how users will categorize files on upload. As an Admin, you’ll create the hierarchy of your metadata, the content of Tag Fields, and the details about them.

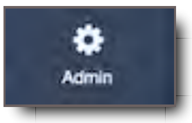


The Anatomy of the Tag Structure Module

In this section, you will learn the different parts of the Tag Structure Module.

Tag Structure Module Components

In CORE, to access the Tag Structure Module, you must be an Admin level user.

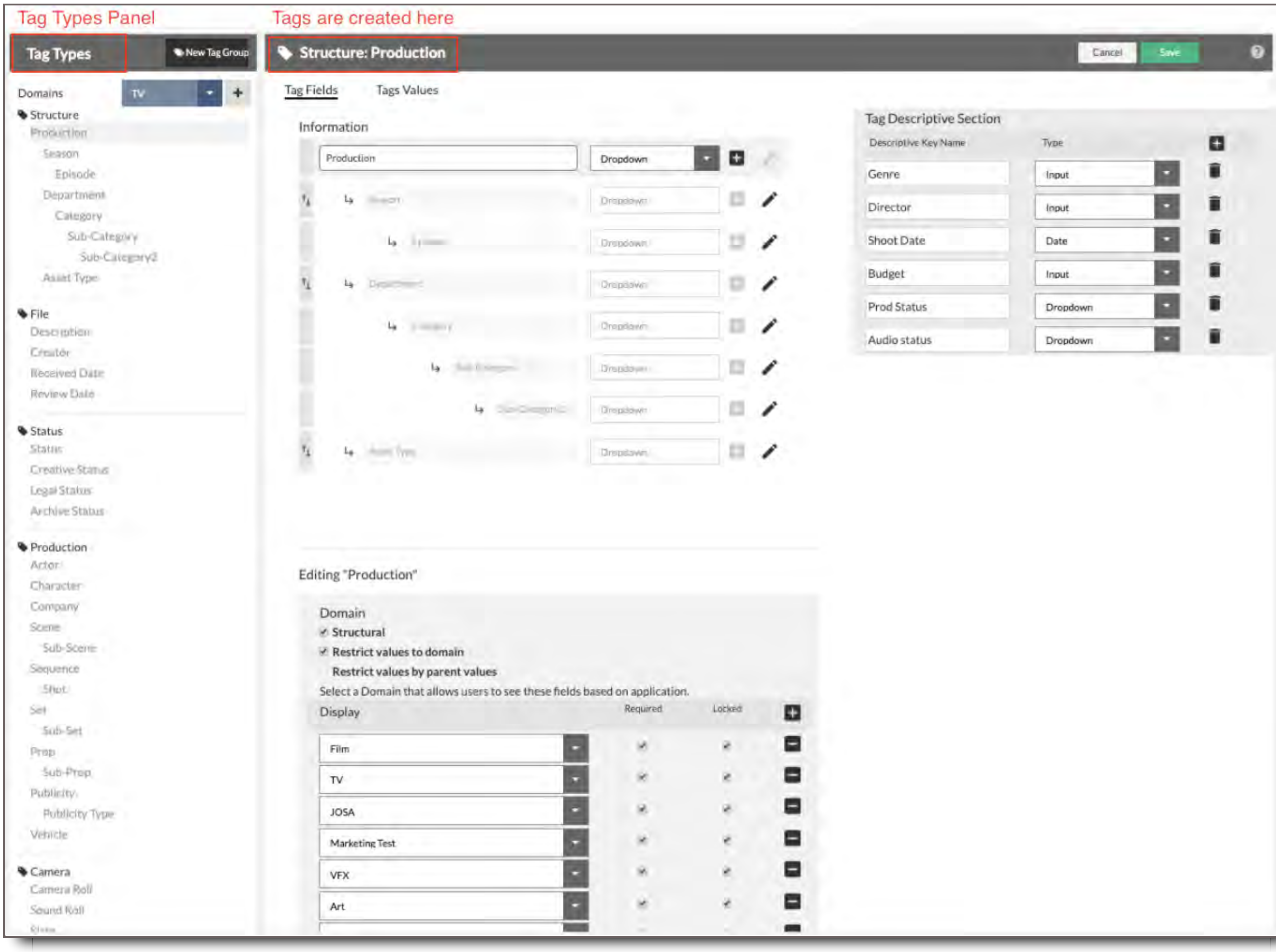
1. 

Go to the Admin Module in the Left Navigation Bar.
2. 

Select the Sub-Module Tag Structure.

In Tag Structure, there are two primary work areas:

- On the left is the Left Tag Types Panel.
- On the right is where Tags are created, edited, and defined.



Left Tag Types Panel

The Left Tag Types Panel contains your list of Domains, the button that creates Domains, and the list of Tag Groups and their respective Tag Fields associated with the Domains.

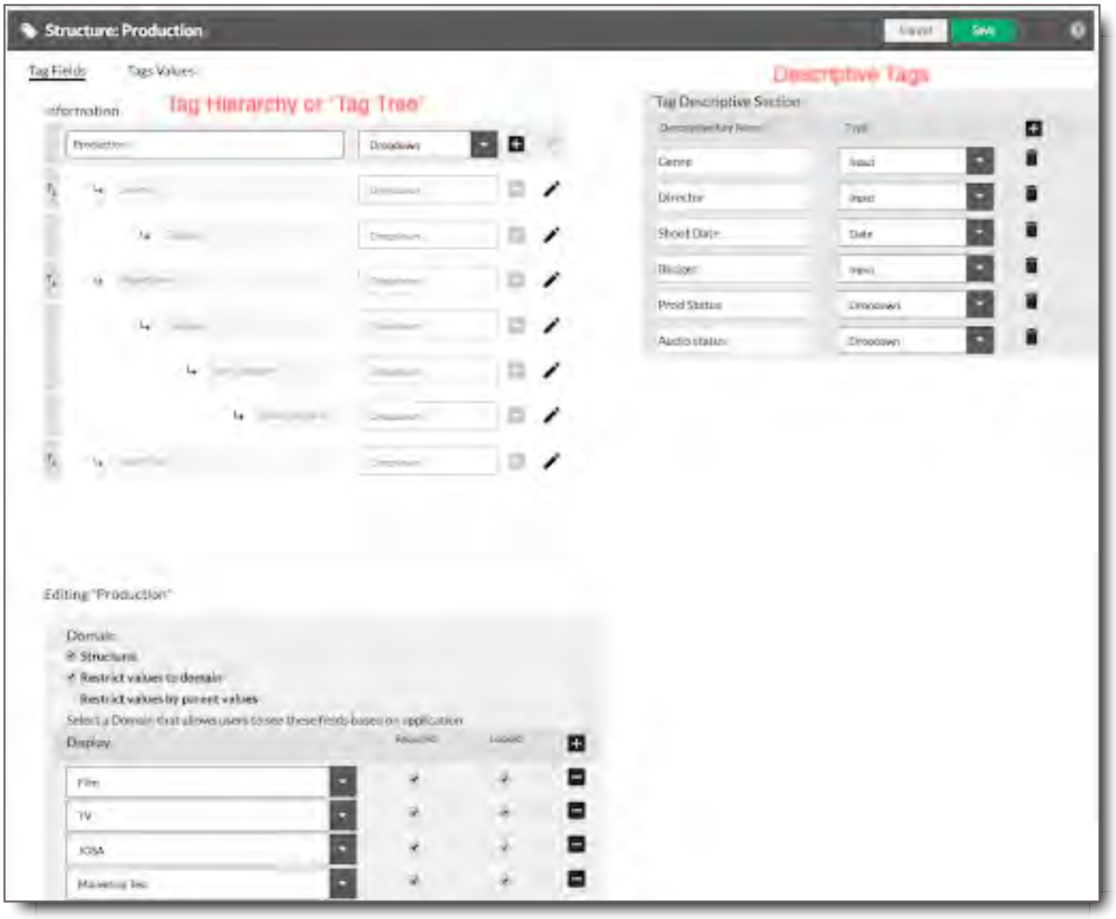
Each Tag Group is identified by the tag icon and a bold title name.

Tags Area

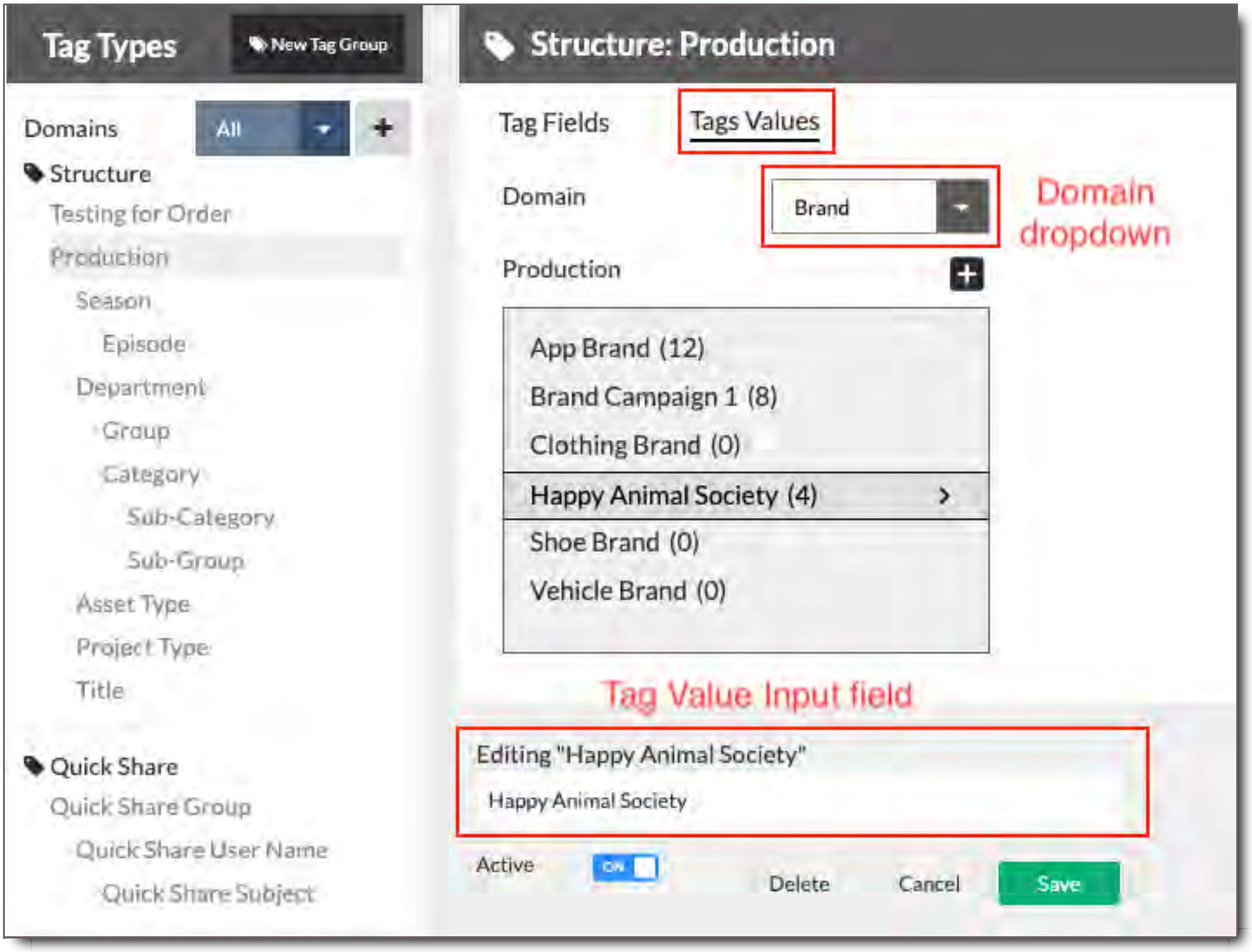
To the right of the Left Tag Types Panel, is the Tags Area where Fields and Values are defined. There are essentially two tabs or sections to this part of the module:

- The Tag Fields section
- The Tag Values section

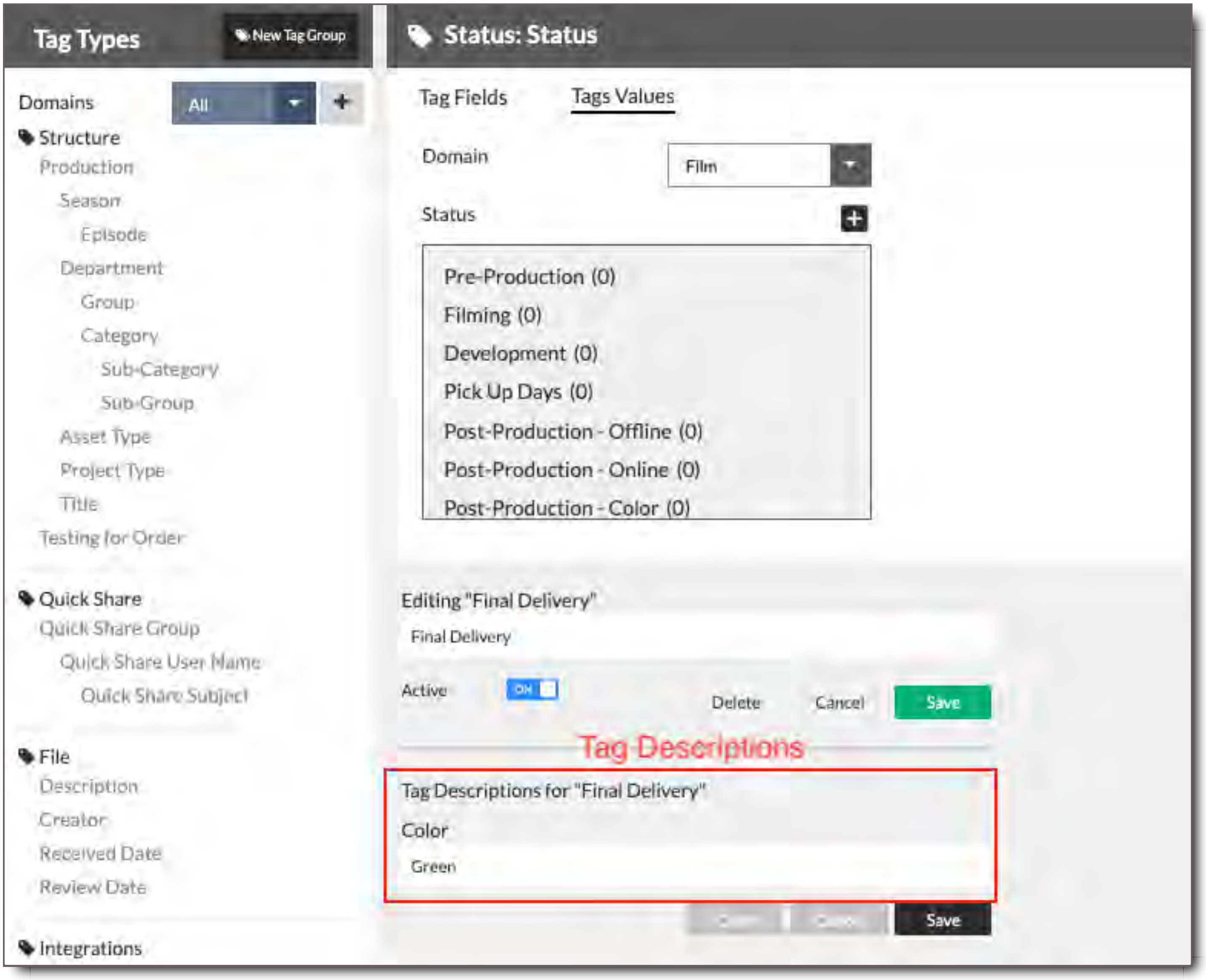
In the Tag Fields section, is the Tag Hierarchy or Tag Tree, the Tag Field Domain Options, and to their right, the Descriptive Tags section. Descriptive Tags are a type of Tag Group often defined as metadata about metadata. We'll detail that more below.



In the Tag Values section, you can manage values for a selected Tag Field. There's the Domain dropdown to select the Domain that you will use for that Tag Field, the Tag Value Boxes where Tag Values for that Tag Field are listed. The Tag Value Input Field is found below the boxes. Here users can add, edit, and delete Tag Values.



In the case of Descriptive tags, data and status color associations can also be added here just below the Tag Value Input.



Domains

What is a Domain

In CORE, a Domain is essentially a top-level category that lets you decide what metadata fields will apply to what type of content. Said a different way, it's a type of workflow that defines the structure in which files are organized.

When a User uploads Files, they select a Domain. That Domain has a specifically organized tag structure called a taxonomy, as well as other associated tags that help make the files searchable. When the files are uploaded, the user tags them according to the structure defined by the Domain.

Admin User's View	End User's View When Uploading Files

Domains allow Files for different project types to be categorized into different groups. These groups are defined by their tags, also known as metadata. For example, television shows need an organizational structure that includes Season and Episode, while feature films do not. Because their organizational needs are different, these two media formats are represented in separate Domains.

CORE Tip: A Domain is Not a project.

Multiple projects using the same workflow or organizational structure can fall under the same Domain. Selecting the Domain dictates the required Tag Fields--the metadata fields a user sees when tagging a file. A Domain also dictates structure, the order of visible tags associated with an Asset group, and what the user sees in the Browser panel.

Ways a Domain Can Be Used and Why

In this section you'll learn how Domains can be used for Permission-ing and DAM organization.

Domains can be used for Permissioning

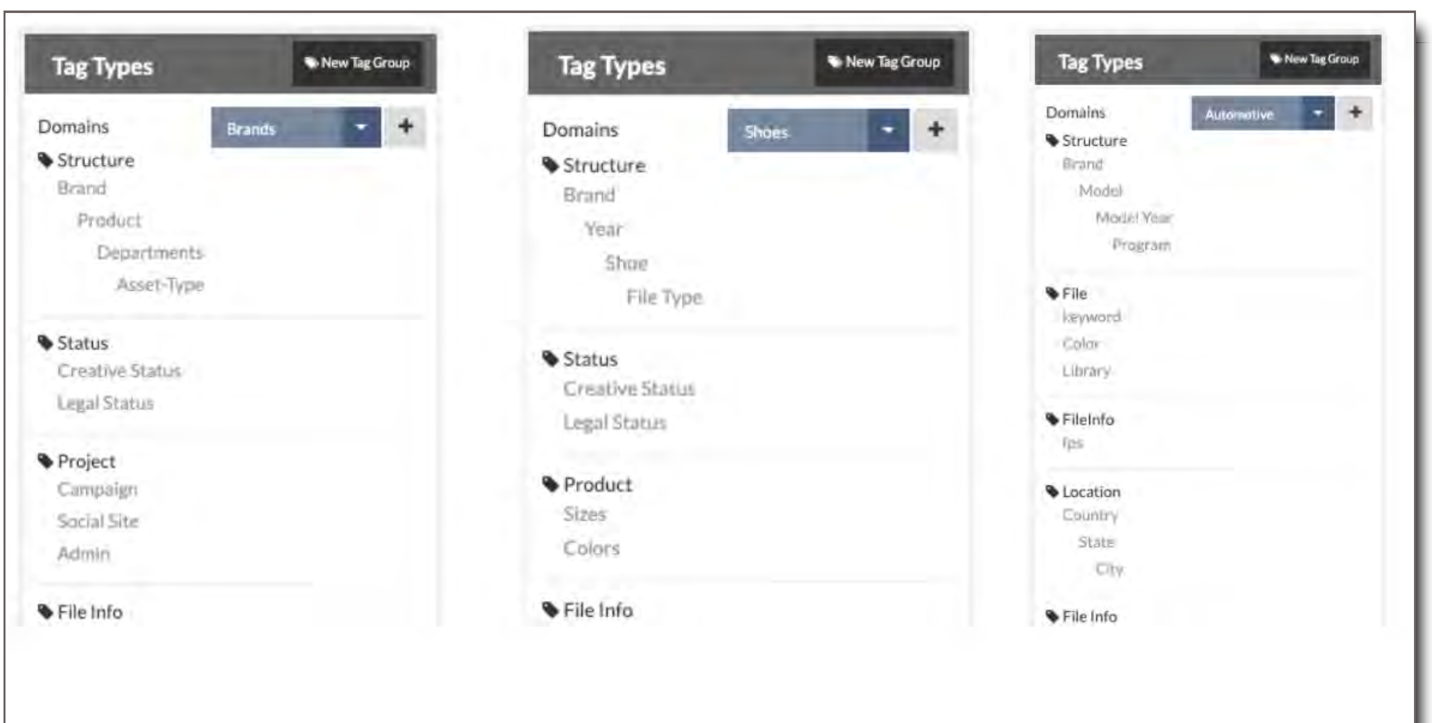
Users are often given access to CORE based on a Domain.

For example, a company that has TV, Film and Online content might have a unique Domain for each. Certain users would have access to one Domain based on their position at the company, but wouldn't have access to any content in another Domain.

So think of Domains as having far reaching permission capabilities as well as a unique tagging structure.

Domains can be used for Digital Asset Management Organization

Every industry is different, and while Domains are helpful in reflecting and complementing workflows, they're also useful for organizing the DAM itself. Domains can be organized by industry, client type, or company departments. For instance, a company that has different divisions, such as Home Electronics, Personal Electronics, Phones, and Media Solutions, might have a domain for each. Or, let's say a company's clients' industries vary from Automotive to Shoes to Dog Food and Accessories. The company would create a Domain for each industry respectively.



Domains are an organizing tool that enable companies to organize their materials according to their own organization.

CORE Tip: Domains are Permanent

When creating your Domain name, make sure it is approved for use and spelled correctly. Once a Domain is created, it cannot be edited or deleted.

Create a New Domain

To create a Domain

1. Go to the Left Tag Types Panel
2. Select the **+** button next to the Domain dropdown menu
3. Enter the name of your Domain
4. Save

You've now completed the first step in building a taxonomy.

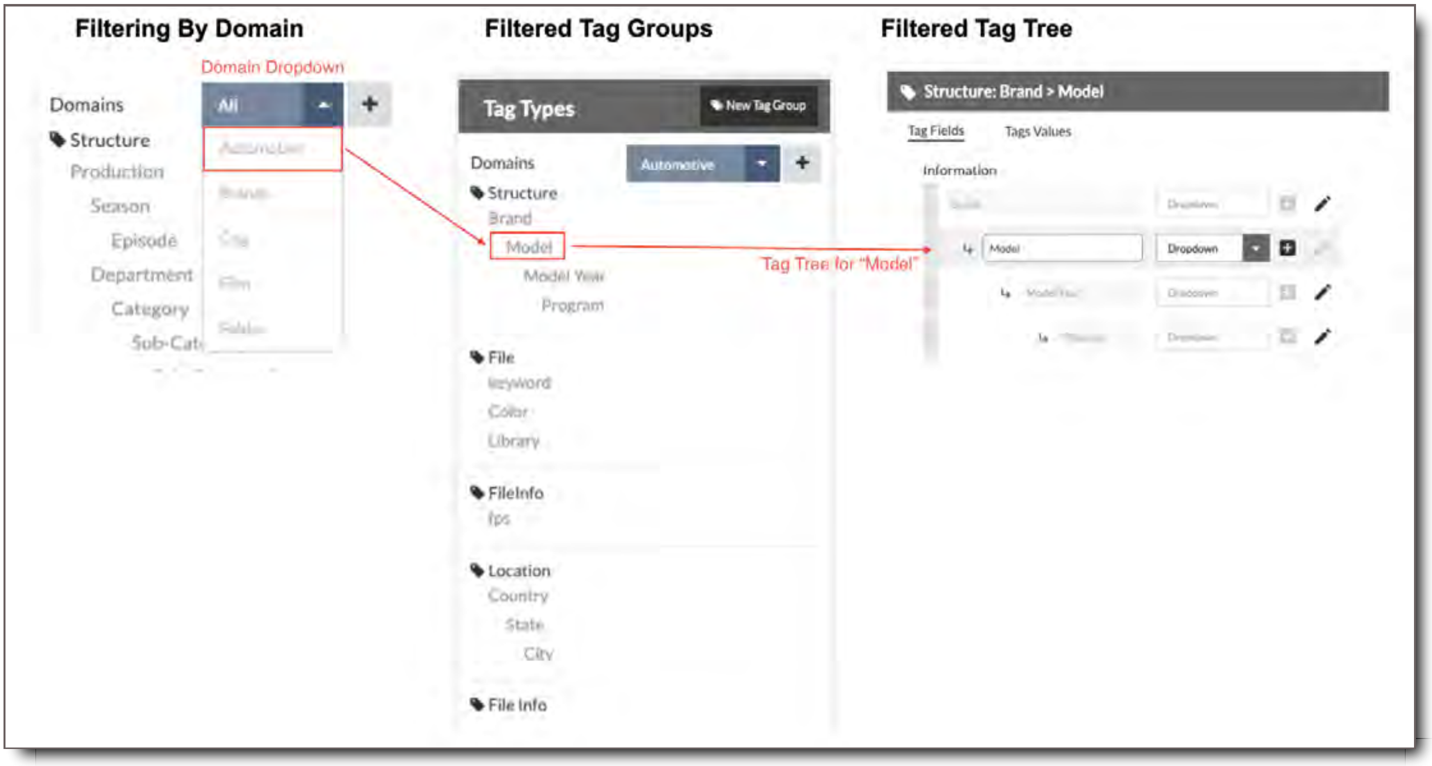
Filter Tag Groups and Tag Trees by Domain

Filtering by your desired Domain shows only the metadata fields that apply to it. When creating new Domains, Groups, and Fields, check your work by filtering to the updated Domain.

1. Go to the Domain dropdown field at the top of the Left Tag Types Panel.
2. You can find your Domain listed alphabetically in the Dropdown list.
3. Select it.
4. The Left Tag Types Panel will filter to show only the Tag Groups and Tag Fields associated with that

Domain.

5. Then select a Tag Field in the Left Tag Types Panel, the corresponding Tag Tree or Tag Hierarchy will appear in the main area on the right. When filtered by Domain, the Tag Tree will reflect the same Tag Fields and hierarchy that is listed in the filtered Tag Group.



No Tag Groups are associated with a new Domain. They must be added or connected. So when you filter by a new Domain, there will be no Tag Groups shown in the Tag Groups list except for File Info.

To see all fields again, set Domain to All. For new Domains, you now can build out your taxonomy by adding existing or new Tag Groups and Tag Fields to it.

CORE Tip: Domain Visibility is Determined by User Permissions

If you as a user can see only one Domain in your list when uploading files, that means you have permission to just that one Domain. What you see as a user is dependent on the permissions you have been granted by your CORE system administrator.

Tag Groups

What is a Tag Group

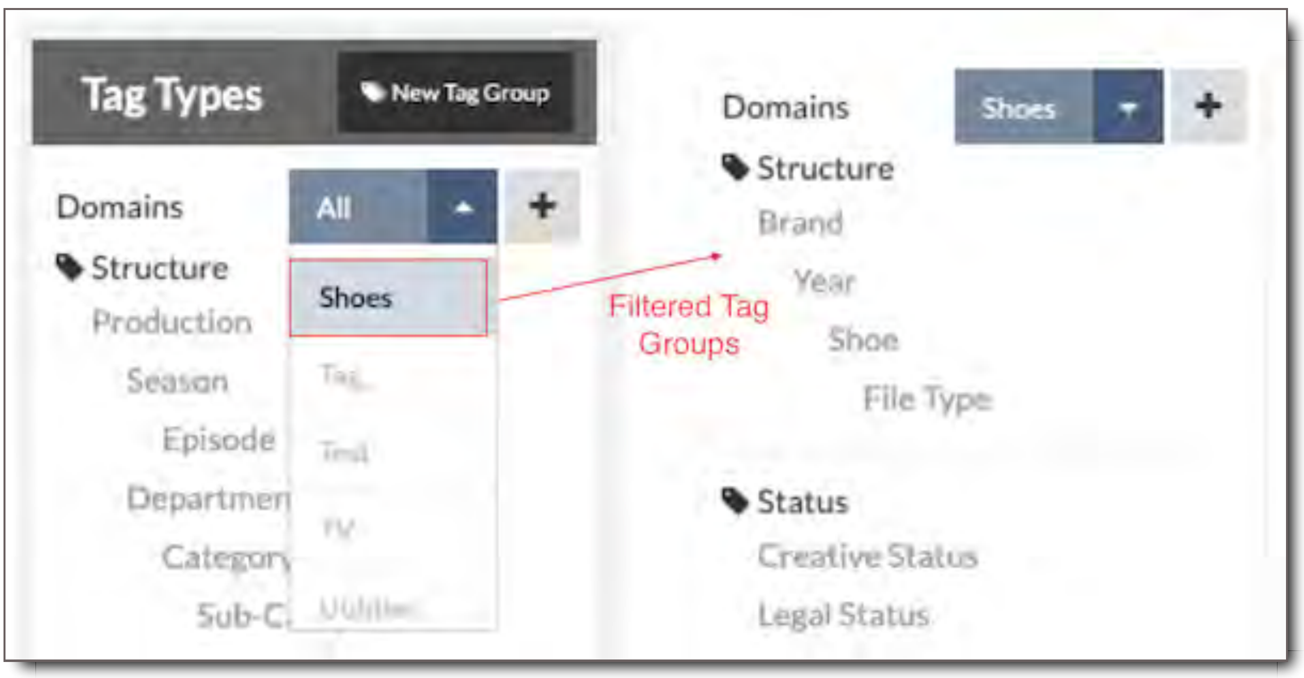
A Tag Group is a set of metadata fields that are grouped together. They are often determined by a common set of values, such as subject matter or use, and their names typically define the set of characteristics that make up a Tag Group, i.e. Structure, Status, Game, etc.

A Tag Group can contain a simple list of tags or have tags with a hierarchical relationship to each other.

A hierarchical relationship is based on levels - Tag Fields that are level(s) above another—and subordination—Tag Fields that are level(s) below another. In this relationship, the superordinate Tag Field represents a class or a group type, in which the subordinate Tag Fields are its members or parts.

For the tag groups with a hierarchy structure, when users chose one Tag Field at a certain level, the below level Tag Fields' tag values will adjust to show different values. These Tag Values are defined by Parent Tag Values in the Domains Options setting.

Tag Groups are customizable to contain as few or as many Tag Fields that are relevant to that group and domain. To filter the Tag Groups you see, select a Domain for your desired view.

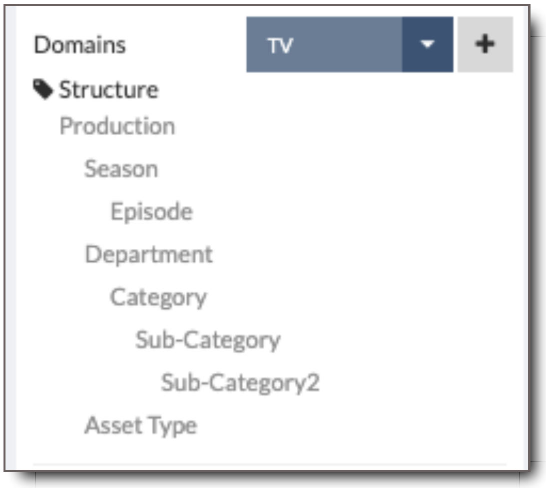


Types of Tag Groups

In CORE, there are four different types of Tag Groups:

1. Structural
2. Associated
3. Inherited
4. Descriptive

Structural - The Structural Tag Group is the type that defines the tag structure for all asset groups and files. It's the core categorization method for CORE.



Associated - Associated Tag Groups are Tag Groups providing additional data around files. They are defined by a common set of values. Examples of Associated Tag Groups are Production, Status, and Project Info.

Inherited - Inherited Tag Groups automatically import metadata when a file is uploaded, because it is data inherited from the files themselves. Examples of Inherited Tag Groups are File Info and Camera.

Descriptive - The Descriptive Tag Groups are often described as metadata about metadata. They are a second layer related to existing data found in Tag Fields by providing additional information and color status options. Descriptive Tags can literally be about anything. This section can be used to build out entire databases around a specific Tag Field.

For instance, if you had a field named "Car Manufacturer," you could add associated fields such as "Number of Dealerships," "Address," and "Phone Number" to it. Or, if it were a movie, you could associate "Genre" and "Director" with the Tag Field "Production." Or if you had a "Brand Website" Tag Field you could associate whether or not it was "A/B Tested."

Tag Groups Order

When you first arrive in the Tag Structure Module, the default view in the Left Tag Types Panel is a complete list of All Tag Groups and Tags.

- The Structural Tag Group is always listed at the top
- Followed by Associated Tags
- At the very bottom, is File Info, the Inherited Tag Group.

It's currently not possible to change the order of the Tag Groups. When a new Tag Group is added, it appears at the bottom of the list above the File Info Tag Group.

Create a Tag Group

To create a new Tag Group, click the New Tag Group button at the top of the Left Tag Types Panel.

Then enter the Group name and click Save.

Edit the Name of a Tag Group

Tag Group Names cannot be edited or deleted at this time.

CORE Tip: Define Your Tag Groups Before Creating Them

When creating your Tag Group names, make sure they are approved for use and spelled correctly. Once a Tag Group is created, it cannot be edited or deleted.

Edit the Contents of a Tag Group

File Info is the default Tag Group for all metadata automatically imported from your files. File Info cannot be changed or added to by a user. All other Tag Groups, however, can be edited.

To edit the contents of an existing Tag Group, users can do any of the following:

1. Select an existing Tag Field and delete it.
2. Select an existing Tag Field and modify it by:
    - Changing its name
    - Changing its Field Type
    - Changing its Domain Options
    - Changing its Tag Values

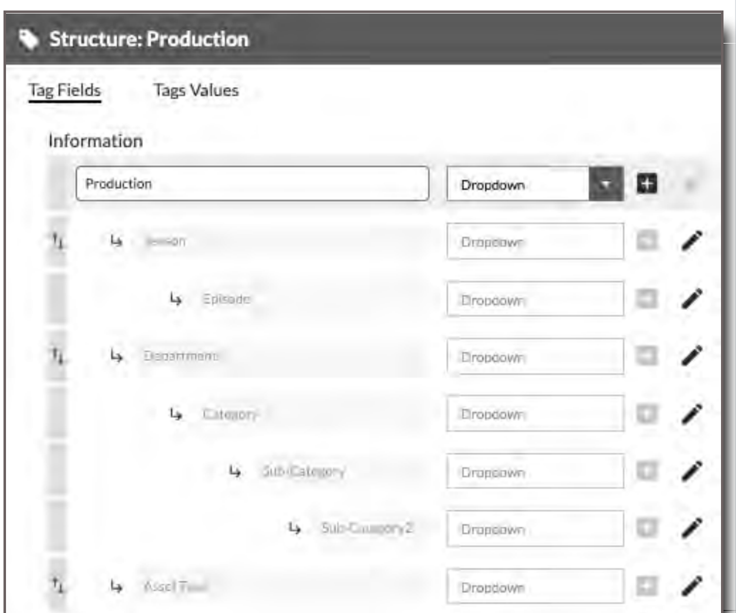
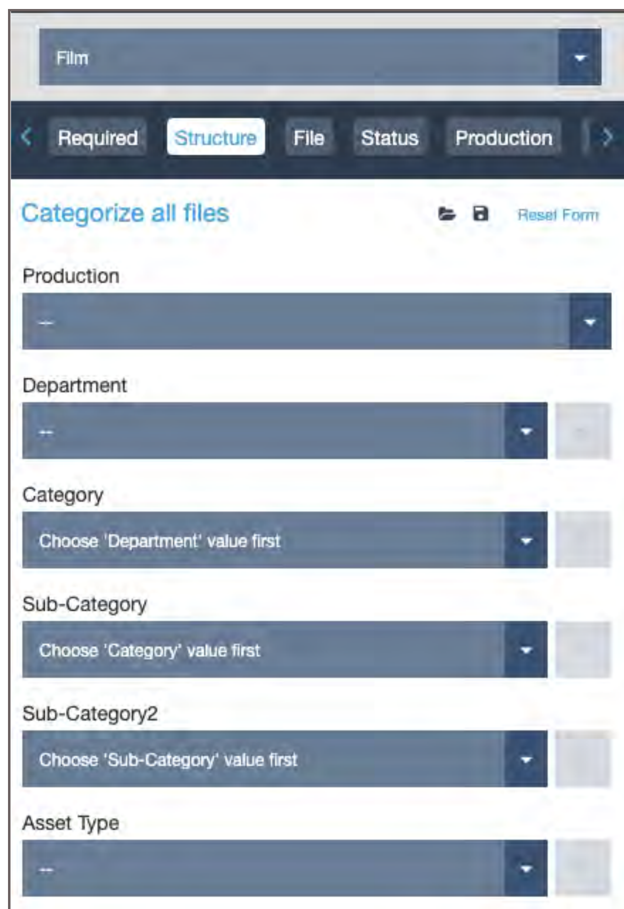
- Changing its order within the Tag Group by Drag and Drop
3. Add a new Tag Field by selecting the Tag Group’s name

For more detailed instructions about how to perform these actions, please read through the remainder of the Tag Structure chapter.

Tag Fields

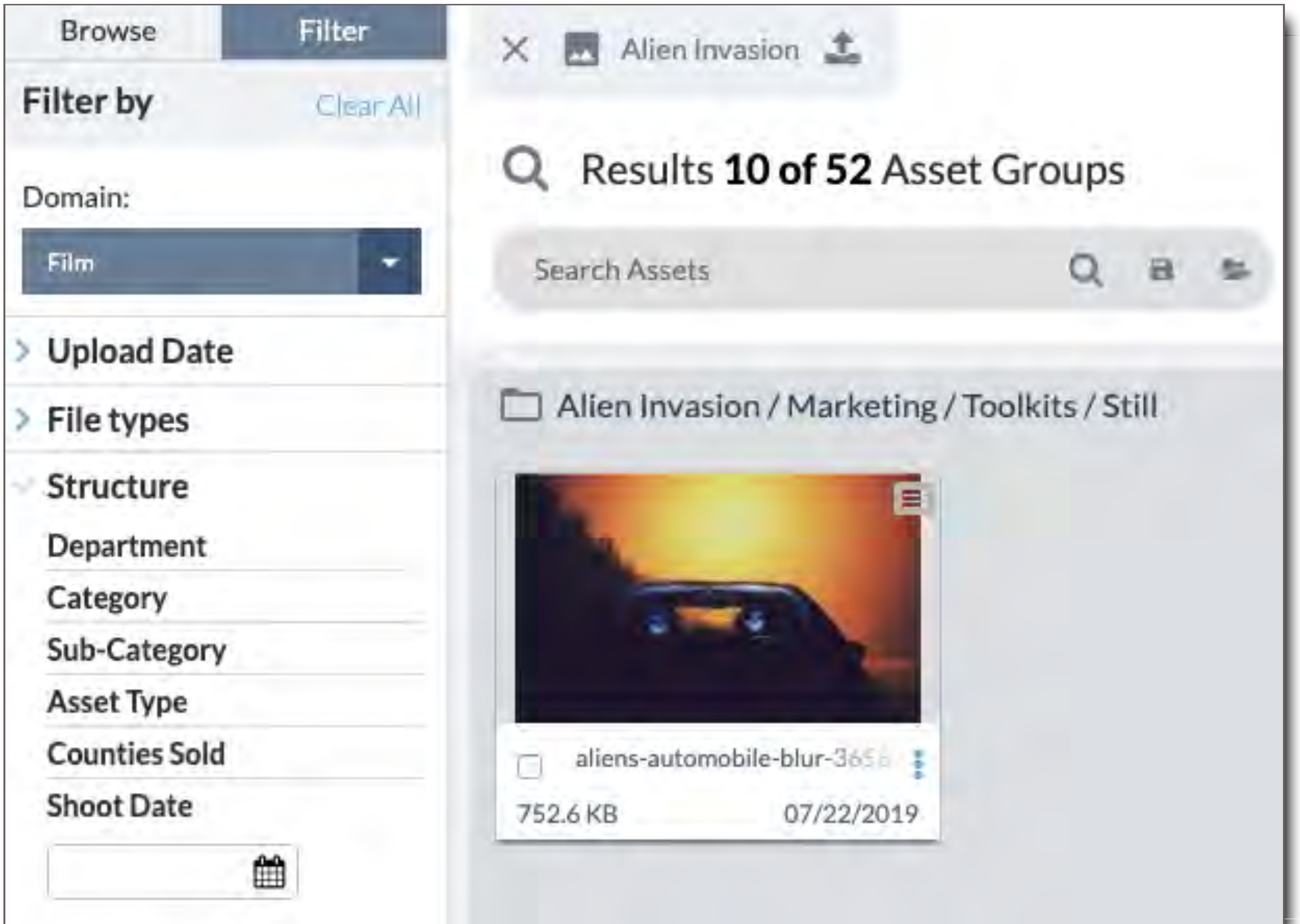
What is a Tag Field

Tag Fields are the Fields a User will choose from when uploading and tagging assets. They are used to organize files and are the main categories for your project, such as Production Name, Department or Asset Type.

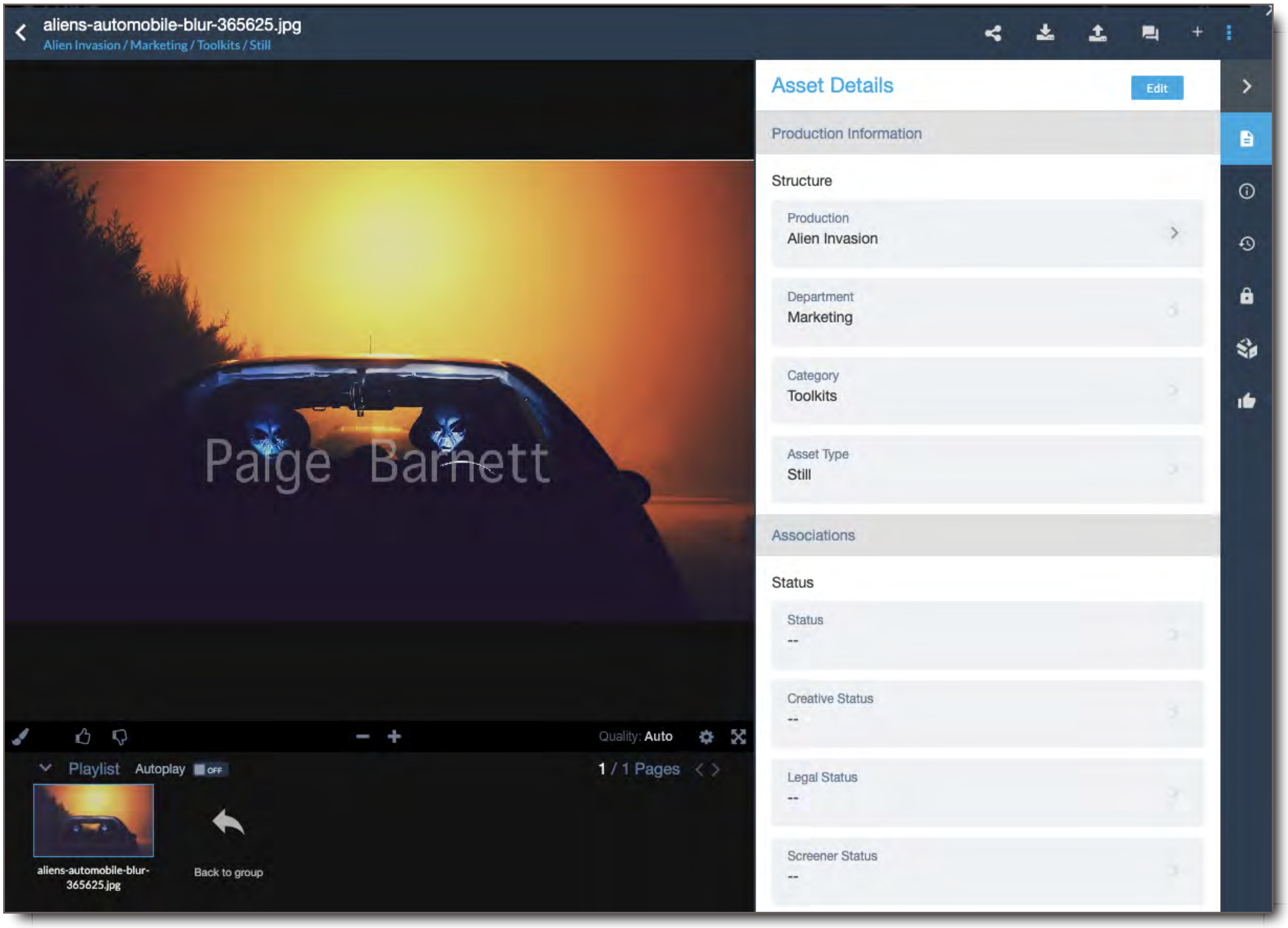
<table>
<tr><th>Administrator View of Structure Tag Group’s Tag Fields in Tag Tree</th><th>User View of Tag Fields in Asset Viewer During Upload</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

The fields also appear in File Search Filters and in the Asset Details Panel of the Asset Viewer.

File Search - Filter Tab - Structural Tag Fields



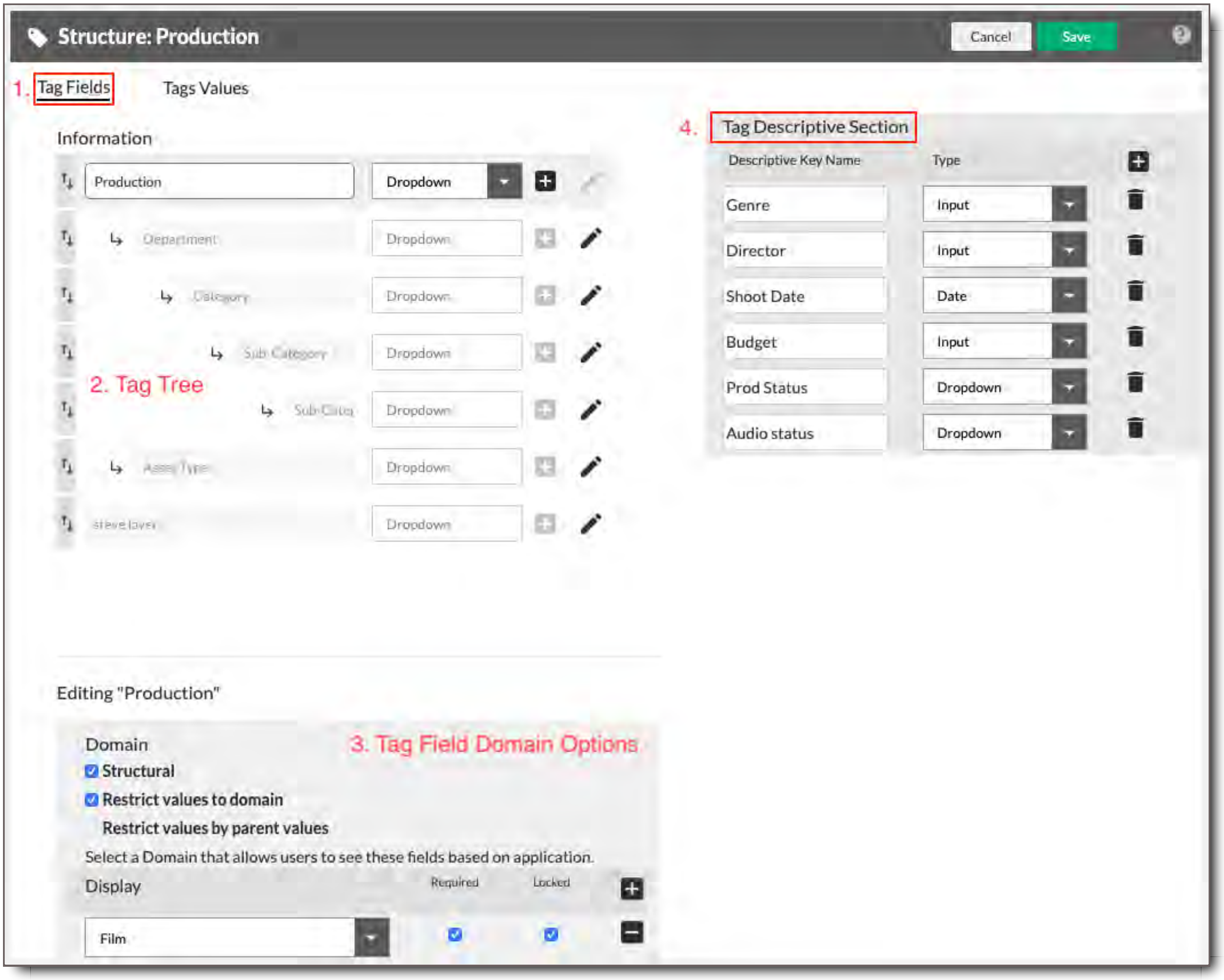
Asset Viewer - Asset Details - Tag Fields



Elements of the Tag Field Section

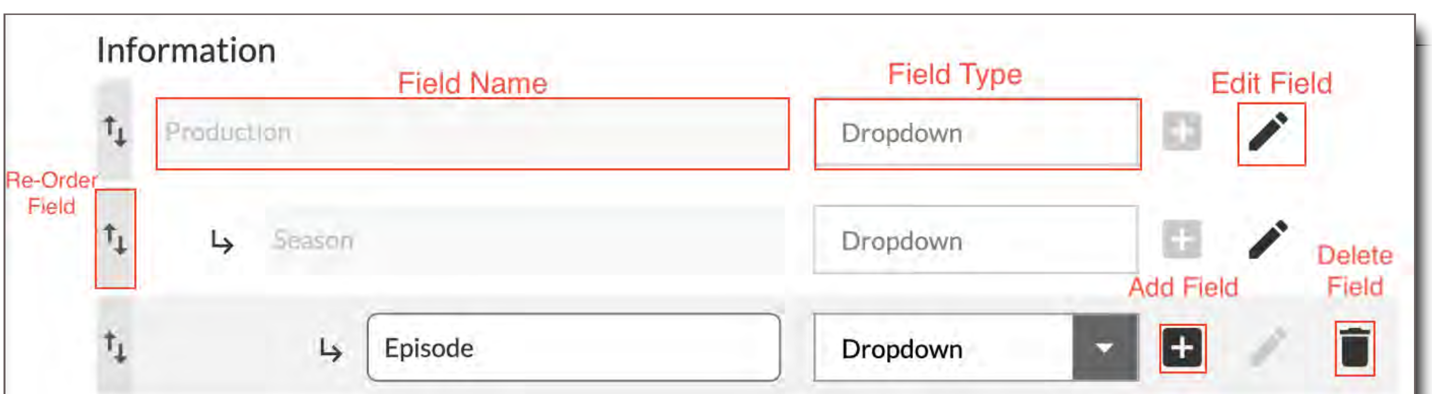
Tag Field Section Overview

1. Tag Fields Tab
2. Tag Tree
3. Tag Field Domain Options
4. Descriptive Tags Section



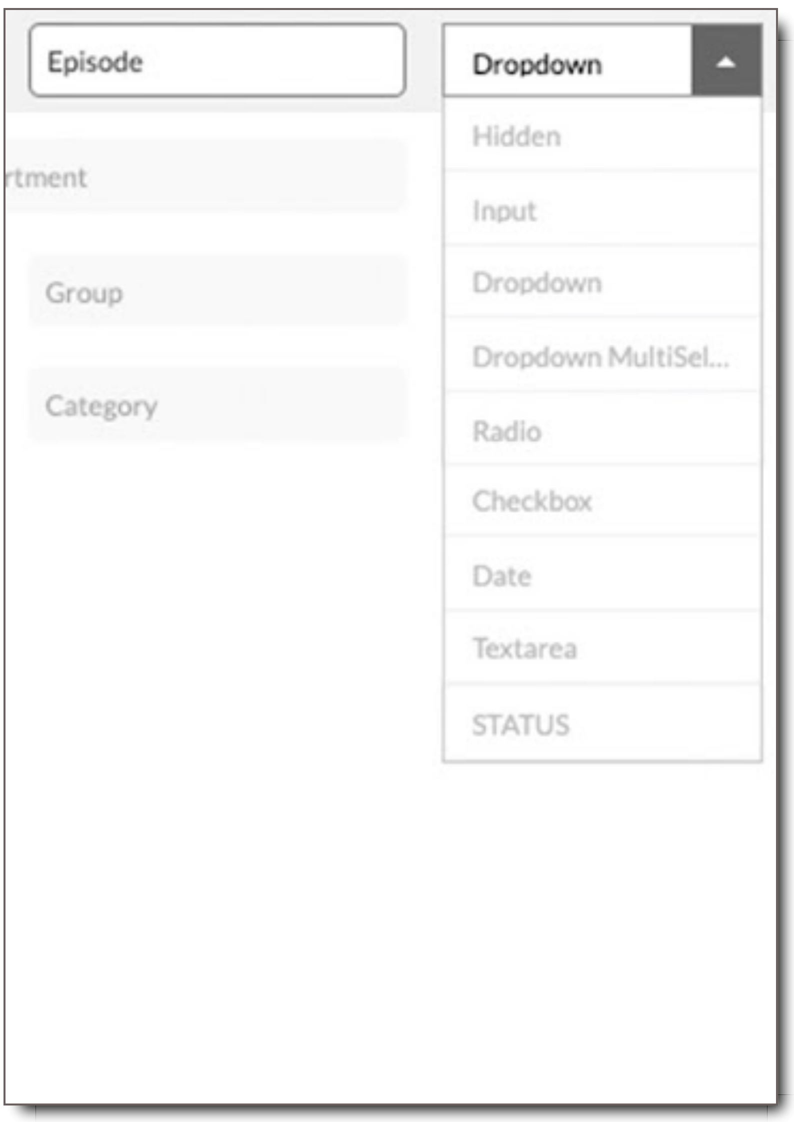
Elements of the Tag Tree

The Tag Tree is where Admins can create and edit a Tag Field.



1. **Field Name** - A text input field where you can add or edit the name of a Tag Field.

2. **Field Type** - A dropdown list where you can select the method a user will use to enter the value of a Tag Field. Entry types include the following:
   i. **Hidden** - The field will not appear in the interface, but you can access this field through the API.
   ii. **Input** - A Text field. You can enter any type of text into this field.
   iii. **Dropdown** - A field where you can select from a pre-specified list of values. Depending on the settings, a User may also be able to add their own values.
   iv. **Dropdown Multiselect** - A field where you can select one or more value from a pre-specified list of values. Depending on the settings, a User may also be able to add their own values.
   v. **Radio** - A field where you must select one circular button option from a list of values.
   vi. **Checkbox** - A field where you can check one or more values from a list of values.
   vii. **Date** - A field where you can enter a date. When editing the field, you'll be able to use a date-picker widget to help you.
   viii. **Text Area** - A large input area field where you can enter long text notes and messages.
   ix. **STATUS** - A field where you can create different status values and attribute a different color to each of them, which will then appear on a File's thumbnail when a status value is entered.

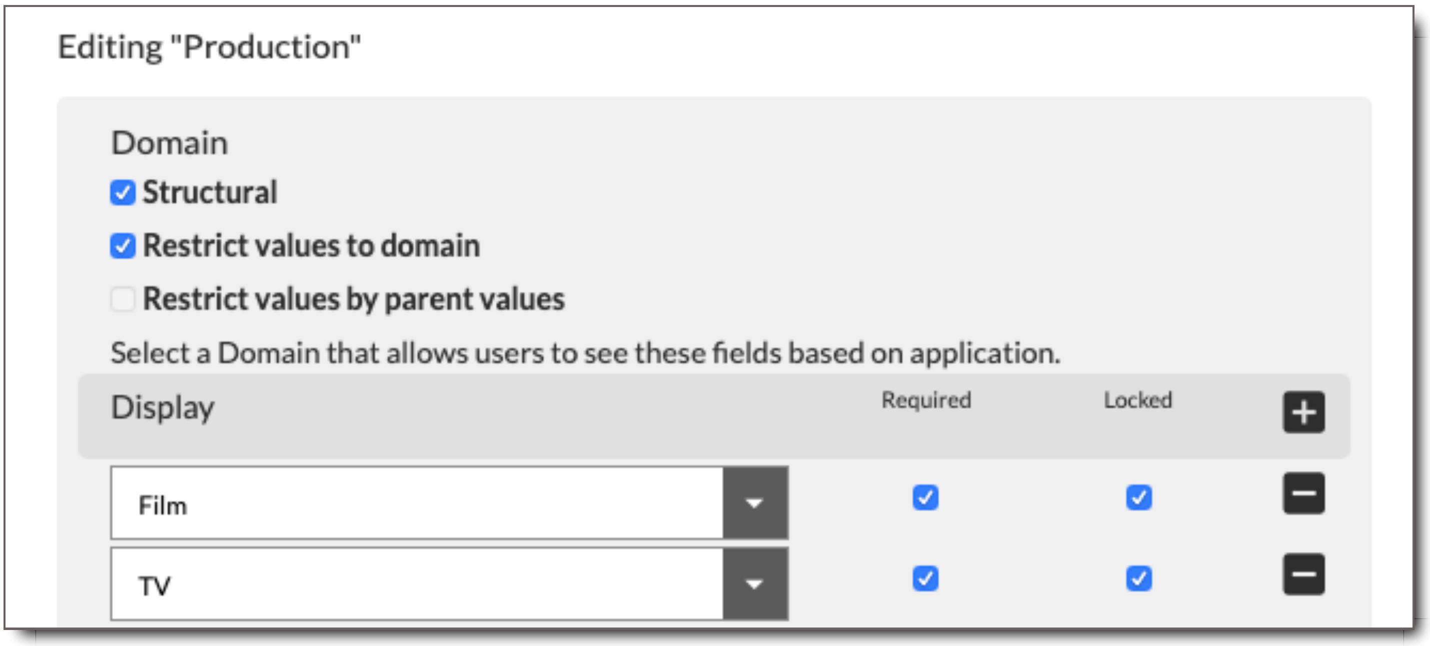


3. **Edit Field** - Icon that when selected, makes the associated Tag Field editable.

4. **Add Field** - Icon that when selected, creates a new, editable, child Tag Field underneath the selected Tag Field.
5. **Delete Field** - Icon that deletes the associated Tag Field.
6. **Reorder / Move Field** - Area that when grabbed with the mouse icon, enables the associated Tag Field to be dragged and dropped into a different order in the hierarchy.

Elements of the Tag Field Domain Options

These settings control how the Tag Field will behave. You'll know which Tag Field you're editing by the Editing "Tag Field Name" at the top of the box.



1. **Tag Field's Behavioral Checkboxes** (located under "Domain")

   i. **Structural** - Structural metadata determines the categorization in 5th Kind. Files that share the same Structural Metadata are grouped together, and browsable in a virtual directory structure, similar to what you may be used to on your desktop. Setting a field to Structural means that it will be used in the core categorization.

   ii. **Restrict values to domain**- If checked, the values entered under any Domain will only be available under that Domain. If not checked, any values entered for this field will be available under any Domain.

   iii. **Restrict values by parent values** - If the field is nested under a parent field, checking this option means that any value you enter will appear under just that corresponding parent value. So, if there are two values in the Parent Tag Field, each parent tag will have separate child tag values.

2. **Domain Display** Adding a Domain to a Tag Field makes the field appear as an option in Asset Details when that Domain is selected. Each field must be connected to at least one Domain.

i. **Required**- If this is selected, the field will become required when a File is set to the selected Domain Purpose, and a File will not be able to be submitted without setting a value for the field.

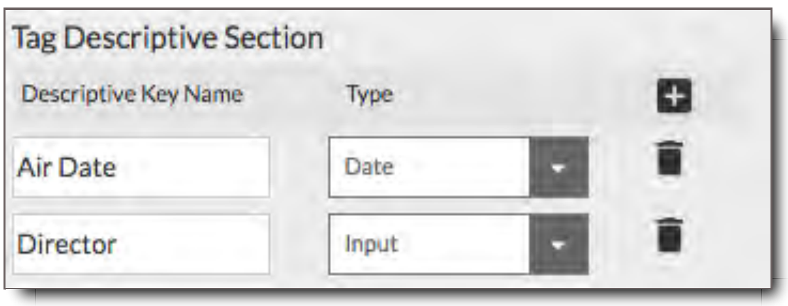
ii. **Locked** - If this is selected, only values that are pre-populated can be used, and Users are not able to add new values when submitting or categorizing Files.

iii. **Add Domain**- Click the + button to add a Domain to the field. The Tag Field will now be available with this Domain.

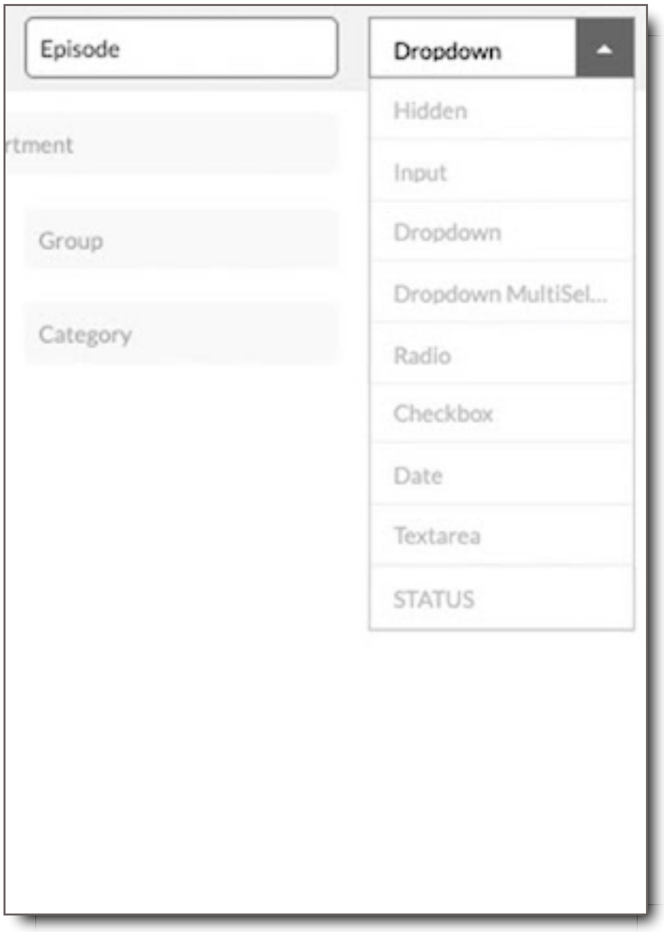
iv. **Remove Domain**-- Click the − icon to remove the Domain from the field. After saving, the field will no longer be listed in that Domain.

Elements of the Descriptive Tag Section

These elements operate the editing and creation of a Descriptive Tag Field.



1. **Descriptive Tag Field Name** - A text input field where you can add or edit the name of a Tag Field.
2. **Descriptive Tag Field Type** - A dropdown list where you can select the method a user will use to enter the value of a Tag Field. Entry types include the following:
   i. **Hidden** - The field will not appear in the interface, but you can access this field through the API.
   ii. **Input** - A Text field. You can enter any type of text into this field.
   iii. **Dropdown**- A field where you can select from a pre-specified list of values. Depending on the settings, a User may also be able to add their own values.
   iv. **Dropdown Multiselect** - A field where you can select one or more value from a pre-specified list of values. Depending on the settings, a User may also be able to add their own values.
   v. **Radio** - A field where you must select one circular button option from a list of values.
   vi. **Checkbox** - A field where you can check one or more values from a list of values.
   vii. **Date** - A field where you can enter a date. When editing the field, you'll be able to use a date-picker widget to help you.
   viii. **Text Area** - A large input area field where you can enter long text notes and messages.
3. **Add Descriptive Tag Field** - Select to add a new Descriptive Tag to the associated Tag Field.
4. **Delete Descriptive Tag Field** - Select to delete an existing Descriptive Tag from the associated Tag Field.

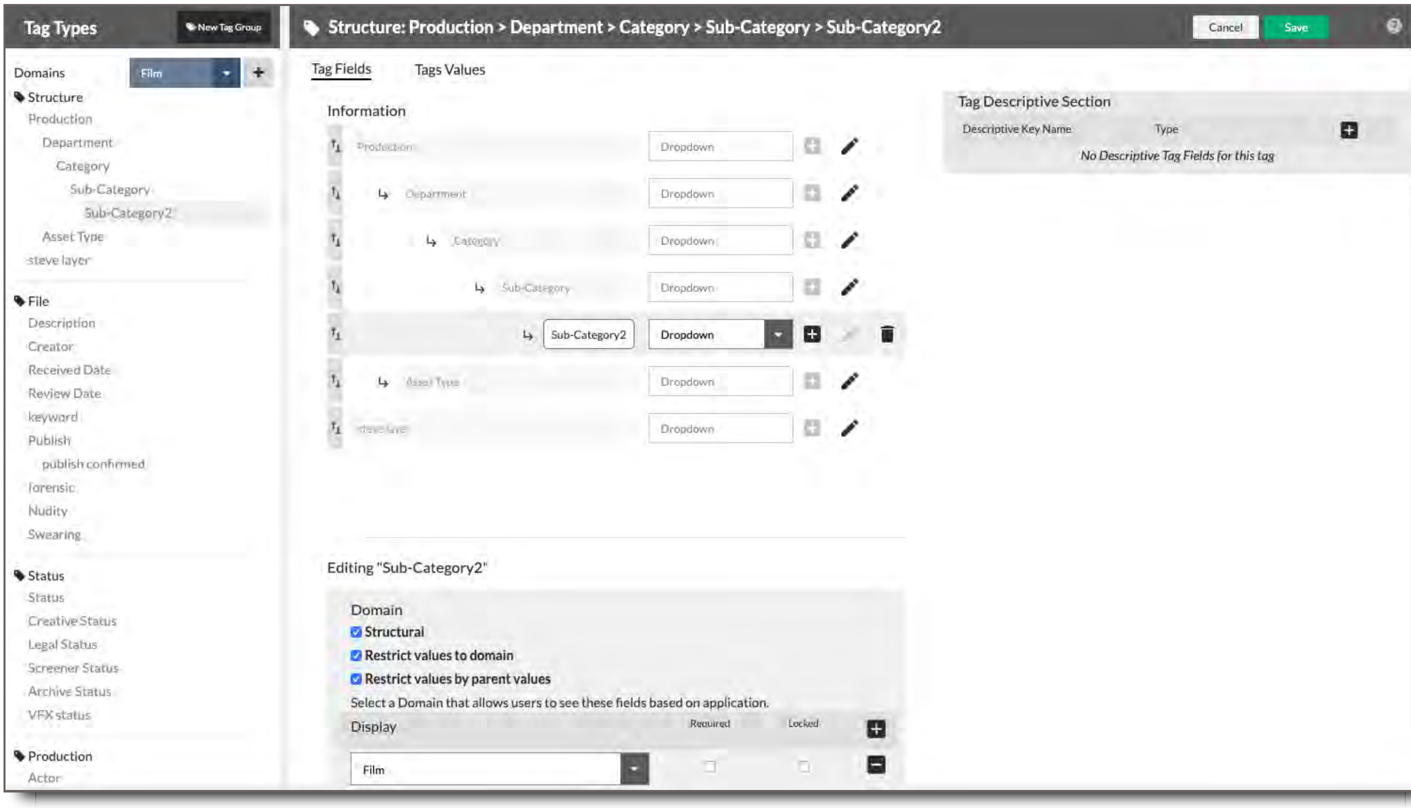


Additional Need-to-Knows About Tag Fields Before Editing or Creating One

- Tag Fields cannot be applied to more than one Tag Group.
- A Tag Field's name can be used only once.
- A new, top-level Tag Field appears at the bottom, but new, child Tag Fields appear directly under their parent tags. However, once saved and refreshed, those new tags appear at the bottom of their hierarchy level.
- Tag Fields within one Tag Group cannot be dragged and dropped to a different Tag Group. Reordering Tag Fields is possible, only within the Tag Field's Tag Group.

Edit an Existing Tag Field

Click on any metadata field in a Tag Group to view and edit it. In the Tags Area, the Tag Tree will update to show the selected Tag Group's Tag Fields. Below is an example of what you'll see:



The field you selected to edit is now a text field.

1. You can change the name of the field.
2. You can change the type of of field it will be, i.e. a checkbox, dropdown, date, etc.
3. You can delete the field.
4. You can add a new, child / dependent field under it by selecting **+**. Go to Add a Child Tag to an Existing Tag Field

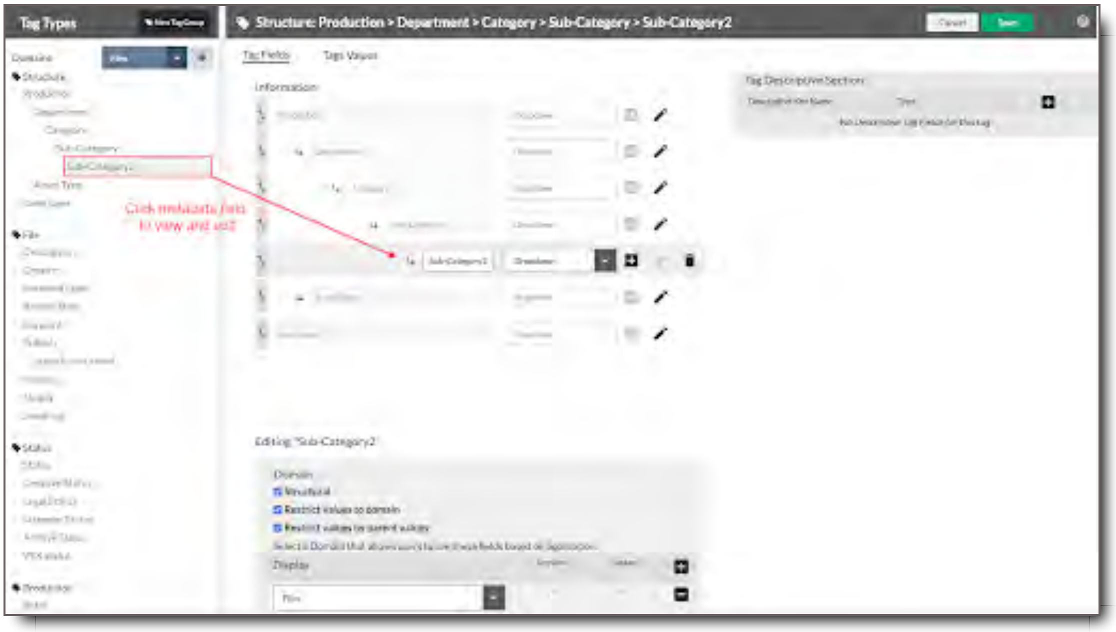
After any change, hit Save. Then continue.

In addition to editing the field directly, you can also edit other aspects of the Tag Field, including the following. (Click on the list item to be directed to that instruction):

1. Adding a new Domain to the Tag Field in the Tag Field Domain Options box below the Tag Tree.
2. Changing the Domain Options relating to the field in the Tag Field Domain Options box
3. Adding or editing a Descriptive Tag to the Tag Field in the Descriptive Tag section to the right of the Tag Tree.
4. Adding or deleting the Tag Values of the Tag Field in the Tag Values section.

Create a New Tag Field

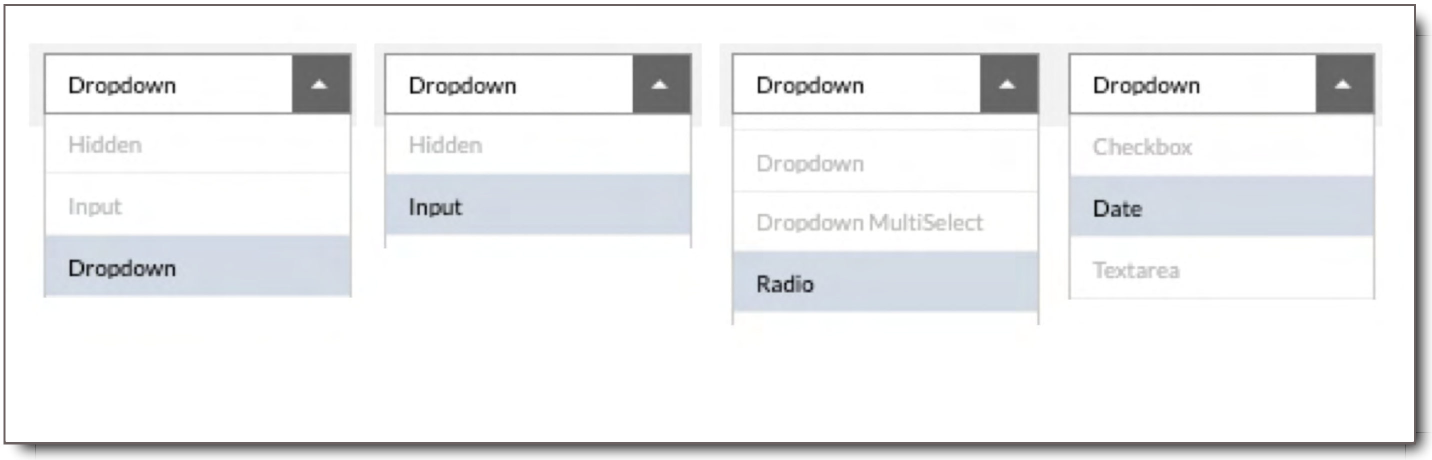
This section shows you how to create and modify the Tag Fields you will use to categorize your Files, including creating hierarchical relationships between them.



To Create a New Tag Field follow these instructions:

1. Go to the Tag Group where the Tag Field will be listed
2. Select the title of the Tag Group.
3. A new, blank, top-level, text input field will appear at the bottom of the Tag Tree.
4. Enter the name of the field. This can be changed at any time.
5. Choose the desired Field Type. The Field Type lets you select the type of data that will be stored in a field.
6. Scroll down to the Tag Field Domain Options box below the Tag Tree
7. Add a Domain to your Tag Field.
8. Save.
9. Go to Tag Field Domain Options section for the next step, or go to the How to Build Your Tag Taxonomy: A Step-by-Step Guide for a more complete guided walk through of the taxonomy creation process.
10. Finally, once a Tag Field has been created and associated with a Domain, it needs values added to it. To learn how to add Tag Values to your Tag Field, go to the Tag Value Section or go to the How to Build Your Tag Taxonomy: A Step-by-Step Guide for a more complete guided walk through of the taxonomy creation process.

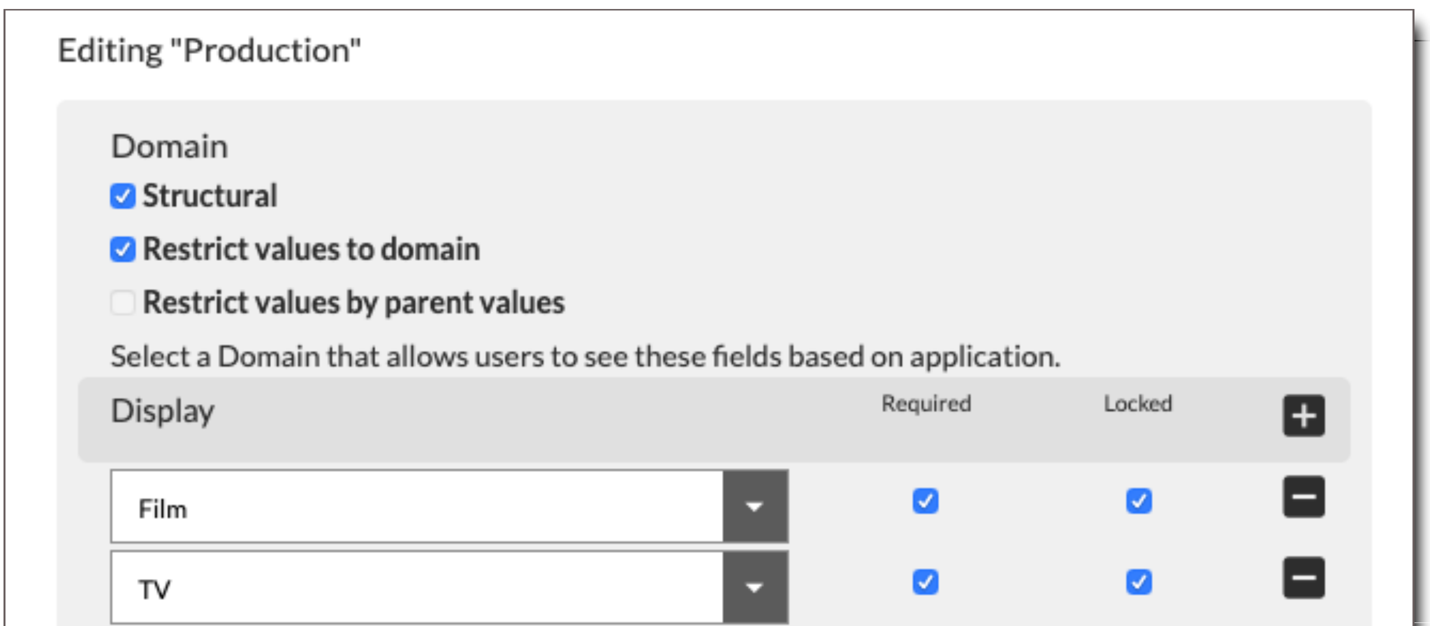
CORE Tip: Select Single Value Inputs for Structural Tags When you set up a new Tag Field, you are required to enter the way the User will select or input data. In the case of structural tags, because each field is like a folder name, only one value can be selected for each Tag Field. The methods that allow a single value input are the Dropdown menu, Input field, Radio, and Date.



Only single value entry methods are accepted for structural tags. Dropdowns are the most commonly used method.

Add or Edit Tag Field Domain Options

Tag Field Domain Options are a required element of a new Tag Field. Once a new Tag Field is created, the Tag Field Domain Options can be modified at any time.



1. **Select Your Tag Field's Behavioral Checkboxes** (located under "Domain")

   i. **Structural** - Setting a field to Structural means that Tag Field will be listed in the structural filter tab and it will be included in the Asset Group name as the key categorization method.

   ii. **Restrict values to domain** - If checked, the values entered under any Domain will only be available under that Domain. If not checked, any values entered for this field will be available under any

Domain.

iii. **Restrict values by parent values**- If the field is nested under a parent field, checking this option means that any value you enter will appear under just that corresponding parent value. So, if there are two values in the Parent Tag Field, each parent tag will have separate child tag values. For instance, imagine you had a field named "Car Manufacturer," and a nested field underneath named "Car Model." Here “Car Manufacturer” is the parent tag, the values of “Car Manufacturer” are “Honda” and “Nissan”. With this checkbox selected, the user sees in the “Car Model” Tag Field that there’s “Civic” under “Honda” and “Sentra” under “Nissan”. If this checkbox wasn’t checked, the user would see both “Civic” and “Sentra” under “Honda” and “Nissan.”

2. **Add Your Domain**

   i. Add a Domain to your Tag Field by selecting the ➕ icon.
   ii. Go to the dropdown menu and select your Domain
   iii. Choose whether or not it is a Required Tag Field for that Domain
   iv. Choose whether or not it is a Locked Tag Field for that Domain
   v. Save

To remove or change your Domain, select ➖ to remove, or go to the dropdown to change it.

Additional Need-to-Knows About Tag Field Domain Options

Domain Options can be modified at any time; however, there are a few things to note:

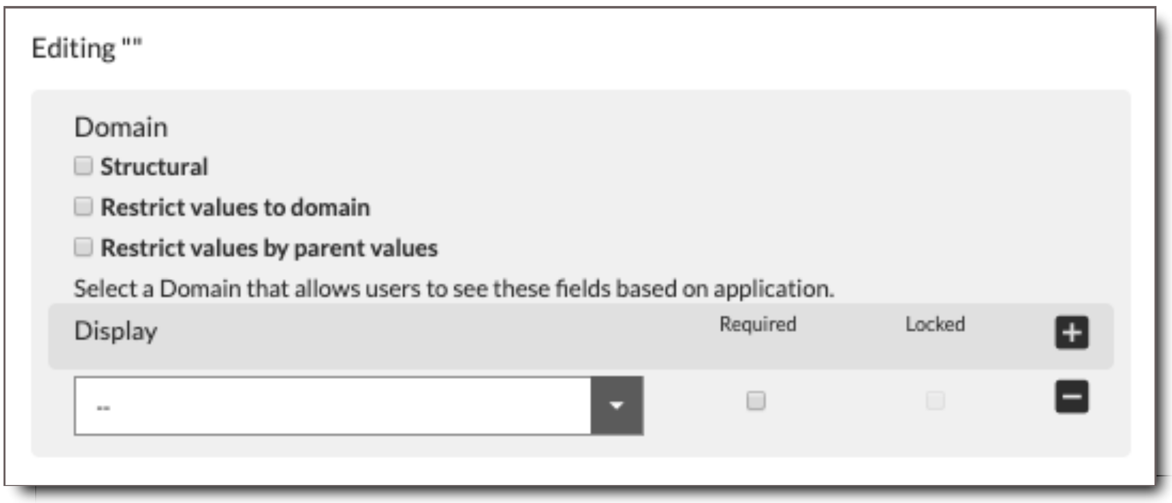
1. “All” Domains cannot be applied at this time to Tag Field Domain Options.
2. There must always be one Domain associated with Tag Field Domain Options.
3. Once a Tag Field is created and Tag Values have been added, if a user selects Restrict Values to Domain or Restrict Values by Parent Values, and they weren’t previously selected, those values become associated with only the Tag Field and Tag Values currently selected. Which means, if these items were broadly available across Tag Values or Domains, they will now be limited to one. And, if the user desired to make them widely available again or available in a couple different areas, these values will need to be manually entered per Parent Tag Value or Domain.
4. If the Admin desires to avoid future clean up and minimize duplications or Tag Values that aren’t standardized, Locking a Tag Field in this section is the best option.

Add a Child or Nested Tag to an Existing Tag Field

To add a Nested or Child Tag Field to an existing field:

1. Click the ➕ button next to your parent Tag Field.
2. A new field will appear indented below it.

3. Enter the field name.
4. Select its type.
5. Scroll down to the Tag Field Domain Options box below the Tag Tree
6. Add a Domain to your Tag Field.



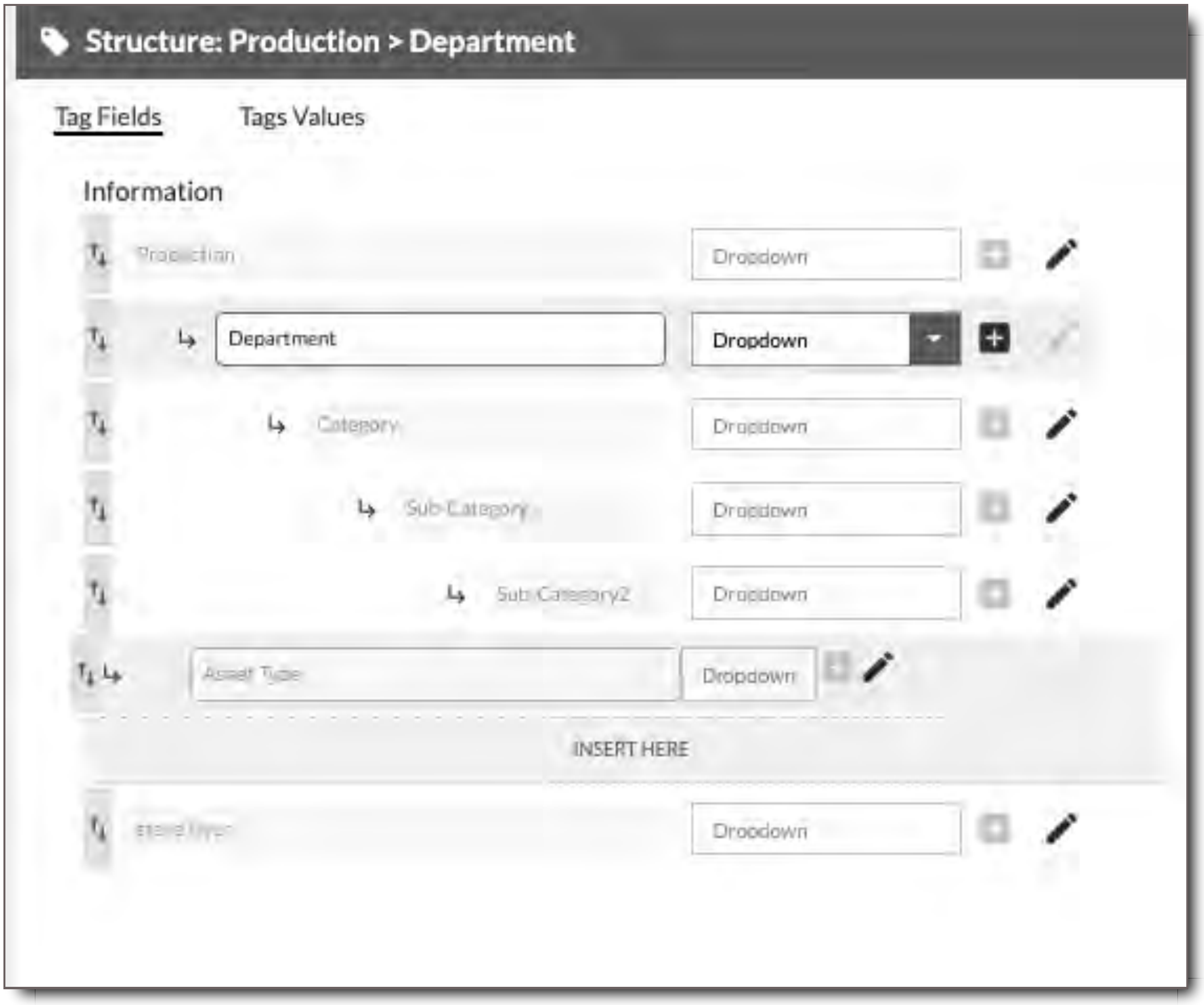
7. Select the desired Domain Options.
8. Save.
9. Finally, once a Tag Field has been created and associated with a Domain, it needs values added to it. To learn how to add Tag Values to your Tag Field, go to the Tag Value Section or go to the How to Build Your Tag Taxonomy: A Step-by-Step Guide for a more complete guided walk through of the taxonomy creation process.

Move a Tag Field’s Position in the Tag Tree / Hierarchy

To change the order of a field, click and drag the handle next to it, then drop it in the desired position. There are some rules and limitations to the re-ordering Tag Fields:

1. Top-level tags, such as Production can be re-ordered.
2. The Production tag, whatever it may be renamed to, is the system tag for populating projects in the File Search Browser Panel. Putting top-level tags above Production will not cause them to appear in the Browser Panel instead.
3. Tags at the same child / hierarchy level, who share the same parent tag, can be re-ordered within that parent tag.
4. Tags with child tags, when moved, will move all the child tags associated with that parent tag.

5. Moving child tags from one parent tag to another parent tag is not currently possible.
6. Moving Tag Fields up or down hierarchy levels is not currently possible.
7. Moving Tag Fields between Tag Groups is not currently possible.



Delete a Tag Field

To delete a field, click the (trash) icon next to it. Note that you cannot delete a field that is currently being used to categorize Files. You must first re-categorize any Files using the field before deleting it.

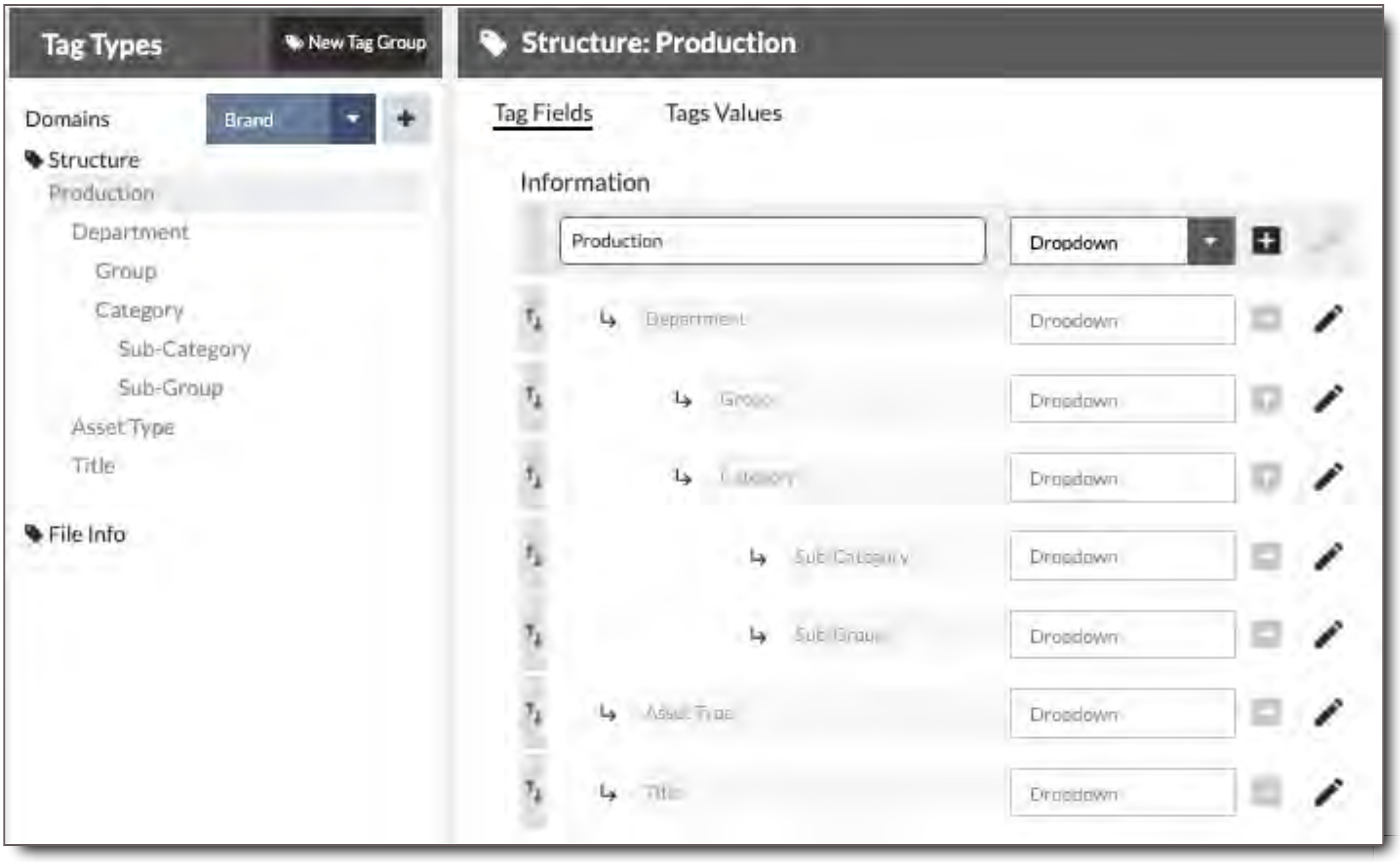
Working with the Tag Hierarchy (aka Tag Tree)

In this section, you'll learn

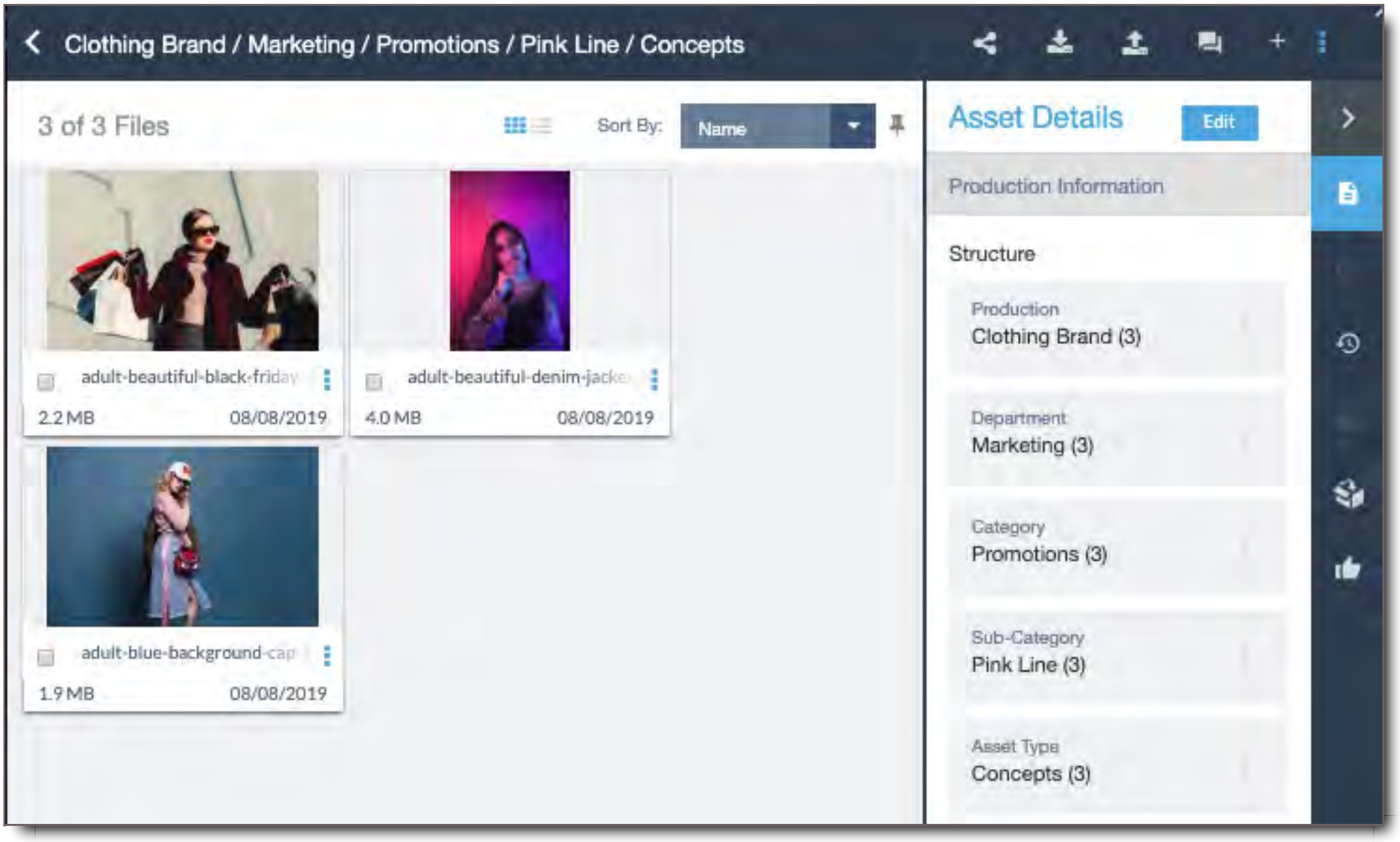
- The effects of the Tag Tree's organization on File Search and the Browser Panel
- And, how to work with the order of Tag Fields in the Tag Tree

In the Tag Tree, the order of your Fields and whether they are nested or listed top down affects how they appear in the Structural Name of an Asset Group and in the Asset Details.

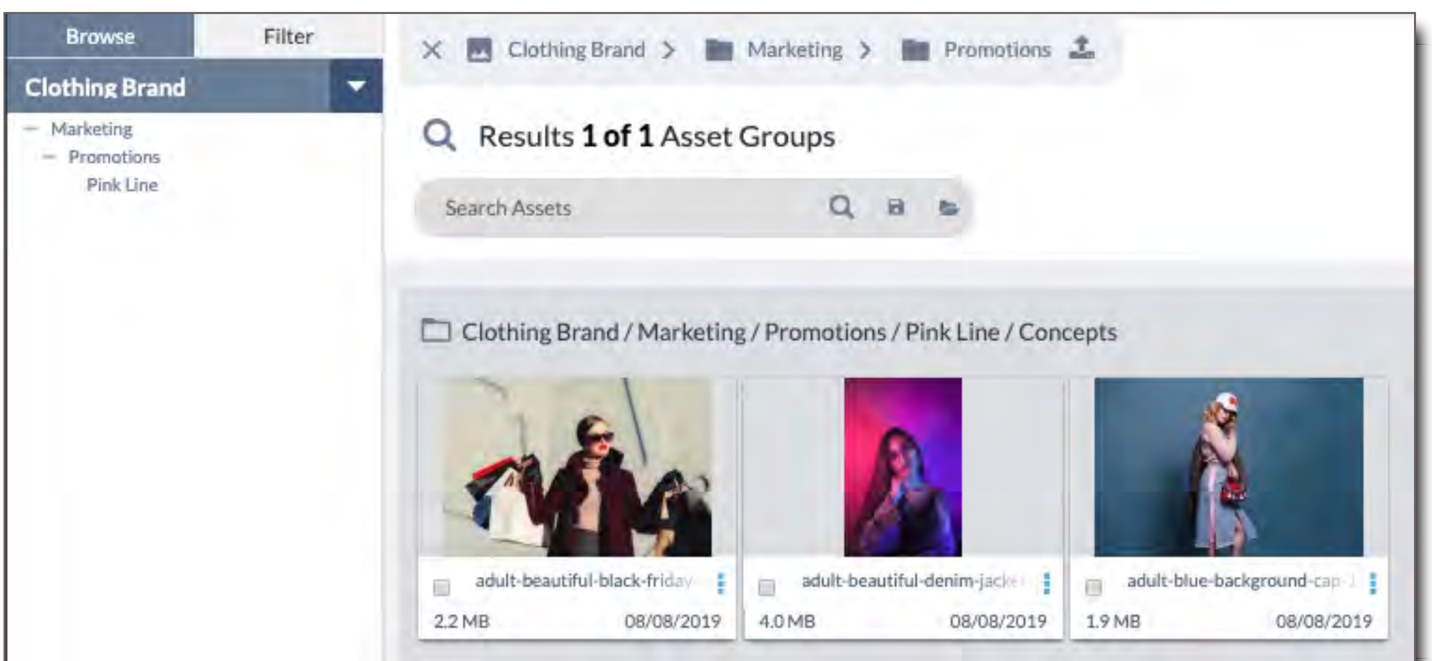
Mixed Nested and Listed Structural Hierarchy



Mixed Structural Tags Make Up Asset Group Name and Appear in Asset Details



Left Browser Panel Shows Nested Structural Tags, but not Listed Tags.
If hierarchy was listed only, listed structure would appear in Left Browser Panel.



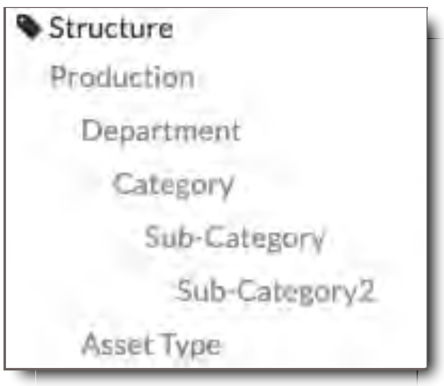
Tag Fields live on two axes:

1. A top down axis. This is equivalent to a list where Tag Fields are organized consecutively, one below the

other.
2. And a left to right axis. This is equivalent to a nested folder structure whether Tag Fields are prioritized in a ranked hierarchy, similar to an outline structure.

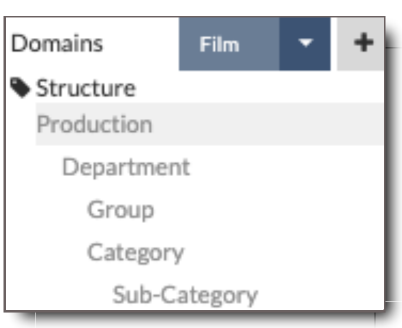
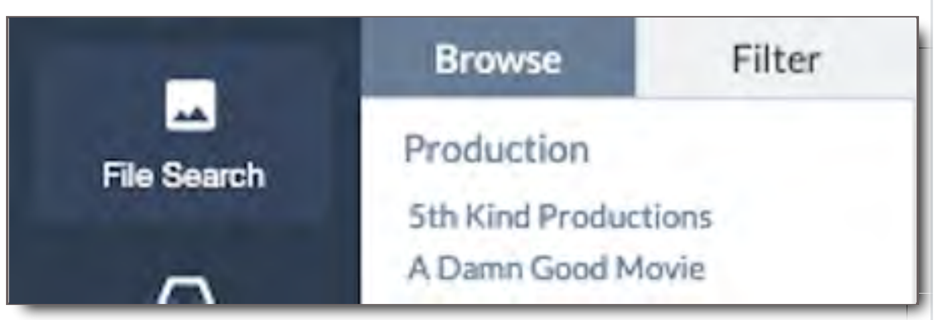
The hierarchy for a Tag Group can be a combination of Tag Fields that is both nested and listed top down.

- A purely nested or left to right structure shows a series of Tag Fields each respectively a child to the parent tag above.
- A purely top down structure shows a series of tags at the same top level.

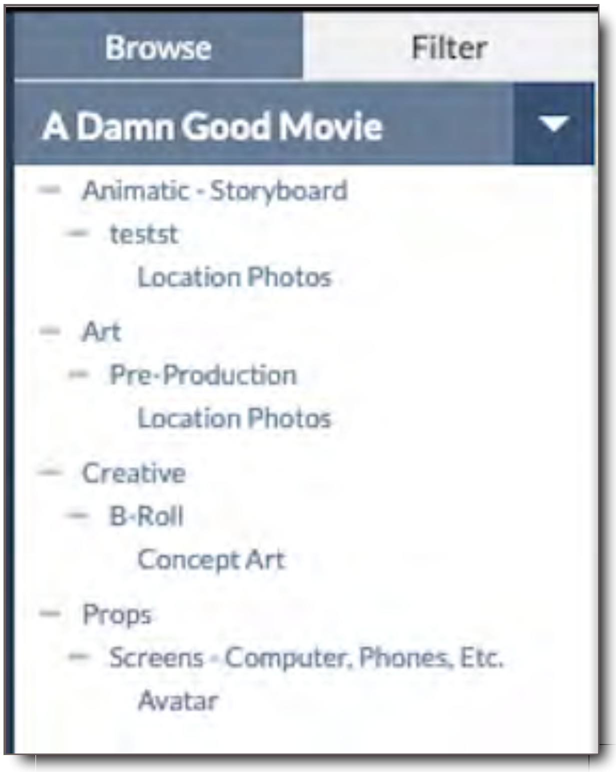
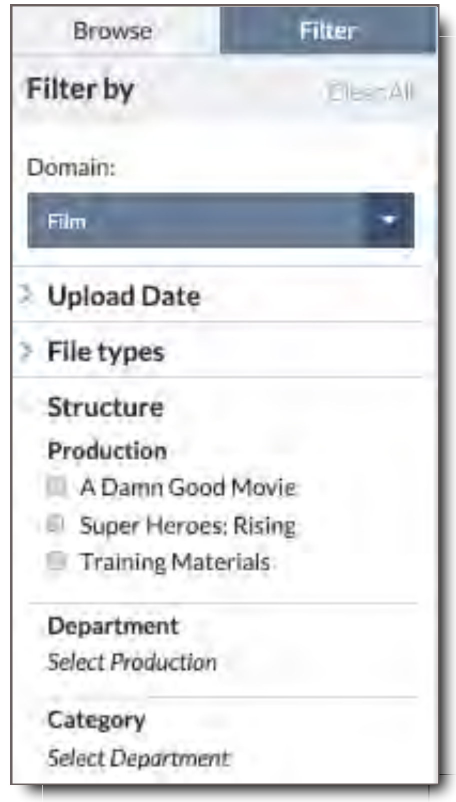
<table>
<tr><th>Nested / Hierarchical Tags</th><th>Listed Tags</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

What the Tag Hierarchy Looks Like and What a User Sees

What an Admin sees in the Tag Structure Module for Tag Groups and the Tag Field Hierarchy is different from what a user sees in the Browser and Filter tabs. Where the Admin sees the Tag Fields, the user sees the Tag Values associated with files. The Browser lists all Tag Values listed in the Tag Field Productions which are associated with files. The Tag Values selected from the tag's hierarchy can be opened with the ✚ below it.

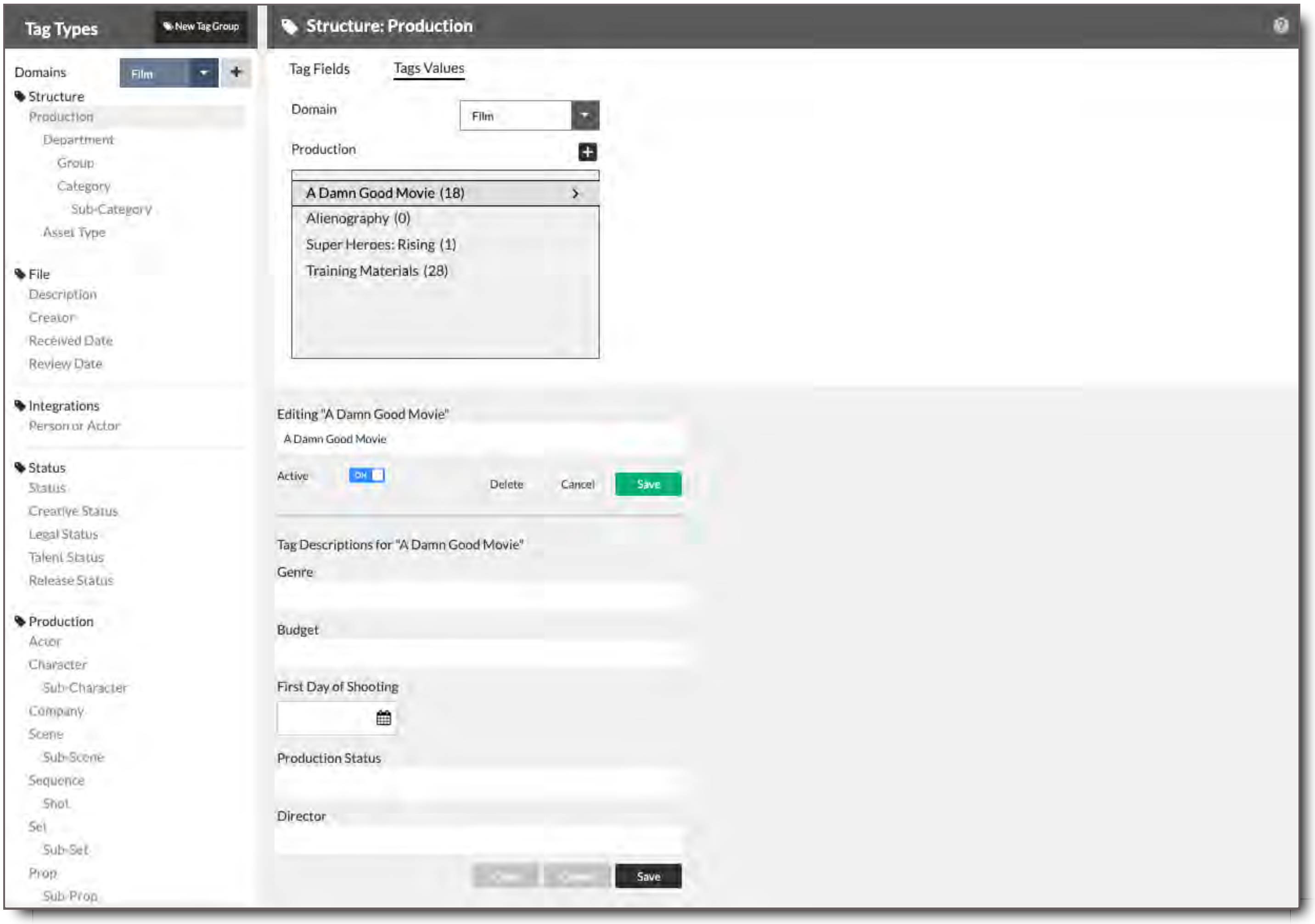
<table>
<tr><th>What the Administrator Sees</th><th>What the User Sees in the Left Browse Panel</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

What the User Sees in the Left Browse	What the User Sees in the Left Filter

<table>
<tr><th>Panel When a Production is Selected</th><th>Panel When Filtering by Domain</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

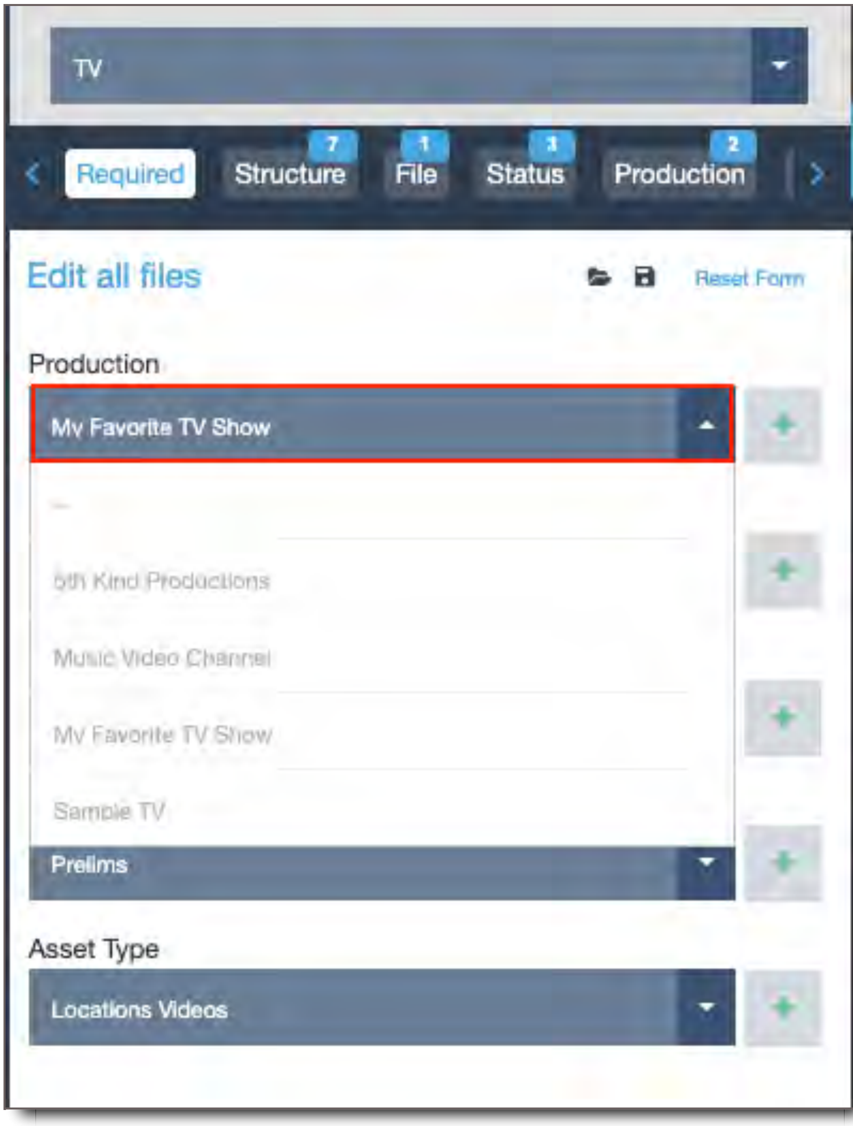
Tag Values

This section lets you manage and add values for a selected Tag Field.

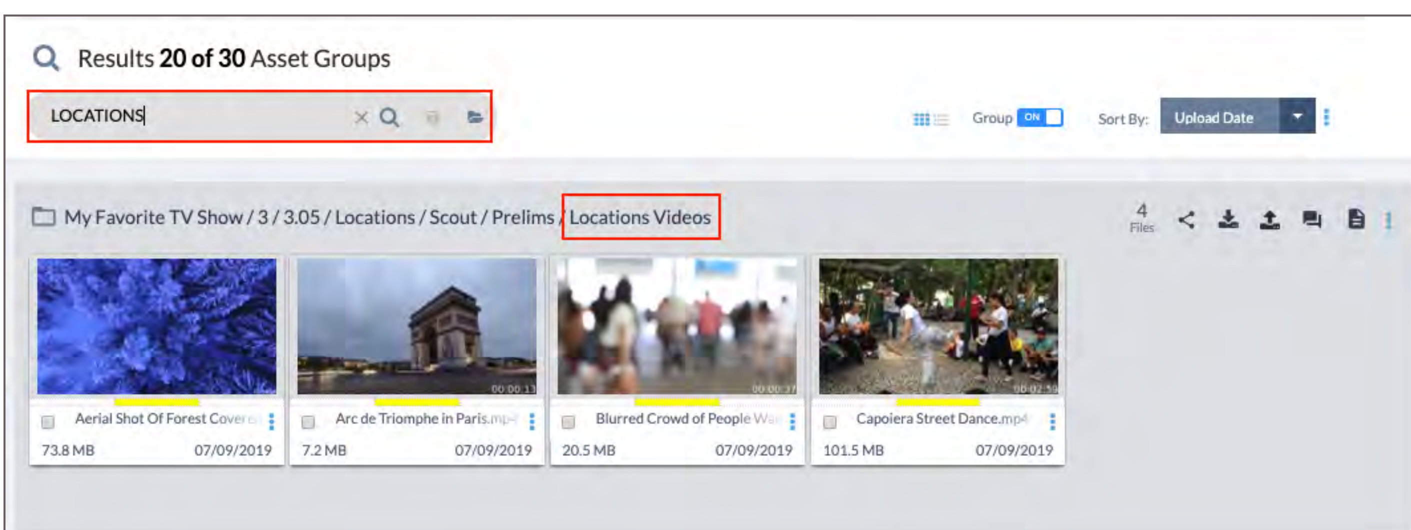


What is a Tag Value

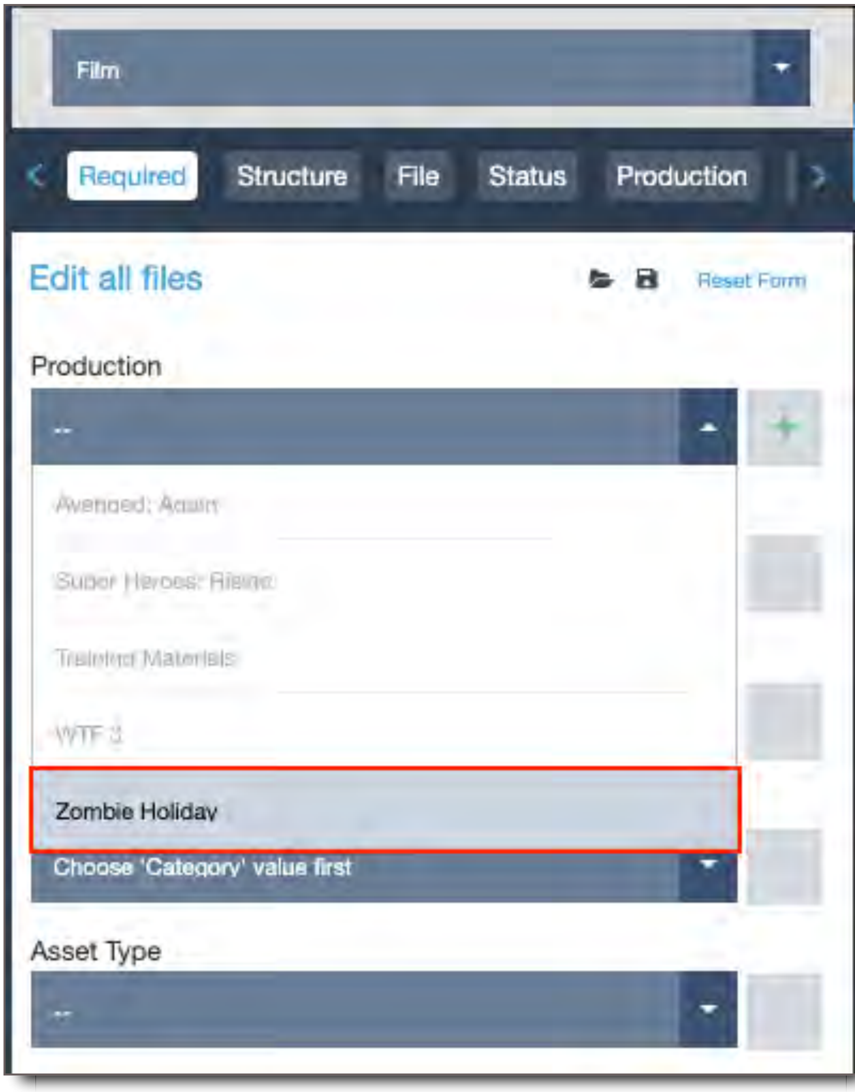
When a user selects or adds a menu option within a Tag Field, that's a Tag Value. Tag Values are the values assigned to Tag Fields. They are the actual menu options a user sees in each Tag Field and the final executed metadata associated with files.



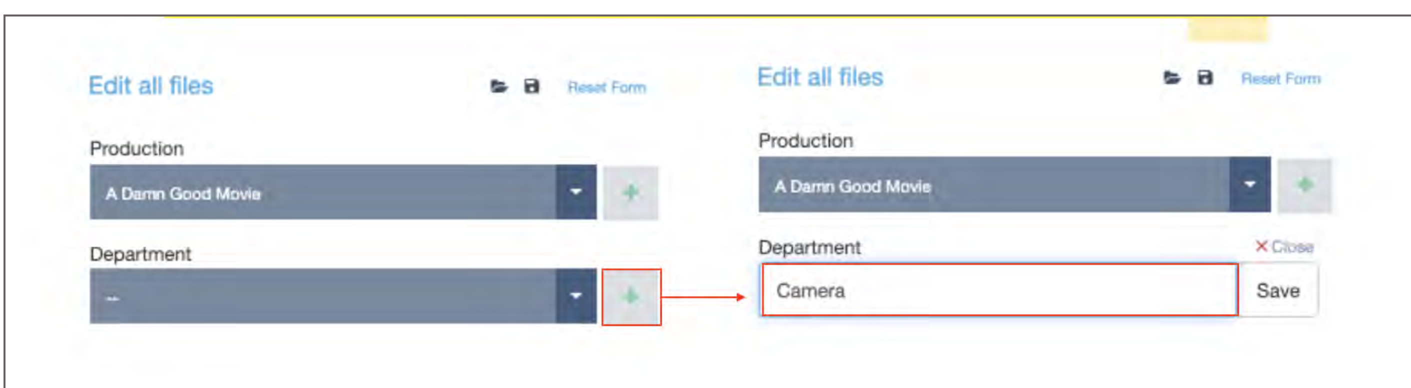
They are the words or values listed in the name of an Asset Group, and they are the Keywords or values used to search and filter for a file.



Tag Values can be anything, such as a Yes and No for a checkbox status, or a list of Production Titles under the Tag Field called “Production,” such as Zombie Holiday, WTF 3, and Avenged: Again.

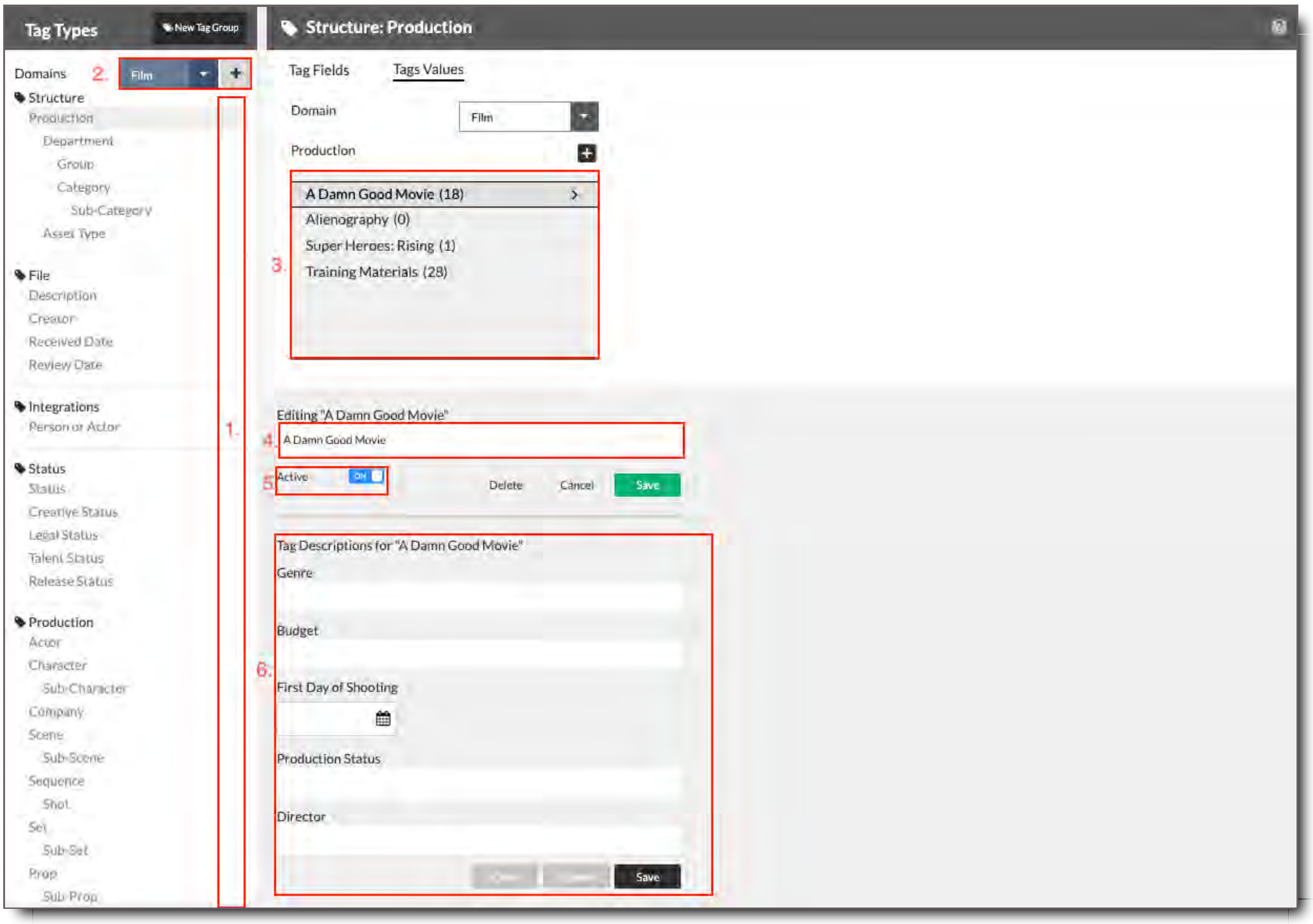


Tag Values can be pre-populated, or users can be allowed to enter their own values when a Tag Field isn’t locked.



Elements of the Tag Values Section

1. **Left Tag Types Panel -** where Tag Fields are selected
2. **Domain Menu -** where Domain is filtered
3. **Tag Field's Tag Value Box -** where Tag Values for a particular Tag Field are listed
4. **Tag Value Input Field where -** the content of a Tag Value is entered, edited, saved, and deleted
5. **Active Toggle** where Tag Values can be hidden from the view of the user when toggled off
6. **Descriptive Tag Value Input Field(s)** where the content of the Descriptive Tag Values is entered, edited, saved, and deleted



Filter Tag Values by Domain

Field values are filtered by Domain Purpose. Select a Domain from the dropdown to view values that have been entered for it.

View and Edit Existing Tag Values

Select a Tag Field either in the Left Tag Types Panel while in the Tag Values section, or select the field in the Tag Fields section and then go into Tag Values. Values that have already been entered will be viewable in a box underneath the field name, along with the number of Files that have been categorized with them.

To edit a Tag Value,

1. Select the desired Tag Field in the Left Tag Types Panel.
2. Filter to the correct Domain.
3. Select the Tag Value in the Tag Value Box.
4. Go to the input field below the box where the Tag Value is now editable.
5. Change the name, toggle the Tag Value to Inactive or delete it.
6. Save.

Add or Edit Tag Values for Nested Fields

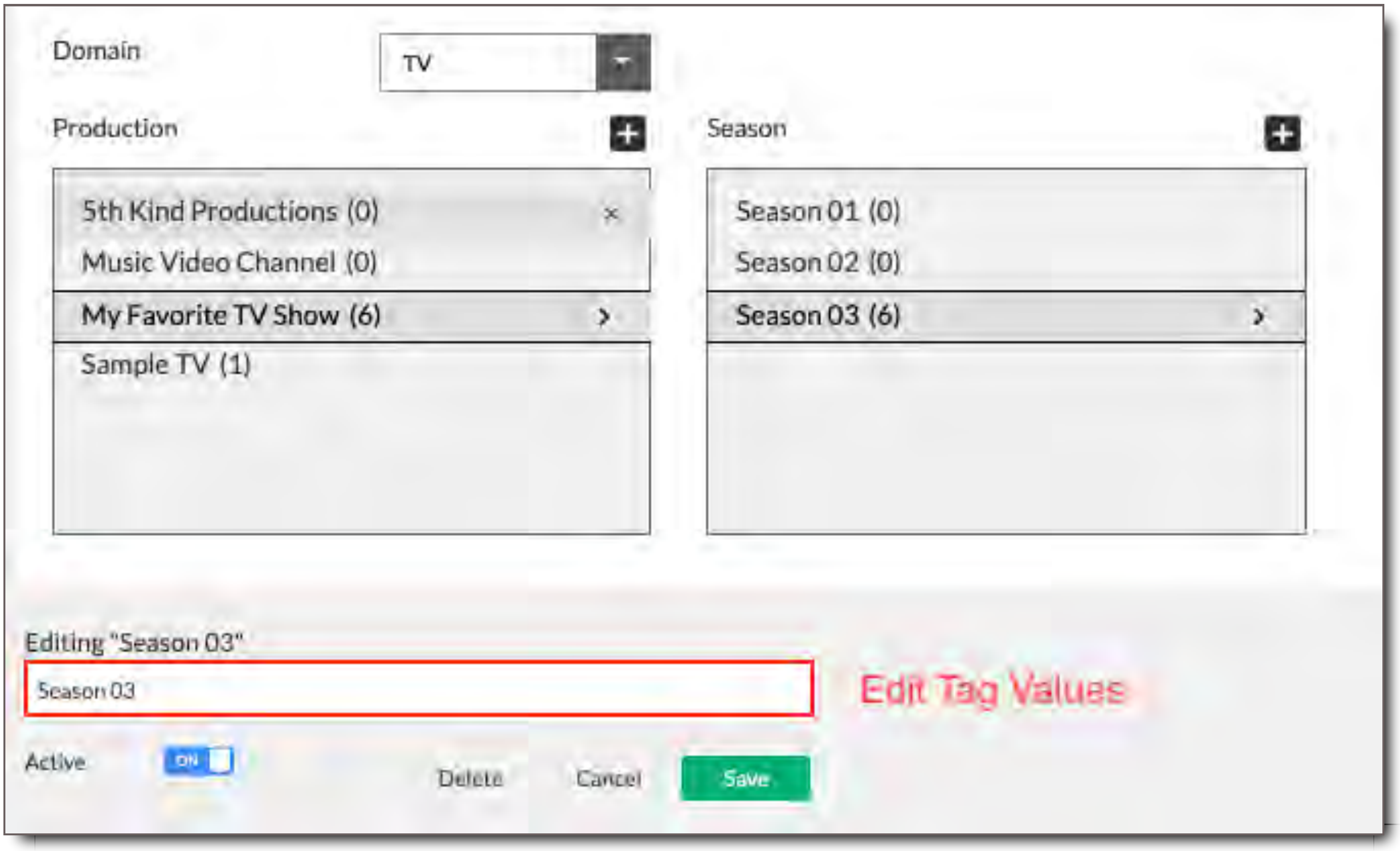
If a field is nested, its values may be dependent on its parent values. Therefore, to view its values, you must first select a value from its parent field to view all values that are nested under it in the nested field. Conversely, clicking on a nested field will display all of its parent fields as well.

Add a Tag Value

To add a value to a field, just click the + icon above it. You'll be prompted to enter the new value. Click Save when done.

Edit a Tag Value

After you have selected a value, you can modify it if you'd like. In the "Editing [value]" section, just type your changes to the Tag Value, and click Save. Your changes will instantly be applied to any File that is categorized with this value.



Delete a Tag Value

To delete a value, click the icon that's displayed when mousing over it, or select it and then click the Delete button in the "Editing [value]" section. Note that you can only delete a value that is not applied to any Files. If you'd like to delete a value that is used to categorize Files, you must first re-categorize those Files with a different value.

Working With Descriptive Tags

What are Descriptive Tag Fields

Descriptive Tags are Tag Fields that allow you to add metadata to your metadata. They are a second layer of information associated with a Tag Field in the Tag Tree. For instance, if you had a Tag Field named "Car Manufacturer," you could add fields such as "Address" and "Phone Number" to it.

Add a Descriptive Tag Field

To add a Descriptive Tag field to an existing Tag Field,

1. First make sure your Tag Field is selected and in edit mode by clicking on its name in the Left Tag Types Panel. See “Car Manufacturer” above, for reference.
2. Then click the ✚ icon in the Descriptive Tag section. Enter a name for the field, and select the entry type.
3. Scroll up to the top and Save.
4. To then add its Descriptive Tag Value, go to the Tag Value Section and follow the directions in Add or Edit Descriptive Tag Values d or Edit Descriptive Tag Values

Edit a Descriptive Tag Field

You can change a field's name and type at any time. Just click on the name box to edit it, or click the Type dropdown to change the type.

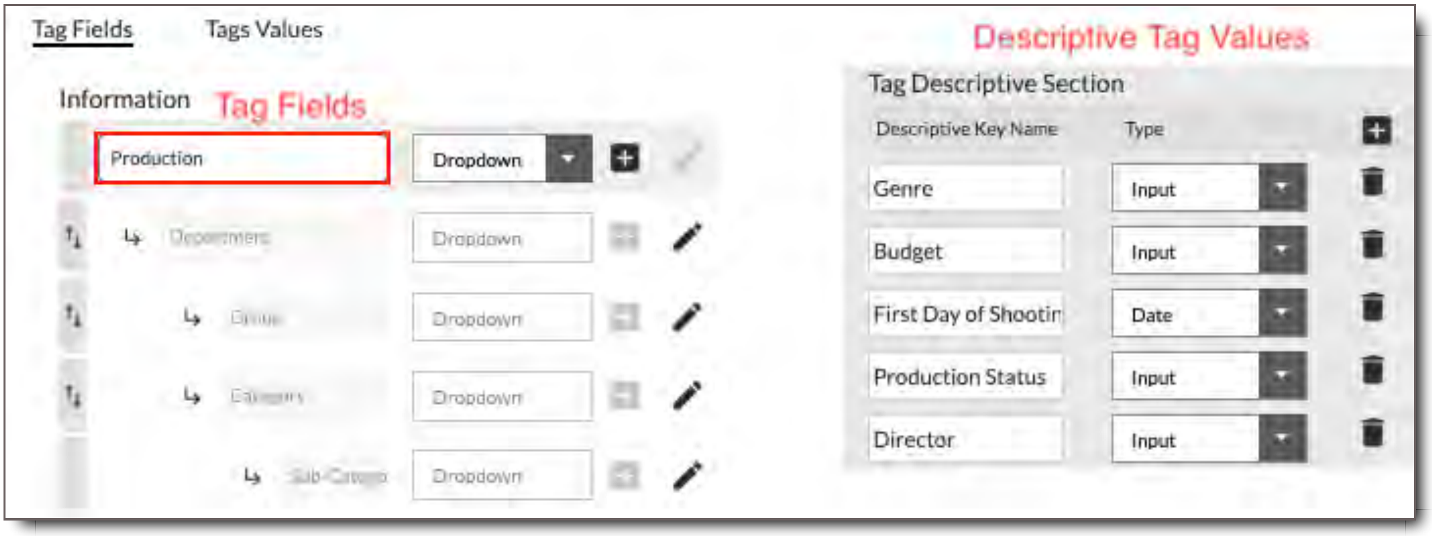
Delete a Descriptive Tag Field

To delete a Descriptive Tag Field, click the trash icon next to it.

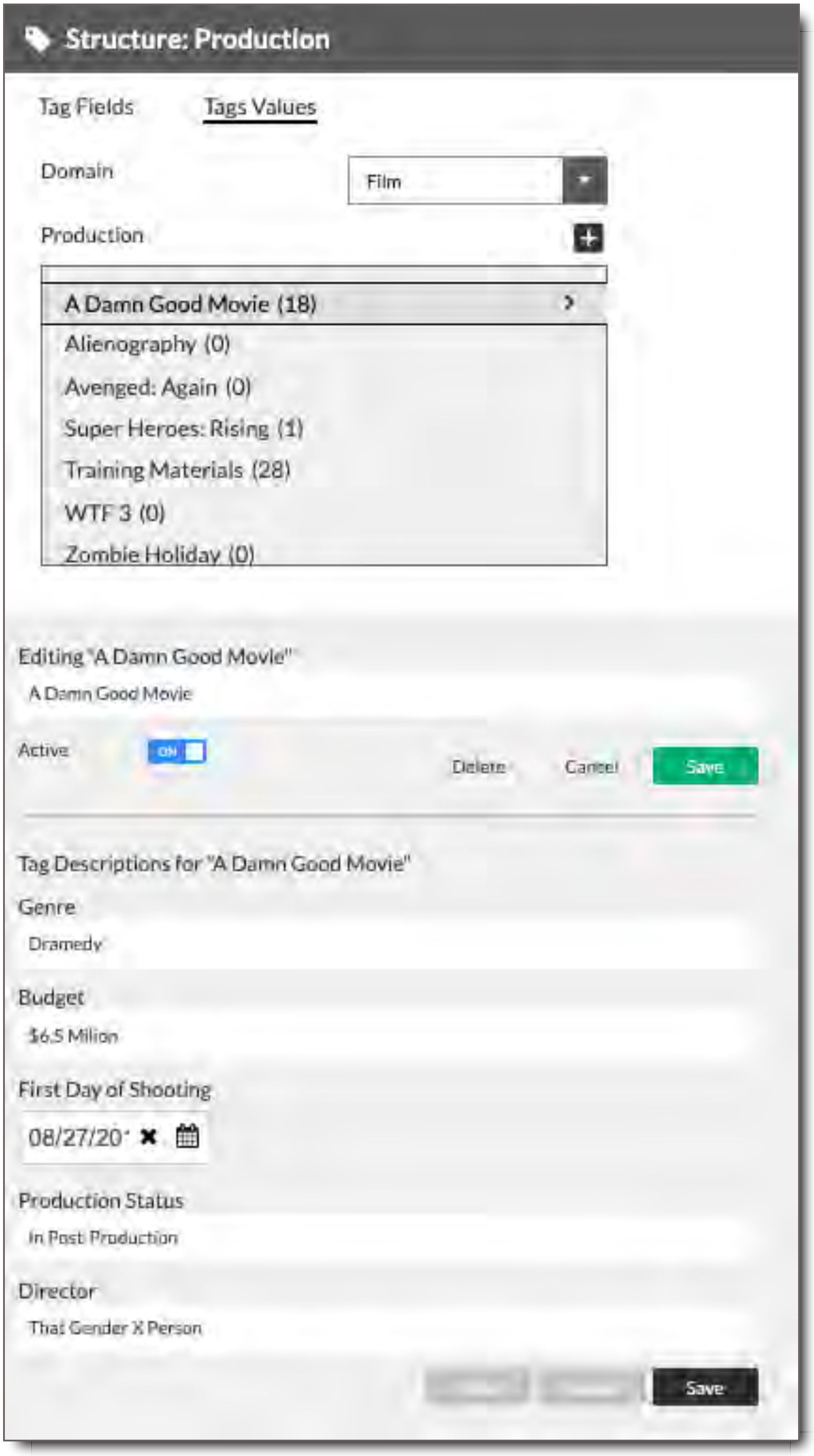
What are Descriptive Tag Values

Descriptive Tag Values, like Tag Fields’ Tag Values are the metadata that is entered or selected in the respective Descriptive Tag Field and then added or edited in the Tag Values section. It’s the information that appears to the user in Asset Details as secondary data to individual Tag Fields and Tag Values.

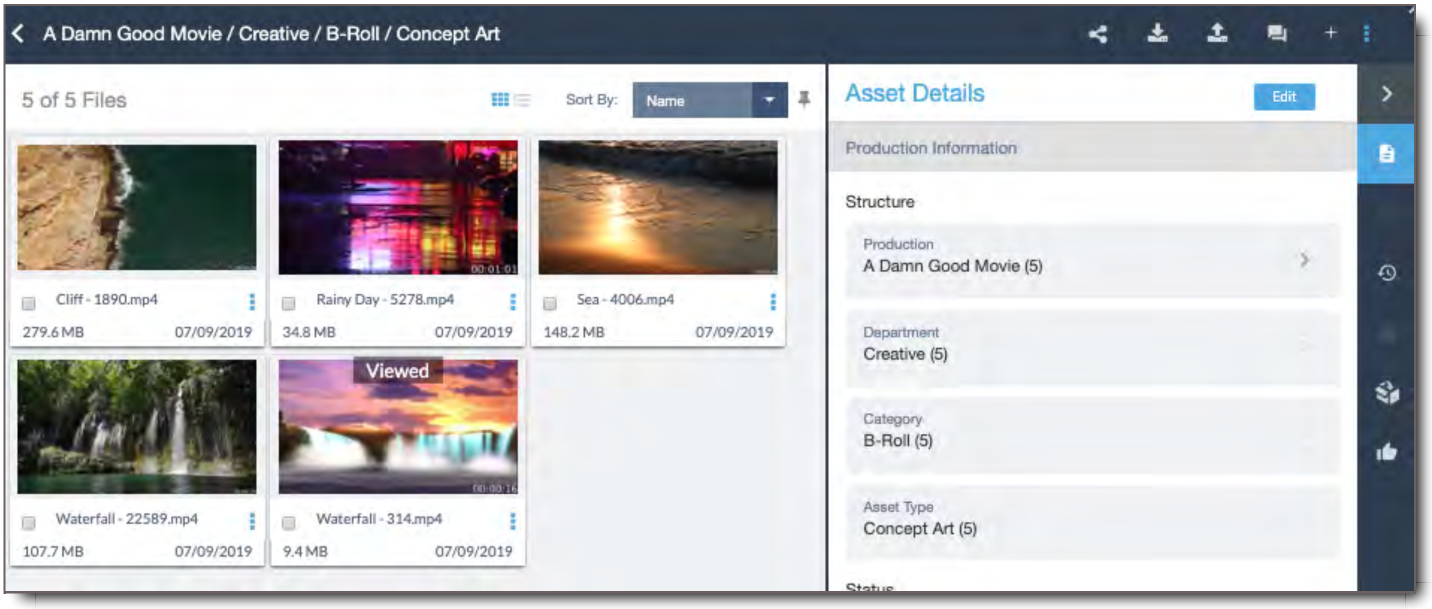
Example, Tag Field is “Production” with Descriptive Tag Fields to the right.



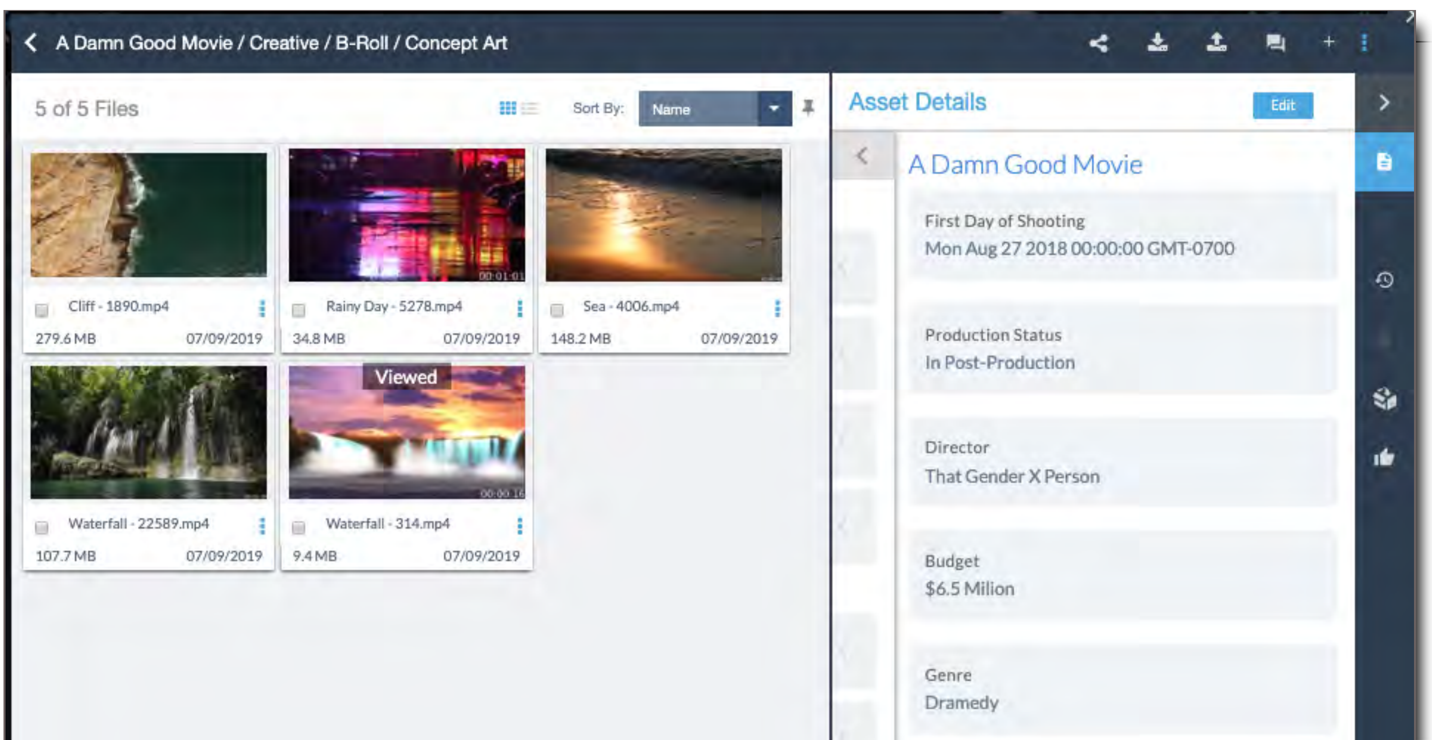
Here, "Production" Tag Field is filtered by Film Domain with Tag Values listed in the box below. Descriptive Tag Values are listed below the regular Tag Values.



Here, Tag Fields and Tag Values are listed in Asset Viewer Module's Asset Details Panel. The "Production" Tag Field's Tag Value is "A Damn Good Movie."



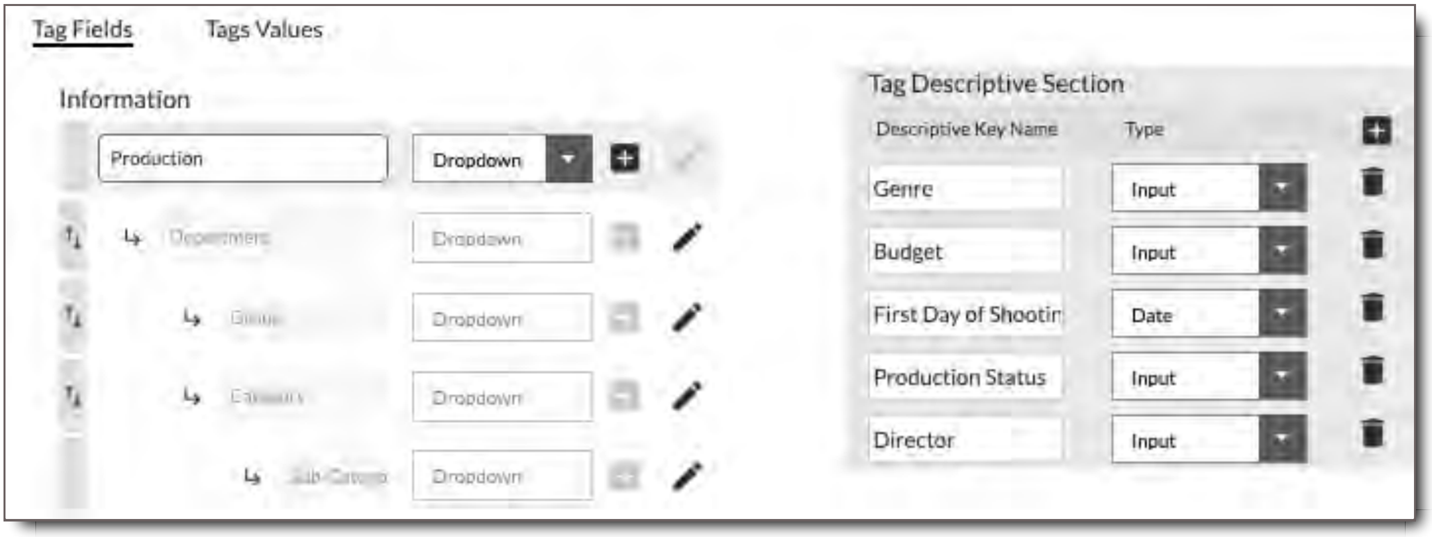
Selecting the right arrow of “A Damn Good Movie” takes the user to the Descriptive Tag Fields and Tag Values.

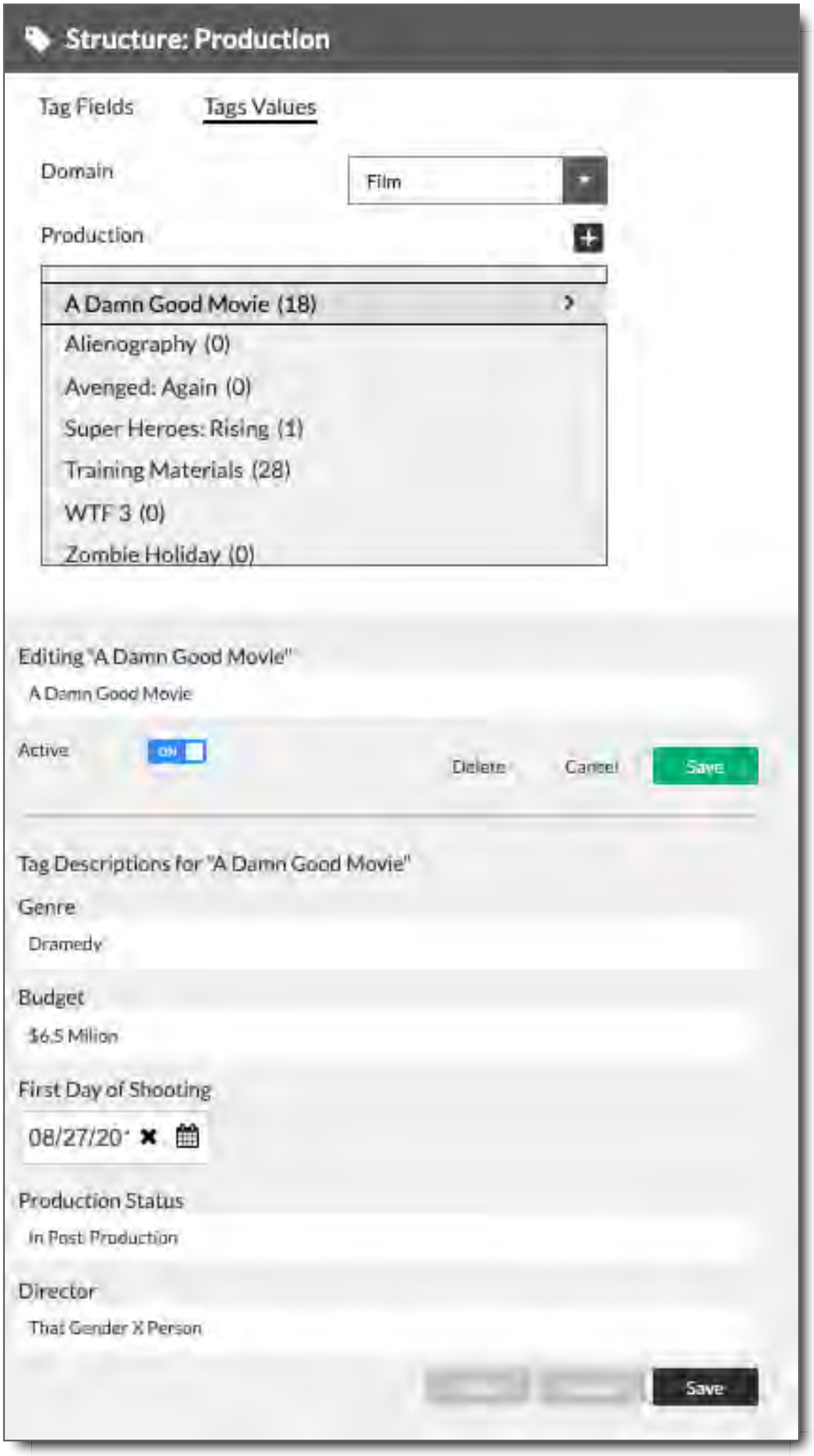


Add or Edit Descriptive Tag Values

When you select a Tag Field, you can view and edit the Tag Values of its associated Descriptive Tag Fields in the Tag Values section. Selecting the Descriptive Tag Fields does not activate the Descriptive Tag Values in the Tag Values section.

By selecting the Tag Field, in the Tag Values section, all the Descriptive Tag Fields's Tag Values that are associated with that Tag Field are listed below the main Tag Values section.





To add or edit any Descriptive Tag Value:

1. Select the Descriptive Tag Key whose values you want to add to or change.
2. Go to the Tag Values section. If your Descriptive Tag Values, don't appear underneath you Tag Values section, do the following:

i. Select the Domain.
ii. Select the Tag Value of the appropriate Tag Field.
iii. If the Tag Field is a Child or Nested Tag, select the chain of Tag Values to get to your appropriate Tag Field and Tag Value.
iv. For instance, if your Descriptive Tag Field is associated with Category, select the Production >> the Department >> then the Category. Your Descriptive Tag Values should appear below once Category is selected.

3. Once the correct Descriptive Tag Field's Tag Values appear below, enter your new value in the field.
4. Click Save when you're done.

How to Build Your Tag Taxonomy: A Step-by-Step Guide

Step 1 - Create Your Domain or Select the Domain You Want to Edit

For a new Domain, in order to build out your taxonomy, you need to do two things:

1. Associate the Domain with a Structure
2. Associate Existing Tag Groups or Create New Tag Groups that fit the workflow and metadata requirements you've identified for this Domain.

For an existing Domain with a defined taxonomy, you'll add new Tag Fields or edit existing ones. Follow the same steps below to achieve the results you want. For the purposes of this guide, these instructions are about how to build out a tag taxonomy for a new Domain.

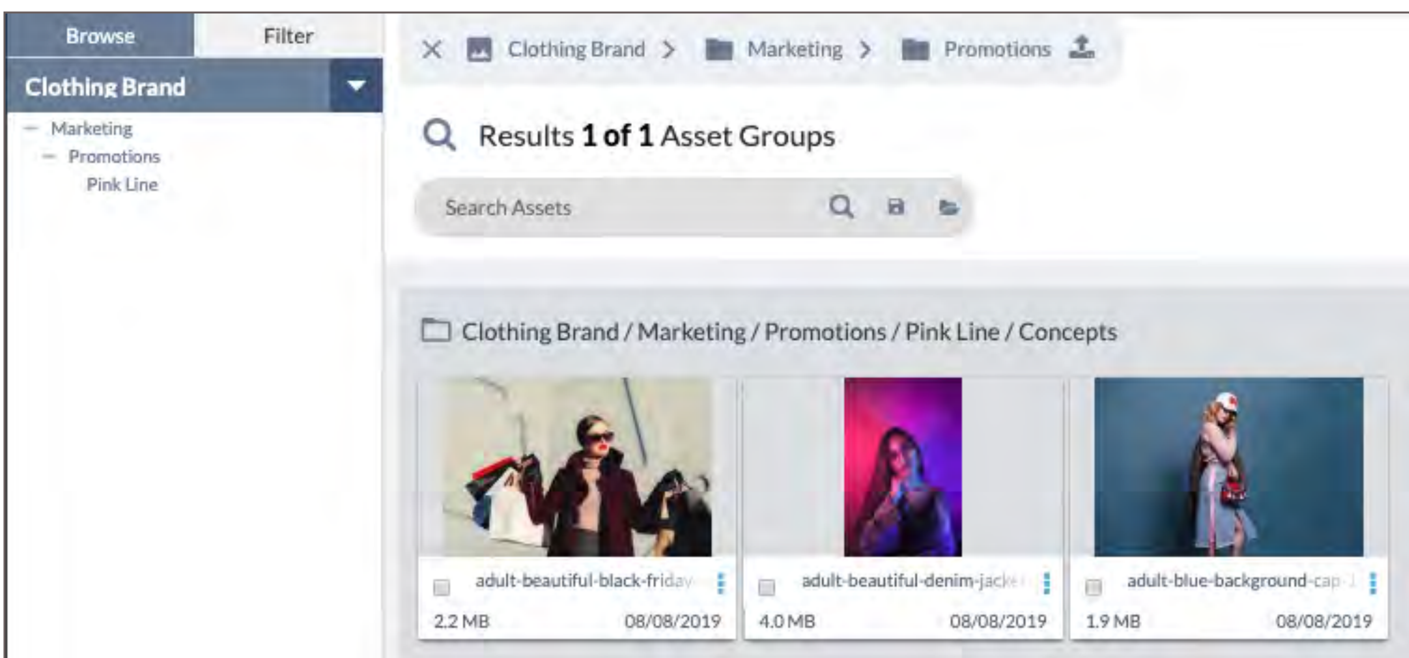
To create a Domain,

1. Go to the Left Tag Types Panel
2. Select the ✚ button next to the Domain dropdown menu
3. Enter the name of your Domain. For this guide, we'll call it "Online."
4. Save.

You've now completed the first step in building a taxonomy.

Step 2 - Start with the Structure Tag Group

Structure is the most important Tag Group of all the Tag Groups in the CORE system. Structure defines the Metadata categorization. Files that share the same structure are grouped together like folders. These files are browsable in the Browser Tab's virtual directory and searchable in the Filter Tab under Structure.



By setting a Tag Field to Structural, it will be listed in the structural categorization of the Filter and reflected in an Asset Group's Name.

Step 3 - Pair Your Domain With an Existing Structure

To create a structure for your Domain, you can pair it with an existing Structure and modify it, or build your structure from scratch.

Description	Image
1. In the Left Tag Types Panel, select a top level Tag Field in the Structure Tag Group by clicking on it. In this case, Production.	
2. Production becomes an editable field to indicate changes are being made.	
3. Next, Scroll Down to the Tag Field Options Box below the Tag Hierarchy Tree. This area is titled by the Tag Field you are editing, so you always know the Tag Field you are changing. This example is called "Editing Production."	

Under "Editing [Production]," you can choose different options that will reflect how a user will view and interact with the Tag Field.

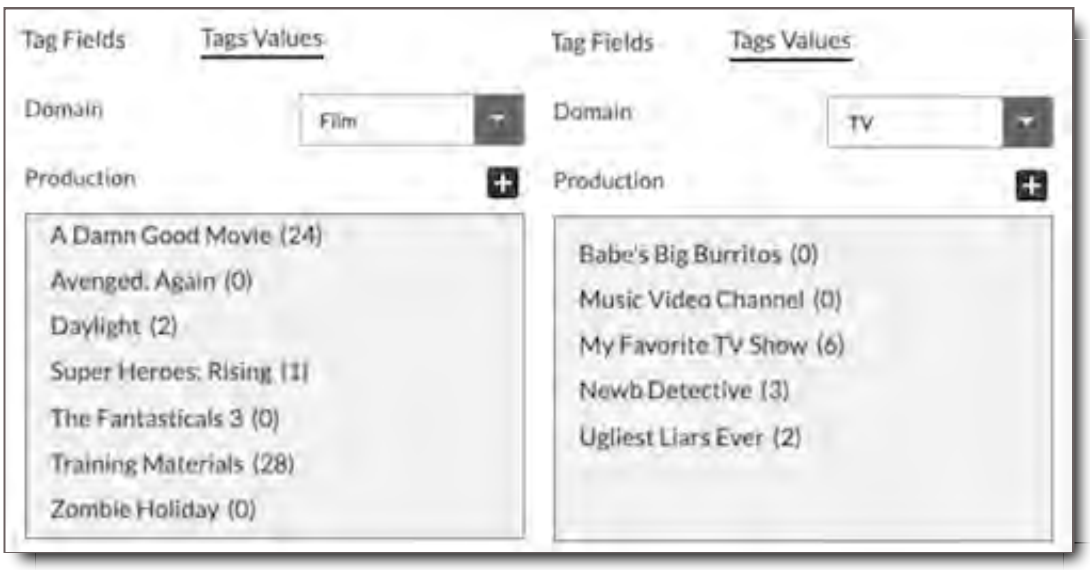
At the top of the box, there are three check boxes:

- Structural

- Restrict values to Domain
- Restrict tag values by parent values

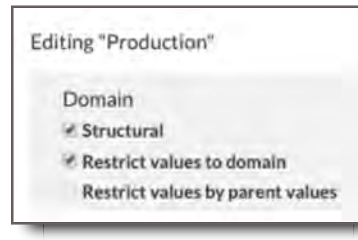
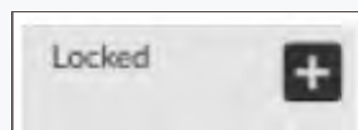
Selecting Structural ensures this Tag Field will be applied to the structural string of an asset group even if it isn't a part of the Structure Tag Group.

Selecting Restrict values to Domain means that the tag values associated with the Tag Field are specific and available to that Domain only. For instance, with this restriction selected, users would see in the Film Domain that the Production Tag Values are The Fantasticals 3 and Daylight, while the TV Domain has Newb Detective, Ugliest Liars Ever, and Babe's Big Burritos.



If this box was not selected, both Film and TV Domains would see all the values: The Fantasticals 3, Daylight, Newb Detective, Ugliest Liars Ever, and Babe's Big Burritos.

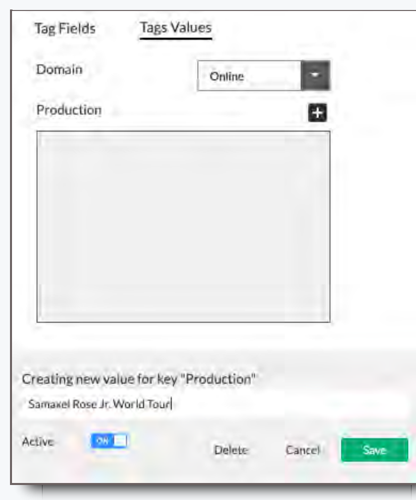
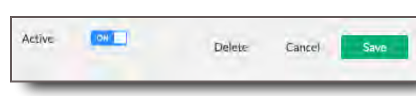
Selecting the third checkbox restricts tag values by parent values which means that the tag values of a nested or child tag is restricted by the values of its parent. For example Babe's Big Burritos is an animated show whereas Ugliest Liars Ever and Newb Detective are not. By choosing "restrict by parent tag values", the Tag Field Department would show Animation as a Tag Value only when Babe's Big Burritos was selected. The other two shows wouldn't have Animation as a Department tag value.

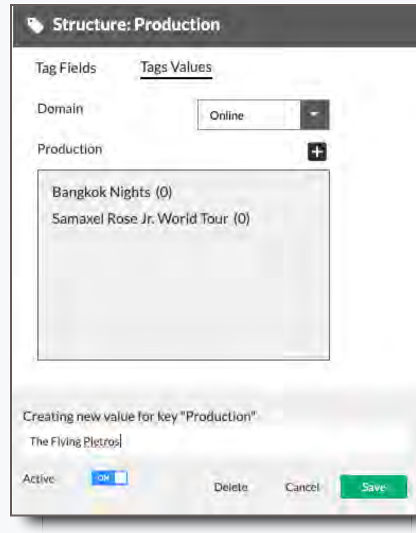
Description	Image
4. In our example with Production, since we are building out our structural hierarchy, we will make sure Structure is checked, and Restrict values to our Domain Purpose. At the top most level of the tag structure, this first Tag Field is the parent, so it cannot be restricted by parent values. Therefore, Restrict tag values by parent values is not clickable for top-level Tag Fields.	
5. Next, select the top **+** button to the right of the Locked column.	
6. In the new, blank field, use the arrow to expand the dropdown menu and select your Domain.	

7. Then, check the Required box if this Tag Field is a required tag when a file is uploaded. Required tags mean the user must fill out those Tag Fields when uploading. This is helpful to ensure users are organizing their files with basic categorization so that files don't get lost in the mix and go tagless.	
8.Next to Required is the Locked column. If you check Locked, it Locks a Tag Field. This means users can select only the Tag Values that are provided in the tag's menu. If this box is left unchecked, it means the Tag Field is unlocked, so when users upload files, they will see a ➕ next to the field and be able to add their own values and menu items. For our example, we will Lock this field.	
9. Now scroll up and hit the Save button.	

You have successfully associated a Tag Field with your Domain. However, there are no tag values in this field's menu yet. It's essentially an empty field. To add those, we must add Tag Values.

Description	Image
10. After Saving, next select Tag Values at the top of the section.	

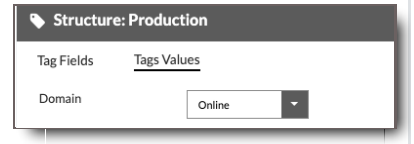
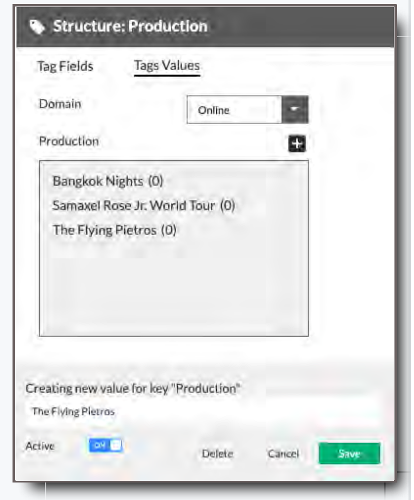
11. In Tag Values, select the Domain of your Tag Field. Here you'll see the Tag Field Production above the Tag Values box.	
12.To add the Tag Values a user will see in their menus when tagging a file, select the ➕ sign above the box.	
13.An empty field appears below the box. Add the first value in your Production Tag Field.	
14. Hit the Save button again.	

15. Select the + sign above the box again, and add another value. Then hit save.	

Congratulations. You have just associated your Domain with the Production Tag Field, and given it Tag Values.

CHECK YOUR WORK:

Description	**Image**
1. Refresh the page.	
2. Go to the Left Tag Types Panel, and select your Domain.	
3. The Domain filters what Tag Groups and Fields are associated with it. You should see your selected Tag Field under Structure. Select it.	
4. Go to Tag Values.	

5. Select your Domain.	
6. You should see the Tag Values you entered.	

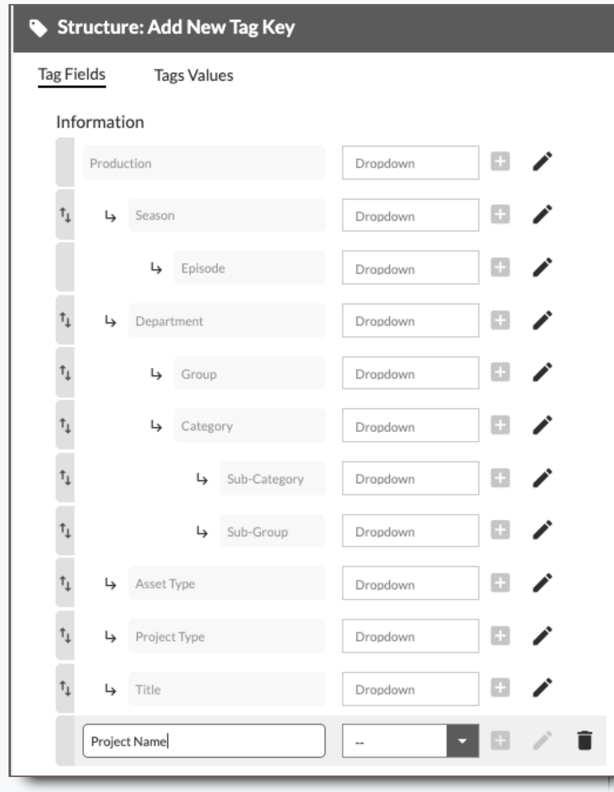
Follow these same steps to pair additional existing Tag Groups and Fields with your Domain.

Step 4 - Create a New Tag Structure with New Tag Fields

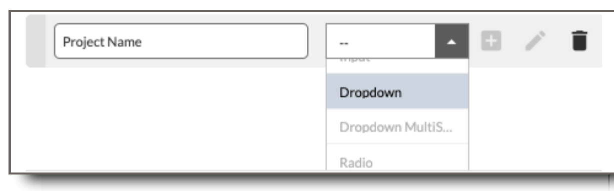
To create your own tag Structure,

Description	Image
1. Click on the Structure Tag Group name, and in the Tag hierarchy you will see a new top level empty field at the bottom.	

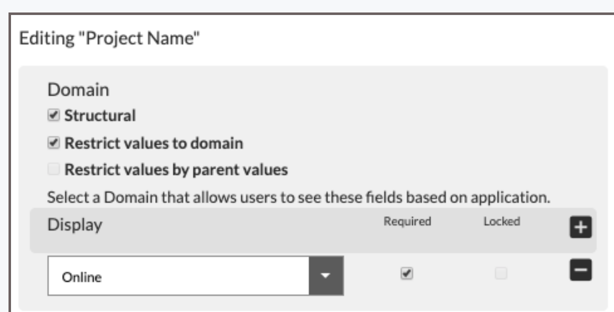
2. Enter your intended name. We will call it Project Name here for training purposes.



3. In the dropdown, choose how a user will select the tag value. For Structure tags, use a dropdown.

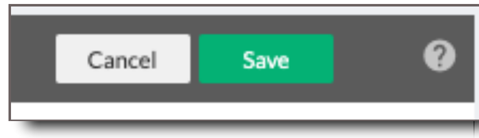


4. Then follow the same instructions to associate it with your Domain and Tag Values as you did with an existing Tag Field.
5. Start by scrolling Down to Tag Field Option Box below the Tag Hierarchy Tree.
6. Select Structural
7.Select Restrict value to Domain



8. Add a new Domain row by clicking ✚ and select your Domain.
9. Check Required.
10. Leave it unlocked.

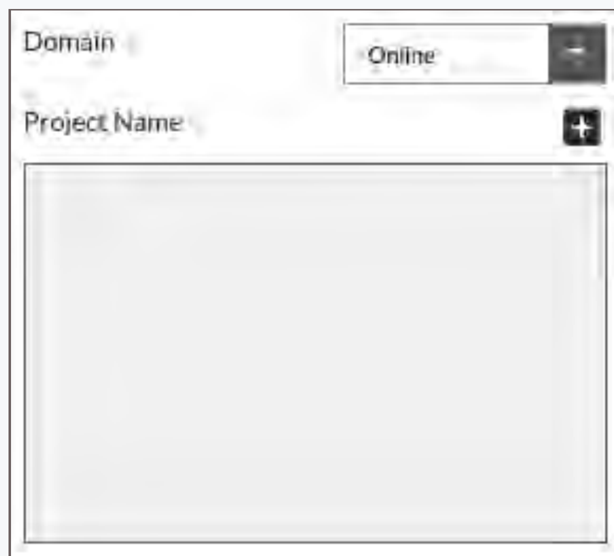
11. Scroll up and Save.



12. Go to Tag Values.

13. Select Domain.

14. Click ✚ next to Project Name



15. Add Project A 16. Save 17. Add Project B 18. Save 19. Add Project C 20. Save.	

Check your Work. Well done.

Step 5 - Create Child or Nesting Tag Fields

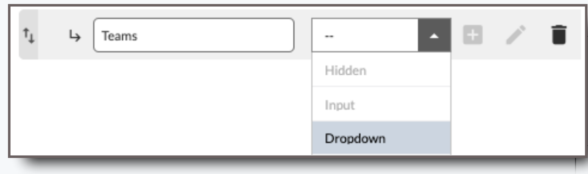
Nesting Tag Fields with a parent-child relationship is like creating a folder structure. Tags in direct connection to each other where one is subordinate are a parent and child.

To create child Tag Fields,

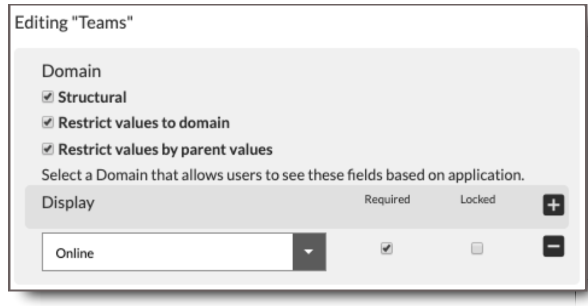
Description	Image
1. Go to the Tag Field that will be the parent. In this example, Project Name. 2. Select the ➕ next to the field. An indented, new blank field will appear under it. This is the child Tag Field or rather the next step down in	

your tag hierarchy.

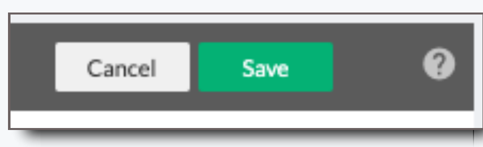
3. Enter your intended name. We will call it Project Name here for training purposes.



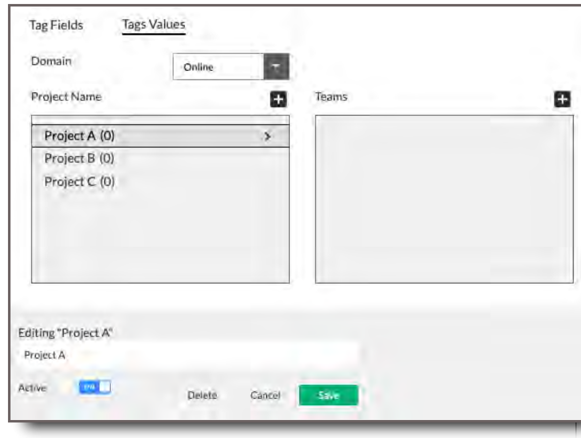
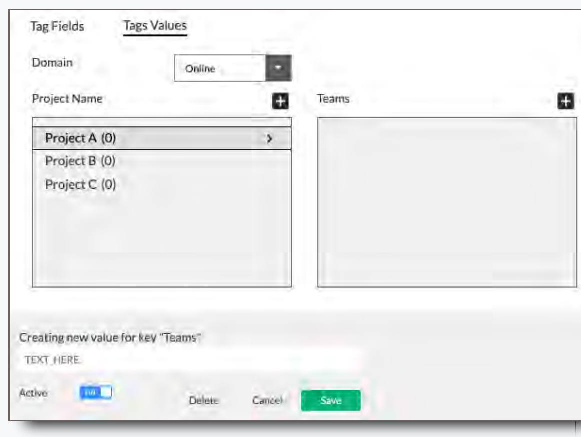
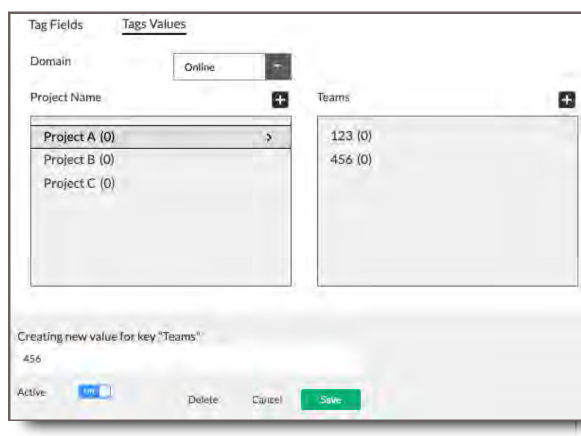
4. Then follow the same instructions to associate the tag with your domain and select the various options:
5. Scroll Down to Tag Field Option Box below the Tag Hierarchy Tree.
6. Select Structural.
7. Select Restrict value to Domain.
8. Select Restrict tag values by parent values.
9. Add a new Domain row by clicking + and select your Domain.
10. Check Required.
11. Leave it unlocked.



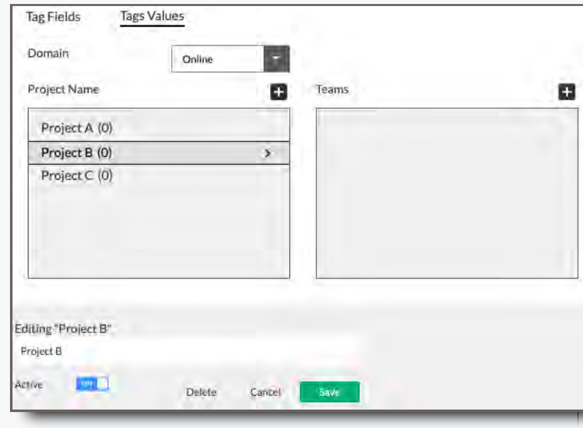
12. Scroll up and Save.



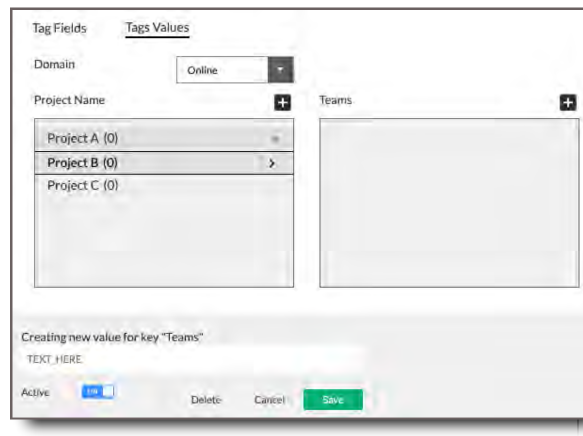
13. Go to Tag Values.

<table>
<tr>
<td>14. Select Domain.</td>
<td>
</td>
</tr>
<tr>
<td>15. Click Project A under Project Name.</td>
<td>
</td>
</tr>
<tr>
<td>16. Select ✚ next to Teams.</td>
<td>
</td>
</tr>
<tr>
<td>17. Add 123.
18. Save.
19. Select ✚ next to Teams.
20. Add 456.
21. Save.</td>
<td>
</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</table>

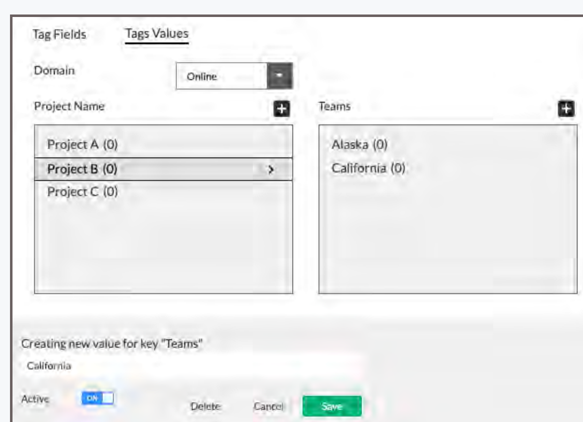
22. Go back to Project Name and select Project B.



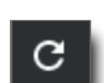
23. Select + next to Teams.

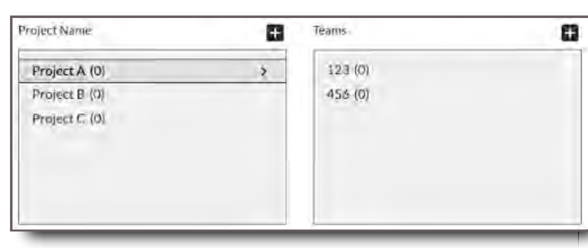


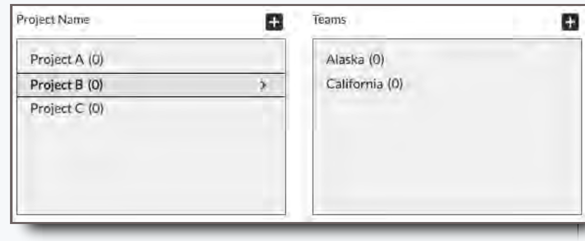
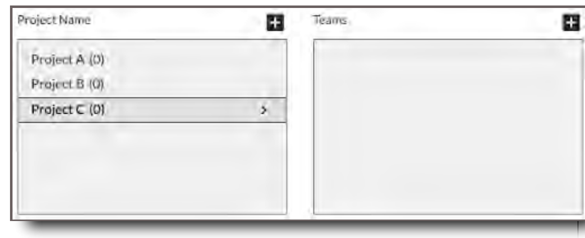
24. Add Alaska.
25. Save.26. Select + next to Teams.
27. Add California.
28. Save and check your work.



29. Refresh



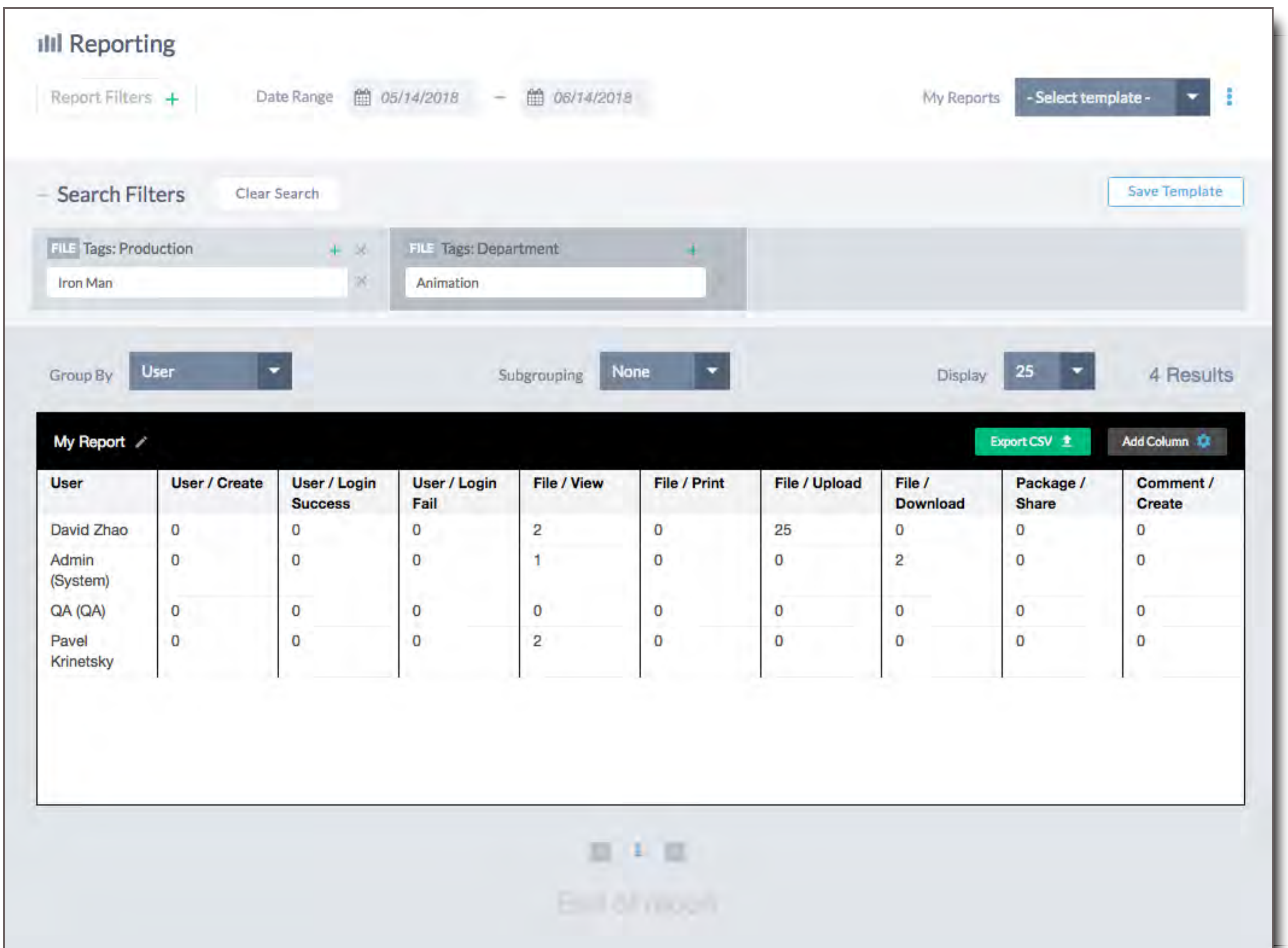
30. Select Teams in the Left Tag Types Panel.	
31. On the right, select your Domain	
32. In the Project Name Tag Value Box, you see that Project A, Project B, and Project C are listed under Project Names.	
33. Select Project A. You will see that 123 and 456 are listed in the Teams tag box.	

34. Select Project B. It shows Alaska and California.	
35.Select Project C. It has nothing.	

Tag Values are restricted by parent values. Mission accomplished

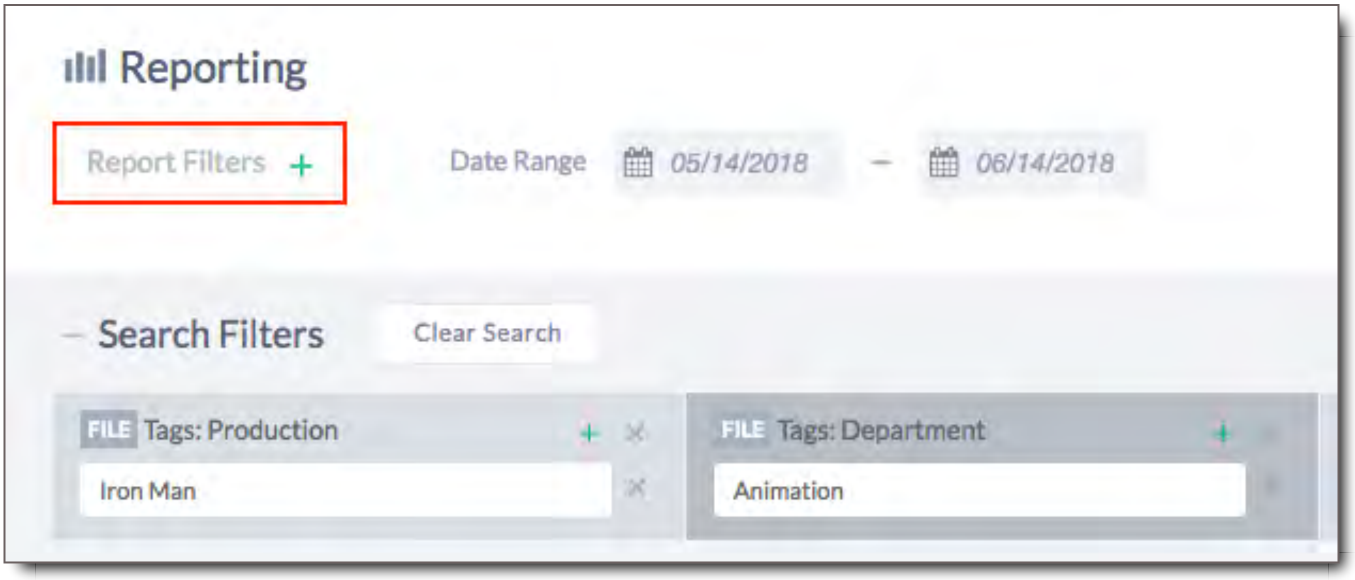
Reporting

The Reporting Module lets you generate reports about nearly any kind of metrics within CORE. You can create and save templates to customize your reports, and schedule them to be run automatically at desired times.



Filters

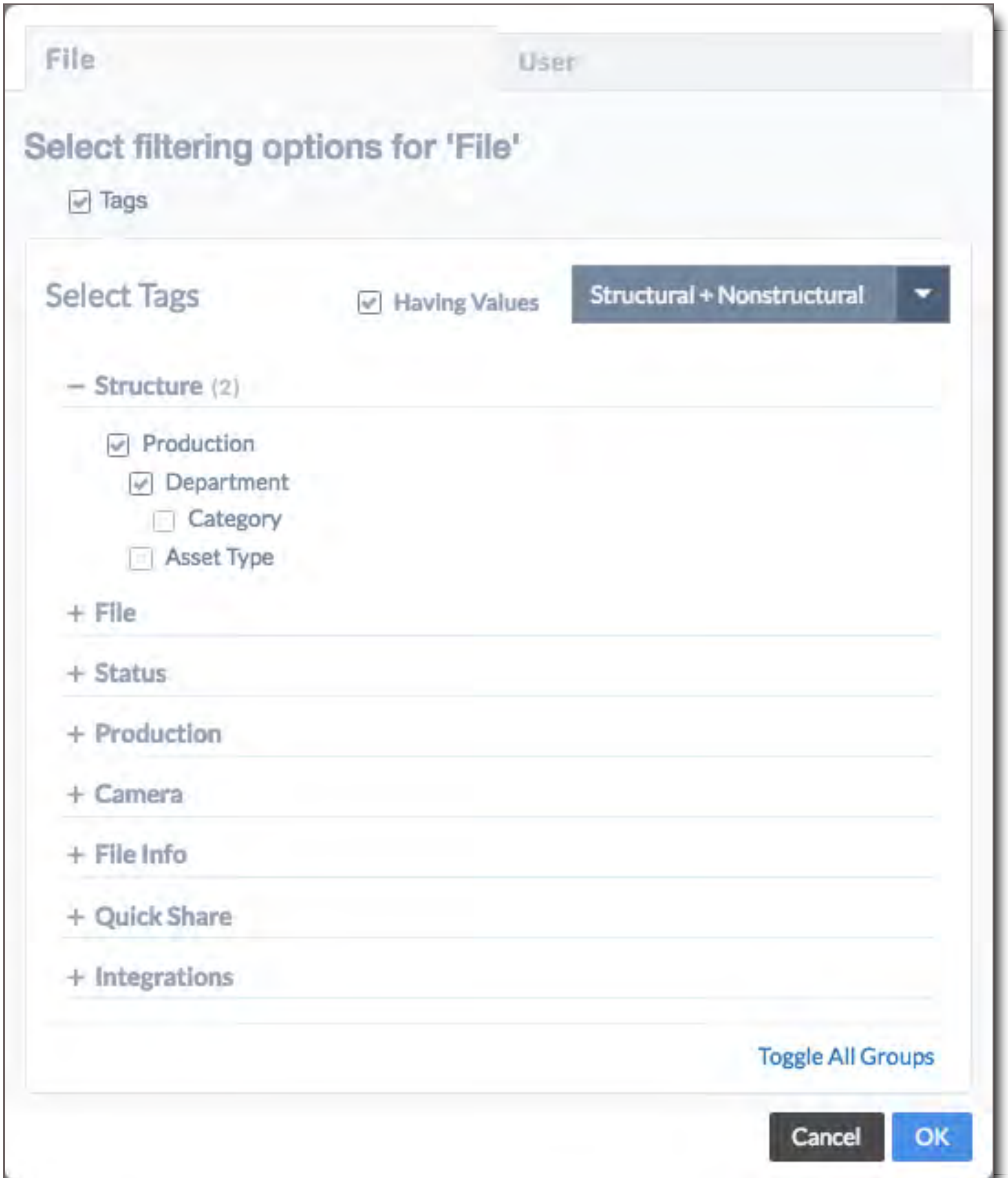
Filters select the subjects that report data will be shown about. You must select at least one filter in order to create a Report.



Adding Filters

To add a Filter, click the "Report Filters **+** button.

File Filters



For Files, you can select any of the metadata fields that have been defined in the Tag Structures Module.

If you'd like to only show fields that have at least one value, click the "Having Values" button.

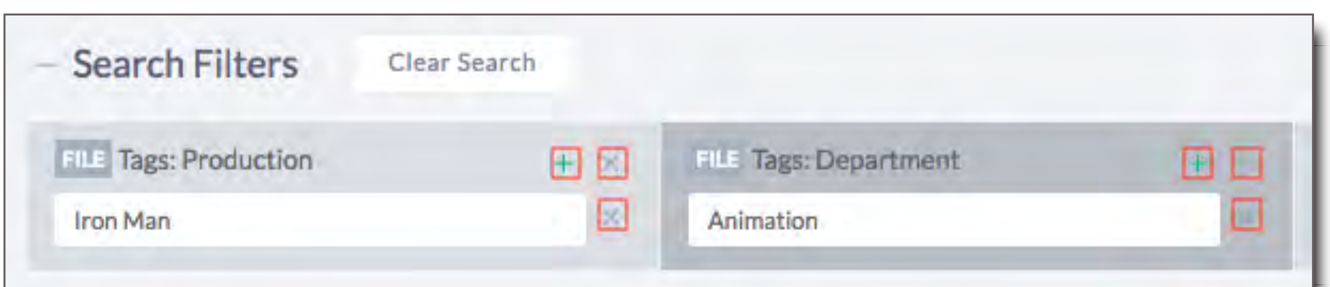
Use the dropdown to select between Structural Fields, Non-Structural Fields, or both Structural and Non-Structural Fields. See Tag Structures for more information.

Note that adding nested Fields will also add all parent Fields above it.

User Filters

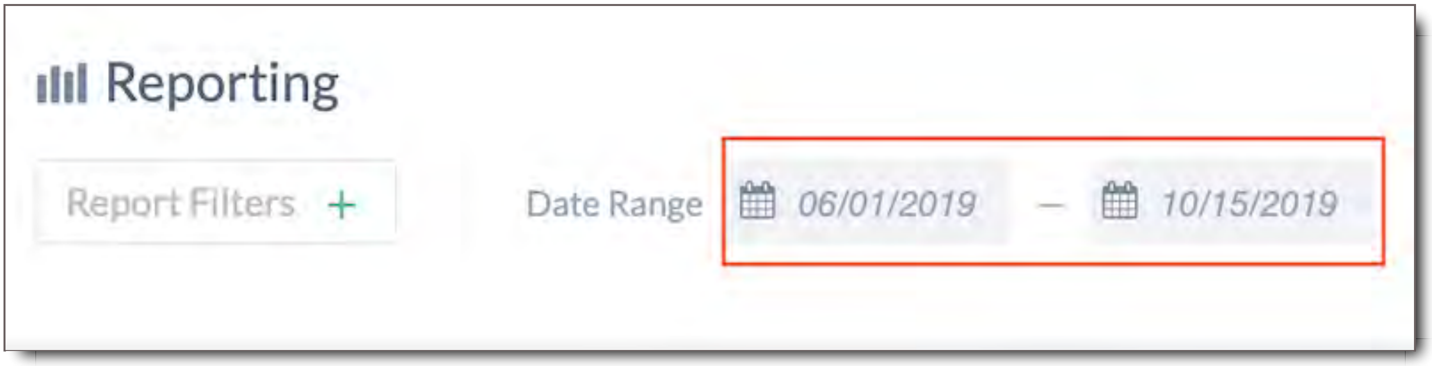
Select User attributes from the Users tab to filter results to Users matching the selected filters.

Modifying Filters



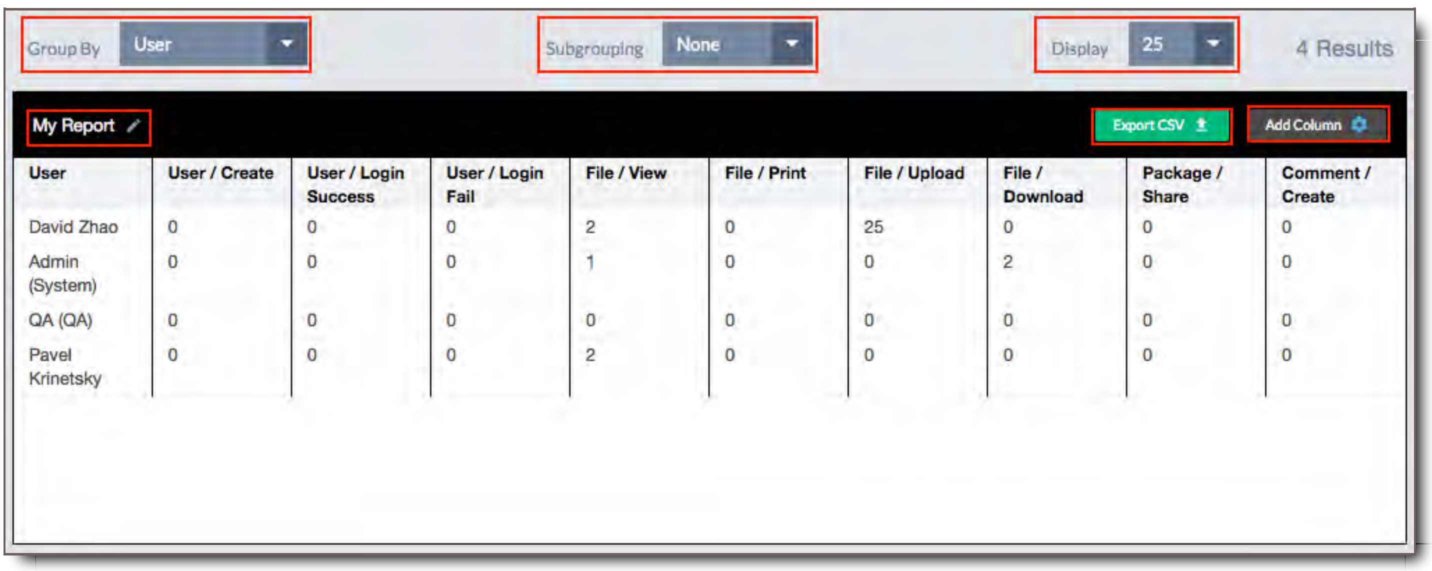
After adding Filters, you must select at least one value from those available. To add a new Filter Value, click the green + button at the top of the Filter. To remove a Filter Value, click the ✕ button next to it. To remove a Filter entirely, click the ✕ button at the top of the Filter. To remove all Filters, click "Clear Search."

Date Range



Use the Date Range selectors to set a range for your report results.

Reports



After setting at least one Filter Value, your report will appear. Use the available options to customize how your data is presented.

Grouping Reports

By default, results will be lumped together, displaying total values, which may not be what you want. To separate your results into more granular details, add a Grouping.

- **User:** Group by User who performed the action
- **Company:** Group by Company of User who performed the action
- **Department:** Group by Department of User who performed the action
- **Date:** Group by Date. You can further choose to group by Month or Year
- **File:** Group by File Metadata Field. Once this has been selected, you can select which Field to group by.

Subgroups

If you have chosen any Grouping other than Date, you can sort your results into Subgroups by Date by selecting Month or Year from the Subgroup dropdown.

Display Count

Select the number of results to display per page.

Changing Columns

Click the Add Column button to select which columns are displayed in the report. Check fields to add them to the report, or un-check them to remove them from the report.

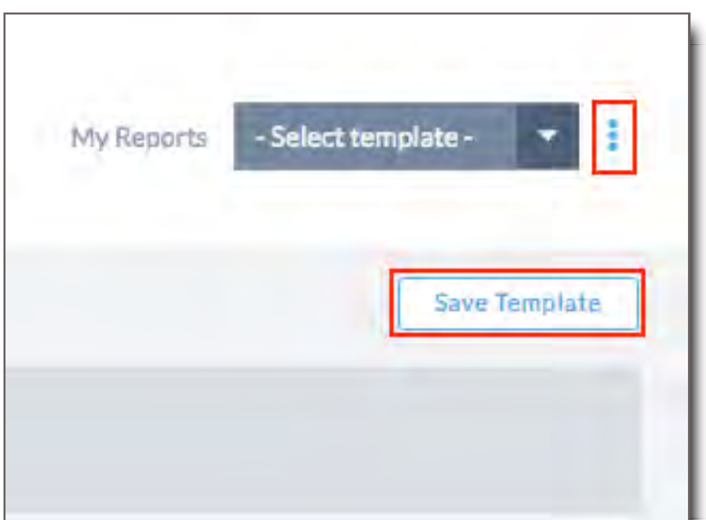
Renaming Reports

Click the ✎ icon next to the report name to change its name. Click Save when you're done, or Cancel to revert your changes.

Exporting to CSV

Click the Export CSV button to download a CSV file of the report.

Templates



Templates allow you to save a custom report that you have created, recall it later, and schedule it to be run at specified times.

Saving Reports

Click the Save Template button to save your current report. It will be saved and added to the My Reports dropdown.

Viewing Saved Reports

Select an existing report from the My Reports dropdown to view it.

Deleting Saved Reports

Select an existing report from the My Reports dropdown, then click the ⋮ button and select Delete.

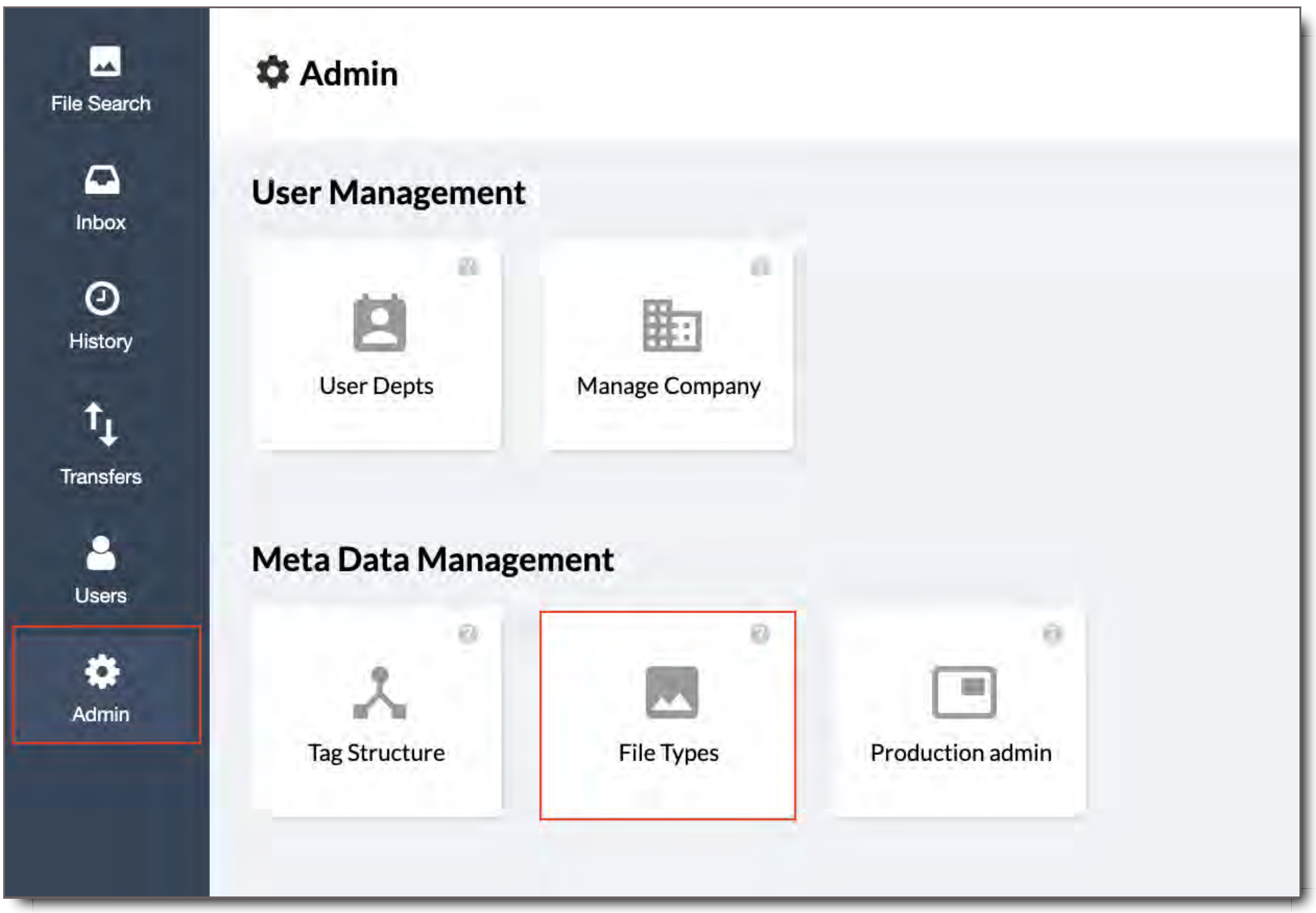
Scheduling Reports

Once you have saved a Report, you can schedule it to be run at specified times.

This feature is coming soon.

File Types

This module gives you control over how Files are processed internally and displayed. From the Admin module, click on File Types to add File Types or edit existing File Types in the system.



File Types Elements

1. **# -** Number assigned to that File Type
2. **Preview -** The icon that will be displayed for a File. Click "Upload Preview Image" to upload an image file to be displayed by default in the interface.
3. **Extension -** The extension of the File Type, for instance, .jpg or .mov.
4. **File Type -** The overall category of file. In CORE there are 6 File Types:
    i. audio
    ii. compressed
    iii. doc
    iv. image
    v. pdf
    vi. video
5. **MIME Type -** The MIME Type of the file. A MIME type is a label used to identify a type of data. It is used so software can know how to handle the data. This affects how the system and your browser will interpret the file. Click here to find information about your file's MIME Type
6. **Edit Icon -** Select to edit a specific File Type
7. **Default -** (Not shown; See in Edit a File Type) - Explanation here of what Default does

Edit a File Type

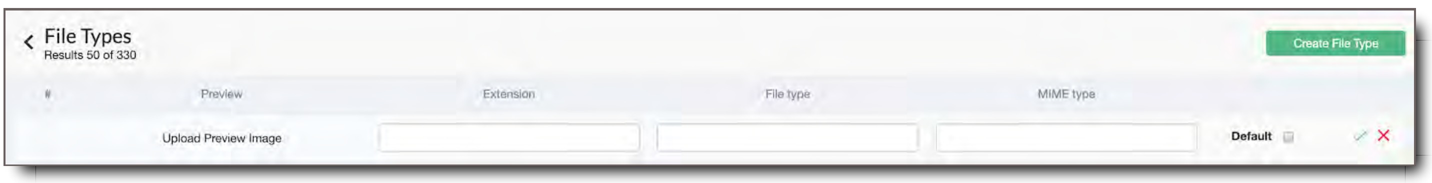
When editing an existing File Type you can update three areas - the Preview Icon, the File Type, and the MIME.

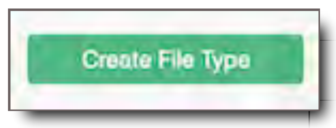
1. Select the edit icon on the File Type you want to edit.

2. In Extension, the original file extension is gray and not selectable.
3. Upload a new **Preview** Icon if desired.
4. Change the **File Type** if desired.
5. Update the **MIME** as needed.
6. Click the **Default** check box if you want your choices to be the default for the file type.
7. When finished making your changes, select the green ✓ to Save. Or select the red X to Cancel.

Add a New File Type

File Types auto-generate when adding Files with extensions not previously uploaded into the system. Adding File Types manually like this are done prior to uploading new Files and their new extensions into the system.

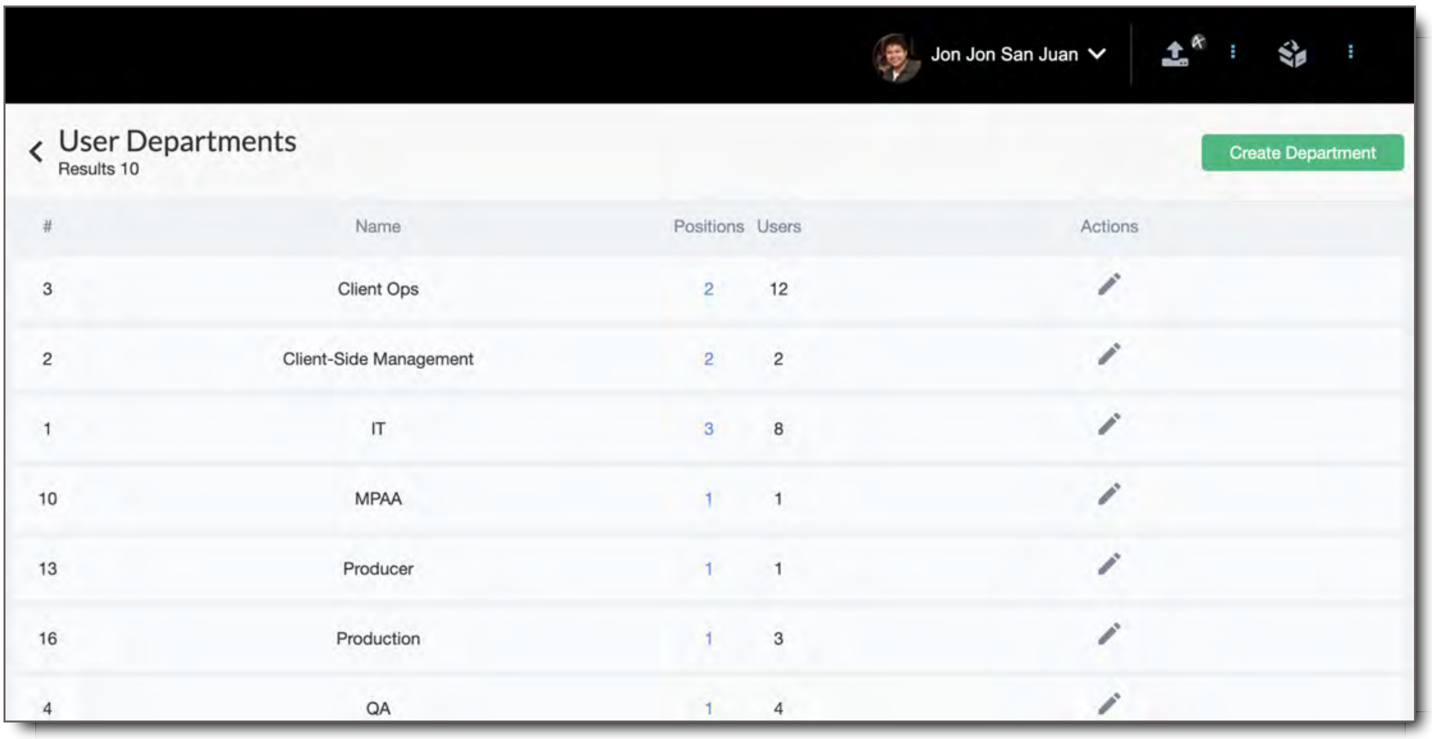




1. Click the Create File Type Button to create a new File Type.
2. Click the Upload Preview Image to add the image you would like to represent the File Type in your system.
3. Choose the image from your computer.
4. Click Open to upload it.
5. Enter the extension for the type of file you're adding.
6. Type the File Type, choose between one of the following:
    i. Audio
    ii. Compressed
    iii. Doc
    iv. Image
    v. Pdf
    vi. Video
    vii. Type the MIME type.
7. Choose if the information provided is the default by clicking the check box.
8. Click the green ✓ check to Save or the red X to Cancel.

User Departments

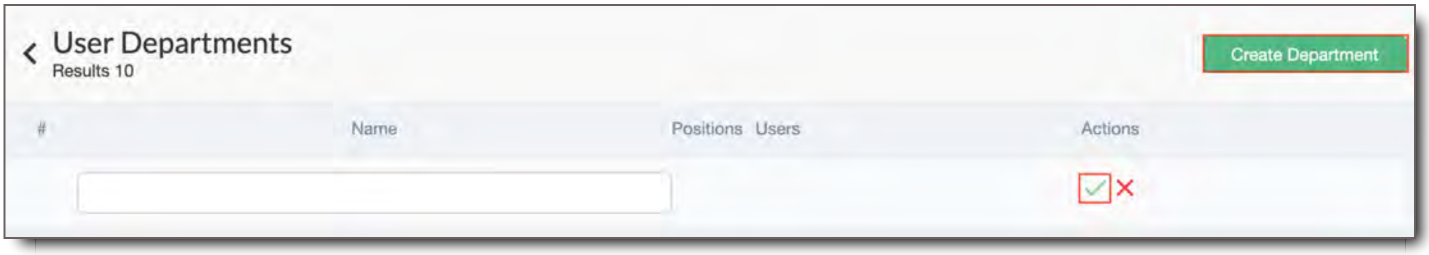
This Admin module lets you control what Departments can be assigned to Users when setting up their profiles.



Departments

When creating a User's Profile, you must assign them a Department, and a Position within that department. This can then be used for limiting a User's access to other Users. See Manage Roles for more info.

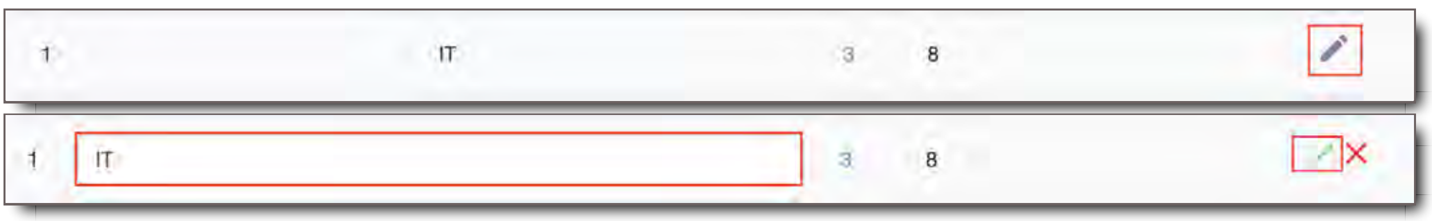
Creating a new Department



Click the "Create Department" button. Enter a name for it, then click the ✔ to save it.

Editing an existing Department

Click the ✎ to change the name of the Department, then click the ✔ when you're done.



Deleting a Department

Click the 🗑 icon of a Department to delete it.

Positions

Each Department has one or more Positions. For any Department, click on the number of Positions to view and edit them.

Creating a new Position

Click the "Create Position" button. Enter a name for it, then click the ✔ to save it.

Editing an existing Position

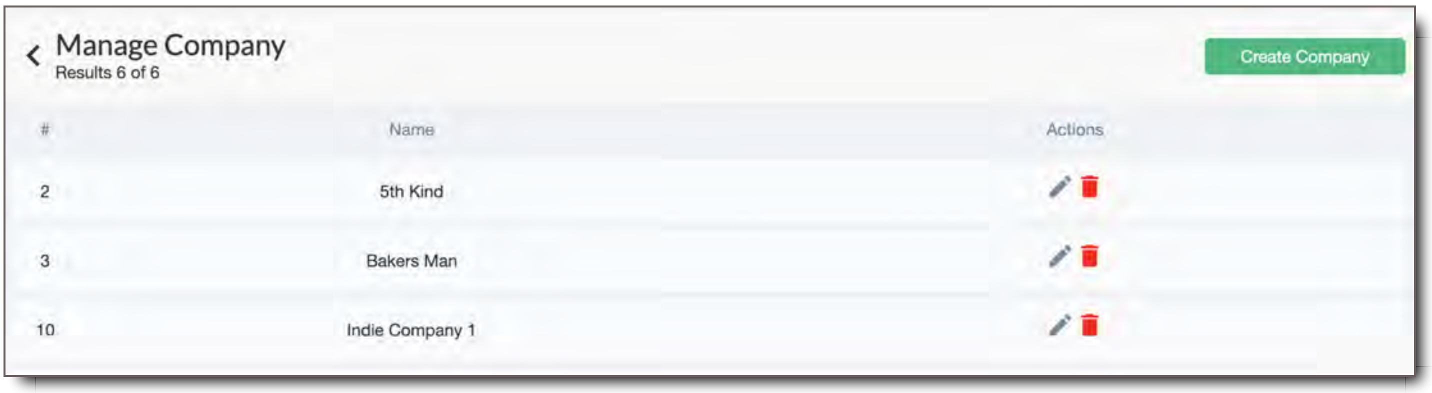
Click the ✎ to change the name of the Position, then click the ✔ when you're done.

Deleting a Position

Click the 🗑 icon of a Position to delete it.

Manage Company

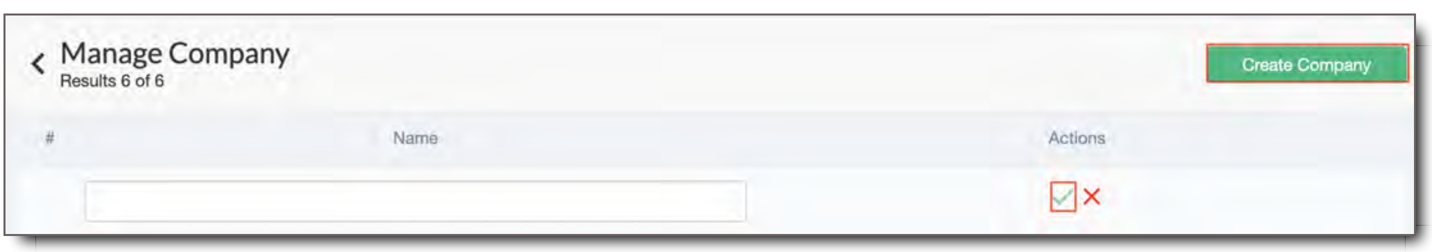
This Admin module lets you control what Companies can be assigned to Users when setting up their profiles.



Companies

When creating a User's Profile, you must assign them a Company. This can then be used for limiting a User's access to other Users. See Manage Roles for more info.

Creating a new Company



Click the "Create Company" button. Enter a name for it, then click the ✔ to save it.

Editing an existing Company

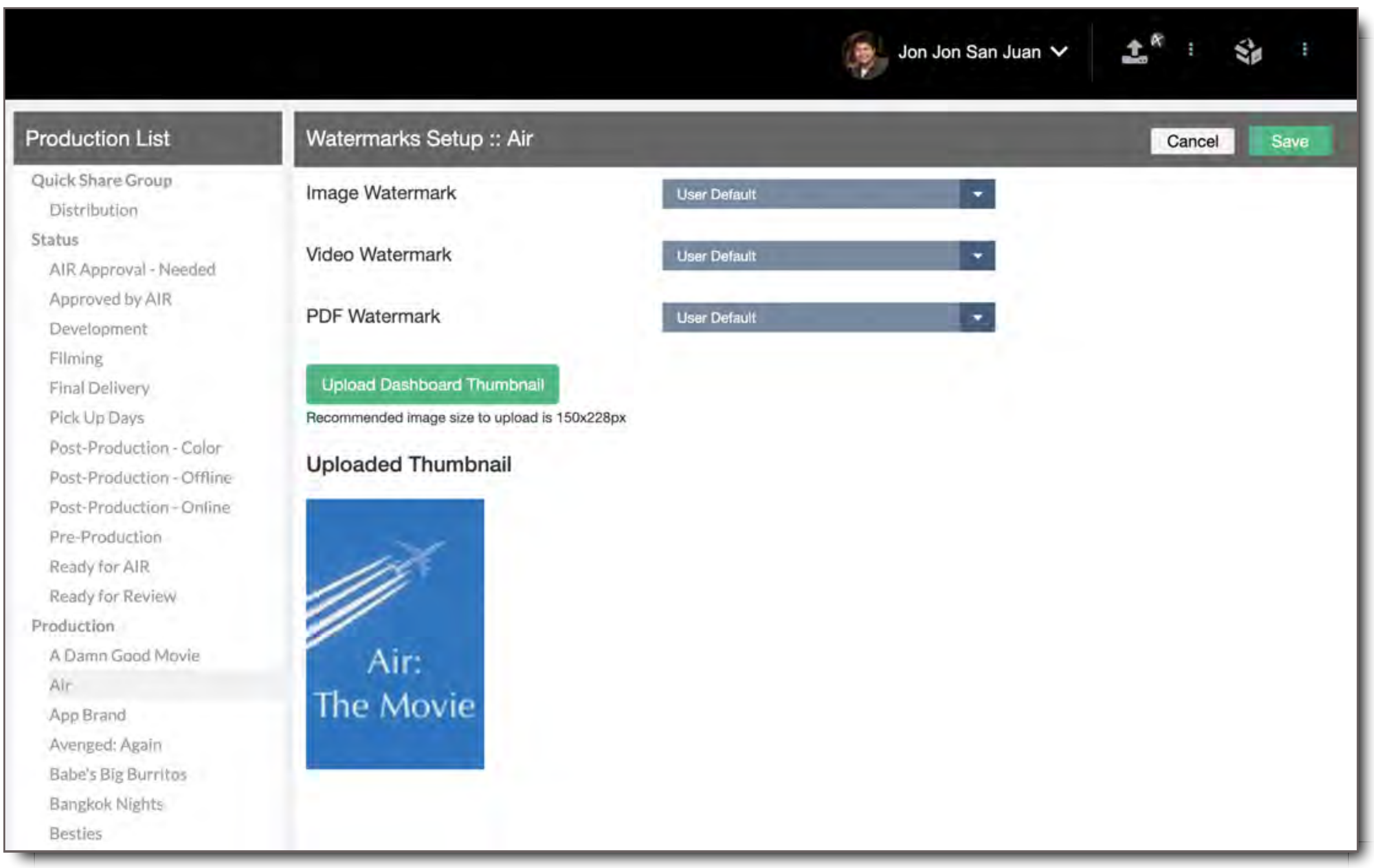
Click the ✎ to change the name of the Company, then click the ✔ when you're done.

Deleting a Company

Click the 🗑 icon of a Company to delete it.

Production Admin

The Production Admin page allows Administrators to create default settings for each of your productions, as well as set default thumbnail images.



Click on any Production in the left side to select it.

Watermarks

By default, Users' watermark styles will be those set in their profiles. You can use this feature to override all Users' default styles when viewing or downloading any File from the selected Production.

Watermark Style

By selecting an option from one of the dropdowns, you will override all Users' default watermark styles when viewing or downloading Files from that Production with the selected style. You can also leave the selection as “User Default,” which will leave all Users with their default Watermark Styles.

Image/Video/PDF Watermark

You can set Production Watermark Styles for different types of Files separately. For instance, by changing the PDF Watermark, you will override the default Watermark Style for all PDFs in the selected Production, but Image and Video Files would not be changed.

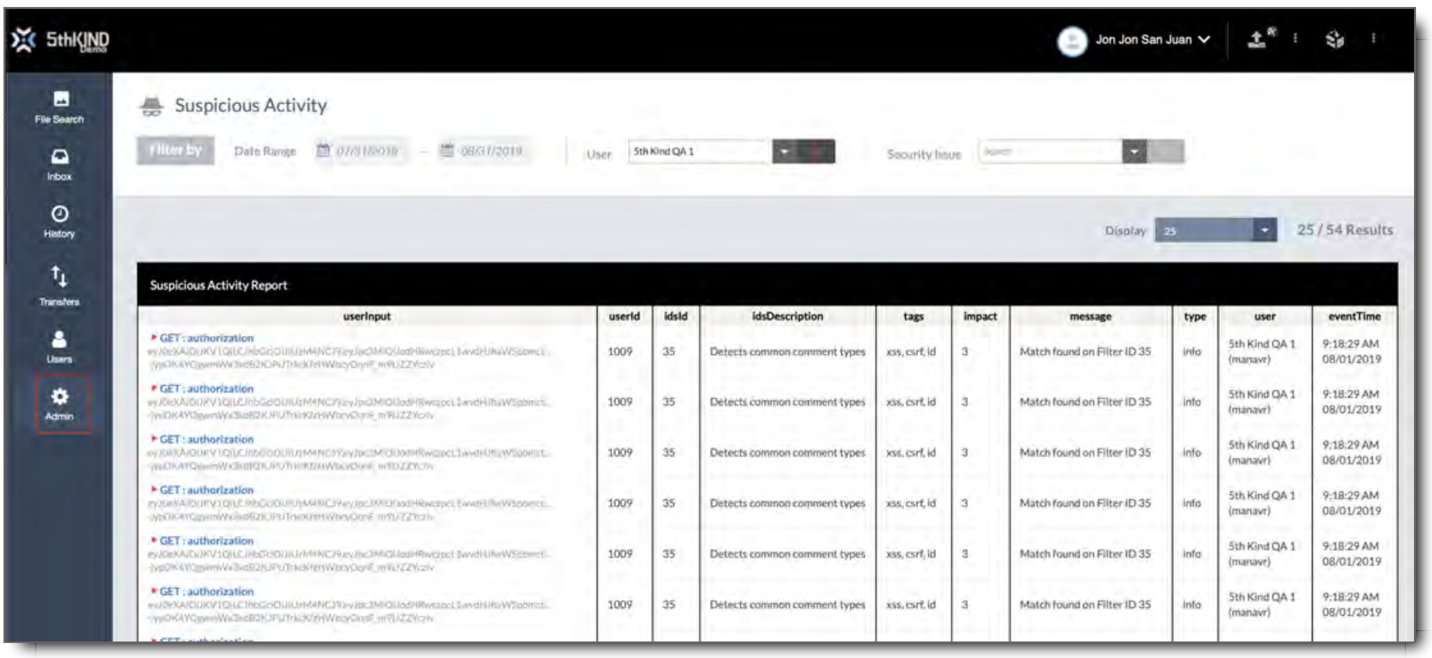
Dashboard Thumbnail

If your environment has been configured to use a Production Dashboard, you can upload an image that will be used as the Production's Dashboard icon. Click the Upload Dashboard Thumbnail button, then select a File from your computer. The recomended image size to upload is 150x228 pixels (2:3 ratio)

Once an image has been uploaded, it will be shown here.

Suspicious Activity

The 5th Kind's CORE system constantly monitors all activity for suspicious behavior, and logs anything it finds. The Suspicious Activity page allows Admins the ability to see all requests made to the system which have been flagged as suspicious.



Filters

Use these filters to view an activity report based on a date range, specific User, or specific security issue.

Date Range

Add a Start and End Date to the Date Range to filter the report by inputs within that range.

User

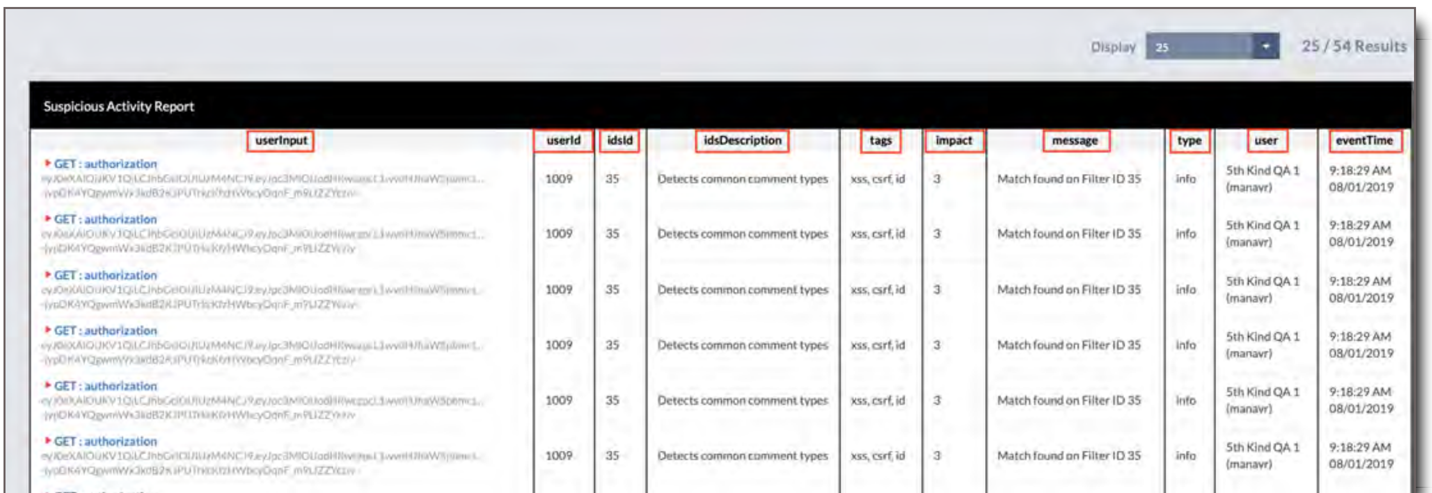
Use this dropdown to view only inputs from a specific User. You can type in this field to search for names. Click the ✖ button to clear it.

Security Issue

Use this dropdown to view only inputs of a specific Security Issue type. You can type in this field to search for Issue types. Click the ✖ button to clear it.

Report

View the results of the report here.



userInput

This field shows the request made by the User. Click the ▸ icon to expand this and view the full request, as well as the Filter Match from the system, which is the portion of the request that was flagged as a security issue.

userId

The internal ID # of the User who made the request.

idsId

The internal ID # of the issue found by the CORE Intrusion Detection System.

idsDescription

The description of the issue found by the CORE Intrusion Detection System.

tags

The category or categories of the issue.

impact

The severity of the issue, on a scale from 1-7.

message

The message from the Intrusion Detection System regarding the issue found.

type

The type of issue found.

user

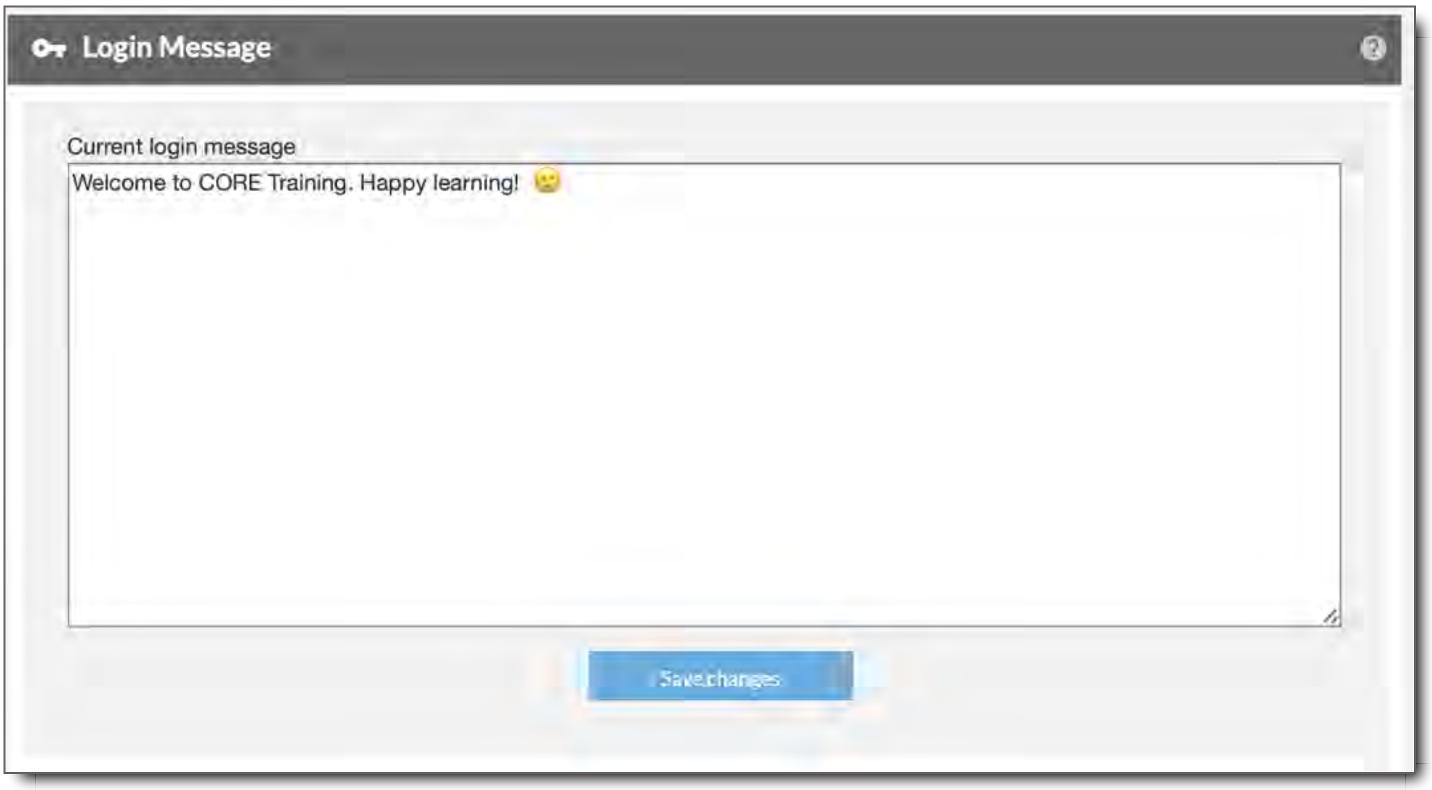
The Username of the User who made the request.

eventTime

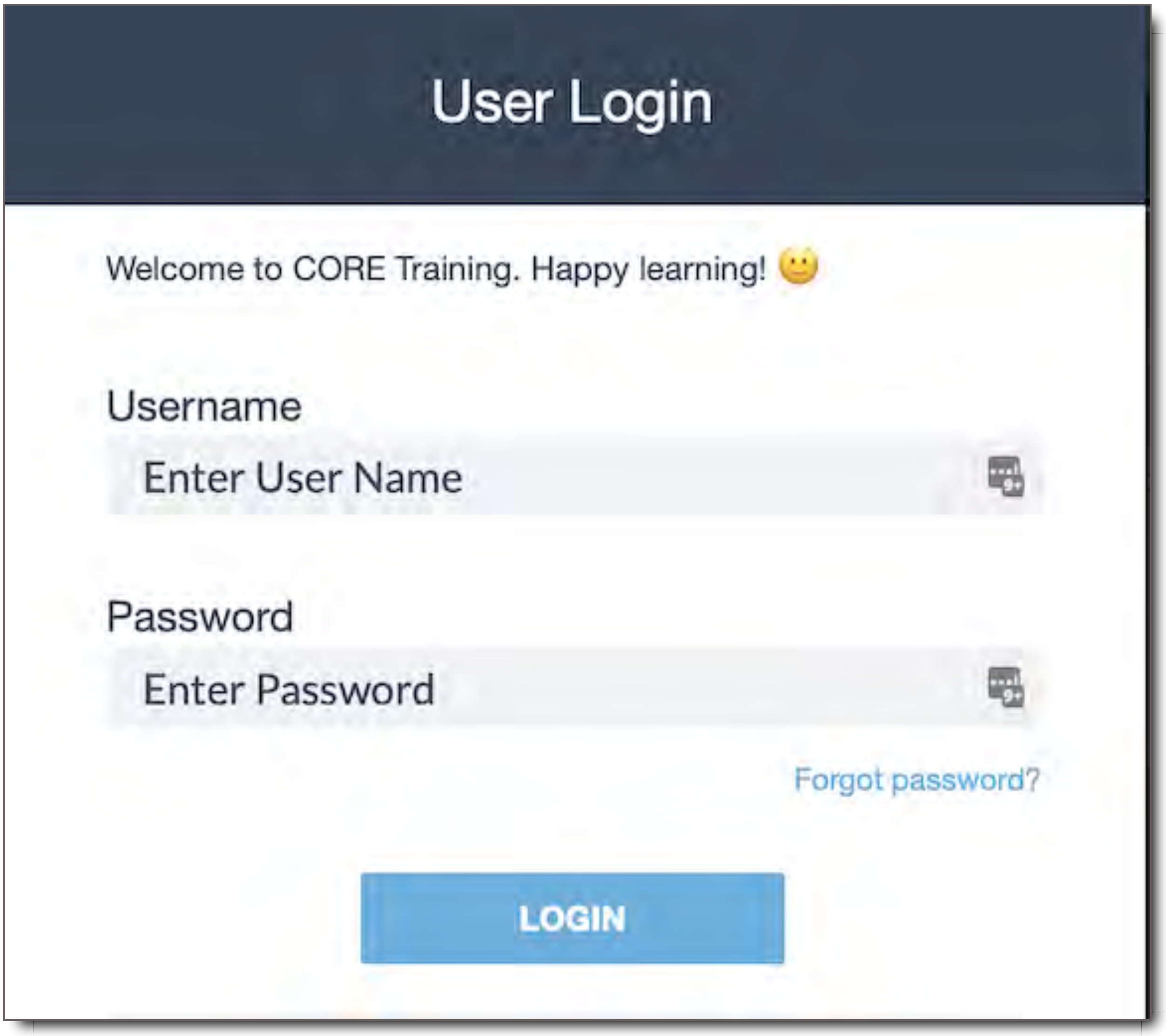
The time the request was made.

Login Message

Admins can use this page to set a custom message that appears on the login screen.



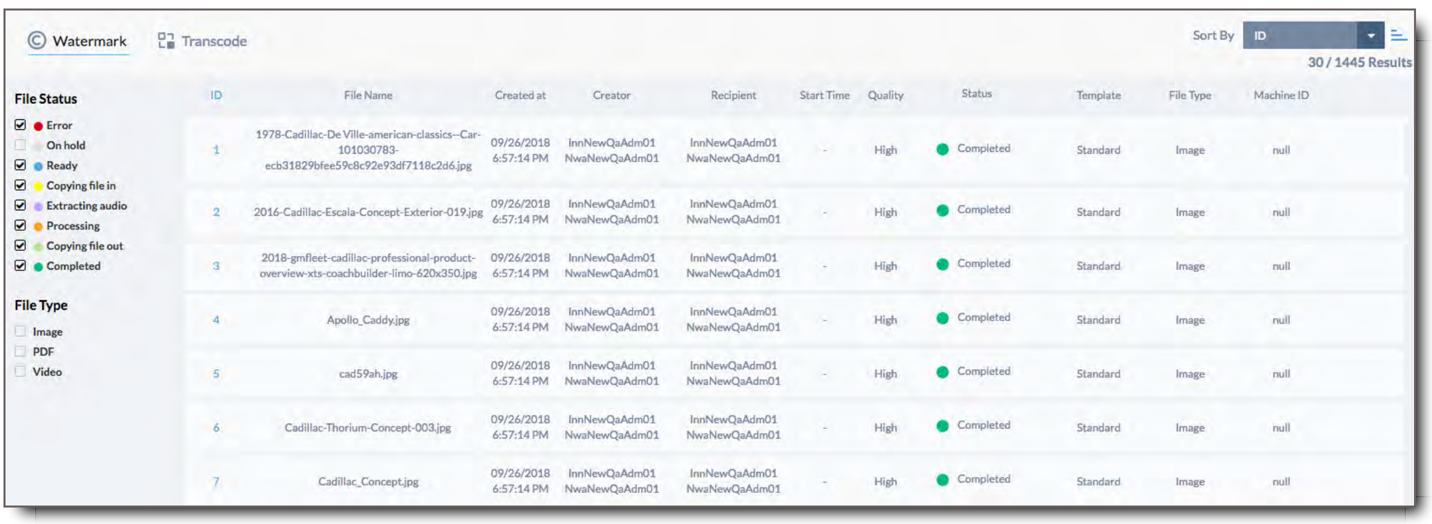
Any text you enter here will be shown to all Users when they are logging in.


User Login
Welcome to CORE Training. Happy learning!
Username
Enter User Name
Password
Enter Password
Forgot password?
LOGIN

Queues

The Queues sub-module is helpful for troubleshooting. Admins can use the Queues page to view the status of files that are being watermarked for download or are being processed as proxies within the system.

Watermark Elements



Queues Left Panel - Watermark

File Status

The checkboxes here represent the various steps of the watermarking process. If a status is checked, any watermarking jobs matching it will be shown. If no boxes are checked, watermarking jobs matching all file statuses will be shown.

1. **Error** - Th#e job errored out and needs to be resubmitted.
2. **On hold** - Proxy is still being created
3. **Ready** - The Proxy has been created and now needs to be Watermarked

4. **Processing** - The Watermark is actively being created
5. **Pending** - The processing server has not picked up the job yet, so it's on deck.
6. **Completed** - The job is finished, and the user should have their watermarked files

File Type

Check one or more of these boxes to limit the watermarking jobs shown to those matching that file type. If no boxes are checked, all file types will be shown.

These are the only file types that can be watermarked in CORE currently:

1. Image
2. PDF
3. Video

Watermark Jobs Results

The main area of the Watermark Queue is a list showing the watermarking jobs matching the specified filters. The list columns include:

1. **ID -** The internal ID# of the watermarking job.
2. **File Name -** The name of the File being watermarked.
3. **Created At -** The time the watermark job was initiated by the User.
4. **Creator -** The User who created the watermark job, either by downloading the File, or by sending it to another User.
5. **Recipient -** The User whose watermark is being applied to the File.
6. **Start Time -** The time when the system began working on the watermark job.
7. **Quality -** The quality of the File that was generated by the watermark job.
8. **Status -** The current state of the watermark job.
9. **Template -** The name of the watermark template being used to apply the watermark style.
10. **File Type -** Whether the File being watermarked is an Image, PDF, or Video.
11. **Machine ID -** The internal ID# of the computer that is processing the watermarking job.

Transcode Elements

Queues Left Panel - Transcode

File Status

The checkboxes here represent the various steps of the transcoding process. The transcoding process is defined in this case as the creation of a proxy from the original source file. If a status is checked, any transcode job matching it will be shown. If no boxes are checked, all transcode jobs will be shown.

File Type

Check one or more of these boxes to limit the watermarking jobs shown to those matching that file type. If no boxes are checked, all file types will be shown.

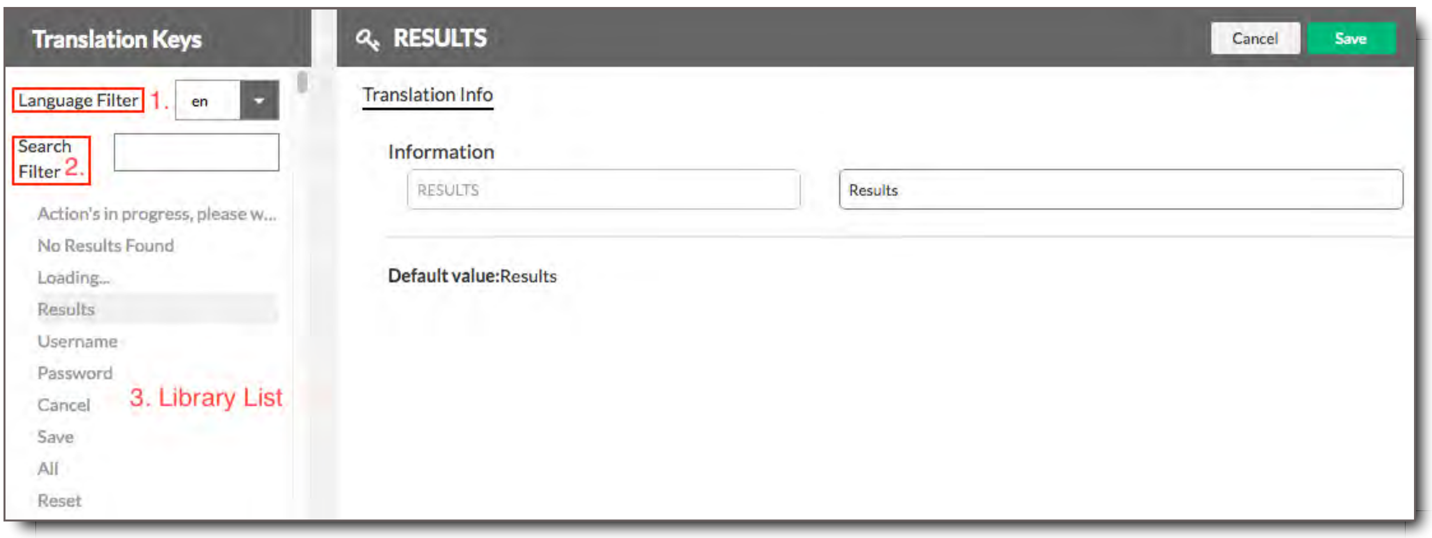
Transcoding Jobs Results

The main area of the Transcode Queue is a list showing the transcoding jobs that match the selected filters. The list columns include:

1. **ID -** The internal ID# of the transcoding job.
2. **File ID -** The ID# of the File being transcoded.
3. **File Name -** The name of the File being transcoded.
4. **Checksum -** The status of the Checksum process, which determines a unique ID for each File.
5. **Proxy -** The status of creating a proxy image for viewing with in the system.
6. **File Type -** Whether the File being transcoded is an Image, PDF, Audio, Document, or Video.
7. **Priority -** The priority of the transcoding job, relative to others.
8. **Proxy Size -** The size of the proxy being generated by the transcoding job.
9. **Status -** The current state of the transcoding job.

Translations Page

The Translations page lets you create new system dictionaries, and edit language in existing ones. The system dictionary is the list of most words and phrases that appear in CORE's interface. Using this feature, you can rename any word as it appears throughout the system.



Changing items in this library only affects words that are part of the CORE platform interface. Changing these words will have no effect on user-generated content, such as file names or comments.

Note: All user guides and Help Documentation found in CORE will continue to refer to default wording in the system.

Translation Keys Panel

This is the full list of words that appear in the CORE interface.

1. **Language Filter -** A dropdown containing the language libraries associated with your system. English "en" is the default language provided.
2. **Search Filter -** A search bar or search field, type in what you're looking for to narrow down the library

list.
3. **Library List -** The list of words and phrases that can be edited in the CORE User Interface.

Results - Translation Info

This is where you change a word or phase once it's selected in the Translation Keys Panel.

1. **Information -** This is the coded value of the word or phrase in the system's backend. This is not editable.
2. **Results -** Apply your edited word or phrase to this field.
3. **Default value -** This was the original word or phrase prior to edits.

Change a Word or Phrase in the User Interface

When you have selected a word from the dictionary, you can change how it is shown. Enter the new translation, then click Save.

To modify a word or phrase,

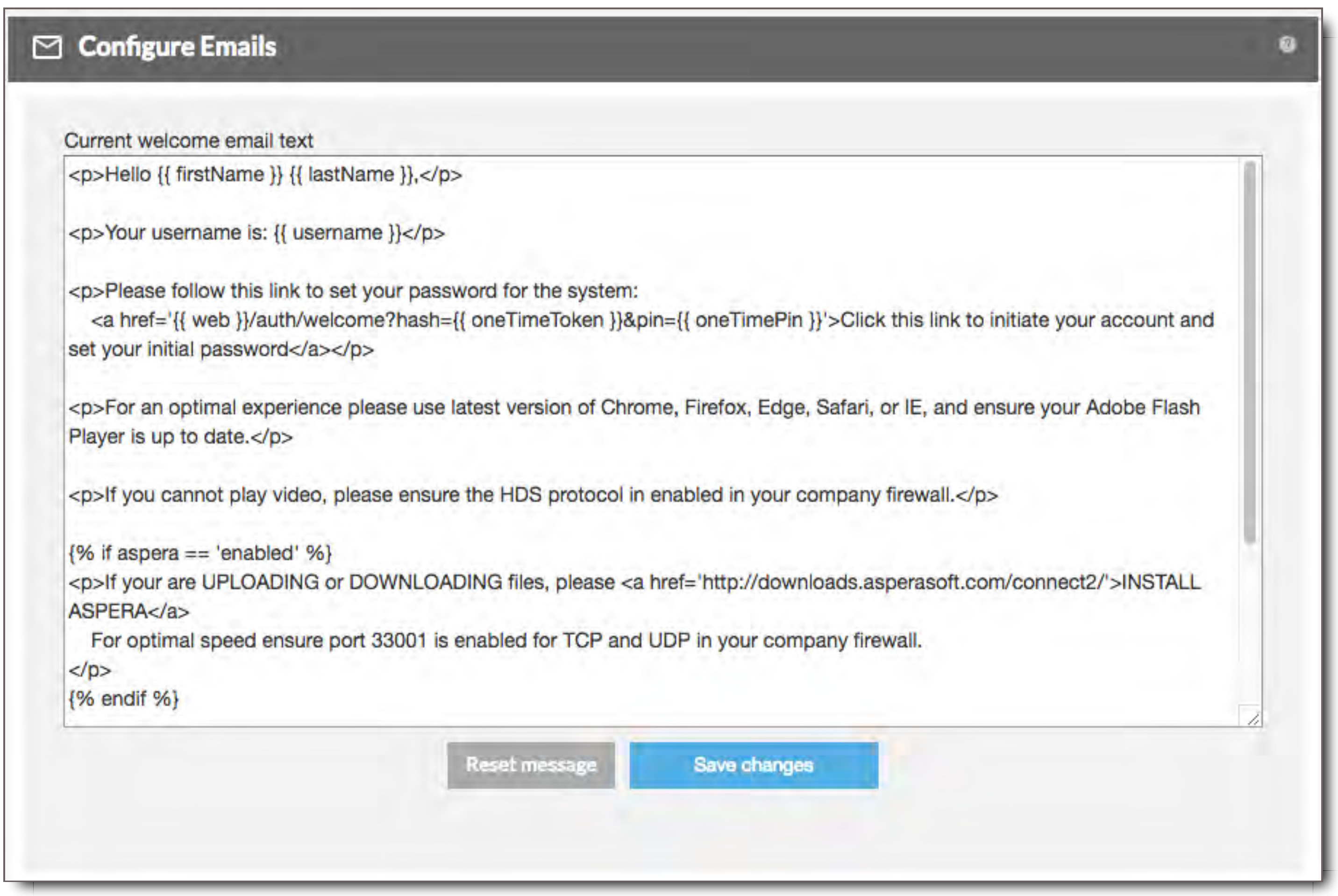
1. Select it in the Translations Keys Panel.
2. Enter your desired change in Translation Info.
3. Save.

To search for a word,

1. Type it in the Search Filter box in the Translations Keys Panel.
2. Hit Enter.
3. If the word is anywhere in the Library List, the results will narrow down.

Configure Emails

This page allows you to customize the welcome email that is sent when a User is invited to CORE for the first time. You can modify it or replace it entirely.



The welcome email must be written in HTML. Click **Save changes** to save your custom email.

To reset to the default email message, click the "Reset message" button.

Template Variables

You can include a number of variables in the email that will be customized for each User, such as their Username. Enter the variables inside curly braces, as shown in the default message.

Variables

- **{{ firstName }}** - The User's first name
- **{{ lastName }}** - The User's last name
- **{{ username }}** - The User's Username
- **{{ web }}** - The URL of your system
- **{{ oneTimeToken }}** - A system variable needed for the User to verify their account upon first login
- **{{ oneTimePin }}** - A system variable needed for the User to verify their account upon first login
- **{{ companyLogo }}** - Your company's logo
- **{{ companyName }}** - Your company's name
- **{{ url }}** - The URL of your system

Box Integration in CORE

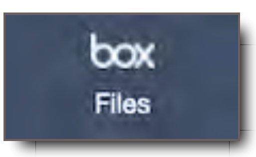
Summary

With the CORE Box Integration, CORE users can integrate Box user accounts into their media workflow.

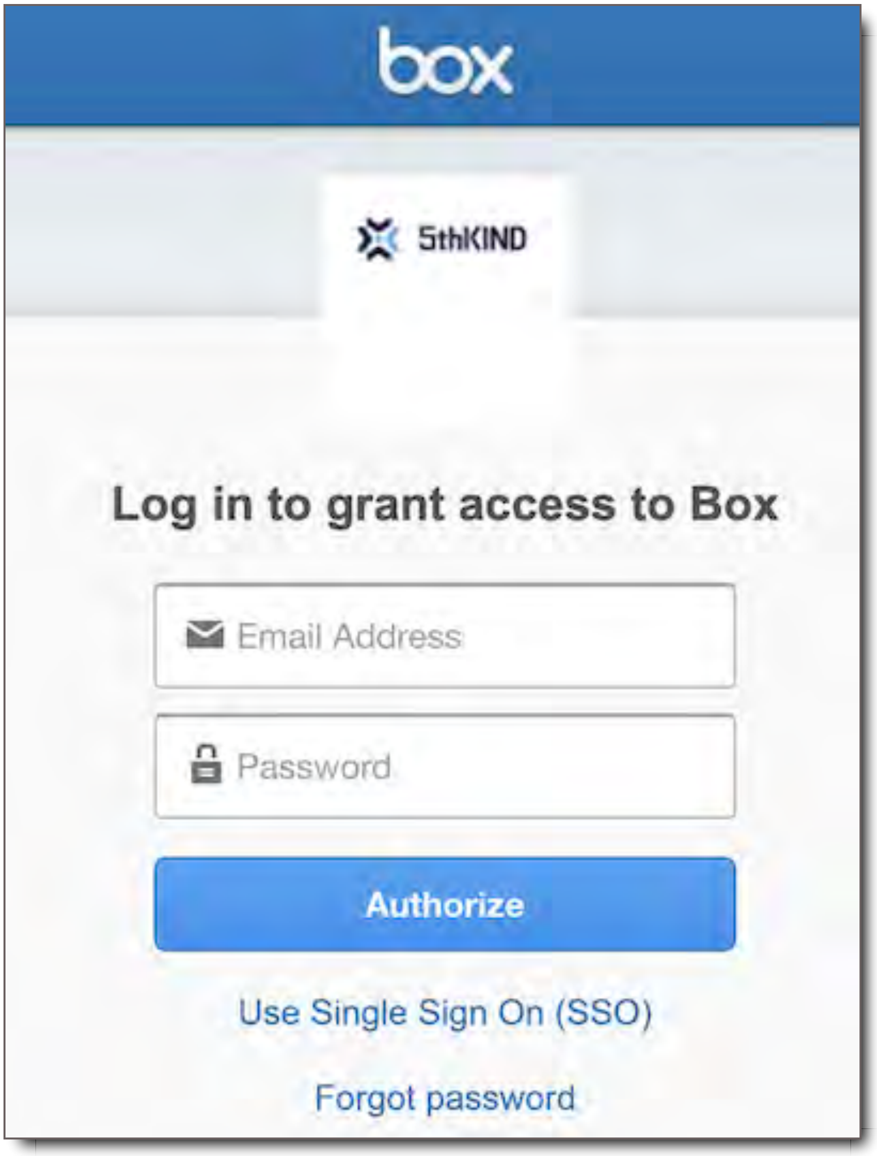
- Users can connect into the Box account from CORE
- Upload and Categorize/Tag your Box assets into CORE
- You can create/save templates to short-cut and automate common tag settings to categorize files.

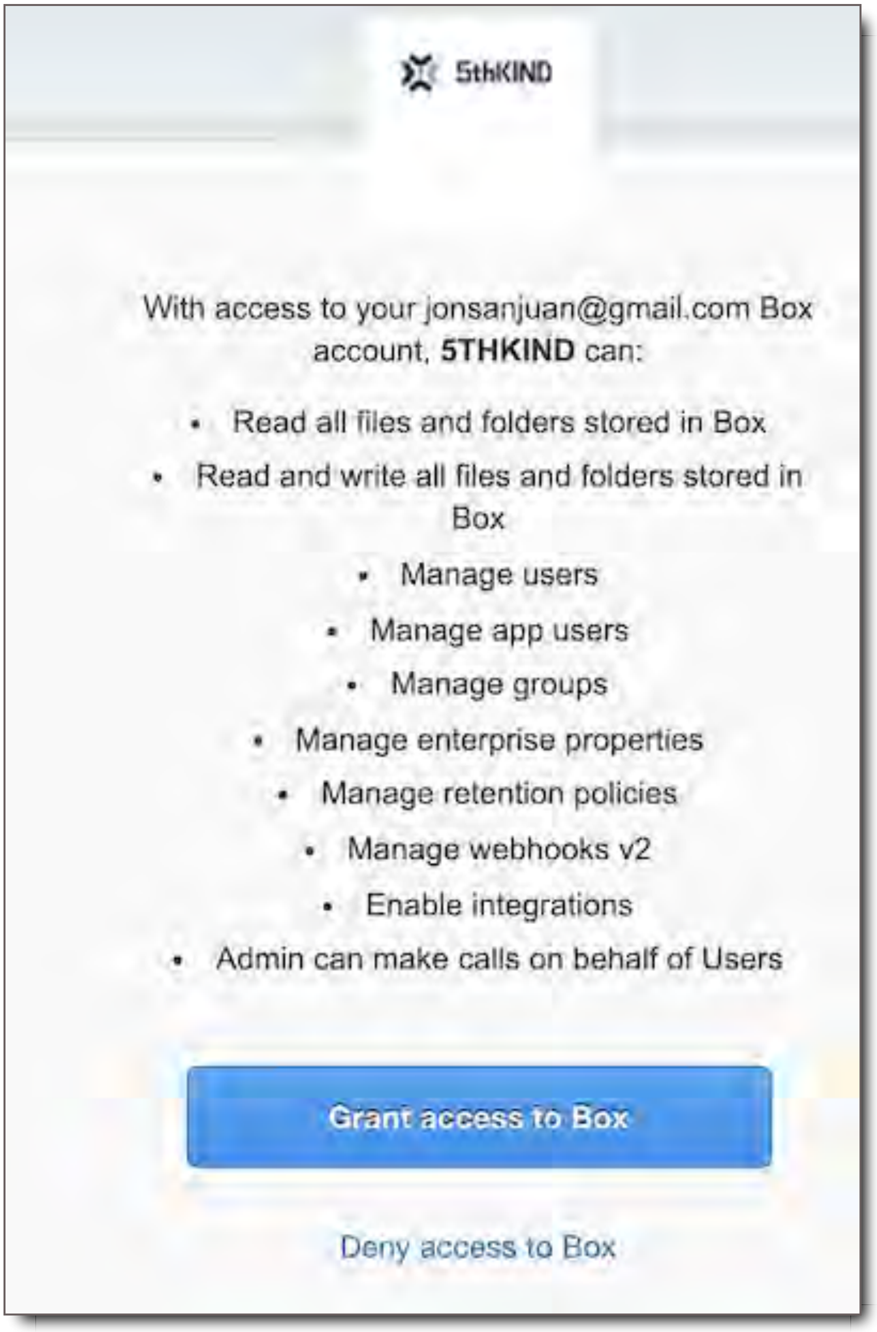
How to Upload your Assets to CORE

1. Go to the Box Icon on the left Panel

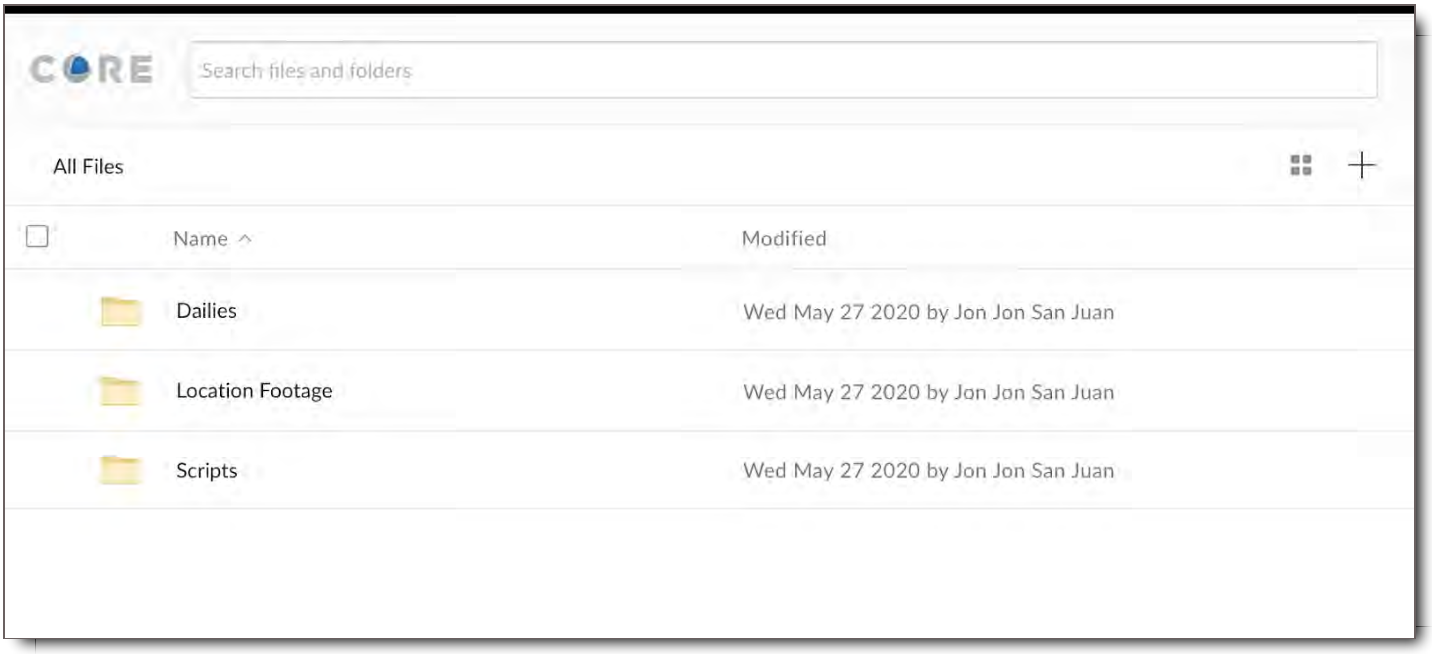


2. Log in to your Box account and allow access

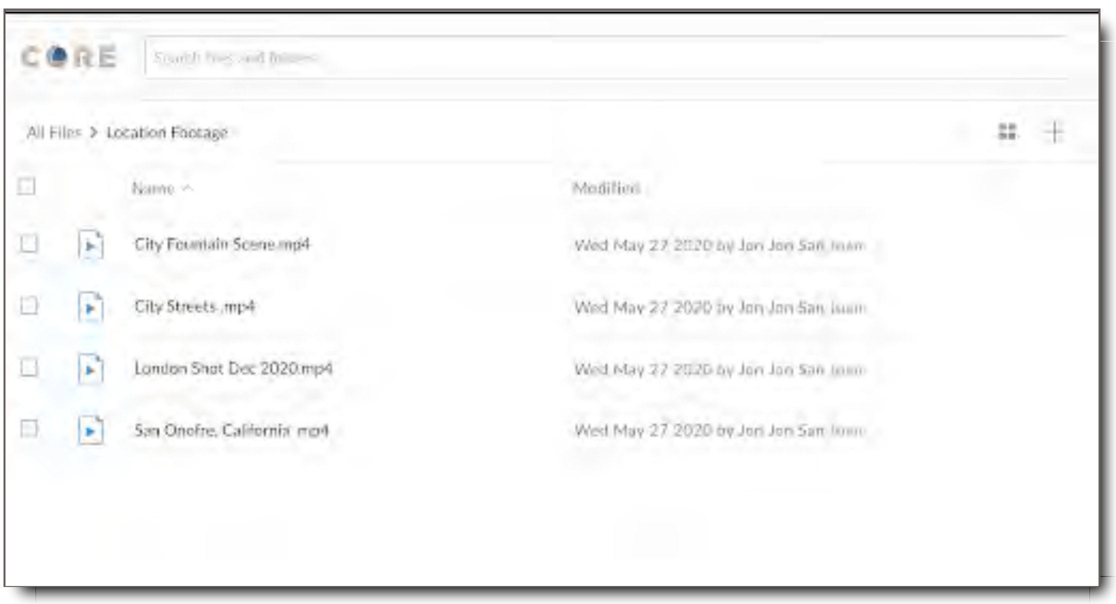

box
5thKIND
Log in to grant access to Box
Email Address
Password
Authorize
Use Single Sign On (SSO)
Forgot password



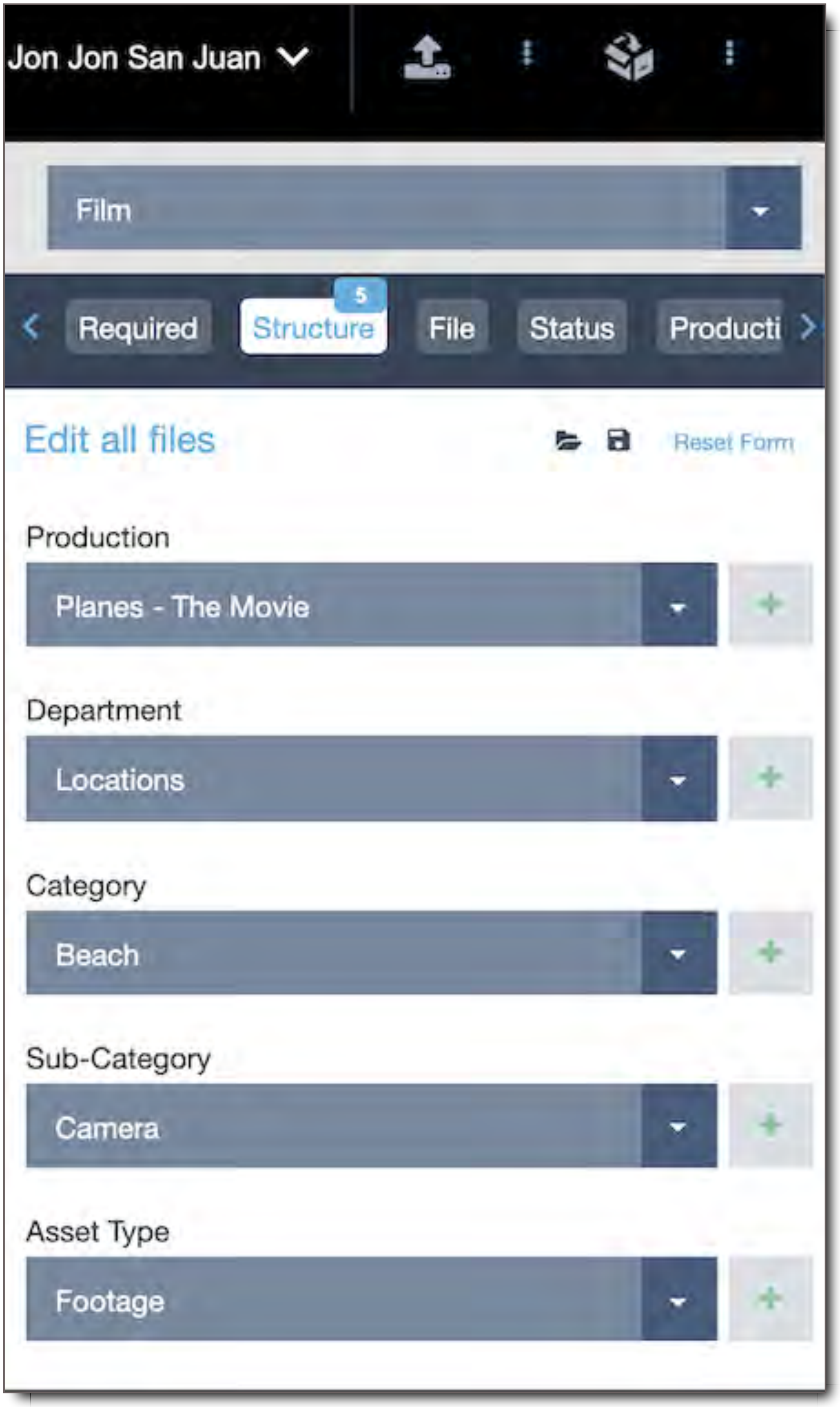
3. Navigate to the assets within the folders of your Box account



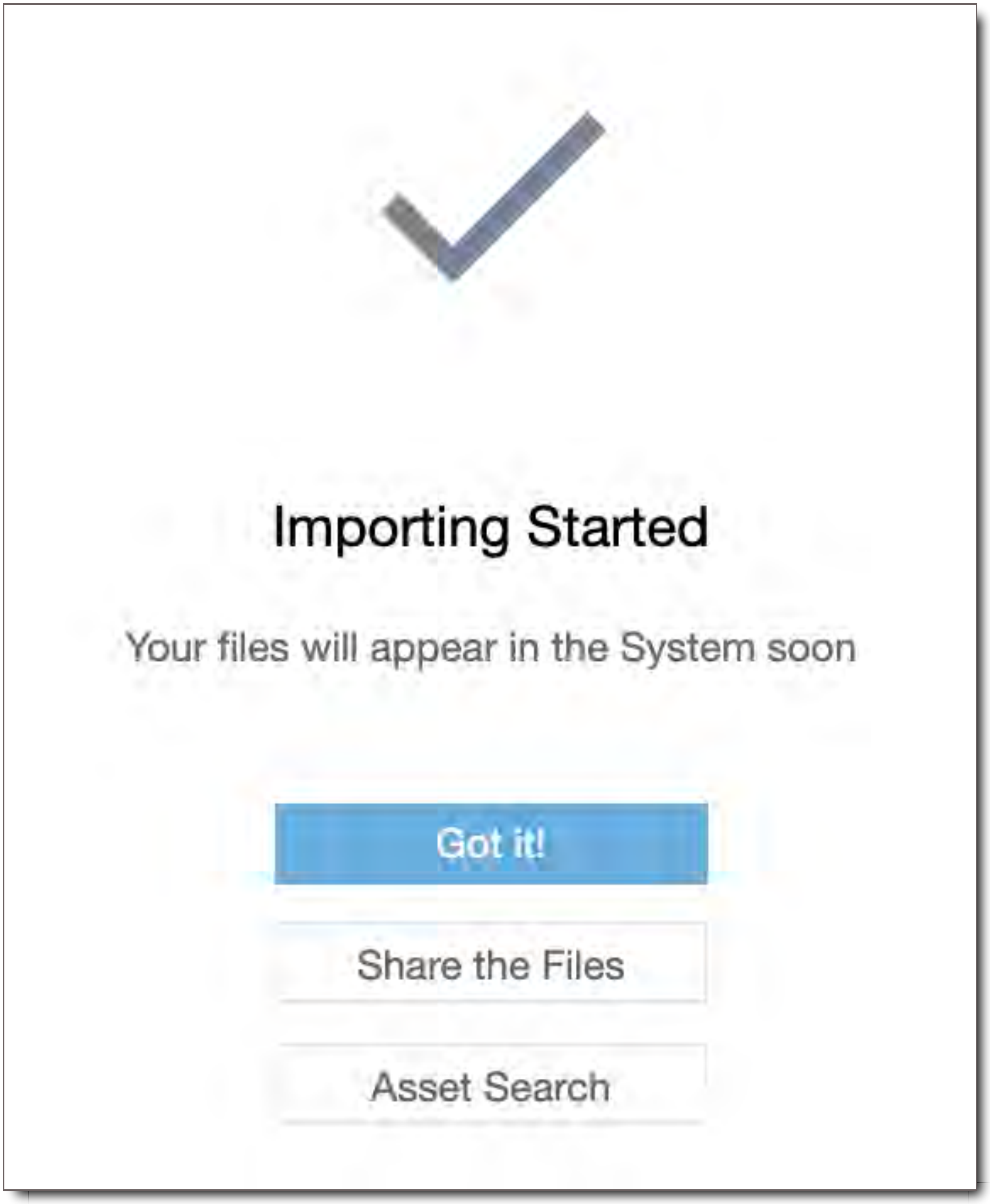
4. Then click the check boxes next to the files you'd like to categorize into CORE.



5. Categorize your Assets and then click Submit. The import will then Start.



6. You can then navigate back to the sharing panel, start the package share workflow or go to the Asset Search.



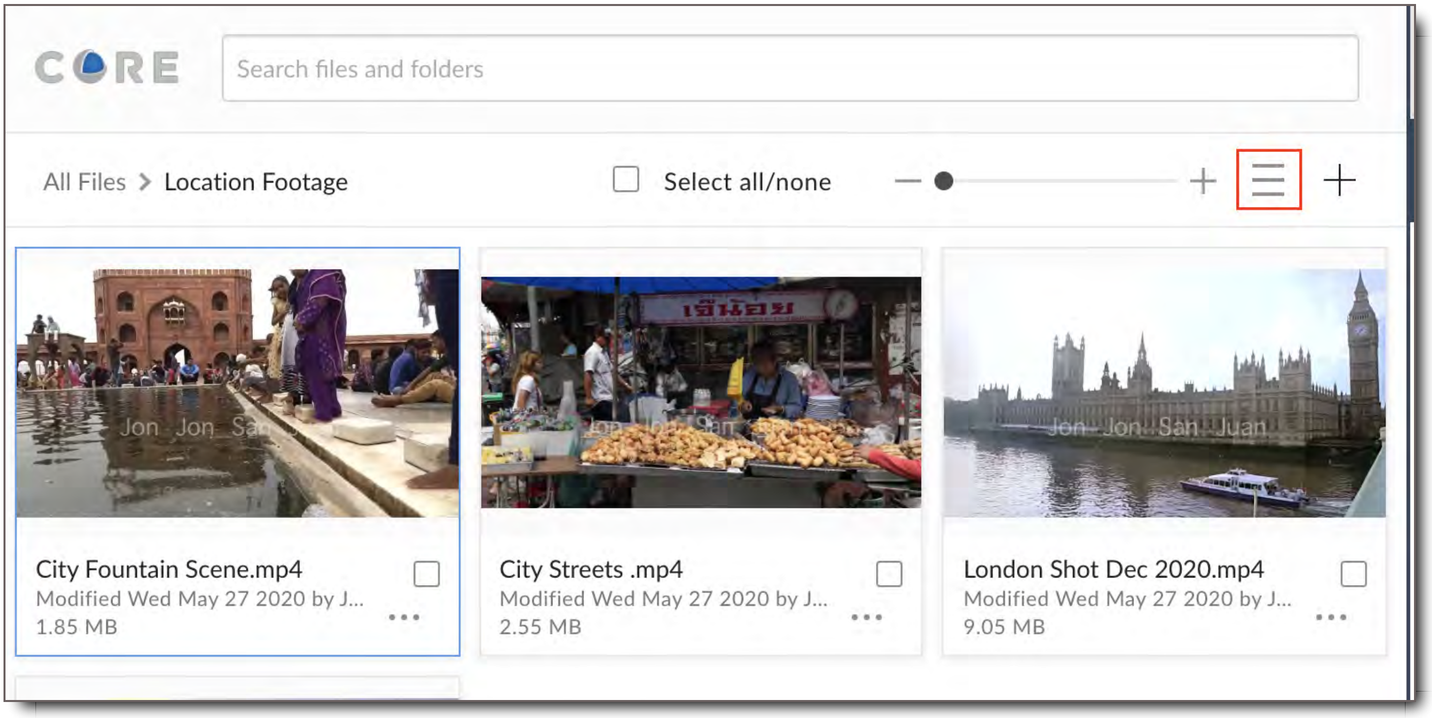
CORE Tip: Categorization Template

Use Categorization Templates to save your categorizations for use later. These templates can save you time when you regularly use the same or common tag settings to categorize files. Click here to see more information to save and load your categorization via templates.

Other Options to select/view your Box Assets in CORE

Viewing options:

- Toggle the Thumbnail Icon ▦ to switch to the Thumbnail view when choosing assets from your Box account.
- From the Thumbnail View click on the list view icon to switch back to List View ☰.
- The - and + sliders increase or decrease the size of the thumbnails when in thumbnail mode.

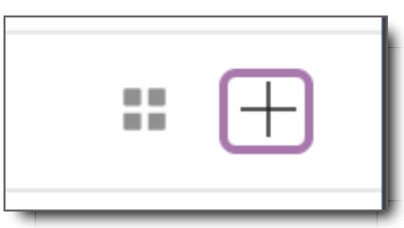


Creating folders and Uploading files into Box through Core

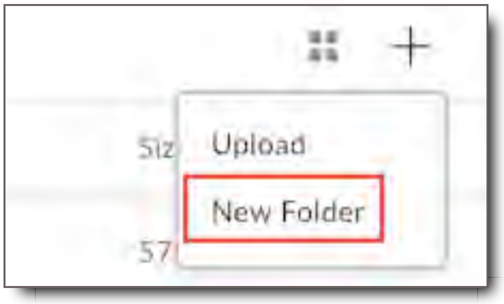
You can upload files or create new folders within your Box account by clicking the + button in the top right corner.

Creating Folders

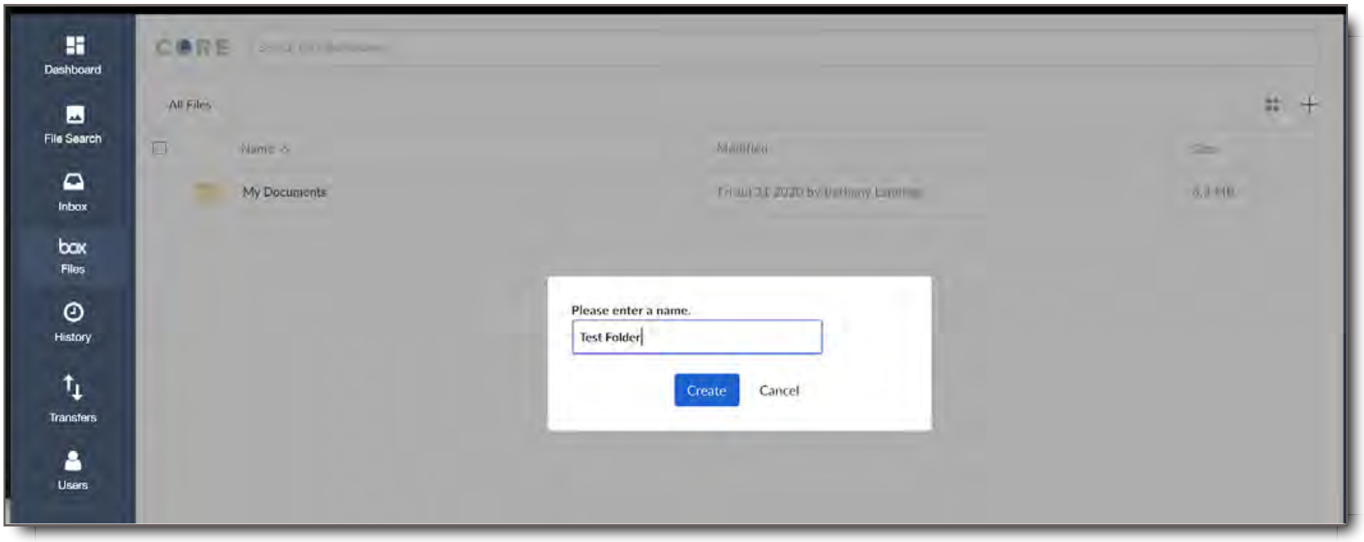
- Create folders by clicking the add button below



- Choose New Folder on the pop window

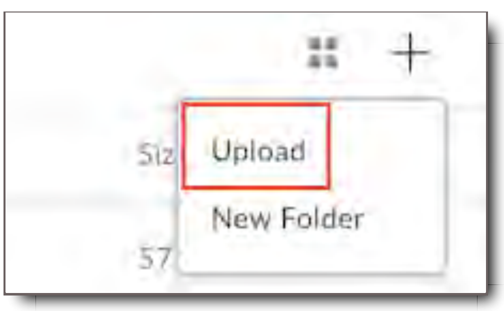


- Name your new folder

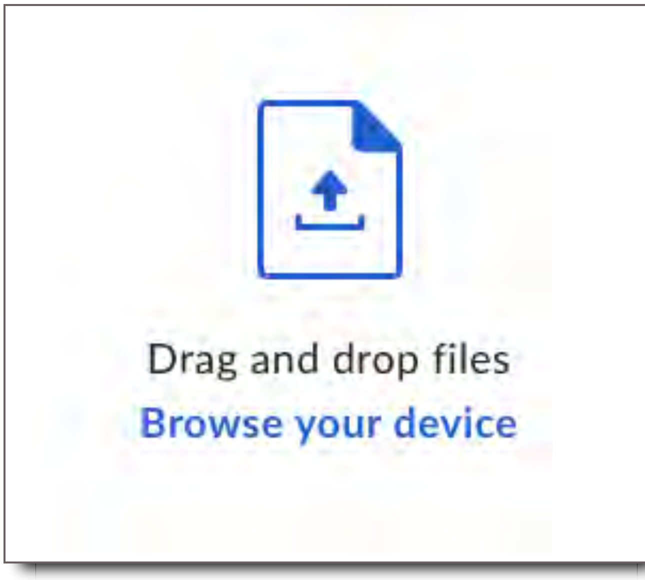


Uploading Files

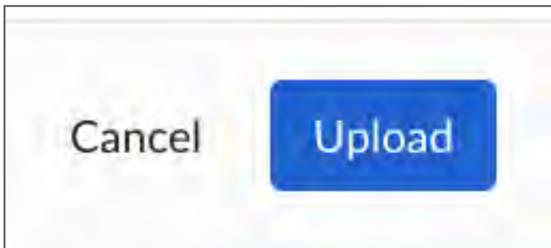
From the same + button in the top right corner, you will also get the option to Upload files into Box through CORE:



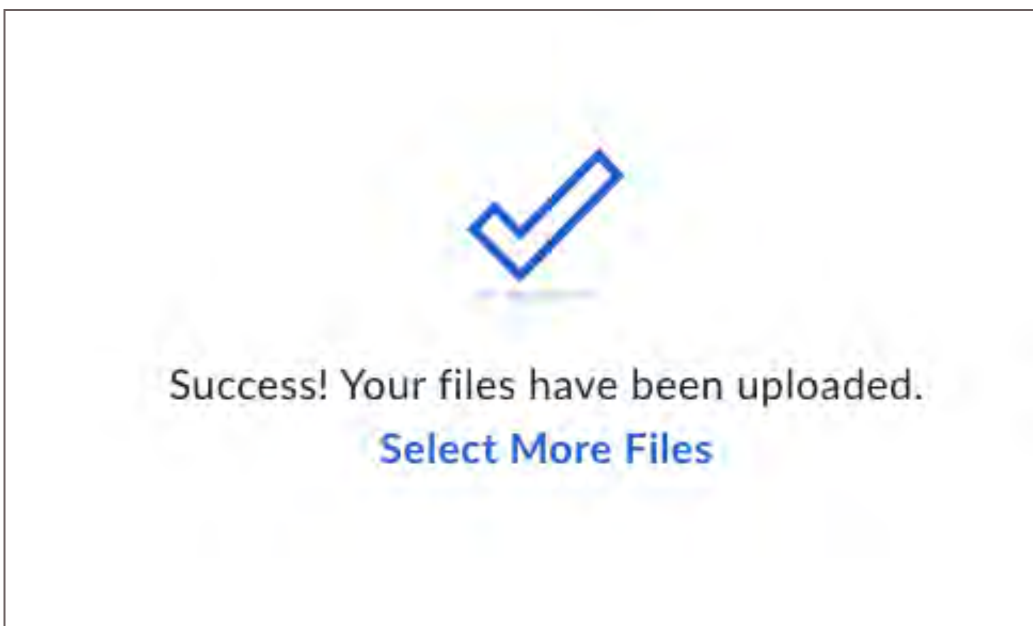
Click Upload & Choose to either Drag and Drop files into the space or browse files from your computer.



Choose your files and click the blue Upload button in the bottom right corner.



Once completed you will see the Success message. Now your files are successfully uploaded in your Box account and can also be categorized and added to CORE.



CORE Sync Review

Summary

CORE Sync Review, the real time sync player is a secure, shareable, integrated, realtime media-agnostic player for global collaboration via your computer browser. The way we engage in the collaborated session is via package sharing on the CORE platform. Your teams can simultaneously view content from anywhere. This application is ideal for real-time reviews, approvals, annotations with partners and clients.

Set Up CORE Sync Review Session as Host

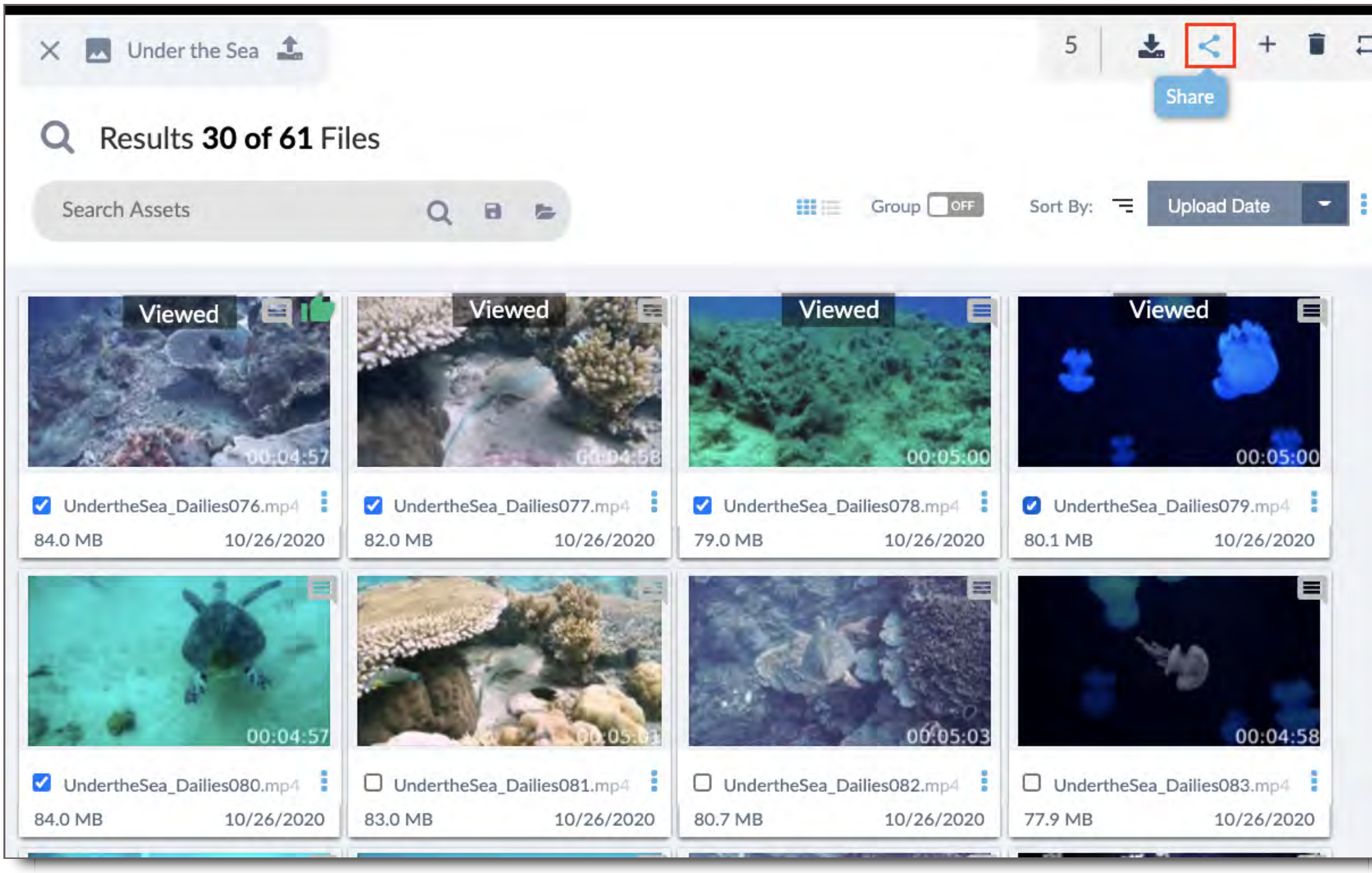
There are 3 steps in setting up your session as a Host:

1. Prepare your media
2. Share your Review package to your recipients
3. Start your session

---

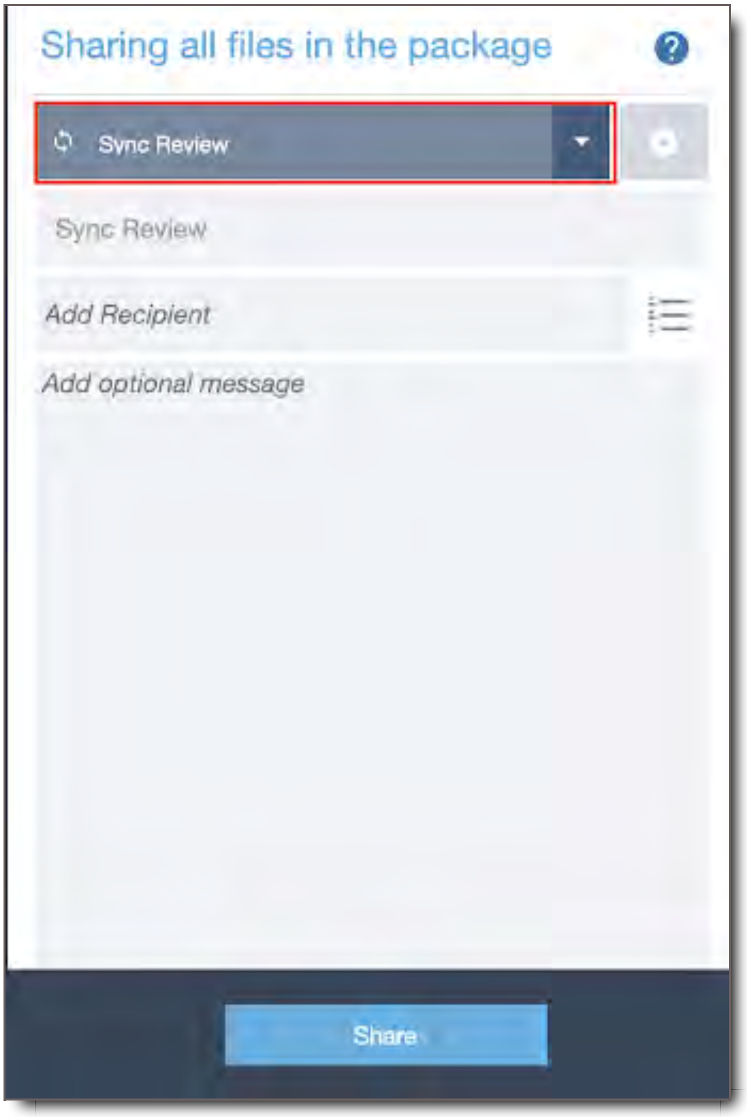
1. **Prepare your media**

Select your target assets and share. One example is shown below

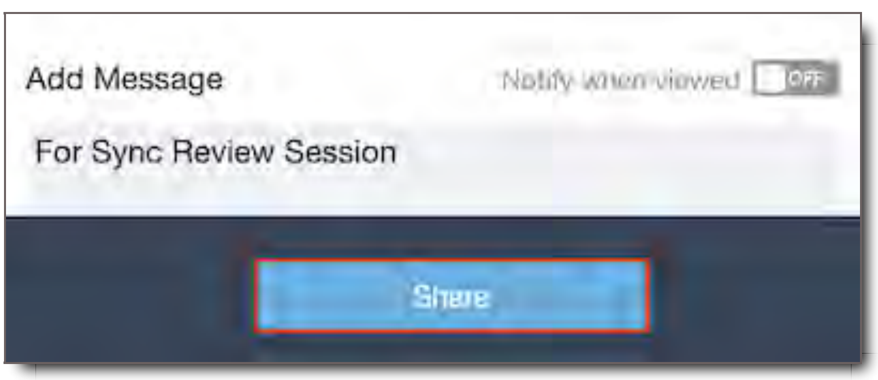


2. **Share your Review package to your recipients**

- On the share dropdown menu, choose Sync Review, and prepare your package as you would for normal package sharing.

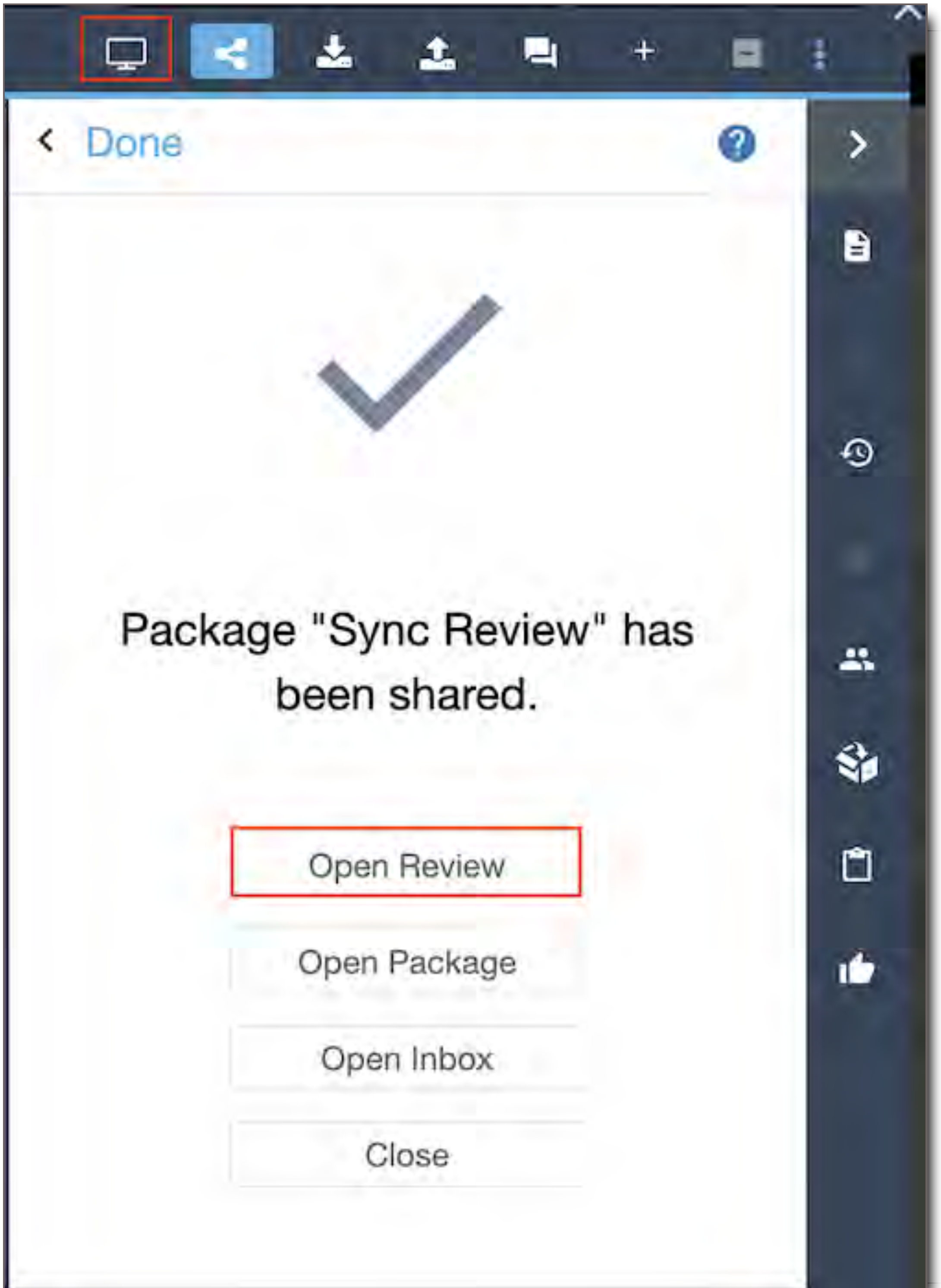


- Share the review package



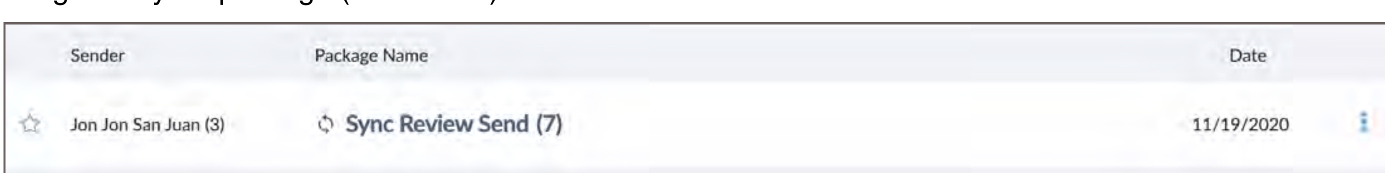
3. Start your session

- Upon the successful share, there will be an option to start the review session by either opening the Open Review button, starting the session from the Package Inbox, or by pressing the Launch Viewer button (TV icon) on the top panel (see below).



Once you action the review button, wait for your collaborators to join the session.

- To start the Sync Review session from the Package Inbox:
- Navigate to your package (sent folder)



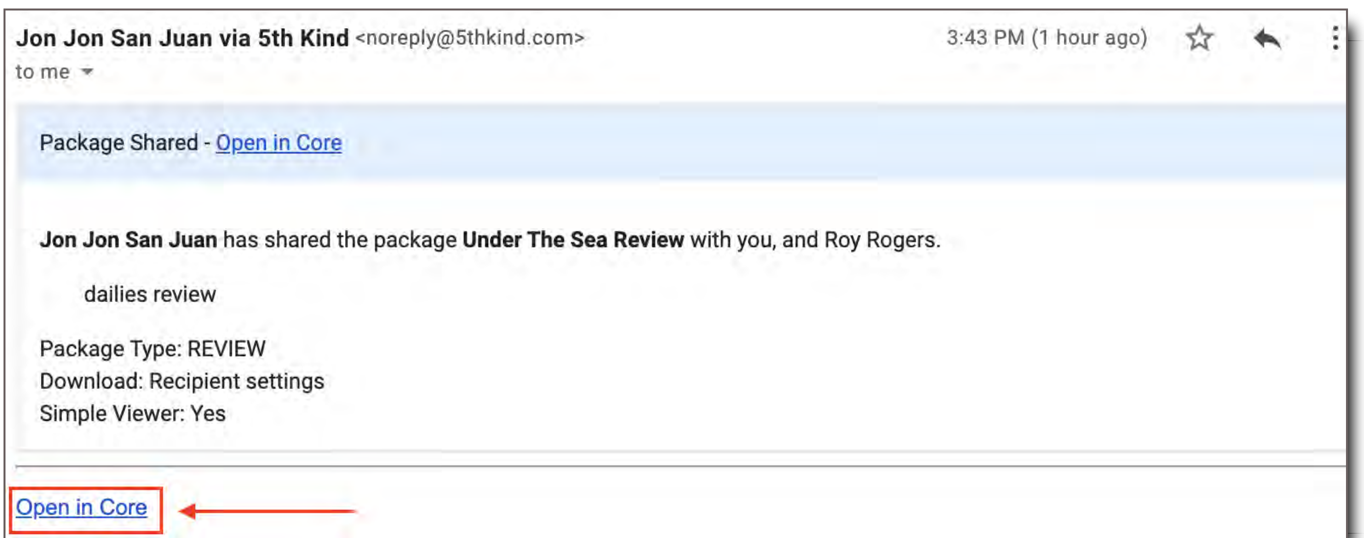
- Click on your Sync Review package and await for other collaborators to join.

- Alternatively, you can on the 3 dot icon, ⋮, and choose Open simple viewer.
- Once you have completed that action, wait for your collaborators to join the session.

Start CORE Sync Review Session as a participant

How to participate in CORE Sync, Real-Time Sync Player session:

1. You will receive the invite in your email

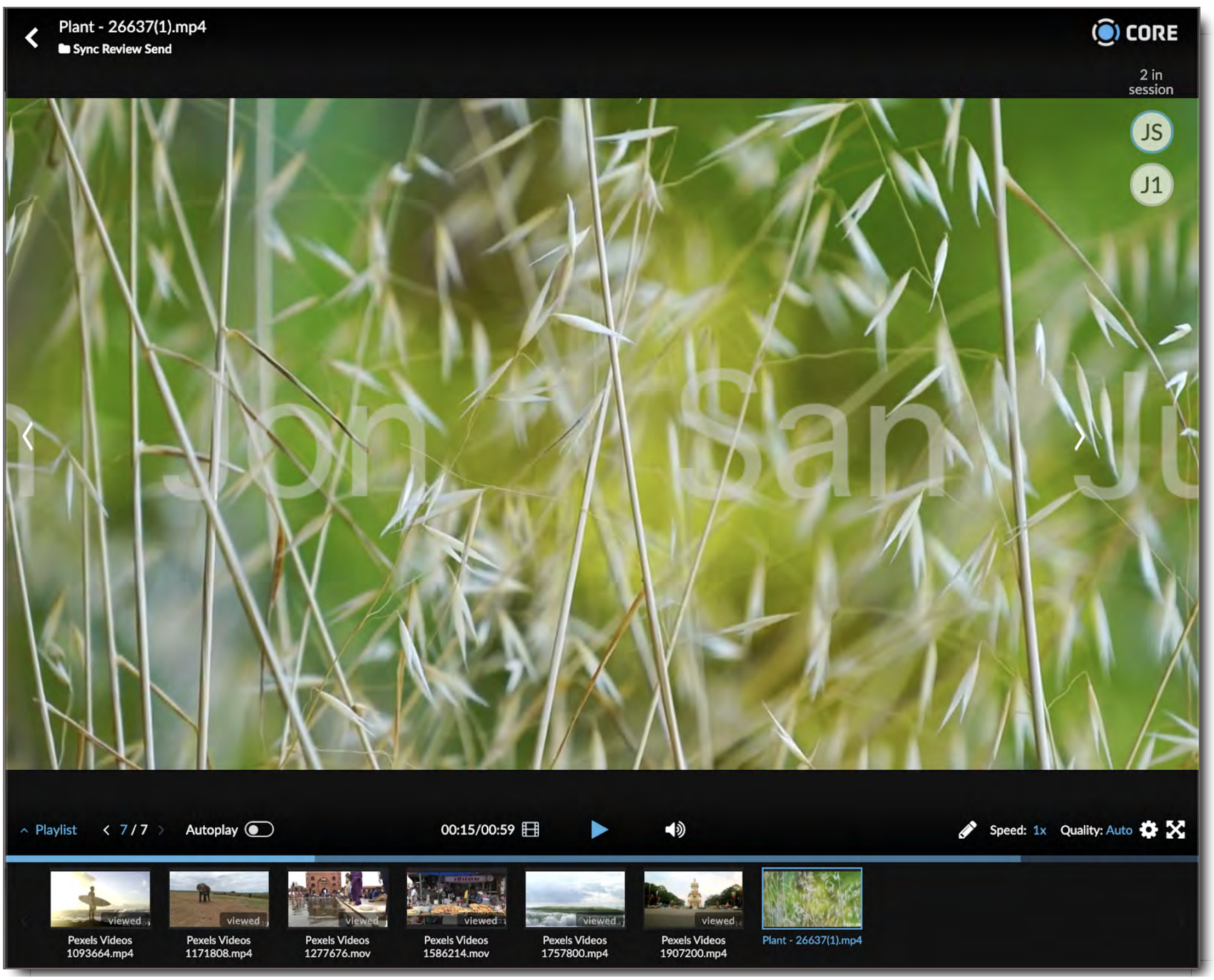


2. Click on the link **Open in CORE** to shortcut to your CORE session (login required if not logged in at the time).

3. You will either wait for the host to start the session or the sync session will start immediately.

4. Note: You will have a unique sessionID for the Sync Review Session

Viewing the Sync Review session on the CORE Simple Viewer Player Session



Collaboration Panel

When you enter the Sync Review session on the CORE Simple Viewer you will see the **Collaboration Panel** on your right hand side.

1. **Host/Presenter** - Highlighted as the User in Blue, represents the Host that is presenting the Review session
2. **Collaborators/Attendees**- Initials of the other collaborators as well as yours will be displayed in grey circular icons
3. **Collaboration Status** You will see a display that will display in text the number of attendees in session.
4. **Full names** will be displayed when attendees hover over the icons

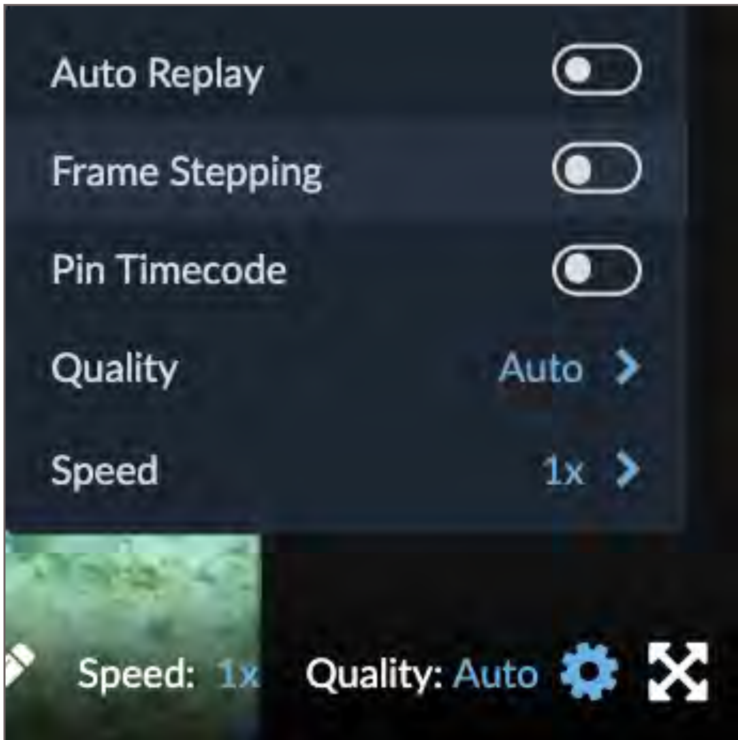
Using the CORE Sync Review Session Dashboard as Host

The Host in CORE Sync review will have the ability to use many of the existing tools from the Asset Player. A list of the tools are described below.

Sync Review Player Tools:

1. **Playlist Toggle** - Open and close your playlist assets
2. **Autoplay Toggle** - Set your playlist to automatically play or set to manual mode
3. **Timecode/Frame Toggle** - Toggle between monitoring by timecode or by frames
4. **Player controls** - Adjust start/stop

5. **Sound Toggle on/off** - Toggle between monitoring by timecode or by frames
6. **Annotate** - Open the annotation toolbox
7. **Speed -** Adjusts Speeds settings
8. **Quality** - Adjusts quality Settings
9. **Settings** - Open Settings options (below)

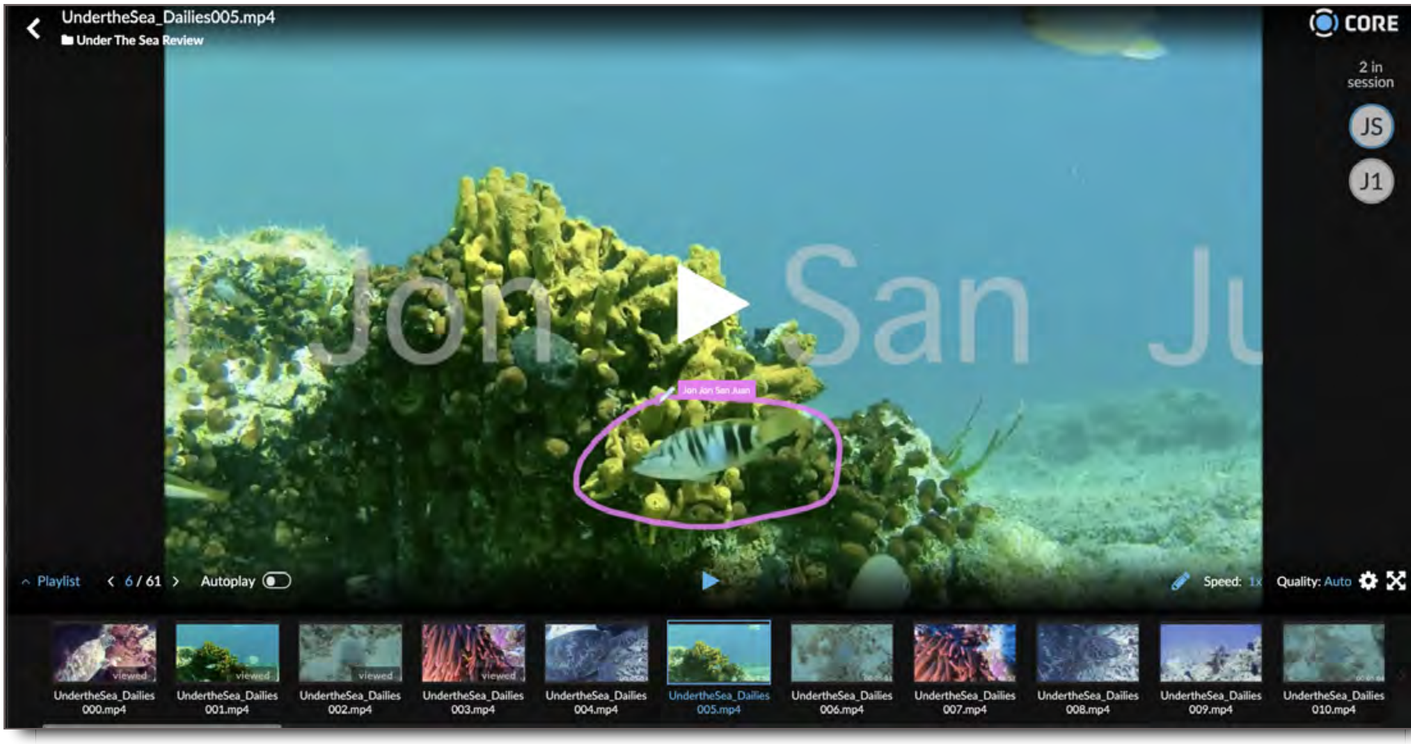


- **Auto Replay**- repeats the selected clip
- **Frame Step** - Adjusts frames forward and backwards using the arrows on the left or right of the play button
- **Pin Timecode** - Pins the timecode on the left side, out of the picture frame.
- **Quality** - Adjust the quality of the video
- **Speed** - Adjust the player speed

10. **Full Screen** - Maximizes view to full screen

Annotating media (PDF, Video, Audio, Images)

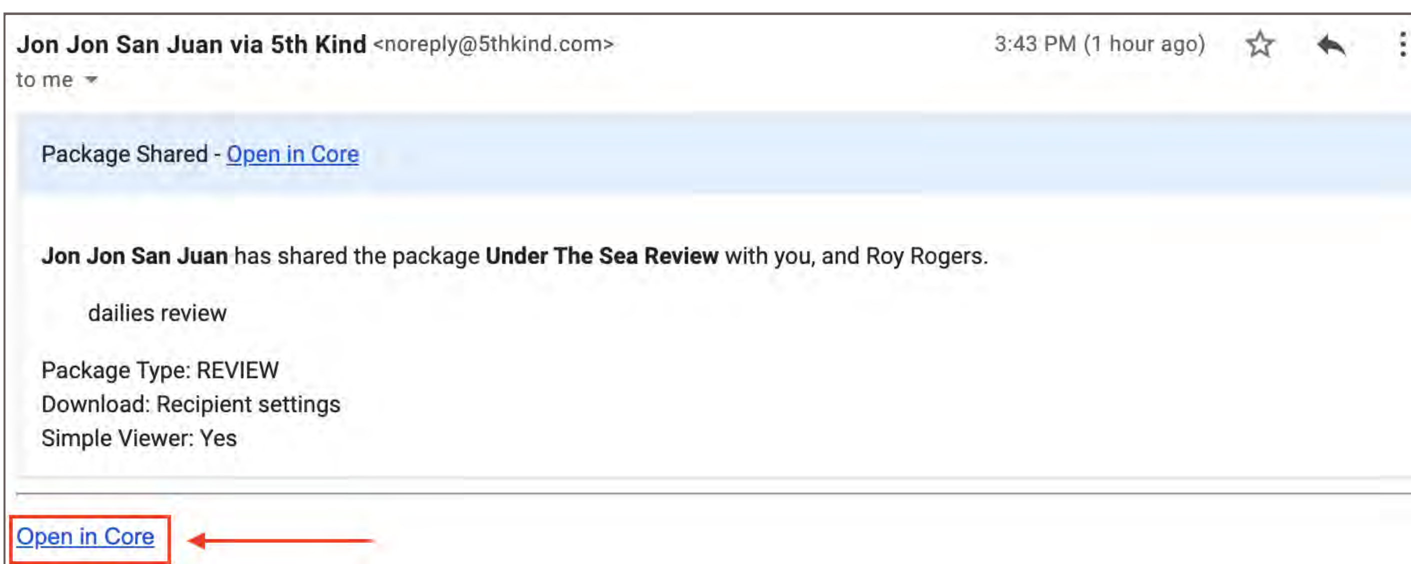
Annotation color assignment - When you enter CORE Sync Review mode you are assigned a specific color throughout the duration of the session. Locate the area of interest and click and draw your section to bring to attention. In this example the color assigned was pink.



Troubleshooting

I lost connection and needed to get back into the session

If you lose connection you can easily sync back to the session by opening your package share email and you will join the others in session.



Jon Jon San Juan via 5th Kind <noreply@5thkind.com> 3:43 PM (1 hour ago)
to me

Package Shared - Open in Core

Jon Jon San Juan has shared the package **Under The Sea Review** with you, and Roy Rogers.

dailies review

Package Type: REVIEW
Download: Recipient settings
Simple Viewer: Yes

Open in Core

Alternatively, you can click on the sync package in your Inbox menu to rejoin the session.

	Sender	Package Name	Date	
	Jon Jon San Juan (3)	Sync Review Send (7)	11/19/2020	

Mobile & iPad v6 App

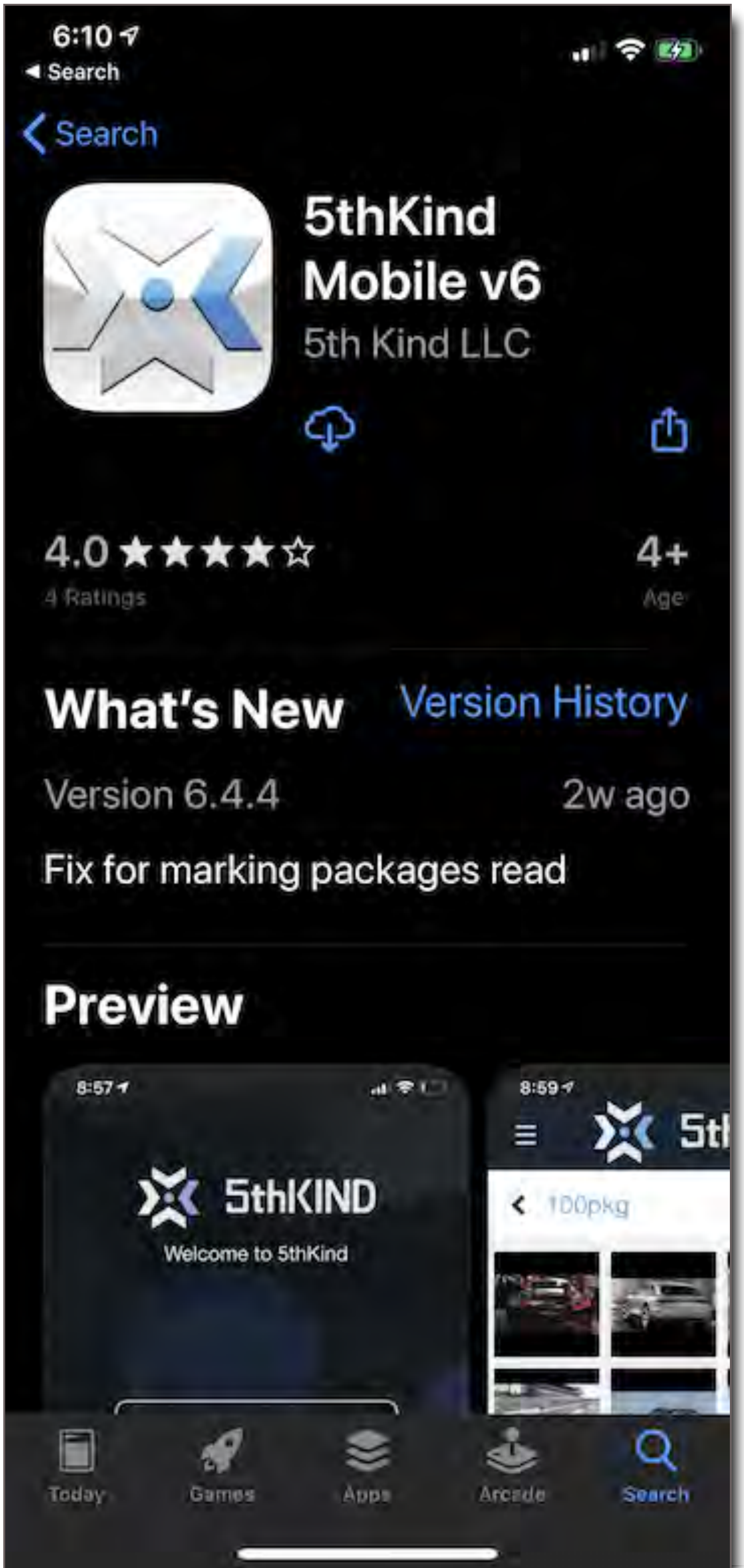
You can view your videos and other files that have been sent to you on your Apple mobile devices.

Setup Instructions

PLEASE NOTE: *To login to iOS app, first go to your computer or phone's web browser, accept your invitation, login, and set up your account on 5th Kind's CORE. If required, connect your Google authenticator prior to using the mobile app. Your user profile must also be enabled for Mobile access, if you have questions about your access please reach out to your system administrator.*

STEP 1.

1. Go to the Apple App Store.
2. Search 5th Kind LLC.
3. Download the 5th Kind Mobile v6 application.
   NOTE: Your iOS must be 11.2 or greater.

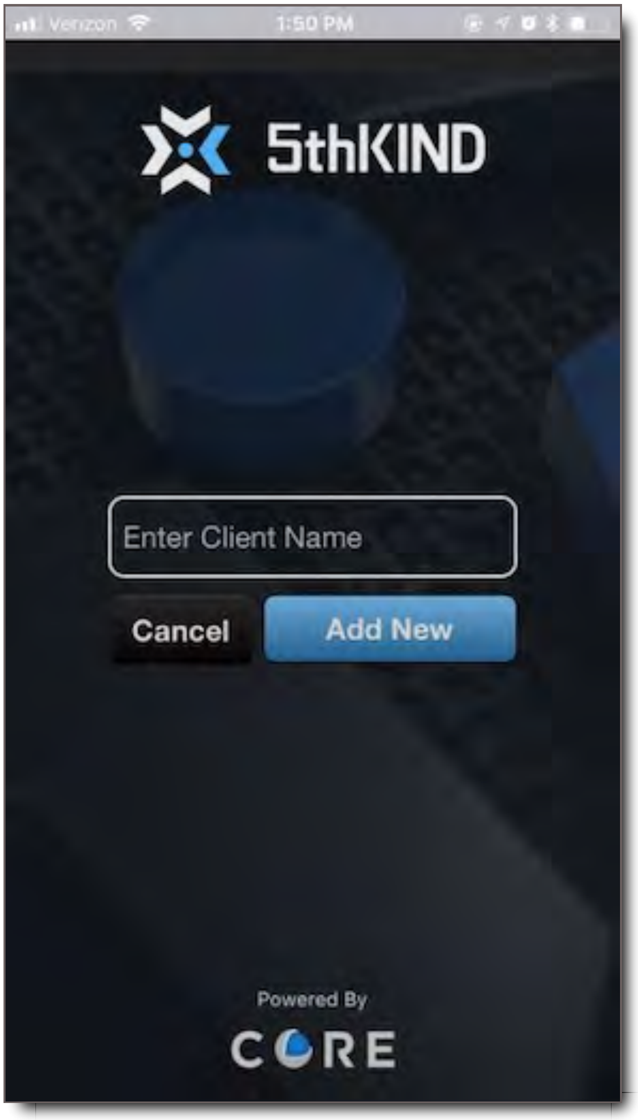


STEP 2:

1. Open the app.
2. Enter your Client Name provided by your Administrator. After the first time, the Client Name will auto-

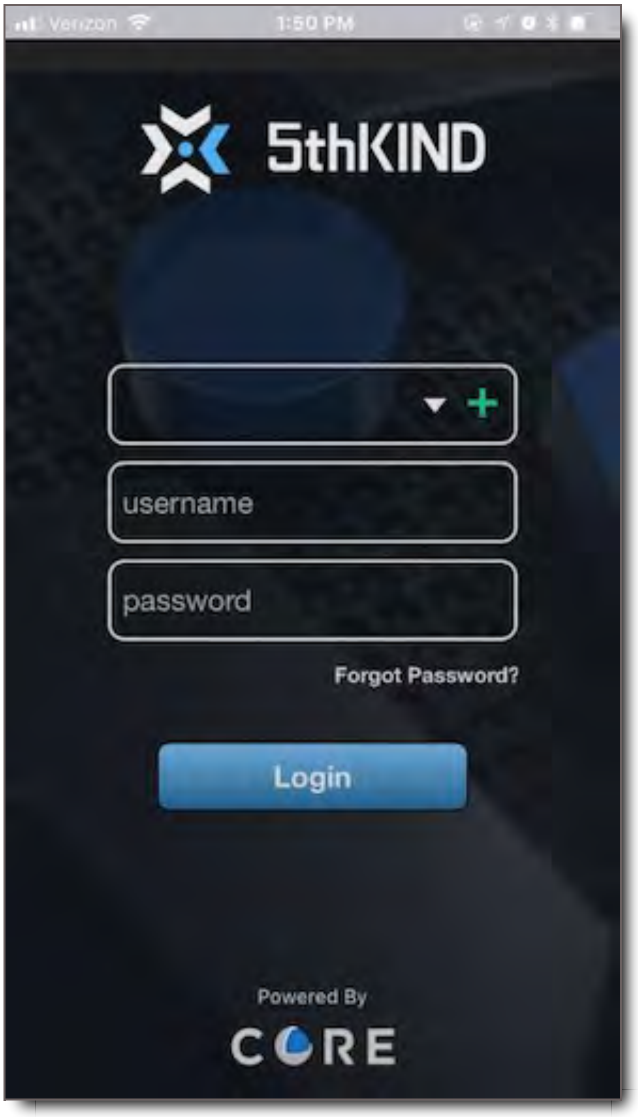
populate.

3. Select Add New



STEP 3:

1. Enter the Username and Password that you setup on the web application.
2. Hit Login.



STEP 4: If required, enter your Google Authenticator.

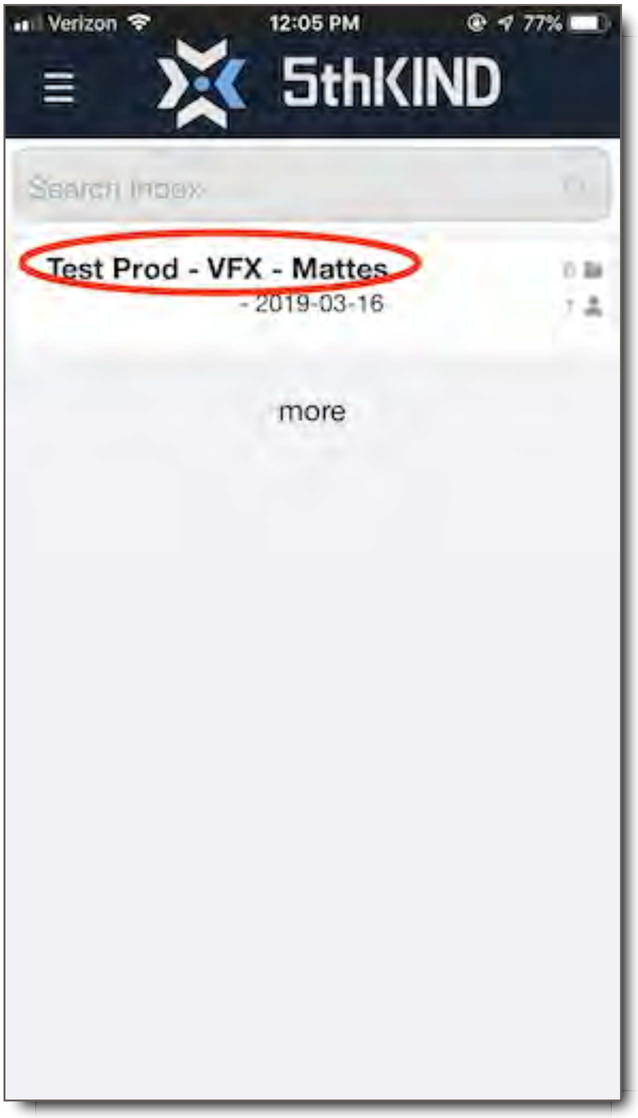
NOT SURE HOW TO USE GOOGLE AUTHENTICATOR?

Click on the Google Authenticator App

1. *Set up the Google Authenticator on the web browser if you haven't already.
2. You will see the CORE client name listed under the 6 digits displayed.
3. Hard Press on the number displayed to COPY it.
4. Go back to the 5th Kind app.
5. Press and hold in the space to PASTE in the 6-digit code. (So you don't have to remember/type the number in the space).
6. Press Login.

STEP 5:

1. The app opens on your Inbox.
2. Click a Package's name to open it and view the contents.



Log In (After Setup)

Once you've activated your account on the desktop, and once you've set up the app on your mobile device, logging in is simple.

When you return to the CORE Mobile App,

1. Enter on the first screen:

    - Your Client Name (this may be pre-populated from your first set up, if you do not know the Client Name please reach out to your system administrator)
    - Your Username
    - Your Password
2. Hit Login.
3. If called for, provide your Google Authenticator number on the following screen.
4. You'll be redirected to the Home Screen, which is your Inbox.

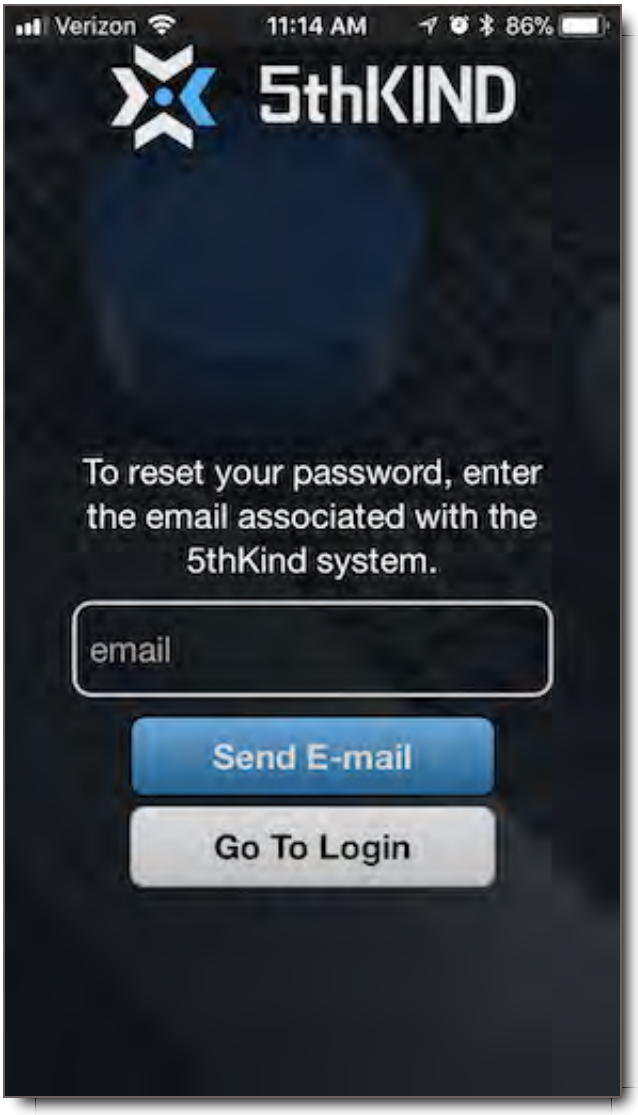
Reset Password - Mobile App

You can reset your account's password from the CORE Mobile App.

To do so,

1. Select "Forgot password?"
2. Enter the email address for your account
3. Select Send Email
4. A confirmation pop up will appear.
5. Select Ok.

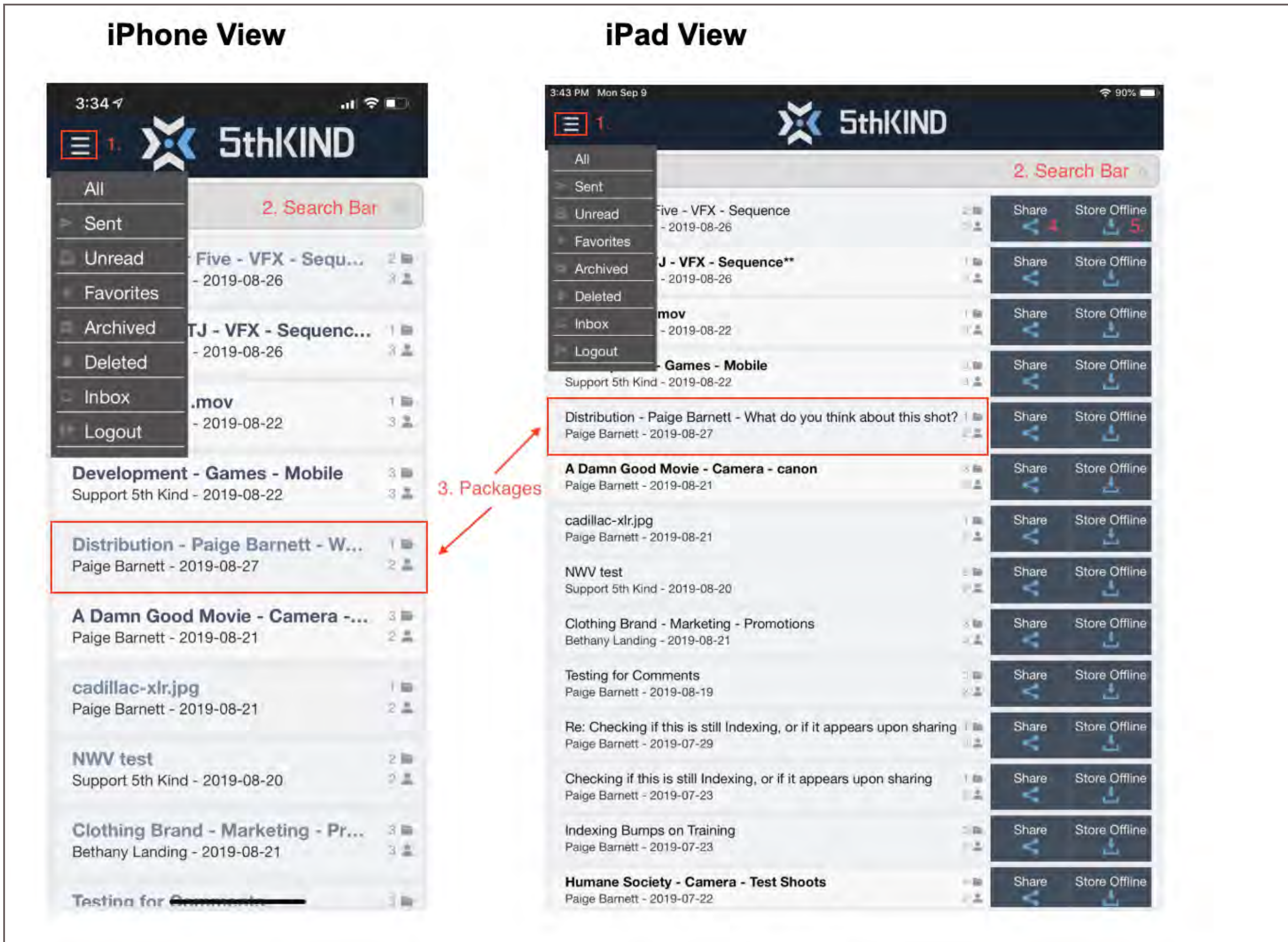
If you wish to cancel resetting your password, select Go to Login.



Navigate the App

The App opens to your Package Inbox. From here, users can view and search for Packages sent to them. In some cases, depending on their permissions, users can share package content and store offline for viewing when wifi is not available.

Inbox Features & Controls



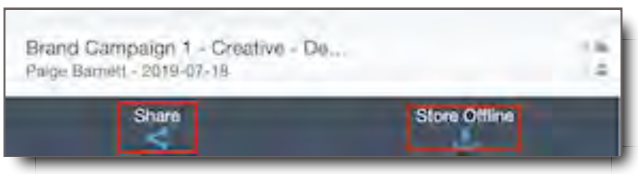
Inbox Elements

1. **Hamburger Menu** - The hamburger menu in the top left corner offers the same navigation options as the Inbox on a user's desktop.
   - **All -** View of all packages from every section
   - **Sent -** Filters to your Sent packages
   - **Unread -** Filters all unread packages
   - **Favorites -** Filters all packages you starred previously
   - **Archived -** Filters any packages you previously archived
   - **Deleted -** Shows packages that have been deleted
   - **Inbox -** Shows received packages
   - **Logout -** Selecting this automatically logs you out of the app
2. **Search Bar -** Use keywords to find the package you seek.
3. **Packages -** The list of packages you've sent or received.
   - **Package Name -** Like a Subject Line on an Email
   - **Package Sender -** Who sent the package
   - **Package Date -** Date Package was sent

- **Files in Package** - Folder icon with a number representing the files in the Package
- **Package Users** - Person icon with a number representing the total users in this Discussion for the Package, also total users in the share

4. **Share -** Button that gives you the ability to share the selected package with others. Will not be available with all packages.
5. **Store Offline -** Button that enables you to cache packages to your phone when the iPhone is in Airplane Mode for offline viewing. Will not be available with all packages. **NOTE:** Does not store content on the mobile device, files are only cached within the app.
6. **Delete Local** - Button appears after package has been stored offline. Enables you to delete the cached files that were cached on your device for offline viewing.
7. **Cancel -** Button appears after clicking Store Offline if you would like to cancel your download before its completion.

iPhone View - Sharing and Store Offline Mode (when swiping left)



Example of deleting cached files - "Delete Local"

Example of cancelling download - "Cancel"

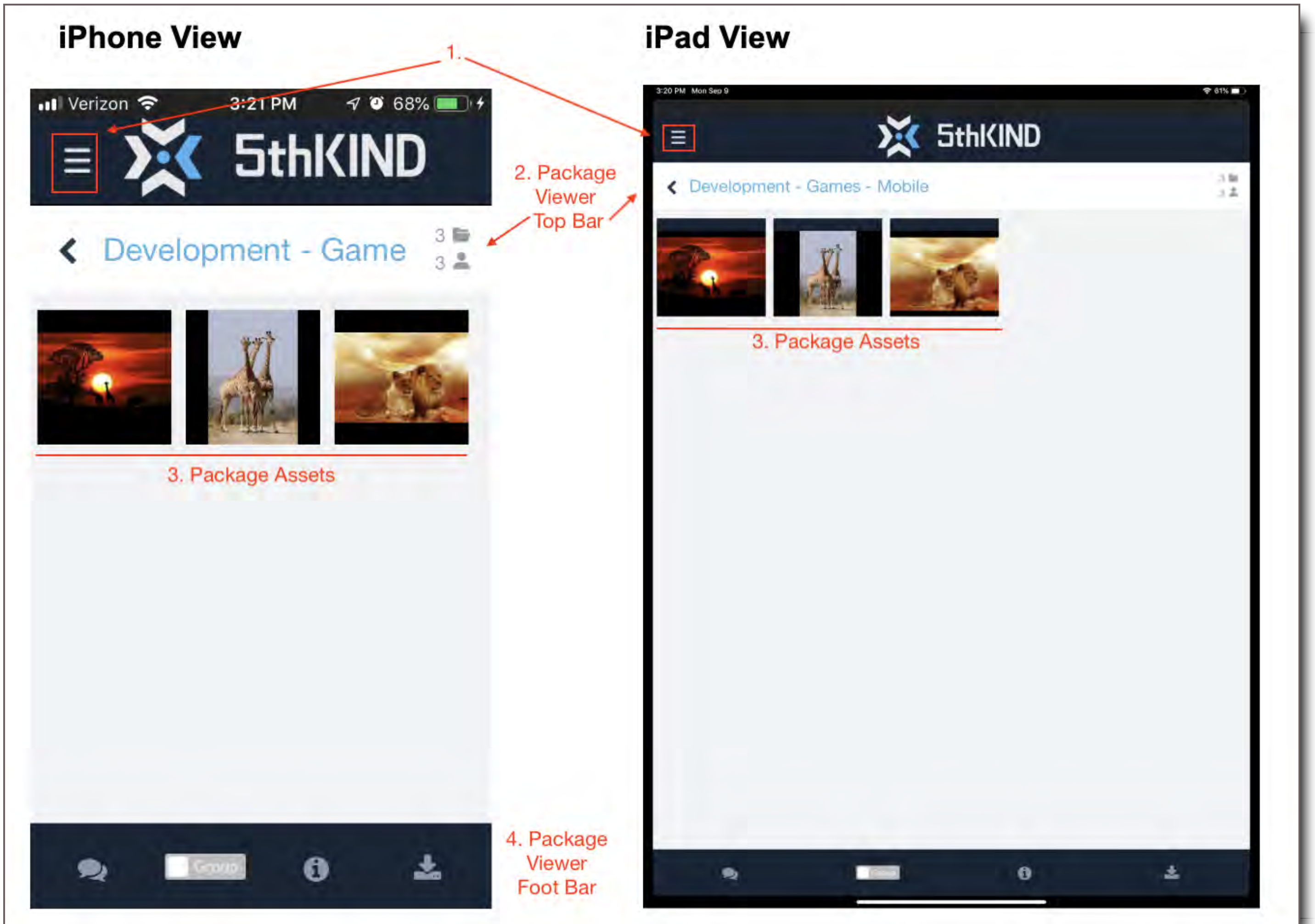
Inbox Actions

On iPad, all the buttons available to the user appear on the screen. No additional swipe actions are required to access functionality controls.

On iPhone, to access Share, Store Offline, Delete Local or Cancel, swipe left and the buttons will appear below the selected package.

Package & Asset Elements

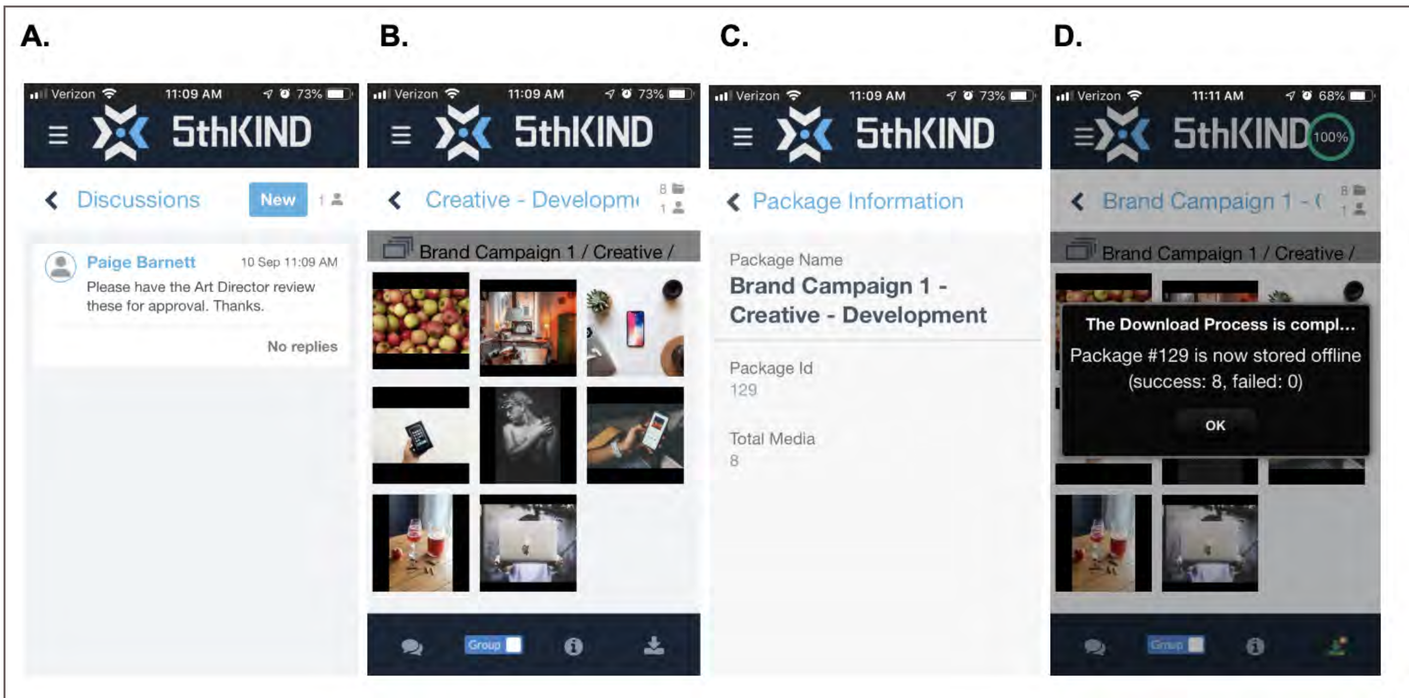
Package Elements



1. **Hamburger Menu -** Menu that takes a user back to the Home Screen or other parts of the inbox, as well as enables a user to logout immediately.
2. **Package Viewer Top Bar -** The navigation bar below the App Header at the top of the screen.
   - **Back Arrow -** Takes you back to the Inbox / Packages Home Screen
   - **Package Name -** Shows a clipped version of the Package Name
   - **Package Files -** Shows the total number of files in the Package
   - **Package Recipients -** Shows the number of people who received the package
3. **Package Assets -** Shows all the files within the Package
4. **Package Viewer Foot Bar**- The footer navigation bar at the bottom of the app screen.
   - **Discussion -** Icon that when selected takes you to the discussion threads for the Package.

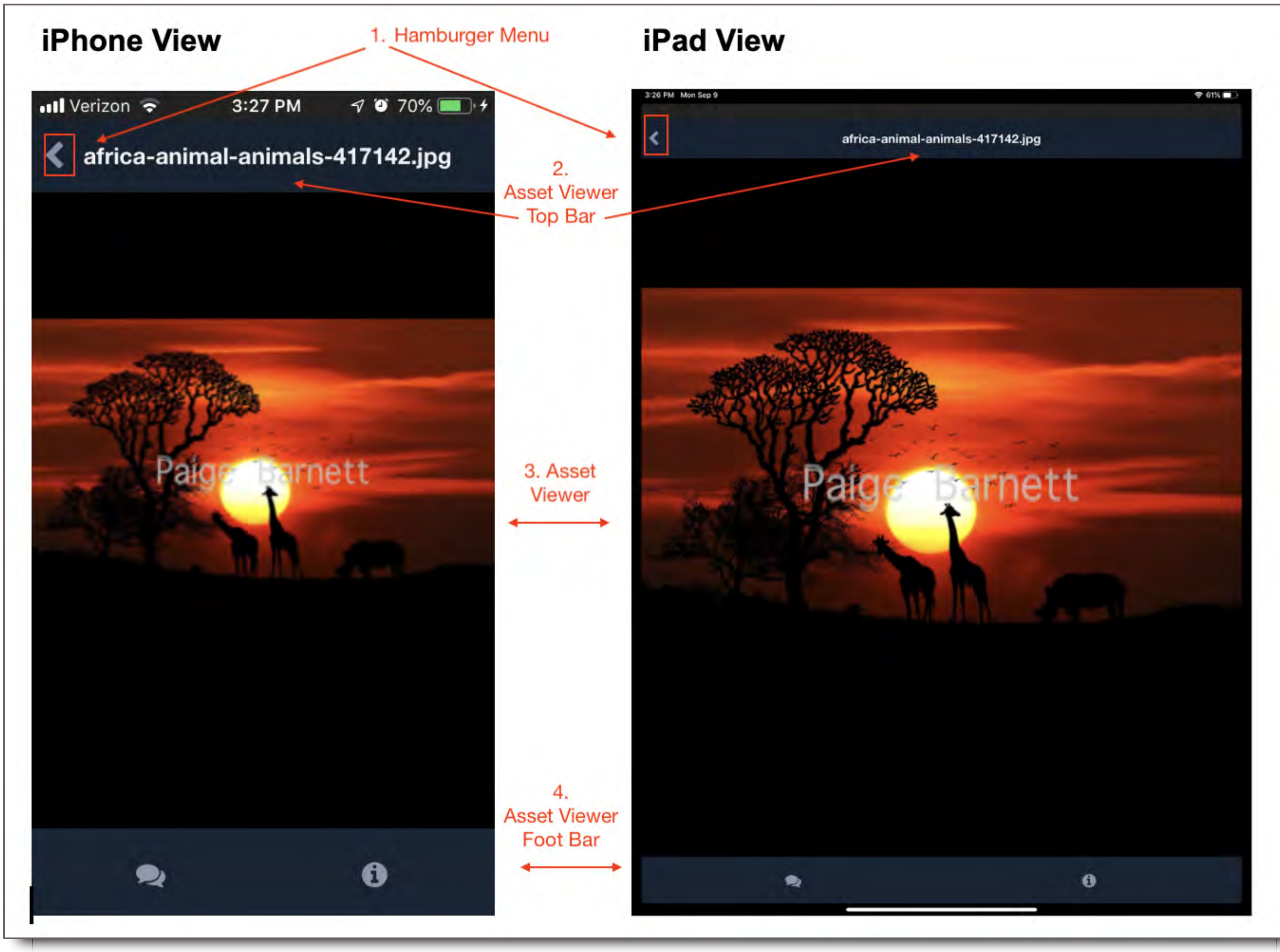
- **Group Mode** - Toggle that when turned on, displays a Package's Files in groups according to their original Asset Groups.
- **Package Details** - An info icon that takes you to a screen outlining the Package's details.
  - **Package Name**
  - **Package ID**
  - **Number of Package Assets**
- **View Offline -** When shown to a user with permission, enables you to cache within the app Files that will be available when the device is in Offline or Airplane Mode. Does not store content on the mobile device, files are only cached within the app.

Package View Footer Bar Features



Asset Elements

Selecting a single File in a Package will open the mobile Asset Viewer.



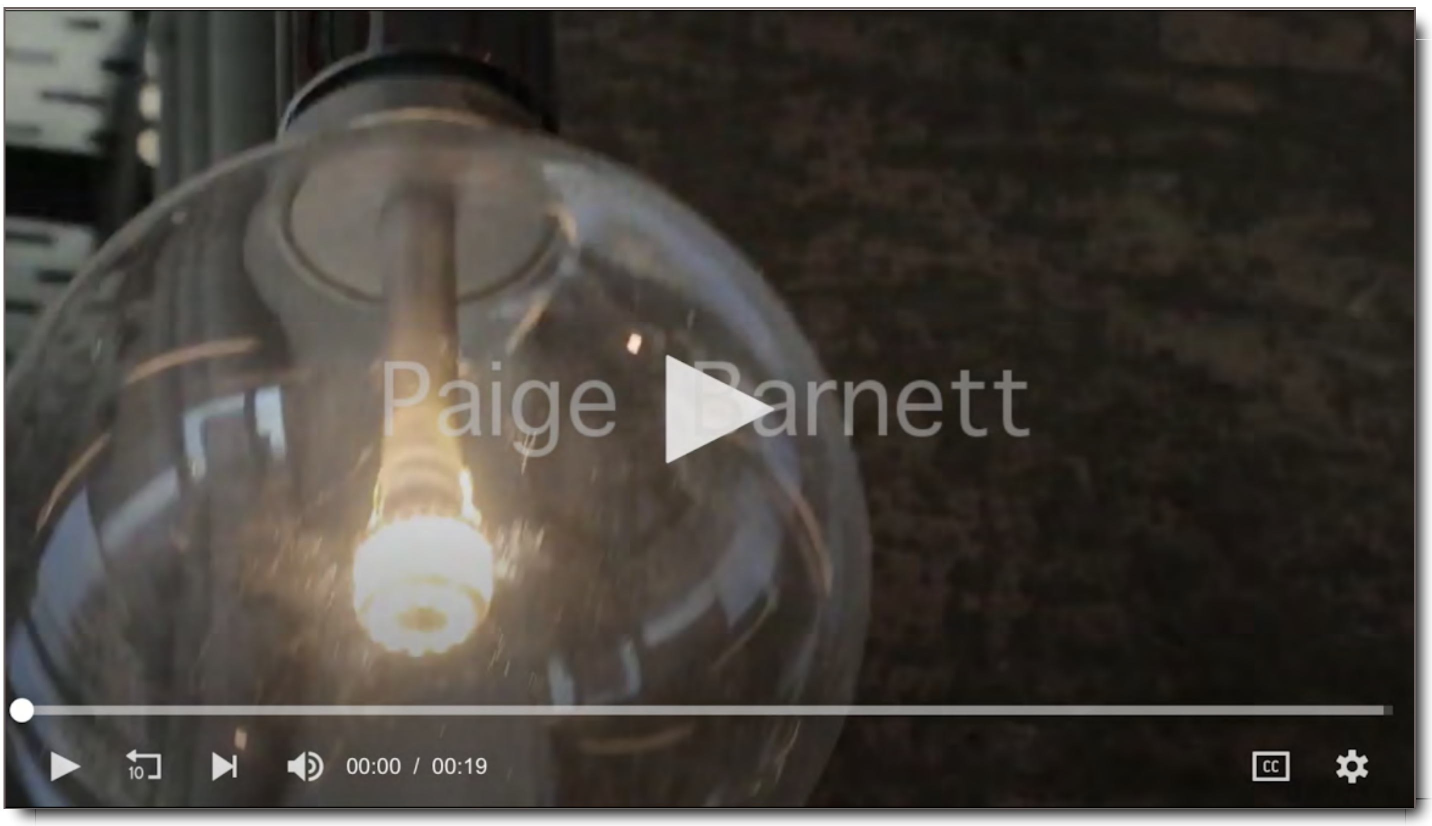
1. **Hamburger Menu -** Menu that takes a user back to the Home Screen or other parts of the inbox, as well as enables a user to logout immediately.
2. **Asset Viewer Top Bar -** The navigation bar below the App Header at the top of the screen.
   - **Back Arrow -** Takes you back to Package Viewer
   - **Asset Name -** Shows a clipped version of the Asset Name
3. **Asset Viewer -** Shows the selected file. Video files require an additional step of hitting the play icon on the video to play. Swiping left and right on the File will take you to the preceding and following Files.
4. **Asset Viewer Foot Bar -** The footer navigation bar at the bottom of the app screen.
   - **Discussion -** Icon that when selected takes you to the discussion threads for the Asset.
   - **Asset Details -** An info icon that takes you to a screen outlining the Asset's details.
     - **File Name**
       - **File ID**
       - **File Size**
       - **File Status**
       - **File Created** - Date File was created in system

Asset Player Controls

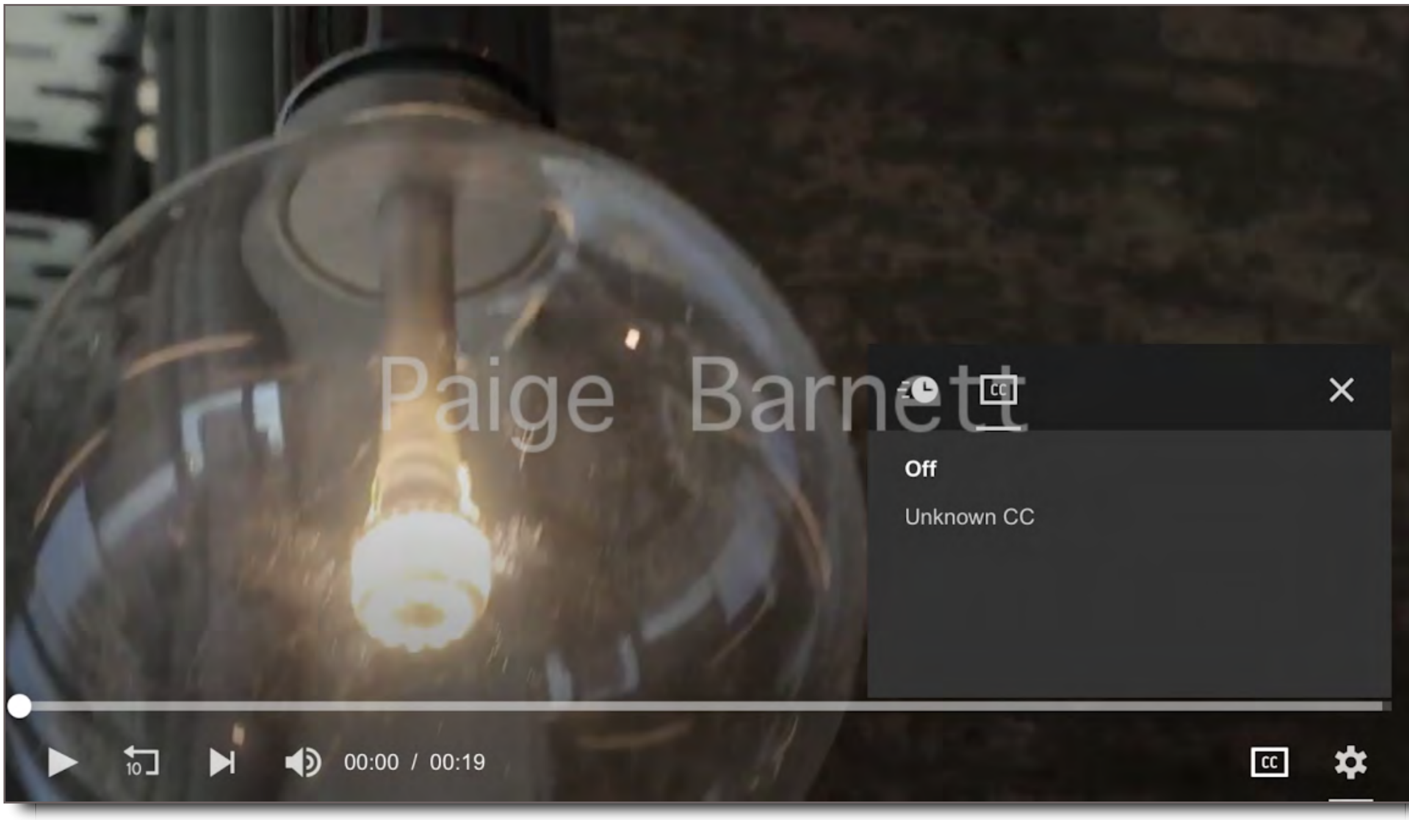
When you play a video in the CORE Mobile App, it opens in a proprietary player with the following controls:

1. **Video Scrubber -** Drag you finger to the point in the clip you wish to play. A preview thumbnail will appear to guide your selection
2. **Play -** Select anywhere on the video's center screen to play it.
3. **Rewind 10 Seconds -** Takes the clip back 10 seconds
4. **Skip Forward** - Goes to the next File in the Package
5. **Volume -** When selected slide to the desired volume
6. **Player Timecode** - Shows where in video you are currently at and videos total runtime
7. **Closed Caption Settings** - Opens a menu to turn closed captions on (if available) or off
8. **Play Speed Settings** - Enables user to watch video at half, regular, double speed

Basic Controls



Closed Caption Settings



Play Speed Settings

Sharing: Discussions vs. Comments

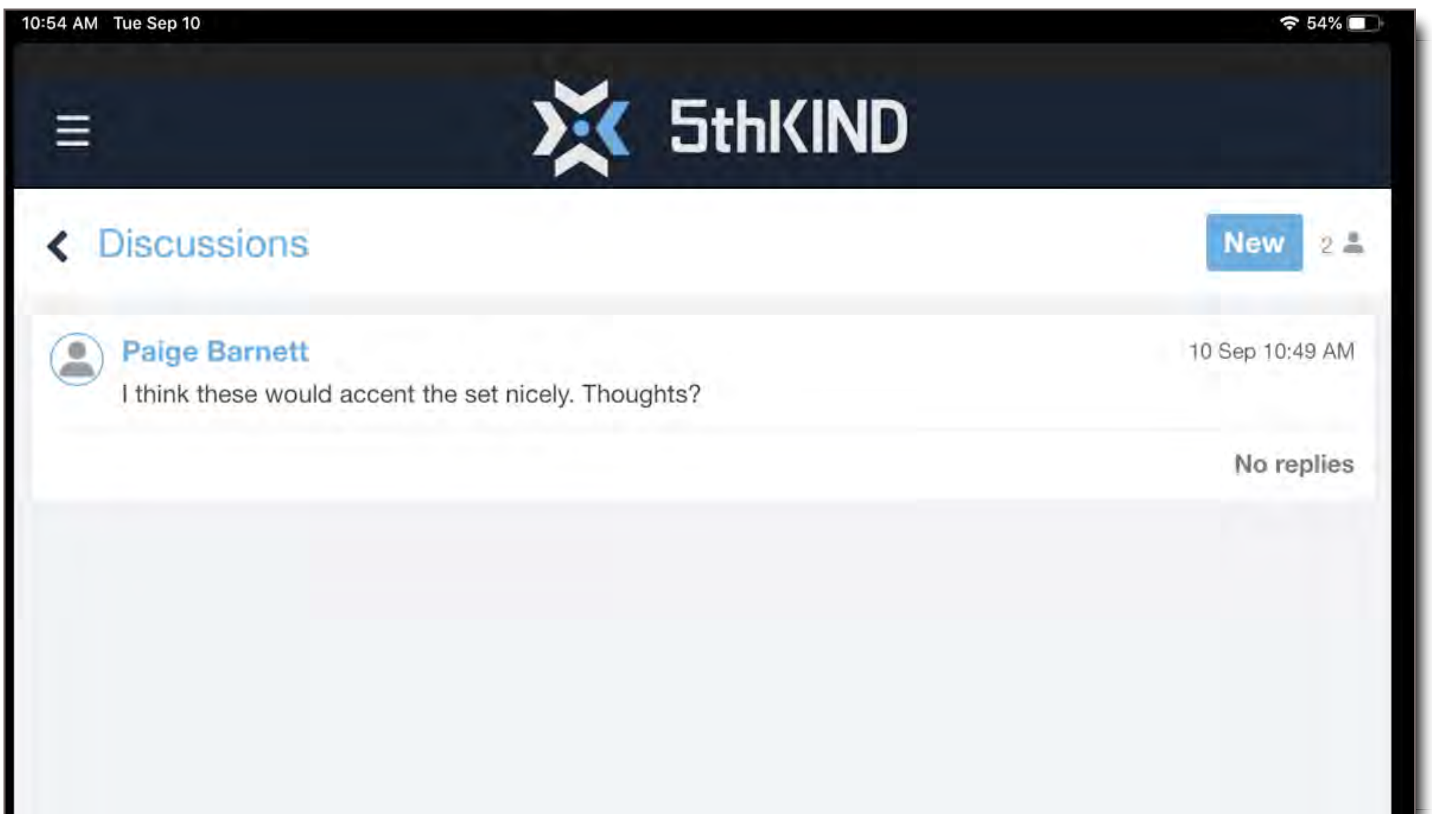
The mobile app workflow is continuously improving so we will update this section as new features become available.

Discussion Panel

This panel shows a list of the different Discussions for a Package or File that are being had by different groups of people.

- A Discussion is a single thread of Comments between a set of users.
- Any changes to the user members on a Comment string creates a new Discussion.
- The users you are able have Discussions with are dependent on your permissions.
- Selecting a Discussion will take you to the Comments Panel.
- The New Discussions page is where you start a new group dialogue on a Package or File, and where you share a Package when the Share button is selected.

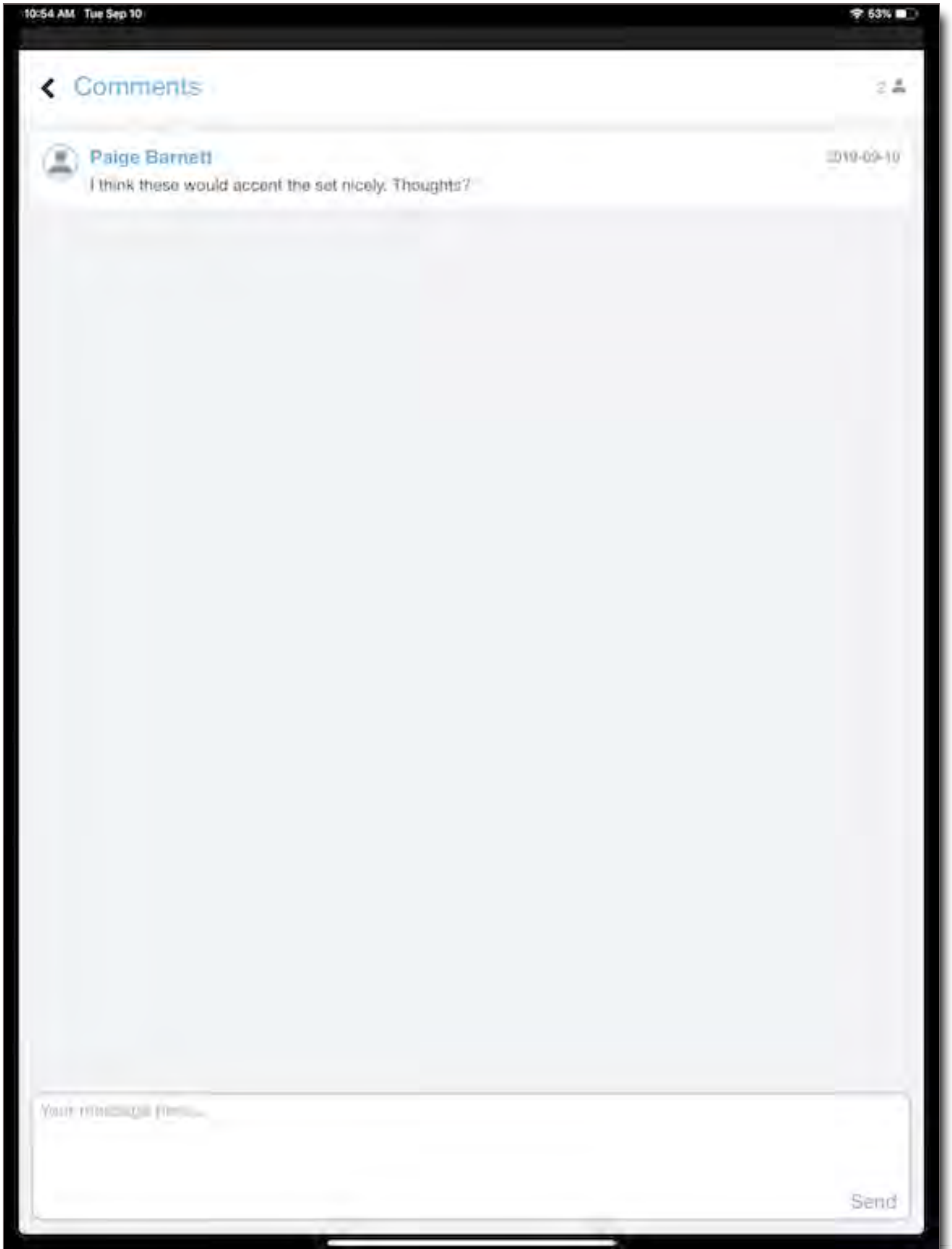
iPhone & iPad Views Are the Same



Comments Panel

The Comments Panel is where you comment on a Package or a File for the group of people with whom you've shared the file. The Comments Panel shows one Discussion.

iPhone & iPad Views Are the Same



NOTE: For any instructions below that describe swiping, this is a specific direction for iPhone devices. All buttons should be clearly visible on an iPad screen. For iPad specific instructions, where swiping is indicated, skip to the next step down.

View a Package

Viewing Standard Packages

Accessing packages in Standard view is a permissions setting granted by your Admin. If you are not able to view a Package in the package viewer, either you don't have permissions to access it or you've been sent only Dailies Packages. For more directions about how to access Dailies Packages, go to the next directions below, Viewing Dailies Packages .

To view a Standard Package in the 5th Kind v6 app,

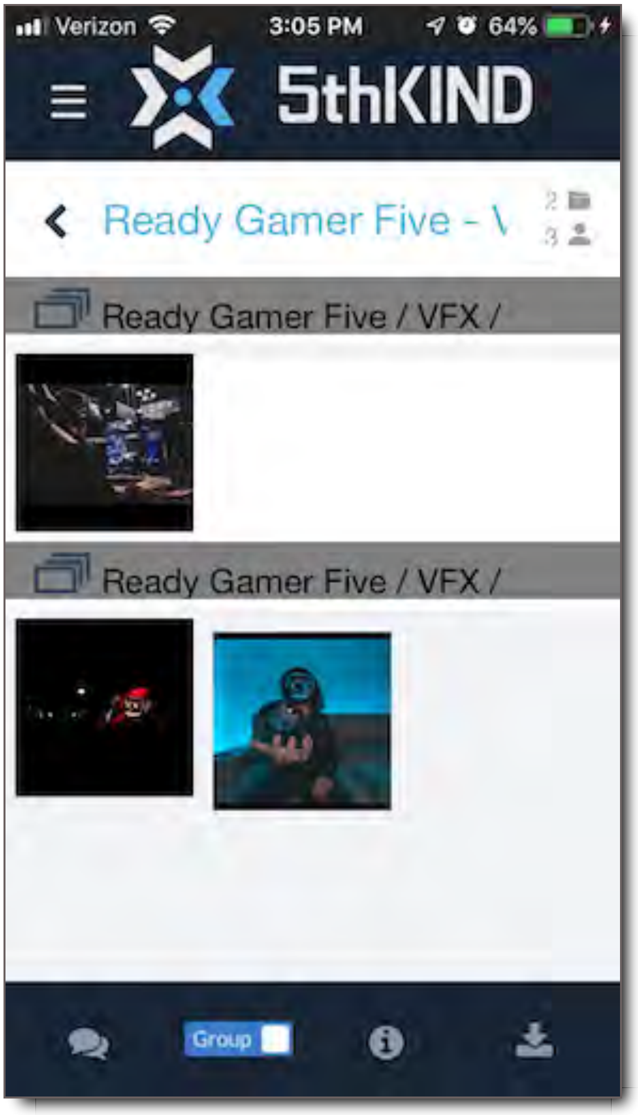
1. Select it.
2. The package will open in the Package Viewer where you can see all Files associated with that package.
3. To view a single File, select it.
4. The File will open in the Asset Viewer, where you can watch the video, view the document, or play the audio.
    - For PDFs and other documents, scroll up or down to go to the page you need.
    - For video, select play. The video will open in the phone or iPad player.
        - In the player, select play once again.
        - When the video is done, select Done. This will take you back to the Asset Viewer.
5. To go back to the main package, hit the back arrow at the top of the screen.
6. To go back to the Inbox, hit the back arrow again. You can also use the Hamburger Menu to navigate back to the Inbox at any time.

Viewing Dailies Packages

If you receive a package of videos that's been sent as a Dailies Package, it will immediately open to the first video in the Package and will then cycle through each File until the end.

View Packages in Group Mode

Turning on Group Mode in a Package, breaks up the Files in the Package according to the Asset Groups they came from.

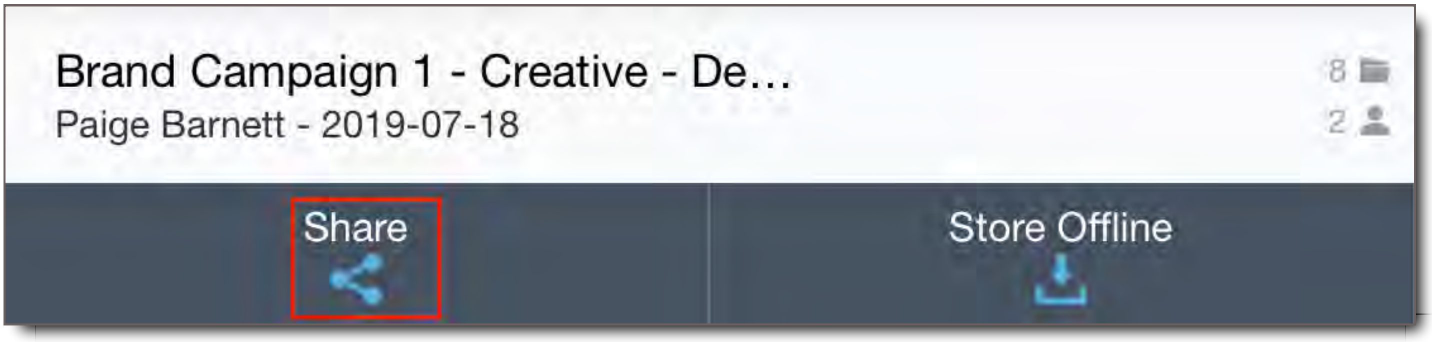


Share a Package

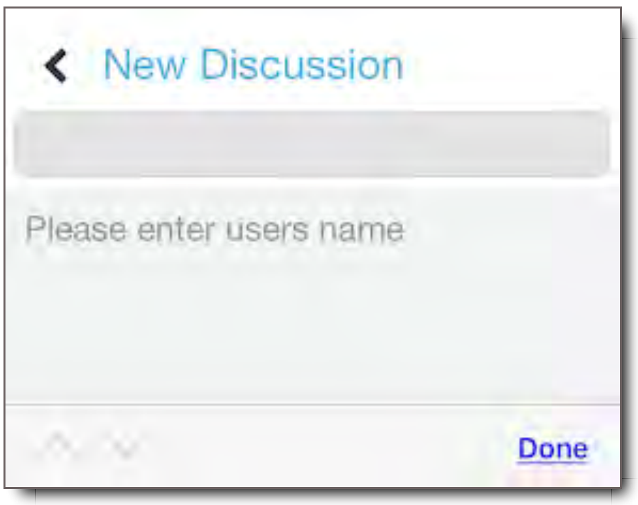
Share a Package from any part of your Inbox / Packages Home Screen by,

1. Swiping left on the package you want to forward.

2. Select the share button



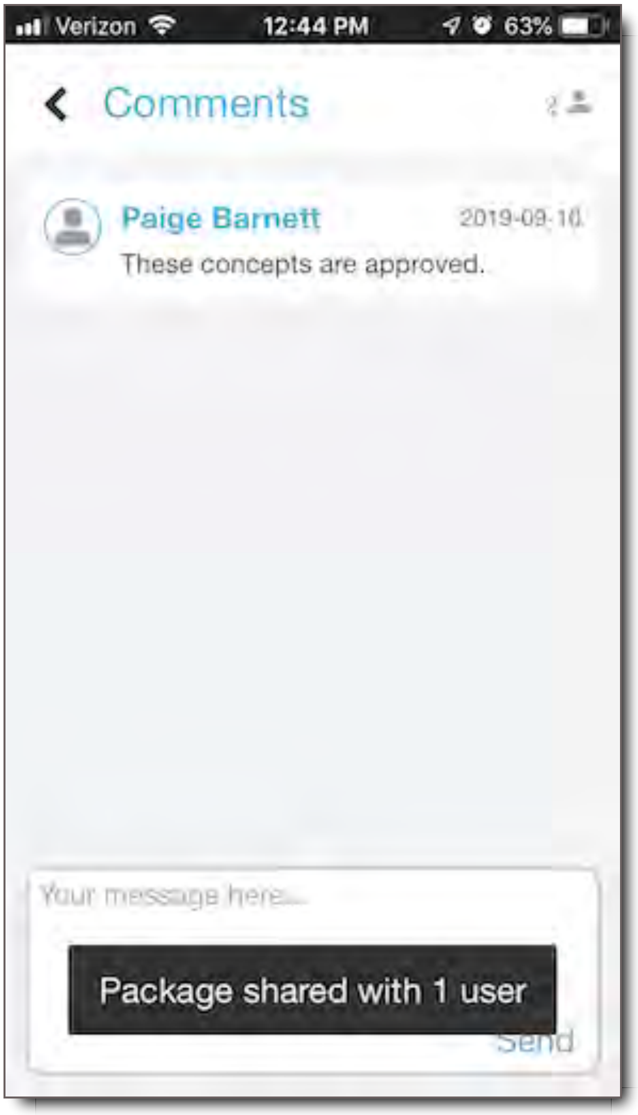
3. The New Discussion Panel will open.



4. Add the users you want to include in the package. They will auto-populate once you start typing. **NOTE:** User lists are not currently available on mobile devices.

5. Type your message.

6. Hit Done.
7. Select Send.
8. A confirmation pop-up will appear from the bottom saying “1 package was shared with user(s).”
9. Your message will appear in the Comments page.



To return to the home screen, use the Hamburger Menu or back out of Comments >> Discussions >> Package >> Inbox / Home.

Cache a Package for Offline Viewing

Caching a package, aka Store Offline, enables users to view packages offline and in Airplane Mode. Currently, the files are cached offline within the app, and not downloaded to the phone. Thus, they use the device's storage when cached, and are removed when Deleted Locally.

If you don't see / the described buttons, then you don't have permissions to use them. Please contact your system administrator if you believe your permissions need to be adjusted.

Cache a Package from Your Inbox / Packages Home Screen

To store your package offline in the Mobile App,

1. Swipe left on the package you want to download.
2. Select the Store Offline button
3. The status circle in the upper right corner will show you download progress. **NOTE:** I if there is only 1 file in the package the green circle will stay at 0 and then quickly finish at 100. If there are multiple files in the package the number will increase incrementally as files are being cached.
4. A yellow dot will appear next to the package(s) as it is being downloaded. When the download is complete, you will receive a confirmation pop-up indicating the success and failure of any files.
5. Select OK to confirm the download.
6. The yellow dot will change to a green dot next to the downloaded package. **Note:** In some cases, if you lose internet connection while attempting to download (cache) a package for offline viewing you may see a green dot next to a package even though not all files are completed. Check your package availability by turning off your wifi and making sure the files play successfully.

Other than the green dot next to the package name, Downloaded packages will look like all the others when you are online. However, when you switch to Airplane Mode or go offline, only the packages stored locally will appear in y our Inbox.

Cache a Package from Package Viewer

To store your package offline,

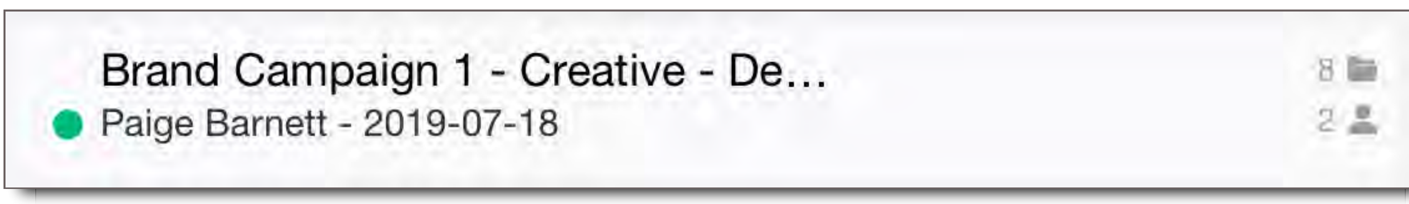
1. Select the Download icon in the Package Viewer Foot Bar

2. The Download will start automatically and become green

3. The status circle in the upper right corner will show you download progress.

4. When the caching is complete, you will receive a confirmation pop-up indicating the success and failure of any files.

5. Select OK.
6. The Download icon will remain green.
7. When you go back to the Inbox / Packages Home Screen, a green dot will appear to the left of the package you cached.



Cancel the Cache of a Package

Canceling the caching of a Package is simple, and doesn't cache any partial files to your phone.

Cancel a Package Download from Your Inbox / Packages Home Screen

To cancel a cached package from your home screen,

1. Swipe left on the package that's in the process of downloading.
2. Select Cancel. **(iPad View)**

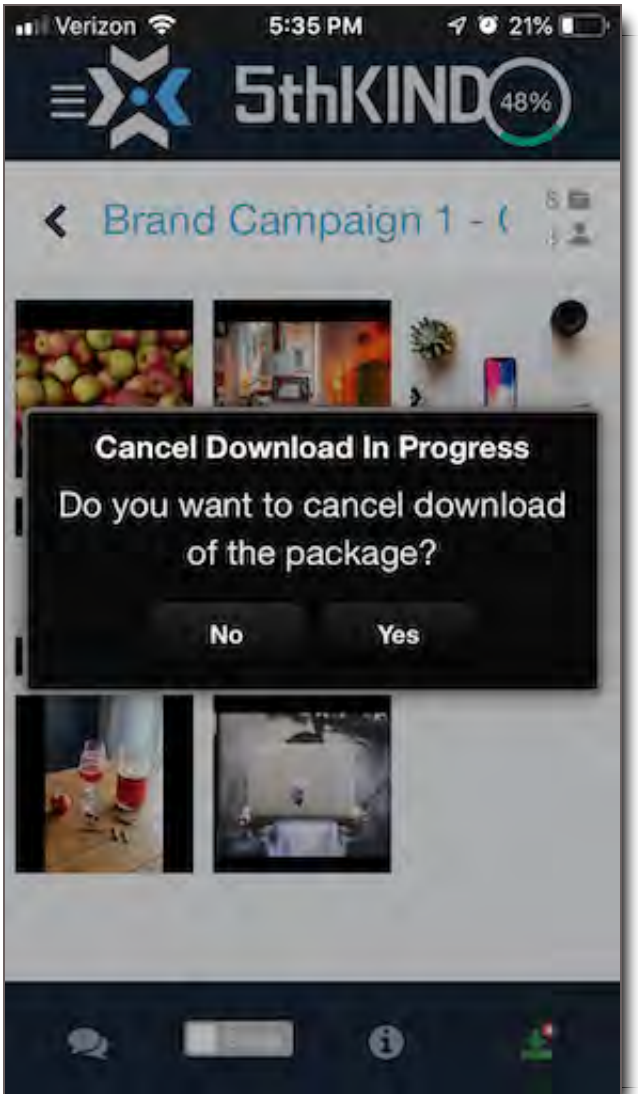
3. A pop-up will appear.

4. Confirm that you want to Cancel.
5. The download will stop at this point.

Cancel a Package Download from Package Viewer

To cancel a caching package from Package Viewer,

1. Select the green Download icon in the Package Viewer Foot Bar
2. A pop-up will appear.
3. Confirm that you want to Cancel.
4. Your download will stop.



Delete a Cached Package

Delete a Cached Package from the Inbox / Packages Home Screen.

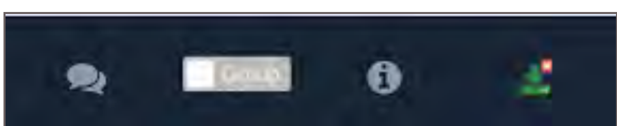
1. From the Inbox / Packages Home Screen, swipe left on the downloaded package.
2. Select Delete Local. **(iPad View)**

3. A pop-up will appear.
4. Confirm that you want to Delete.

5. The package will delete from the phone's cache instantly, and the green dot will disappear.

Delete a Cached Package from Package Viewer

1. In the Package Viewer Foot Bar, select the green download icon.



2. A pop up will appear confirming you want to delete.
3. Select YES.
4. Done.

Comment on a File or Package

When there's only one conversation on a Package or File it will open automatically to the Comments Panel. If you wish to start a New Discussion thread, back out one screen to the Discussions Panel where you can create a New Discussion.

Comment on a Package

To comment on a Package,

1. Select it from the Inbox.
2. Select the Discussions Icon at the bottom in the Package Viewer Foot Bar.
3. Select an existing Discussion or create a new one.
4. Enter your message.
5. Select Done on your keyboard.
6. Hit Send.

Comment on an Individual File

To comment on a File,

1. Select the file in the package you are viewing.
2. Select the Discussions Icon is the Asset Viewer Foot Bar.
3. Select the existing Discussion or create a new one.
4. Enter your message.
5. Select Done on your keyboard.
6. Hit Send.

Create a New Discussion on a File or Package

To create a New Discussion thread on a File or Package with different users,

1. On the Discussions Panel or a File or Package select NEW.
2. Enter the names of your users.
3. Enter your message.
4. Select Done on your keyboard.
5. Hit Send.

Troubleshooting

My File Won’t Open or Play

In the mobile app, if your file won't open or play,

1. Go to your DESKTOP environment.
2. Go to the Package.
3. Select the File.
4. If the thumbnail says "Processing", trying reprocessing the File.
    - Select the File
    - In the Asset Viewer Top Bar on DESKTOP, select the ⋮ icon.
    - Select Reprocess File
    - A pop up should appear at the top of the screen confirming the reprocess.
    - Refresh the browser.
    - The File should now load, making it available for play or viewing. If it does not, contact your system administrator.

If you don't have access to the desktop environment, contact your system administrator.

What are the Device Requirements for the App

Requires iOS 11.2 or later. Compatible with iPhone, iPad, and iPod touch.

CORE by 5th Kind App

You can view your videos and other files that have been sent to you on Apple TV.

Set Up Instructions

PLEASE NOTE: To login to Apple TV app, first accept, login, and set up your account on 5th Kind's CORE from your computer's web browser. If required, connect your Google authenticator prior to using the app.

STEP 1: Download the app "CORE by 5th Kind" on the Apple TV app store

STEP 2 Initial Login: After opening the app you will be prompted to enter:

- Server Name = Client Name (get this from your system administrator)
- Username = same as desktop
- Password = same as desktop
- PIN = You will choose a unique PIN for this Configuration

Example of initial login (below)

Following initial setup, you will not be prompted to re-enter this info. Subsequent logins will welcome last logged in User and prompt for a 4 digit PIN or you can click "Manage Users" to switch Users

Enter the PIN for this User and Log In

STEP 3: if required by your company, enter your Google authenticator code which was setup during your first login to the web application.

NOT SURE HOW?

On your phone, click on the Google Authenticator

Enter the number for your client server into the Code field.

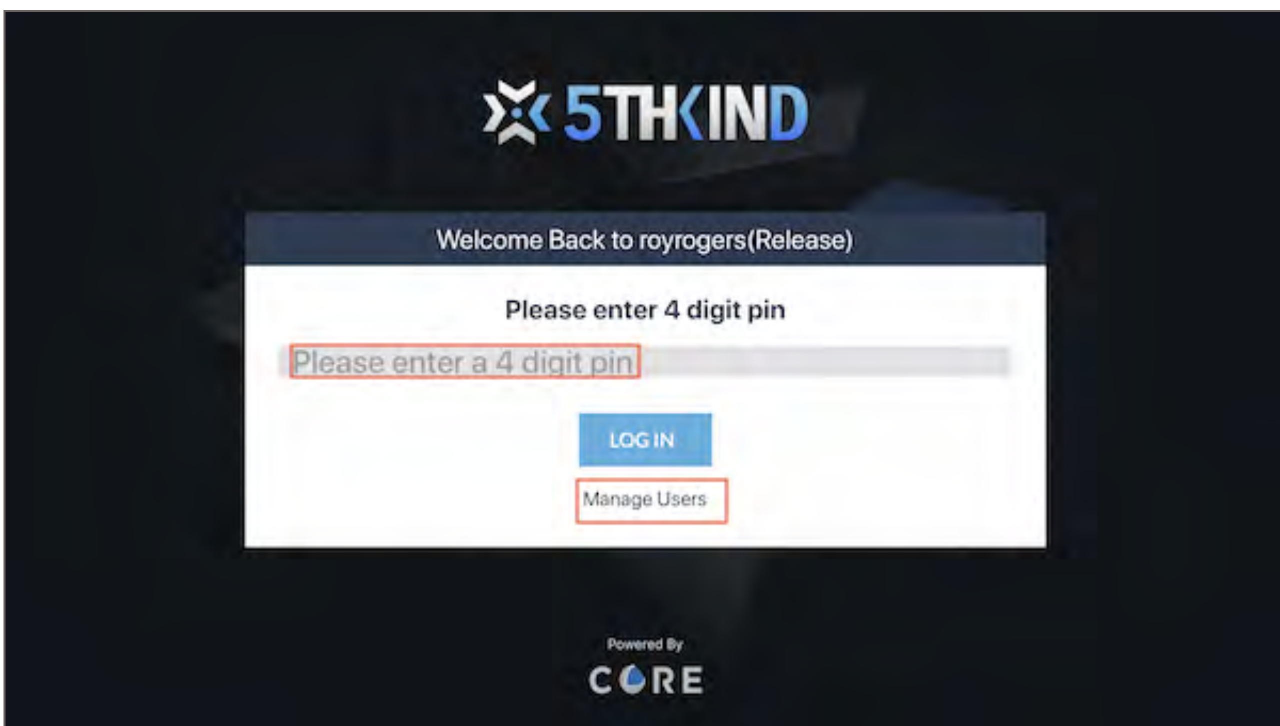
Logging in and How to Log in as another User (Managing Users)

Log In

When you restart the App, you will be welcomed, referencing your last login environment. To simply login again, type the PIN to enter, or to login as another User, click Manage Users.

Please Enter 4 Digit Pin - Enter PIN here

Manage Users - Click here to Select an Existing User, Delete an Existing User or Create a New User.



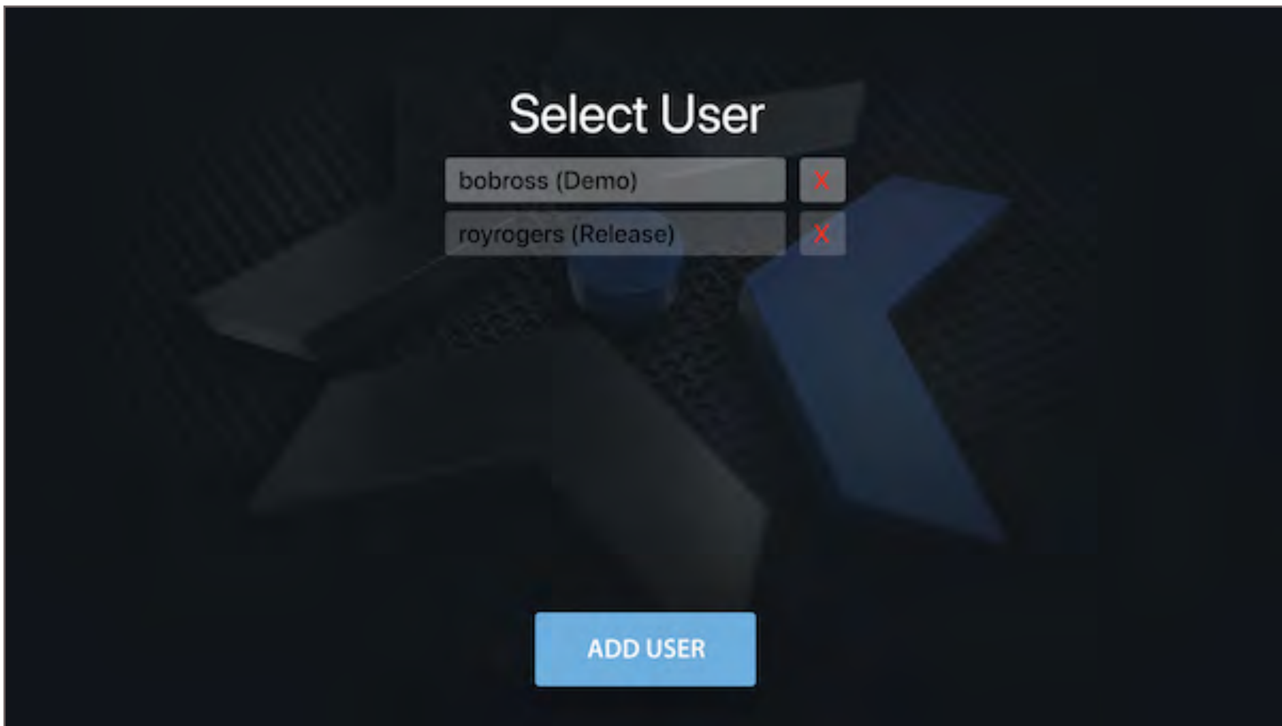
Managing Users

In this section, you can Select, Delete, and add additional Users.

Select Users - Click on User to enter the User Login Screen

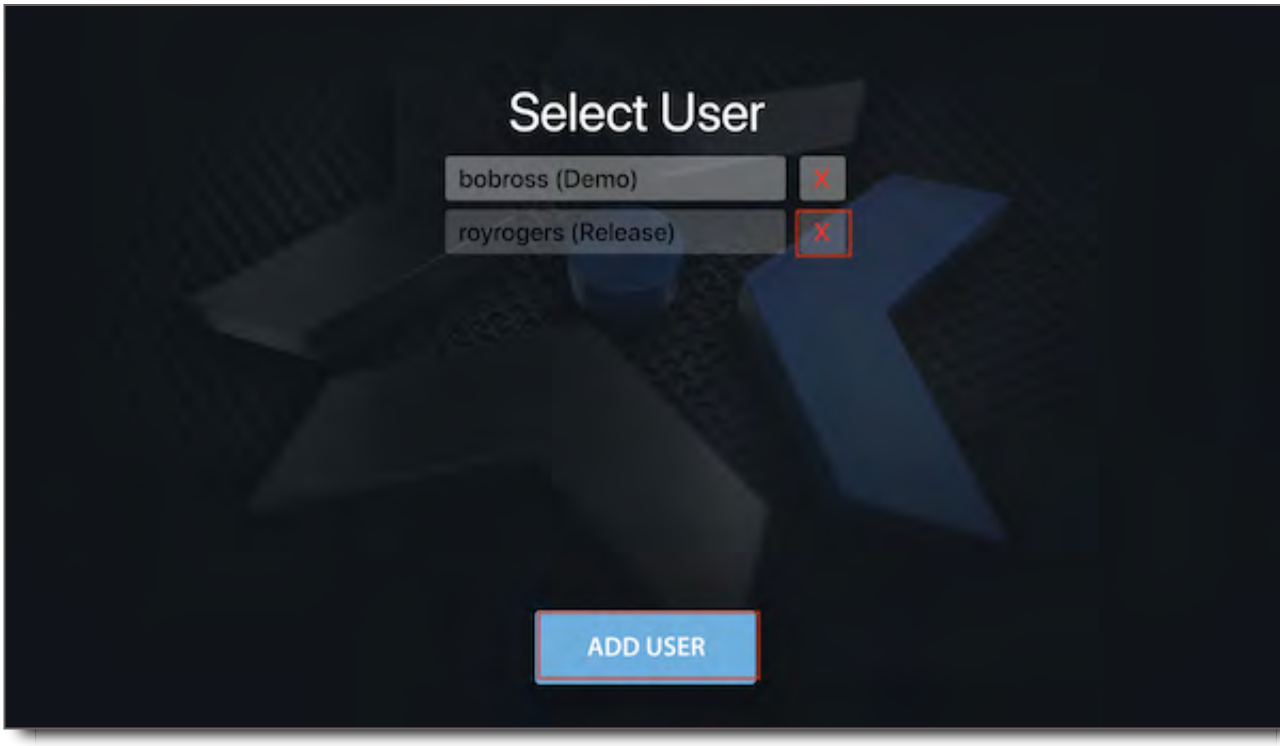
Delete (X) - Delete Users Configuration by clicking **X**

Add User - Click here to Add a new User Configuration with unique PIN



Forgotten PIN

If you have forgotten your pin, you will need to delete the configuration with the forgotten password the Select User Screen In this example, highlighted in red was the "royrogers"User was ready for deletion.

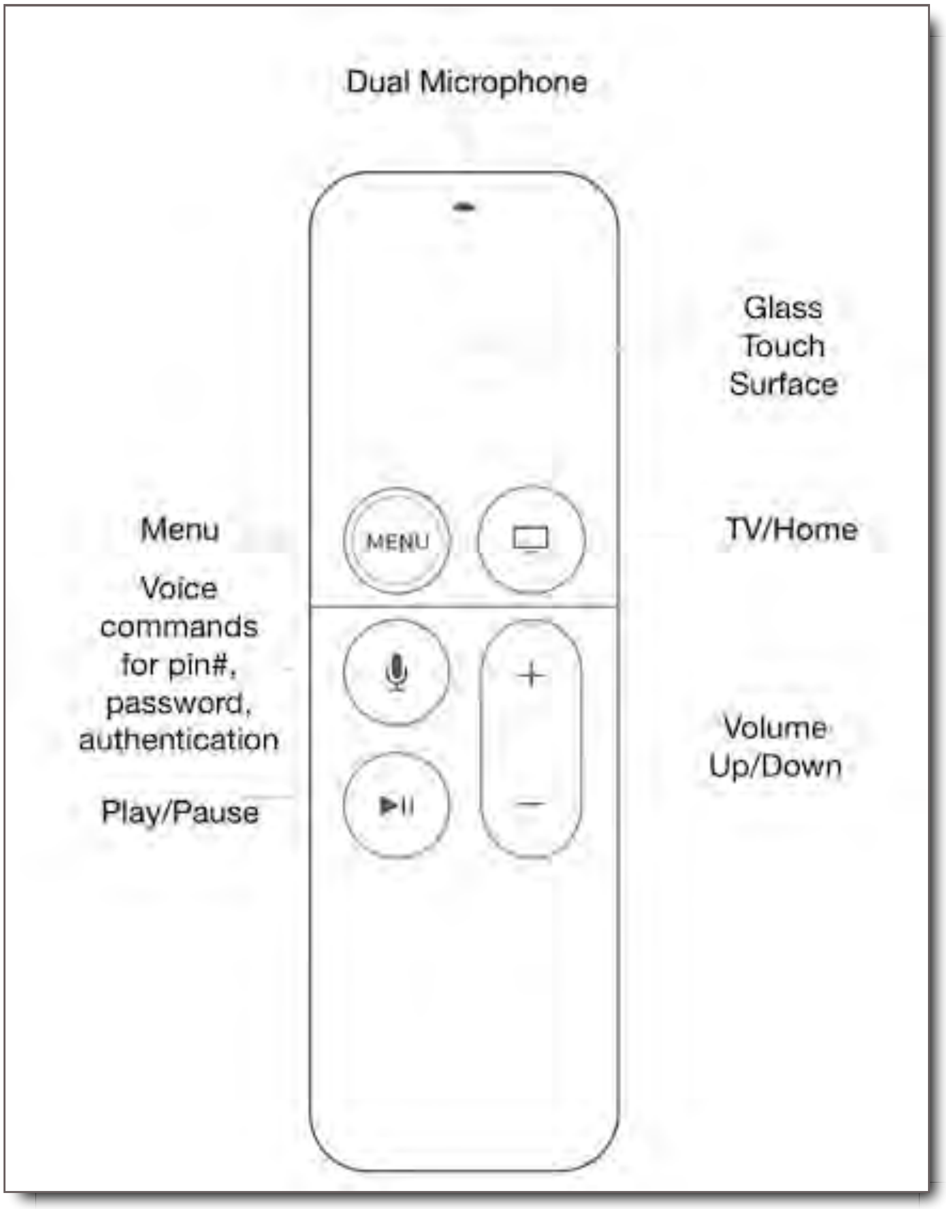


Then click "Add User" to create a new user configuration with unique PIN. You will then re-authenticate the Client Name, Username and Password to save your new User configuration.

App Controls

Use your Apple TV Remote to control the playback of your video.

Use your Apple TV Remote to control the playback of your video.



Play and Navigate Content

Select a Project

To navigate the screen, swipe up, down, left, or right on the remote's touch surface. To select a project, hover over the project thumbnail then click the center of the touch surface.

Select a Package

Swipe up/down to navigate project inbox. To select a package, hover over it then click the center of the touch surface.

Play, Pause

To play or pause content, click the center of the touch surface OR press ⏯

Fast Forward

Hold down the right edge of the touch surface during playback. Alternatively, press ⏯, then swipe right on the touch surface to track to a specific time code.

Rewind

Hold down the left edge of the touch surface during playback. Alternatively, press ⏯, then swipe left on the touch surface to track to a specific time code.

-10 Sec - During playback, click the left edge of the touch surface.

Skip to Next File

During playback, swipe right on the touch surface to skip to next file in a package

Skip to Previous File

During playback, swipe left on the touch surface to jump to the previous file.

View Package Contents

During playback, click the **MENU** button. A file thumbnails list will appear horizontally across the bottom of the screen. Swipe left/right to scroll through files. Click the center of the touch surface to select a file for playback.

Exit the App

1. To exit the App, click the menu button on the remote from the Main Projects Dashboard.
2. Click the touch surface to select “Continue” when you see the “Caution, Are you sure you want to leave

5th Kind CORE” alert.

- If you did not want to exit, select cancel to return to the App

Screener Application

The Screener App allows you to Stream videos from Packages to a pre-configured Apple TV. To allow streaming to an Apple TV using the Screener App, you must first configure it, and then give access to Users.

Configuring an Apple TV for the Screener App

Download the 5thKind Screener App from the Apple TV App Store, then open it.

You must enter the Client Name, the name of the Device, and the Registration Code. If you do not have this information, you can get it from your Administrator.

What's my Device Name?

If the TV or other device you're logging into hasn't previously been registered on CORE, contact your administrator for the appropriate naming convention before you register the app. If the device has been registered, your CORE administrator can give you the name to enter when "registering" your device, aka logging in.

What's the Login Code Number?

Contact your CORE administrator for the current Login Code Number.

Login After Set Up

If the Screener App is already registered with a device, when you open the app you should be logged in automatically.

Logout

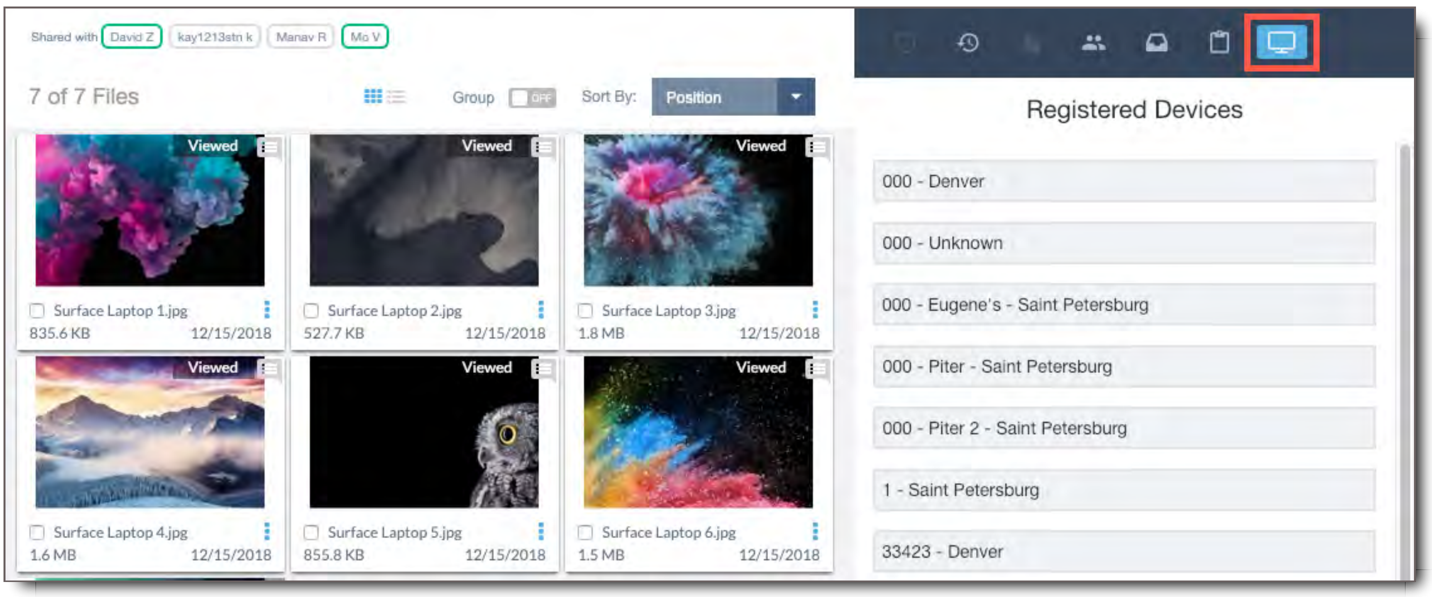
There's no logout option on the Screener App. Exit out of the app to close it. It will be registered with that device the next time a Screening Manager needs it.

Switch Client Servers

If you are an Admin, and you have more than one company, or you need to test the app on different environments, the Screener App doesn't yet have a simple logout screen. To switch client server environments, you need to uninstall and reinstall the application on the device you are testing.

Streaming Videos to Screener Devices

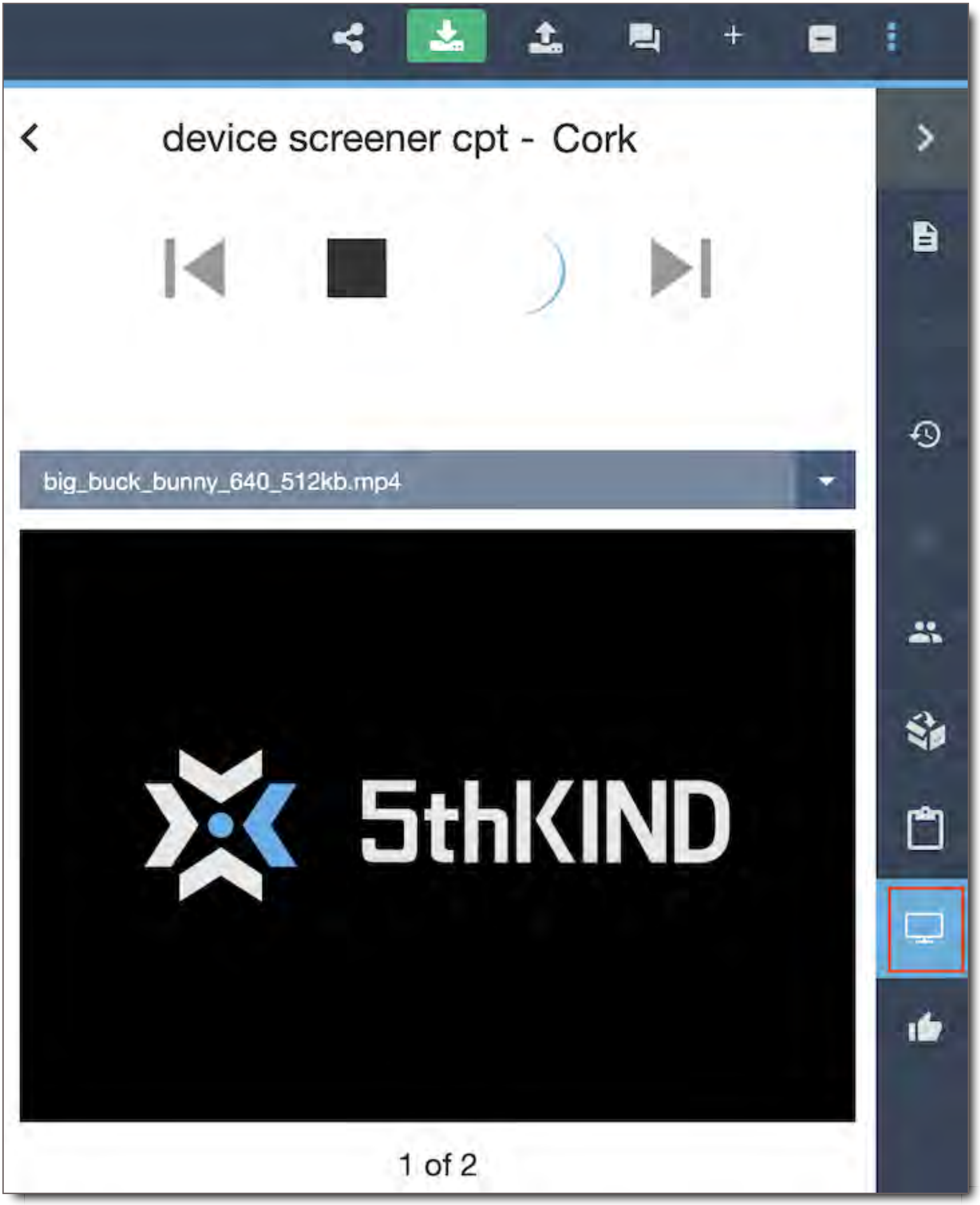
If your User Role gives you permission to stream to Screener Devices, you can do it from any Package.



When viewing any Package, click the icon to open the Screener Panel.

If you have the ability to stream to more than one Device, you will see the available Devices listed. Select one to proceed.

If you only have the ability to stream to a single Device, you will automatically be taken to the Screener Player.



The Player will automatically start playing the first video in the Playlist to the selected Device.

Screener App Controls

Click the ■ button to pause playback.

Click the ▶ button to resume playback.

Click the ⏭ button to play the next video in the Playlist.

Click the ⏮ button to play the previous video in the Playlist.

The icon of the currently playing video will be shown at the bottom of the Screener Panel.

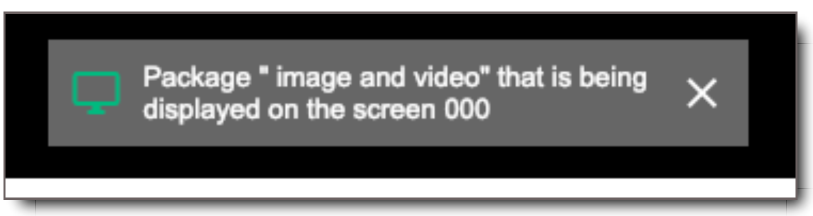
Selecting a Video to Play

To select a video to play manually, click its thumbnail in the Package, then click the ▶ button to start playing it.

Using the CORE While Streaming

You can continue to use the system as normal while streaming.

If you close the Package, you'll see a notification in the top bar containing the name of the Device you're currently streaming to.

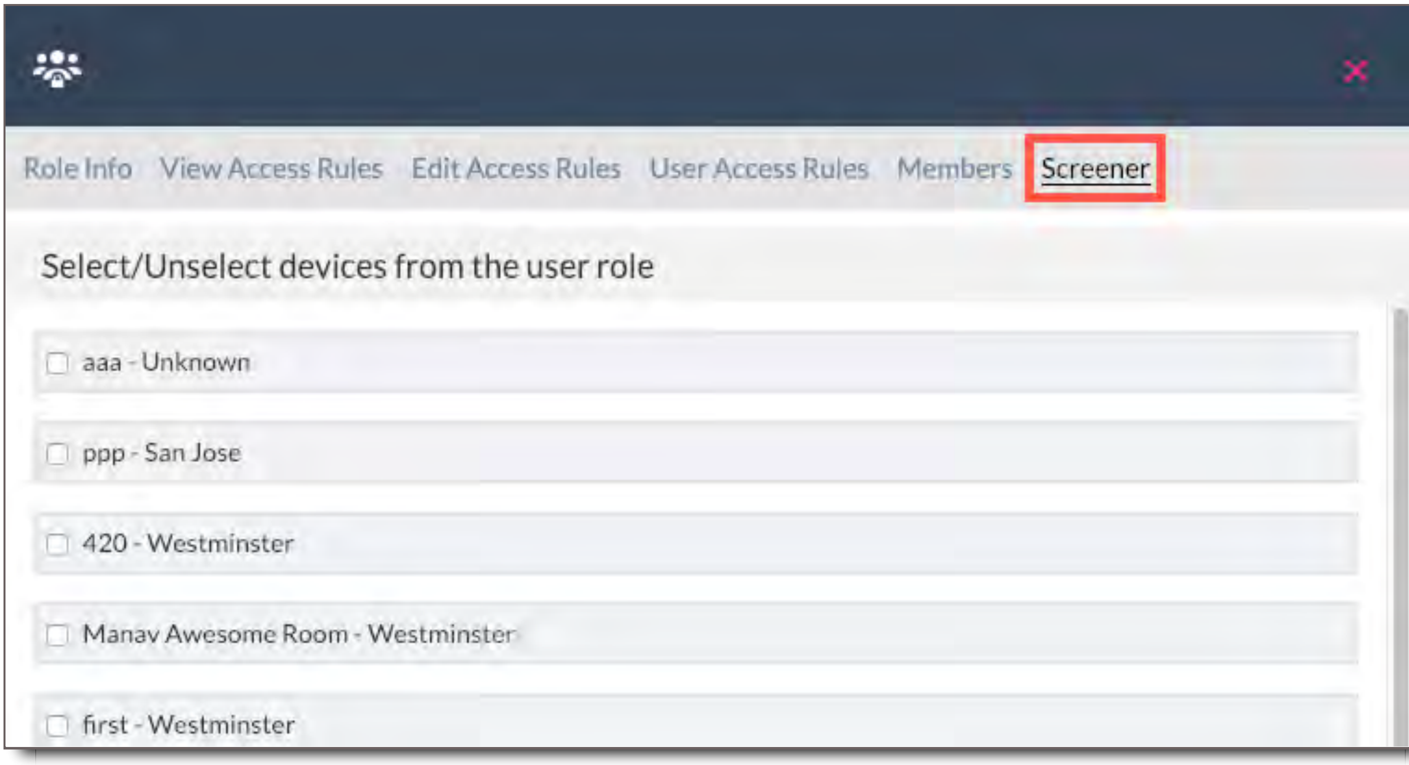


Click it at any time to return to the Package and the Screener Panel.

Click the ✕ button on it to stop streaming.

Managing Access to Screener Devices

Admins Only: To stream to a Screener Device, a User must be granted permission for it in their User Role.

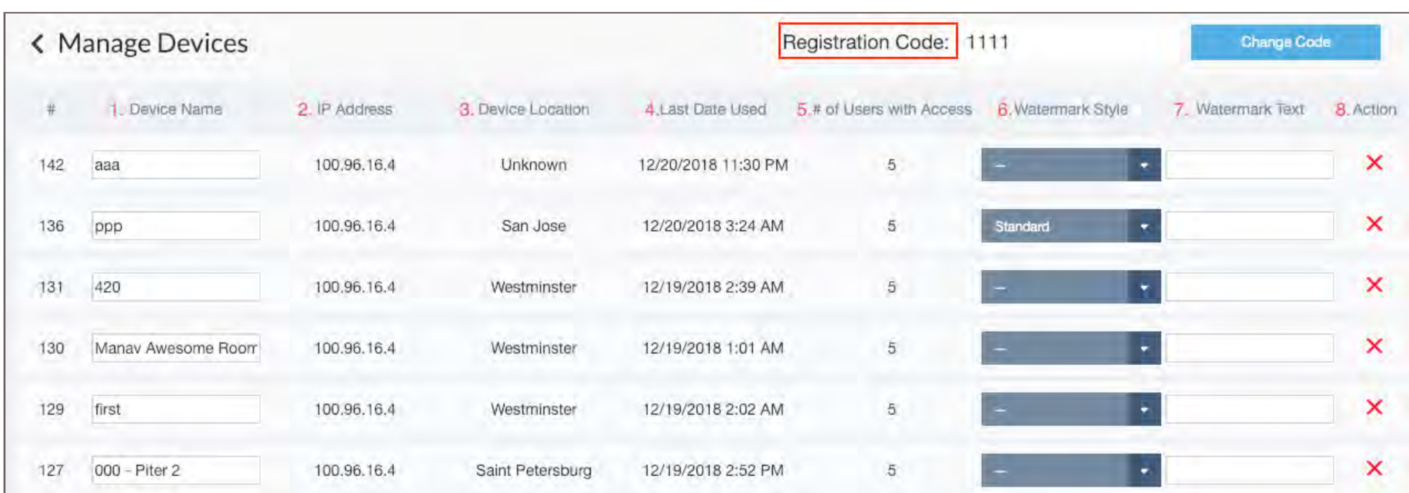


When viewing a User Role, click the Screener tab. Check the box of any Screener Device the Users should be able to stream to.

See User Roles topic for more information about creating and managing User Roles.

Managing Screener Devices

Admins Only: The Screener App Admin Panel allows you to manage registered Screener Devices.



Registration Code

Anyone registering a Screener Device must enter this code for security reasons. You can change it any time by typing a new code and clicking **Change Code**.

Devices

View your registered Screener Devices here.

1. **Device Name-** The name of the device. You can type a new name here to change it.
2. **IP Address-** The IP Address of the Screener Device.
3. **Device Location-** The city where the Device is located.
4. **Last Date Used-** The most recent time when someone streamed to the Device.
5. **# of Users with Access-** The number of Users in the system who are able to stream to the Device. See the next section for more details.
6. **Watermark Style-** The style of the Watermark that will be applied to videos streamed to the Device.
7. **Watermark Text-** The text of the Watermark that will be applied to videos streamed to the Device.
8. **Action-** Click the ✖ to un-register the Device. Once you do this, the Device can no longer be streamed to.

How to clear your cache

Clear your web browser's cache, cookies, and history

After product upgrades, bug patches, and general anomalies that affect how CORE looks in your browser, it's necessary to clear your browser's cache for the past 24-48 hours. 5th Kind recommends clearing only your browsing history, cookies, and image and file cache.

CORE Tips

- If the instructions below don't exactly match what you see, you may need to update your web browser to the latest version.
- If you don't see instructions below for your specific version or browser, search your browser's `Help` menu for "clear cache". If you're unsure what browser version you're using, from the `Help` menu or your browser's menu, select `About [browser name].` In Internet Explorer and Firefox, if you don't see the menu bar, press Alt .

Desktop browsers

Chrome

1. In the browser bar, enter: `chrome://settings/clearBrowserData`
   - (Alternatively, you can click the Menu ⋮ icon. Then More tools and Clear Browsing Data)
2. At the top of the "Clear browsing data" window, click `Advanced` .
3. Select the following:
   - `Cached images and files`
4. FFrom the "Time range" drop-down menu, you can choose the period of time for which you want to clear cached information. 5th Kind recommends `Last 7 days.`
5. Click `CLEAR DATA.`
6. Next refresh your Core browser window.

Firefox

1. From the `History` menu, select `Clear Recent History` . If the menu bar is hidden, press Alt to make it visible.
2. From the `Time range to clear:` drop-down menu, select the desired range; to clear your entire cache, select `Today.`
3. Under `History` , select all of the items to clear your entire cache (you do not need to clear the items under Data). Click `Clear Now.` Next refresh your Core browser window.

Safari

1. From the `Safari` menu, select `Preferences.`
2. A popup opens. Click on the tab `Advanced.`
3. Check the option `Show Develop menu in the menu bar` at the bottom. Now you should see a new menu item in the main menu named `Develop.`
4. Now click on the menu item Develop you can select Empty Caches from the submenu items.
5. Next refresh your Core browser window.

Microsoft Edge

1. In the top right, click the Settings icon ⋮ .
2. Click the History icon (looks like a clock), and then select `Clear browsing data.`
3. Select `Cached images and files.` Click `Clear.`
4. Next refresh your Core browser window.

Troubleshooting Login with Google Authenticator (MFA)

Google Authenticator is a two-factor (2F) or multi-factor authentication (MFA) software used to keep applications, like your Core account, more secure. Depending on your company's security protocols, you may be required to login to your Core account using Google Authenticator. To do so, download the Google Authenticator app on your smartphone (image below of the app icon).

Once you've downloaded the Google Authenticator app on your phone you will open the app and allow it to use your phone's camera so it can scan the barcode from the Core login page on your computer browser. Google Authenticator randomly generates a six-digit, one-time use passcode every 30 seconds so that your identity can be verified when logging in. If you enter an incorrect code into the login page of Core, you will get the message User provided invalid MFA login code.

Troubleshooting Tips:

Follow the troubleshooting steps below to resolve this error and log into Core:

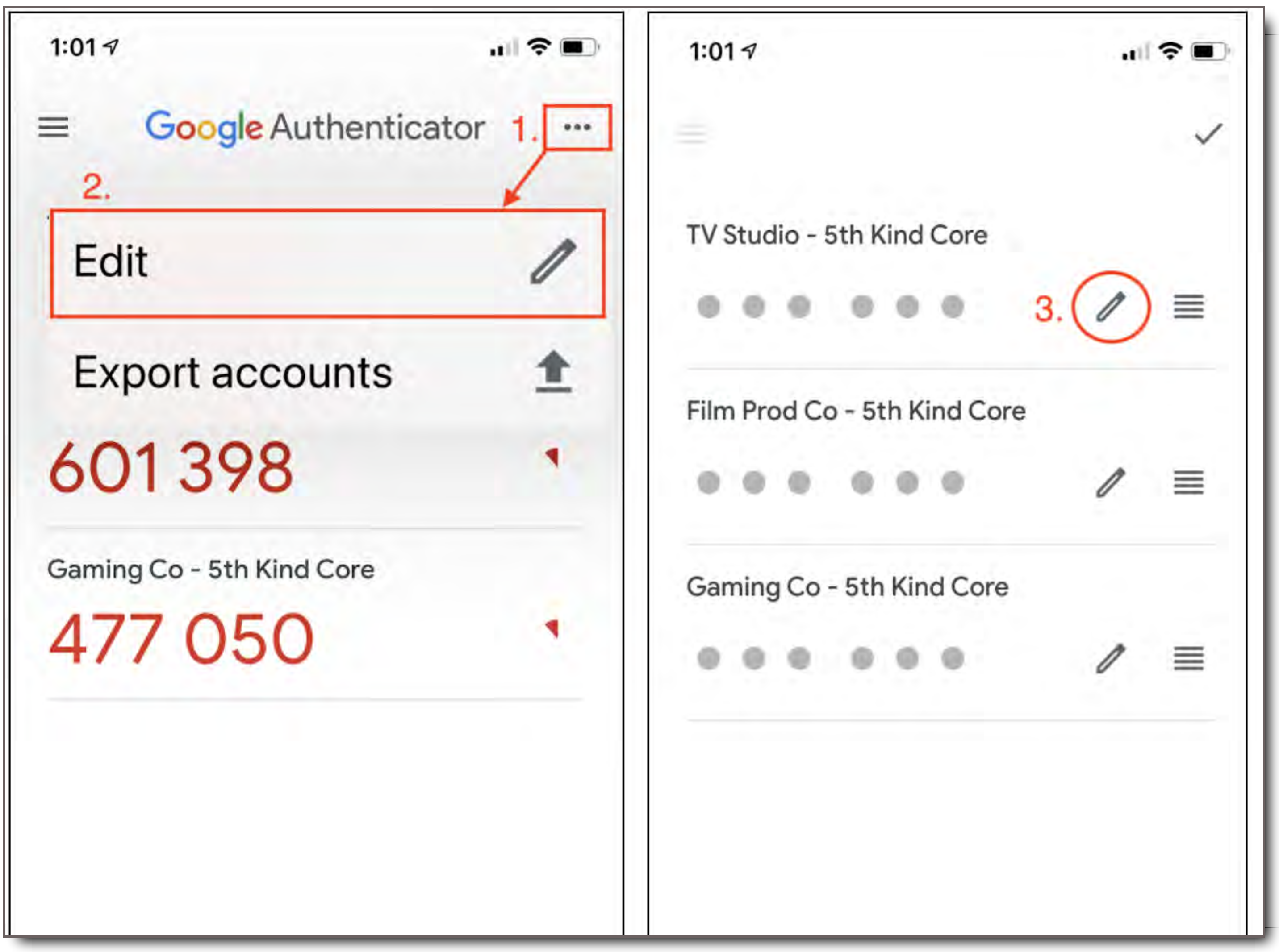
- The initial Google Authenticator set-up must be done on a computer with the Google Authenticator app downloaded on your iPhone or Android phone. For detailed instructions, visit our guide Multi-Factor Authentication & SSO
- The six digit code will change every 30 seconds and turns red as it's about to change. Give yourself plenty of time to enter and submit the code before it changes.
- The six digit code should be entered as XXXXXX with no spaces. The Google Authenticator App will present the six digit code with a small space in the middle. This is simply to make the number easier to

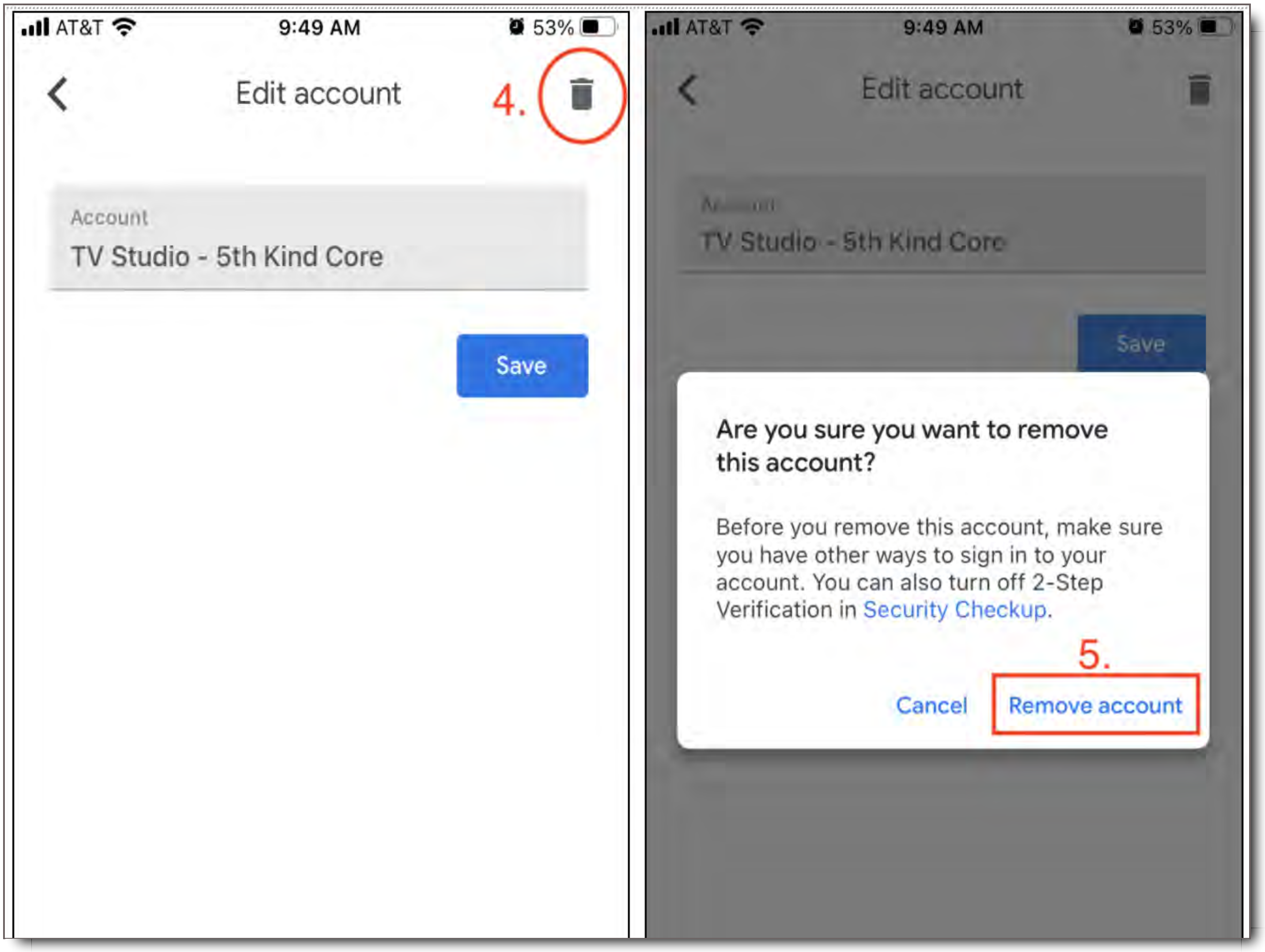
read.

- If you have reset your MFA and are logging into Core on the AppleTV or a mobile device immediately after, please close out the app and then open it again to refresh.
- If your MFA code needs to be reset for any reason, such as you purchased a new phone, you will have to scan a new barcode in Core on your computer. Once you scan the new barcode, you will see your Core environment appear again at the **bottom** of the list of codes (if there is more than one). To avoid confusion, it is always helpful to delete the old environment code(s) before you reset your MFA (visual guide below to delete old codes). A newly reset MFA code appears at the bottom of the list of codes if you have multiple codes on your phone.

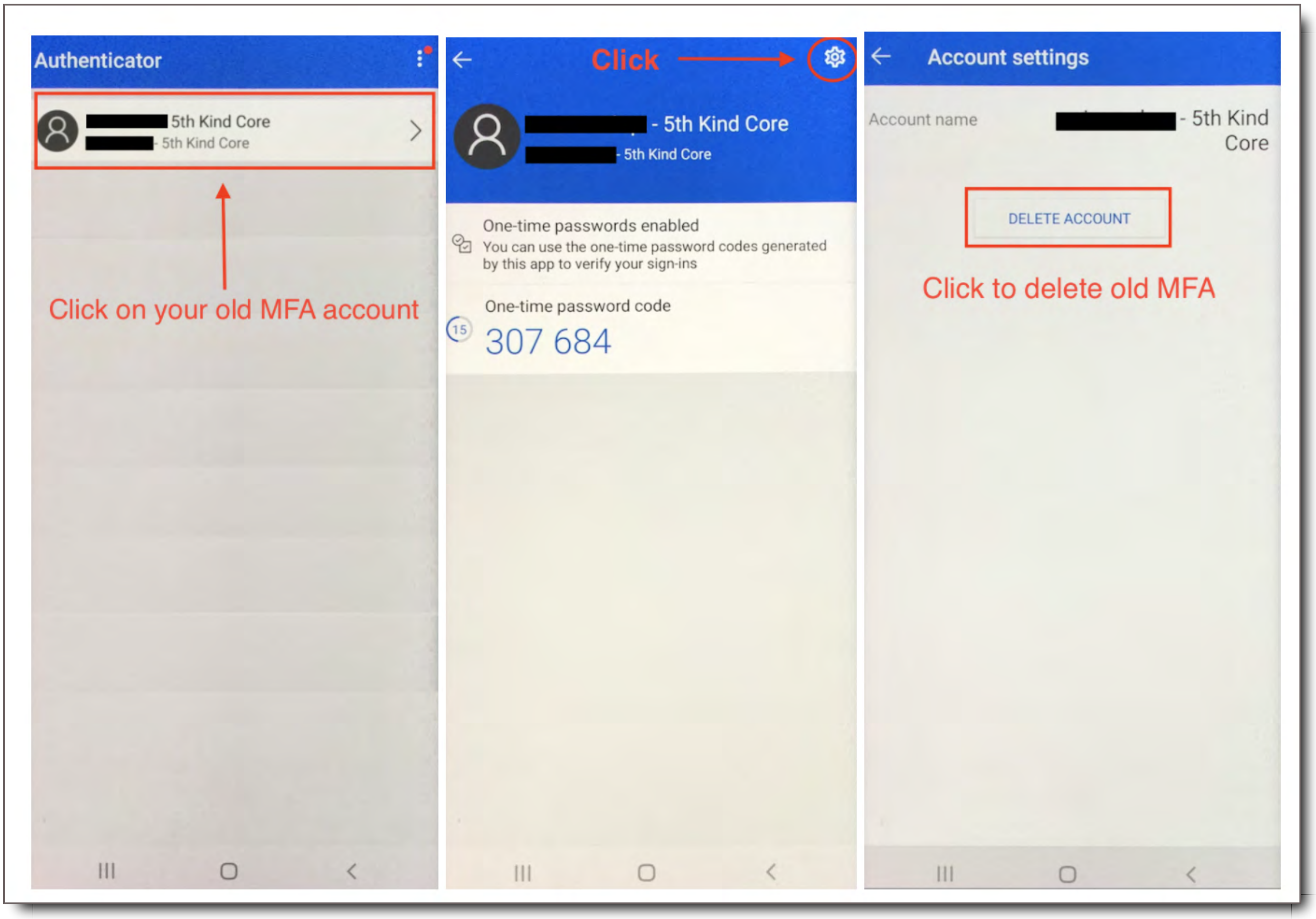
How to Delete Old MFA Codes

iPhone




AT&T 9:49 AM 53%
Edit account
4.
Account
TV Studio - 5th Kind Core
Save
AT&T 9:49 AM 53%
Edit account
Account
TV Studio - 5th Kind Core
Save
Are you sure you want to remove this account?
Before you remove this account, make sure you have other ways to sign in to your account. You can also turn off 2-Step Verification in Security Checkup.
5.
Cancel
Remove account

Android



If you have followed the tips above and are still having trouble logging in with MFA, then you may need to sync your phone with your computer. See Troubleshooting steps below on Syncing your phone time to your computer time.

Troubleshooting Next Steps:

Sync the Time on Your Phone to Your Computer

Since Google Authenticator is time based, the times on your phone and computer must match. To sync your phone, please try the following:

On iOS (Apple iPhone):

1. Go to the iPhone **Settings App** (your phone settings area)
2. Select **General**
3. Select **Date & Time**
4. Enable **Set Automatically**
5. If it's already enabled, disable it, wait a few seconds and re-enable

6. Enter the code in the Two-Factor Authentication box.

On Android:

1. Go to the main menu on the **Google Authenticator** app
2. Tap **More Settings.**
3. Tap **Time correction** for codes.
4. Tap **Sync** now.
5. Enter the code in the Two-Factor Authentication box.

Your phone and computer must be set automatically in the **same timezone**. Instructions to set the timezone on your computer will vary by type. Here are instructions for Windows and Mac OS.

Windows 10

1. Launch **Control Panel**.
2. Click on **Clock and Region** and then on **Date and Time**.
3. Make sure the shown Time zone is correct to your current location.
   - If not, click on Change time zone button to make proper changes.
   - Make sure **Automatically adjust clock for Daylight Saving Time** is checked.
4. Make sure the shown Date and time is correct.
   - If not, click on Change date and time button to make changes.
   - Select a proper month, date, and year. Then make sure the proper Hour and minute is chosen.

After making the adjustments click OK.

Mac OS

1. Click on the time in the upper right corner and choose Date and Time Preferences.
2. The Date and Time pop-up window will appear. Under Date and Time, make sure the box is checked for Set Date and Time Automatically.
3. Next, click on Time Zone and make sure the box is checked for Set Timezone Automatically Based on Location (Must be the same timezone as your phone).

If you have gone through the above troubleshooting steps and are still getting the Invalid MFA error message, please contact your system administrator to reset your Google Authenticator. Once reset, you will have to scan the new barcode the next time you log in to Core to receive your new code, which will be added to the bottom of the list within the Google Authenticator app.