Licenses

Documentation

Managers

ThirdLight

Overview

In Chorus's licensing system, some files provide licenses, while others use them. The files that provide licenses are usually agreement documents; the files that use licenses can be any file that contains licensed content, usually videos, images, or audio.

A license has a duration term that determines how long you can use the content for. It can also contain metadata with details about the license, and the content it is licensing. A duration term can be 'In Perpetuity', so never expire, but still be recorded in the system.

A license can be for any content that requires a license. Chorus lets you define any number of license types: talent, voiceover, videographer etc. Each license type can have an icon to help recognise it, and a different set of metadata.

To license a file, you create a license in an agreement file and then attach it to the file needing a license. Once the licensed file has a first-published date, the license gets an expiry date. The file will now expire when the license expires.

An agreement file can provide any number of licenses; a file can use any number of licenses. Any number of files can share the same license. For instance, all the images from a photoshoot can have a single license from one agreement. All files sharing a license will share its expiry date, so will expire together. The first of the files to be published sets the expiry date for the others sharing the license.

If a file has more than one license it will expire when the first of its licenses expires. A licensed file can pass its licenses onto another file that requires licenses. This allows you to license content that appears in other content, for instance audio within video. We refer to these files as 'intermediaries'.

Intermediaries can be used to group licenses together that are usually used together. This can save time when attaching licenses. For instance, if a model and her tattoos have separate licenses you can create an intermediary file for her and use it to manage both licenses together.

When you publish content, you can use the final content file as an intermediary to record all the places it is published. You create proxy files (perhaps with a screenshot of the published content) and attach the final content to them. You then add each date it was published to the proxy files. For instance, you can create a proxy file for YouTube, Twitter, Instagram, etc. The first proxy file published will set the expiry date for the content file it represents, which in turn will set the expiry date for all the licenses attached to it.

Licensing Spaces

You create and manage licenses in the space where you store your agreement files: the **providing** space. You can apply licenses from the license providing space to the files in any space you can access that is a licensing space.
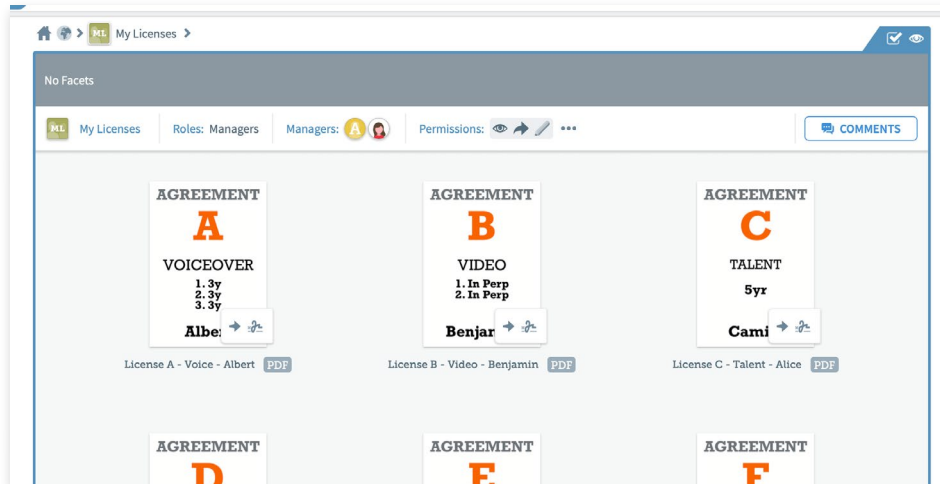
In most cases, a single license-providing space will be sufficient. However, if you have more than one licensing team, or have to manage some license types together (for instance by region), it is possible to dedicate a space for each.

Only members of the licensing team, with permission to view the agreement documents, should be members of a license providing space.

License Managers

Managers of a licensing space are license managers. They can create license types, upload and addend agreements, create licenses on agreements, and apply licenses to any file they can access in other spaces. They need access to the license-providing space.

## Where should you store the licensed content

You shouldn't store the content files (videos, images, audio) in the same space as the agreements. Only the licensing team needs access to the agreement documents and licenses can be applied to files in any space that is a license **using** space.

If the people creating and publishing the content need to see the licenses they can be given permission to view them. Everyone will be able to see that a file has expired.

Expiry Warnings

A grey license is not in use. When you publish a file that uses the license, the license turns green. As a license approaches its expiry date it will turn amber, then red, before finally expiring, whereupon it takes on a red striped appearance and all files using it expire.


Licenses in various states
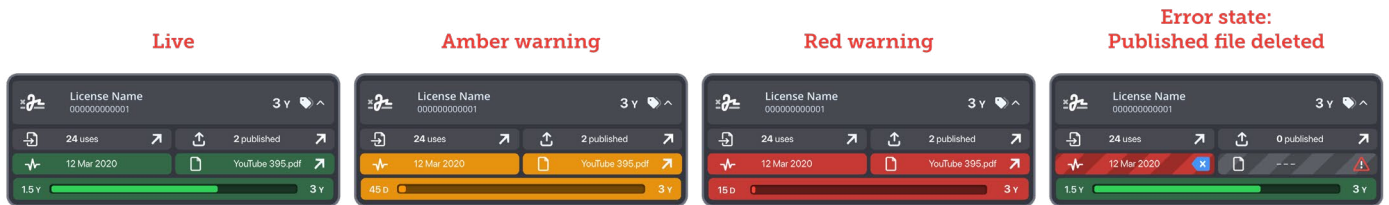
Each license type can have unique expiry warning periods. This is to accommodate different levels of difficulty, and time required, to renew a license. It is for this reason we use the terms 'Red' and 'Amber' warnings rather than, say, 15 and 45 days. When looking at a report, two files in the amber or red section could have different periods until expiry.

Default warning periods can be set in the site settings. Each license type can override the site defaults.

Warning periods run concurrently, so an amber period of 30 days and a red period of 15 days will trigger 30 and 15 days before expiry. The amber period should be longer than the red period.
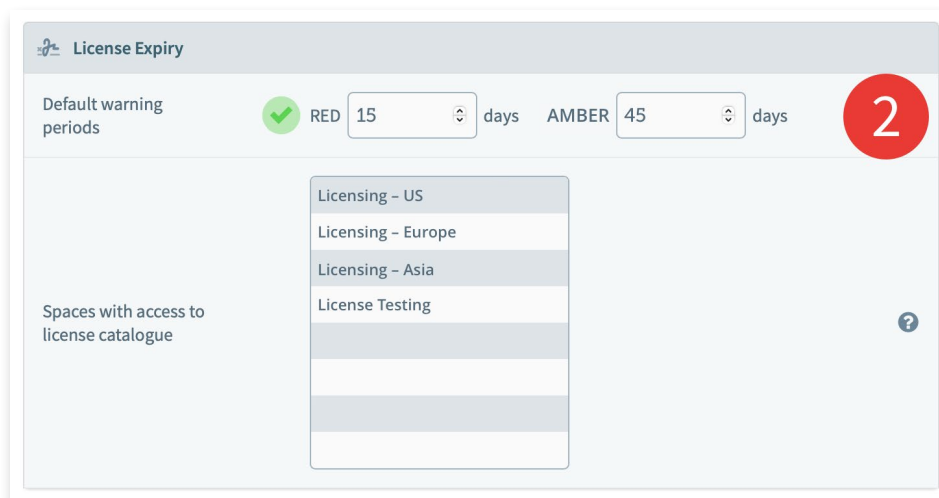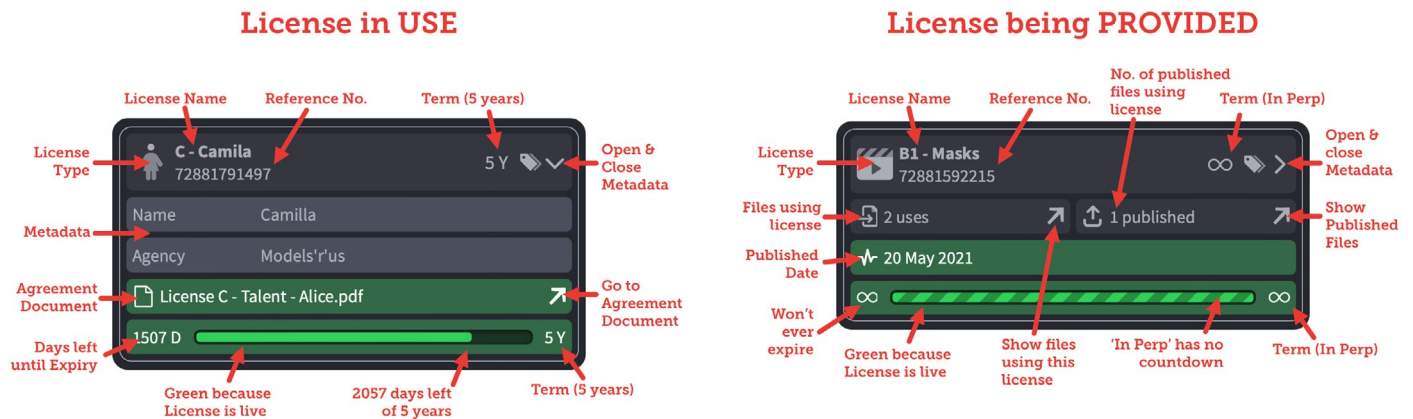

1. Go to Admin > Site > License Expiry > Default Warning Periods
2. Enter the number of days for each period and hit Save.
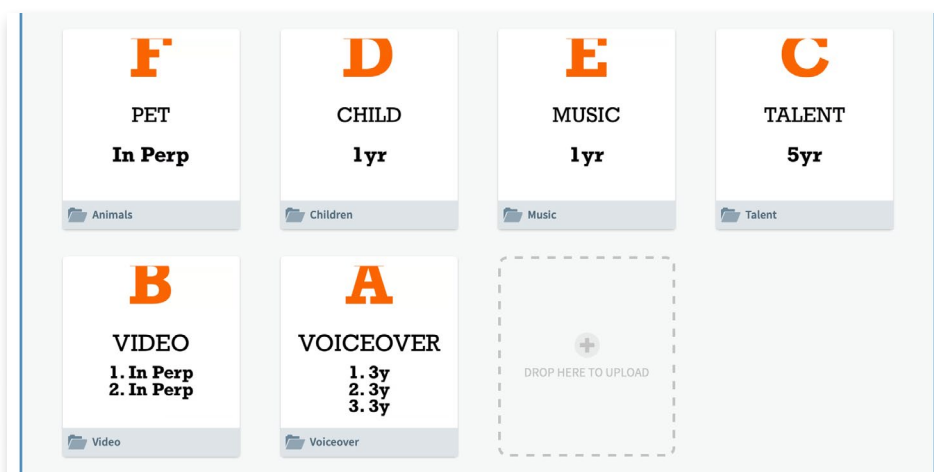
Provide vs Use

Agreement files provide licenses. Other files use licenses.

A file can only be in one of these two modes so, in the UI, the file's license tab can only be in one of these two modes. As long as a file provides a license, or uses a license, it will be locked into that mode.

License in USE

License Name · Reference No. · Term (5 years)

License Type · C - Camila · 72881791497 · 5 Y · Open & Close Metadata

Metadata · Name · Camilla · Agency · Models'r'us

Agreement Document · License C - Talent - Alice.pdf · Go to Agreement Document

Days left until Expiry · 1507 D · 5 Y

Green because License is live · 2057 days left of 5 years · Term (5 years)

License being PROVIDED

License Name · Reference No. · No. of published files using license · Term (In Perp)

License Type · B1 - Masks · 72881592215 · ∞ · Open & close Metadata

Files using license · 2 uses · 1 published · Show Published Files

Published Date · 20 May 2021

Won't ever expire · ∞ · ∞

Green because License is live · Show files using this license · 'In Perp' has no countdown · Term (In Perp)

Agreement Folders

If you have many agreements to manage, we recommended that you organise them into folders based on the type of licenses in the agreements and who is providing the licensed content. You can then use folder metadata to pre-fill the licenses as you create them.


F PET In Perp — Animals

D CHILD 1yr — Children

E MUSIC 1yr — Music

C TALENT 5yr — Talent

B VIDEO 1. In Perp 2. In Perp — Video

A VOICEOVER 1. 3y 2. 3y 3. 3y — Voiceover

DROP HERE TO UPLOAD

Setting up the licensing spaces

Before you can use a space to manage licenses, a site manager needs to give the space the 'manage licenses' ability.

See the Admin document for more details.

Setting up Metadata

Each license type should have an associated metadata panel to contain information about the license and the provider of the content. We recommend you create these before creating the license types. However, you can edit the panels afterwards.
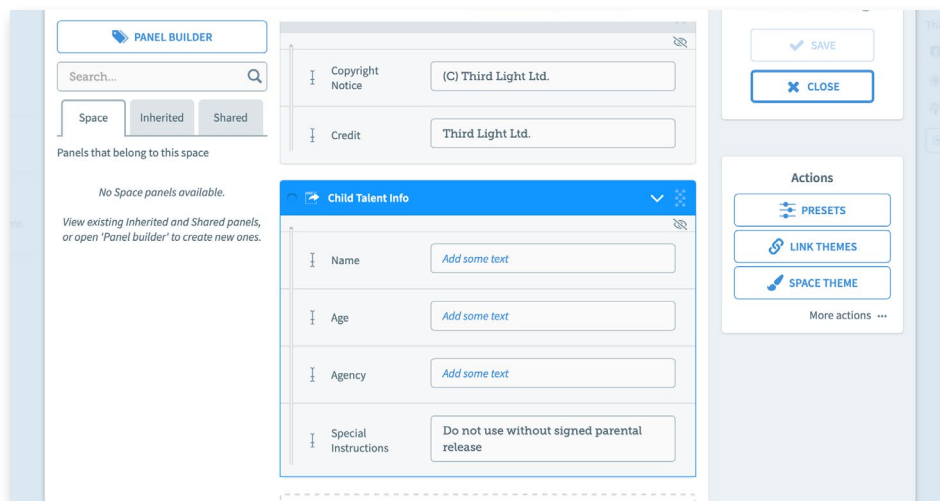
You do not need to apply these panels to the space itself; you should, however, apply the panels to any folder you want to apply folder metadata to.

We recommend using clear, consistent panel names, that can easily be distinguished from normal metadata panels. For instance: Talent Info, Voiceover License.

If you have licence types that are subtle variations of each other, you can use the same metadata panel for all of them.

Field Names

You do not need to make separate fields for common metadata fields like name, title, copyright, etc., so use `name` rather than `talent-name`, `copyright` rather than `video-copyright`.

Primary Licenses

Each content file can have a primary license that shares its metadata with the file metadata. This is useful for managing credits and copyright strings. Metadata in primary licenses can be searched for.

If a file has the same field in its file metadata and its primary license metadata, the value will show in both places. If you edit the field in the file metadata, it will override the value in the primary license field. This is useful if you, or the person using the file (who might not be a license manager), needs to change a value without affecting the license.

Creating a licensing space

A licensing space is a space with the **Use Licenses** and **Manage Licenses** setting on.

If you don't have a suitable space, ask a site admin to create one for you, and to give it the ability to use and manage licenses.

All members of the licensing team who will be managing licenses should be managers of the licensing space, so should be in the managers' role for the space. To add people to the managers' role.

1. Go to your licensing space
2. Manage > This space... > People Tab
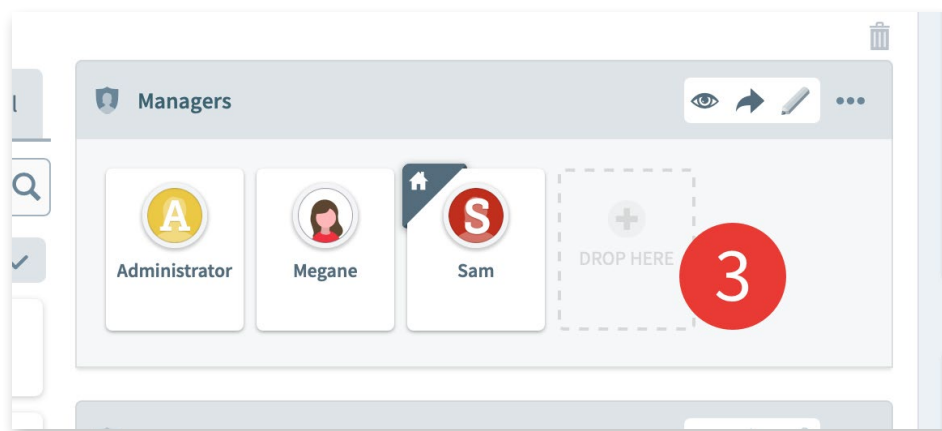
3. Drag the people you want to manage licenses into the Managers' role and click Save.

Creating metadata panels for license types

You can put any type of information about the content and the license provider in a license's metadata. This is a good way to manage credits and copyright strings.

1. Select your licensing space and go to Manage space... > Metadata Tab
2. Open the Panel builder
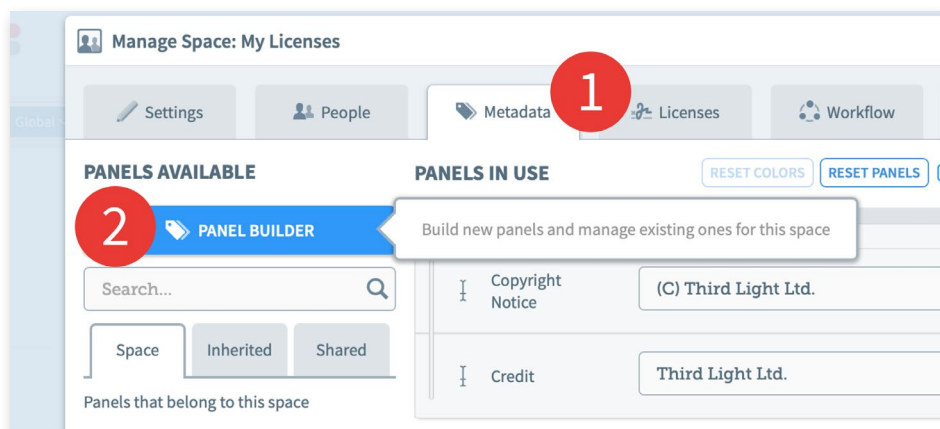
3. Click New Panel
4. Give it a clear, consistent name, e.g., Talent License or Model Info
5. Drag fields into the panel
**6.** Click Save and close the modal.
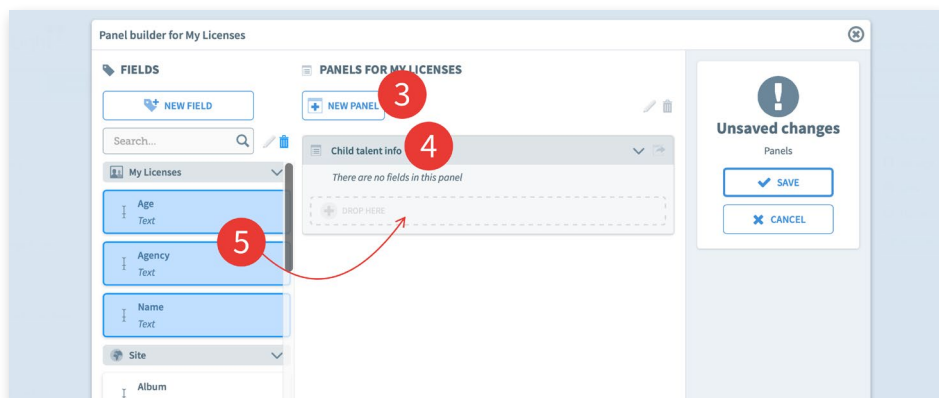
7. It will take you back to the Metadata's tab. The new panel will show under the Panels available section. You do not need to add the panel to Panels In Use.
8. Close the Space Manager.

Creating license types

Each licensing space can create and manage different license types. Licenses of these types can be applied to any file in the site. To create a license type:
1. Select your licensing space and go to Manage space… > License Tab
**2.** Click New License button
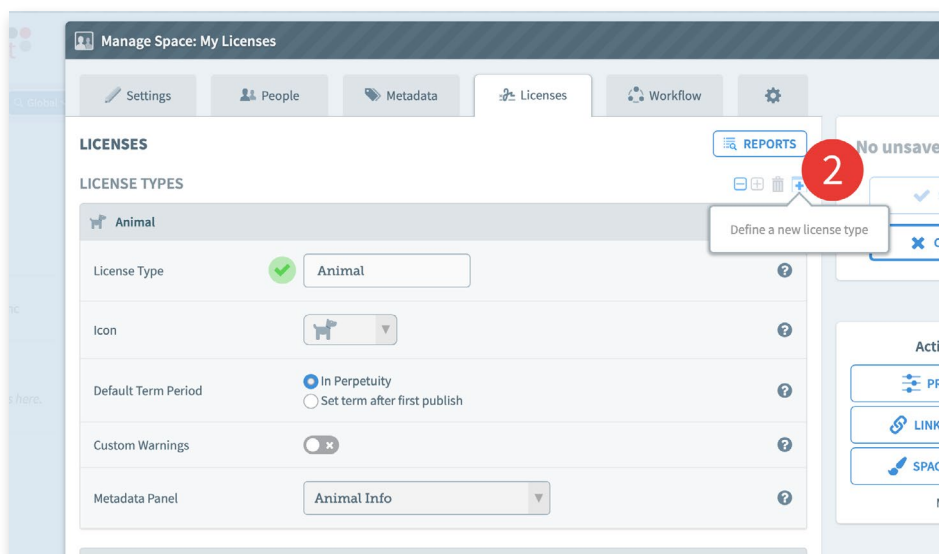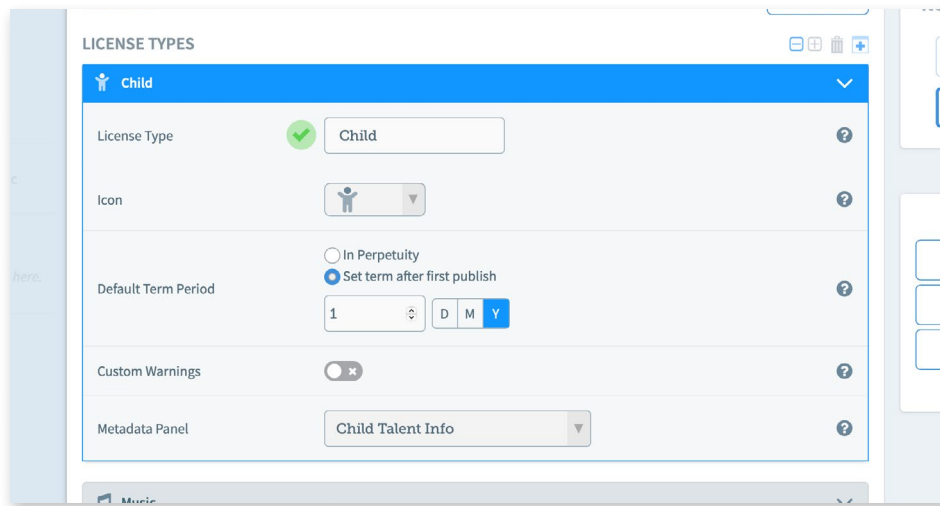
3. Give the license type a unique name
4. Choose a suitable icon that is meaningful to your team. More than one license types can use the same icon.
5. Set the default term period for this license type. (Individual licenses can override this.)
6. If needed, change the expiry warning periods
7. Select a metadata panel (see Creating metadata panels for license types)
8. Click Save

Uploading an Agreement Document

Your agreement files must be kept in your license providing space.

Before uploading agreement documents, it is worth considering how you want to organise them. We recommend considering a folder structure that allows you to easily apply folder metadata to the agreements. Folder metadata applied to agreements will be applied to any corresponding license metadata within the agreement. This will save you a lot of form filling when creating licenses. (See Creating a folder with default licensing data, below.)
Note: Agreement files must be PDFs
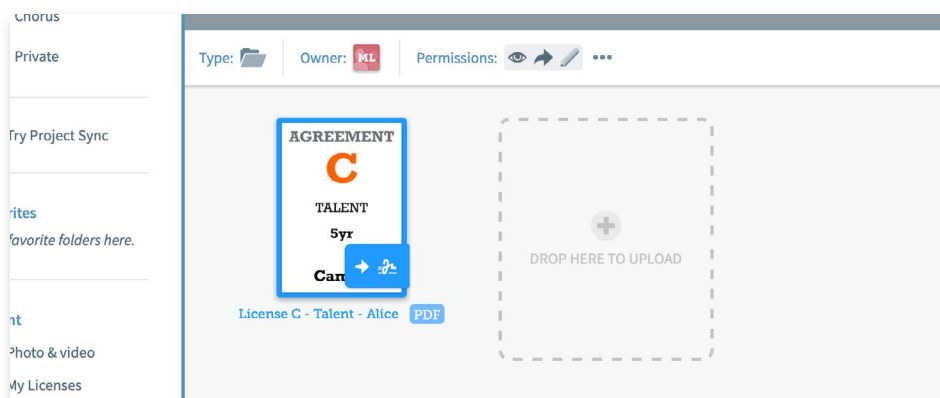
To upload agreement documents:
1. Navigate to where you want the agreement documents to be kept
2. Drag and drop one or more PDF agreement file from your desktop, or click on the plus icon to add files from your desktop

Creating licenses on an Agreement Document

You must create license types before you can create licences.
Note: Before creating licenses, consider using folder metadata to autofill the license metadata.

To create a license:
1. Open the agreement document and go to the licensing tab.
2. Click Edit Licenses to start edit mode. Edit mode will remain open until you click close, below.
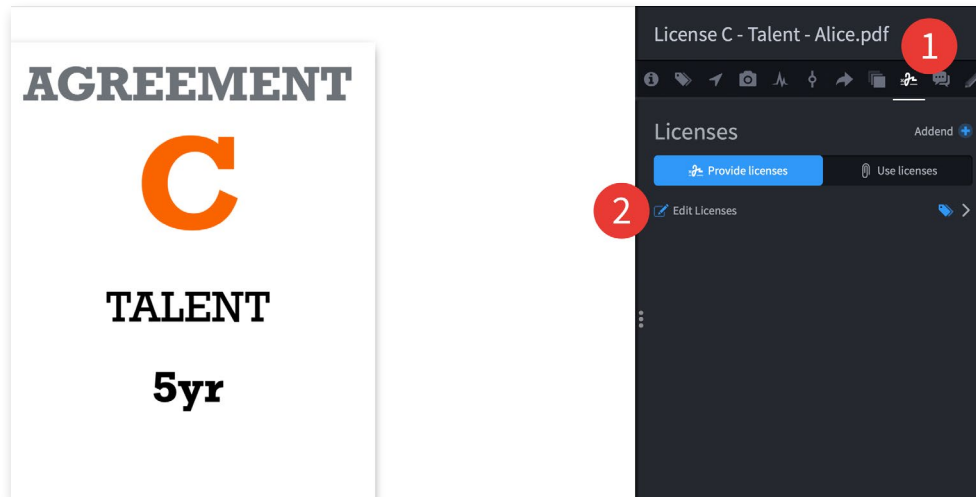
3. Click New to create a new license
4. Enter a name, preferably unique, though every license will get a unique reference to help to cross-reference with other systems
5. Choose a license type
6. Click Save to load the default term and attach the correct metadata panel.
7. If the metadata fields don't show, click on the opener
8. Fill out the metadata
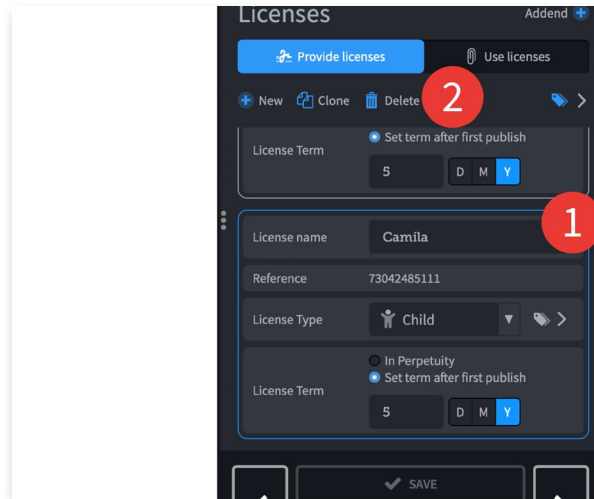**9.** Change the term if needed and click Save.
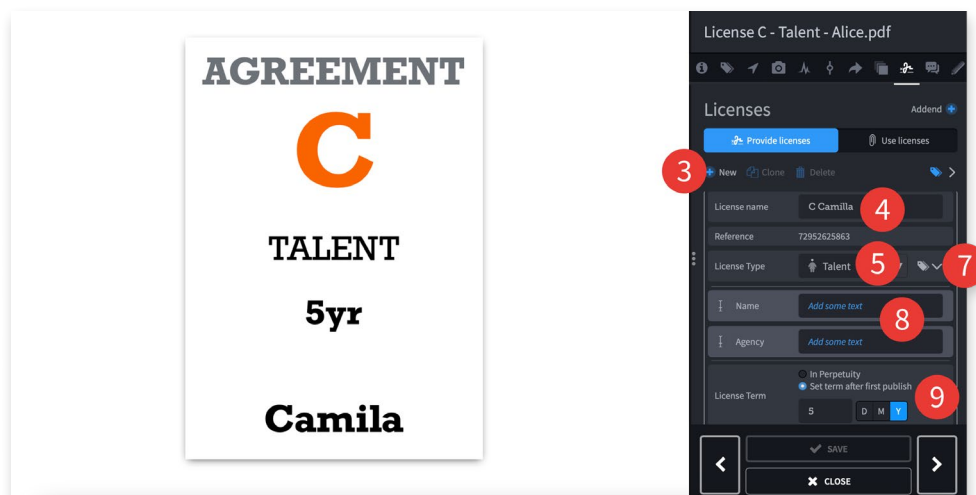
To create another license, clone it (see below).

Deleting a license

If you need to delete a license:
1. Select the license, it will become highlighted
2. Click on delete, the license will vanish, but won't be deleted until you save the change
**3.** Click Save

Deleting a license that is in use can leave files in a published—but unlicensed—state.

Creating a folder with default licensing data

We recommend using a folder structure that allows you to easily apply folder metadata to the agreements. Folder metadata applied to agreements will be applied to any corresponding license metadata within the agreement. This will save you a lot of form filling when creating licenses.

For instance, if you create a folder for each license type, you can use folder metadata to set defaults for the license metadata for each license type. If you create folders within for each provider of licenses of that type, you can override these defaults and add other useful information like copyright and credit.
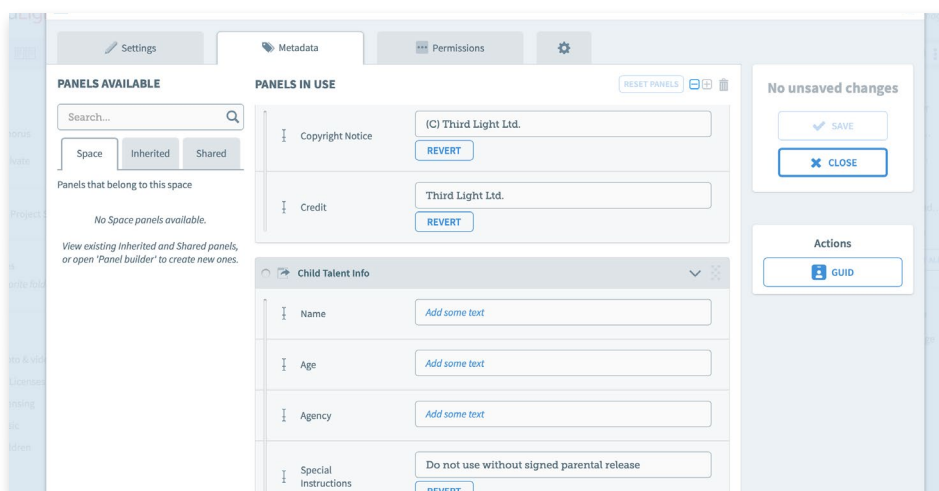
Note that you do not have to use the same panels on the folders as the licenses—it is the fields within the panels that get shared. So, as long as a panel has the same field, the file will get the default data.

This can be a powerful way to work. By combining folder metadata with primary licenses you can change the credits for hundreds of files simply by changing the metadata on one folder.

To apply folder metadata to agreement documents:
1. Create the folder to hold the agreements
2. Select the folder
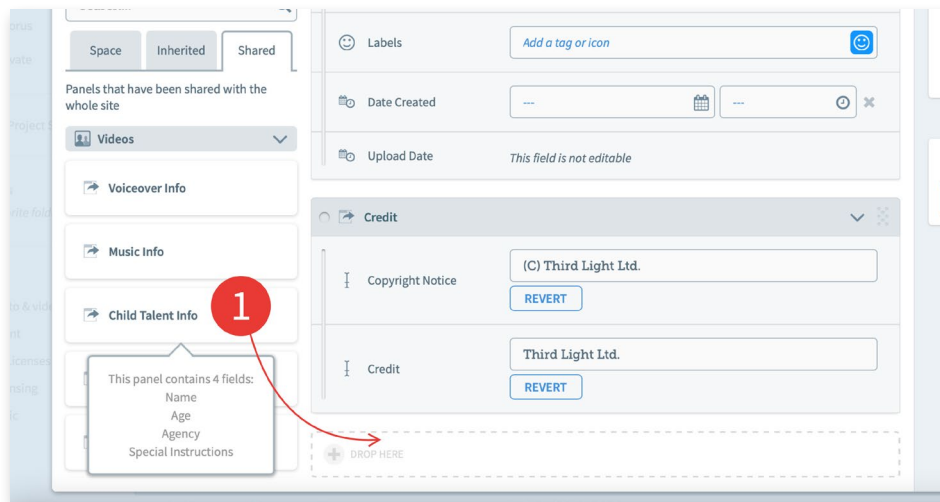
3. Click Edit... > Metadata
4. Drag the appropriate Panel to Panels In Use
5. Enter the default metadata for all agreements in this folder. You can leave any field blank.
6. Click Save

To create more specific defaults, and fill in the blanks for an individual license provider, create another folder within it and repeat the process. Again, it is fine to leave blanks.

Multiple licenses from a single agreement

An agreement file can contain any number of licenses. For instance, a voiceover artist could record five voiceovers in a single session, each requiring a separate license. The details for all five licenses can be contained within a single agreement document.
In this case, we create five licenses in the agreement file, so the document can provide five separate licenses, each with an independent expiry date. One license expiring will have no effect on the other licenses in the agreement.

Cloning a license

When creating more than one license on a single agreement file, we recommend filling out all the metadata needed before cloning the file. This will ensure that the metadata gets cloned too.

To clone a license:

1. Select a previous license, it will become highlighted

2. Click on clone to create a duplicate

3. Modify the title

4. Click Save to load the metadata and terms

5. Modify the metadata

6. Change the term if needed.

7. Click Save
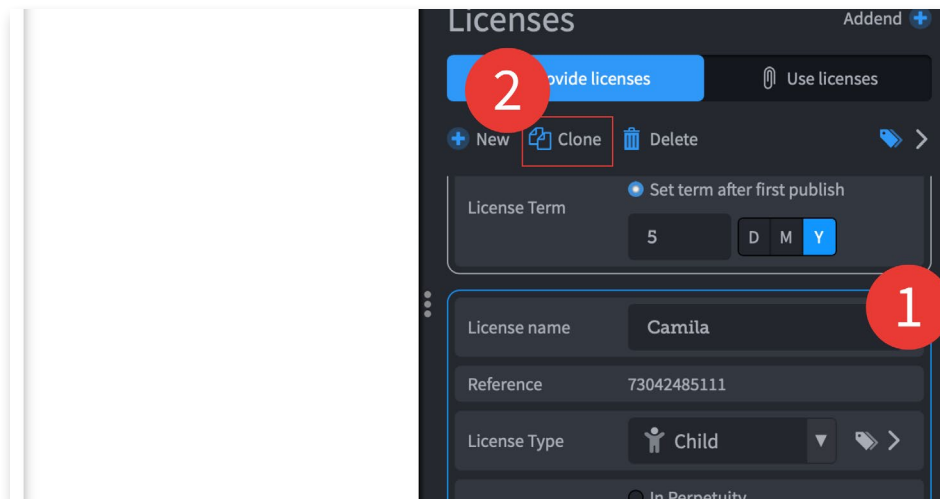
Applying licenses to a file

You apply licenses to content files similarly to how you attach files to each other. However, license attachment has a new menu action to differentiate it from normal file attachment. To attach a single license in an agreement file to a content file that needs that license:

1. Select the file containing the license
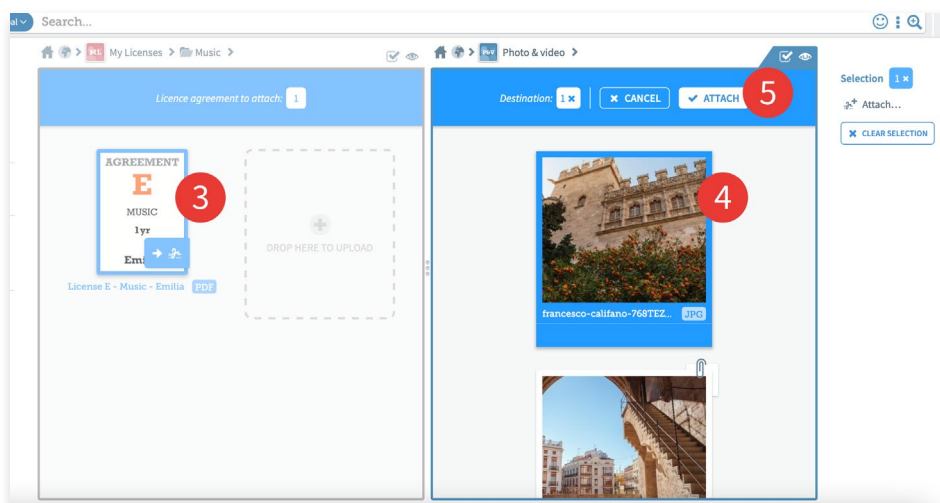
**2.** Click Licenses > Attach licenses from...

3. A two pane view will open. The file you selected will be highlighted.

4. In the other pane, navigate to and select the content file you want to apply the license to

5. Click Attach

6. The file will now use the license

Note: If the agreement file contains more than one license, the content file will now be using all its licenses. (See below how to select a single license.)

Selecting the correct license when an agreement provides more than one license

By default, all the licenses an agreement provides will get used when attached to a file. If an agreement provides more than one license, you can remove the licenses you don't need by editing the licenses and unticking some.

1. Double-click the file that uses the licenses to open it
**2.** Click on the licenses tab
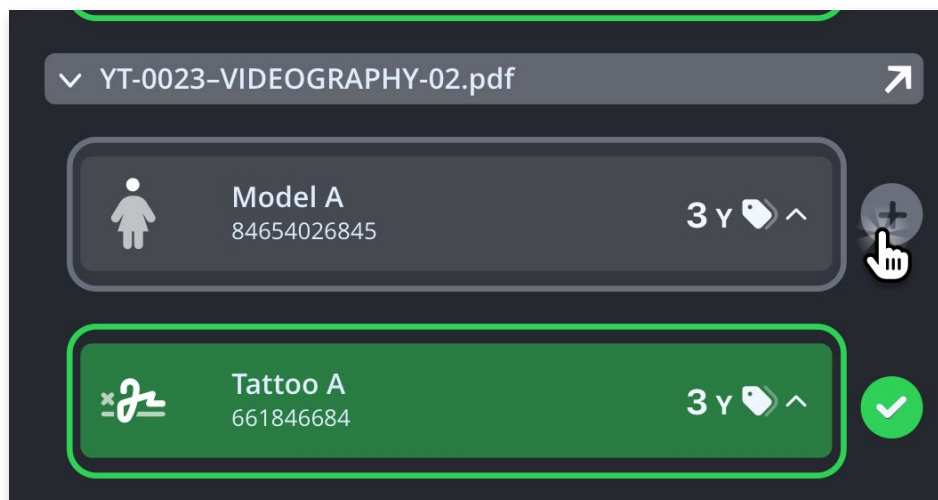
3. Click on Edit licenses
4. Find the agreement file listing and deselect the licenses you don't want, leaving just the license you want with a green tick next to it
5. Click on Save

Setting a Primary License

Each file that uses licenses, can have a primary license that shares its metadata with the file's metadata. To set the primary license:
**1.** Go to a file's licenses tab
2. Edit licenses
3. Mouse-over the licenses to reveal a blue star
4. Click on the blue star to choose the primary license and click Save.
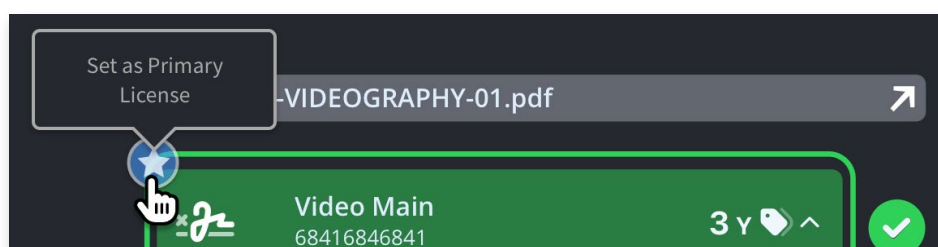
Applying a license to multiple files

If you have a single license that covers content in more than one file, for instance one license for a whole photoshoot, you can attach the license to all the files. To do this:
1. Select the file containing the license.
2. Click Licenses > Attach licenses from...
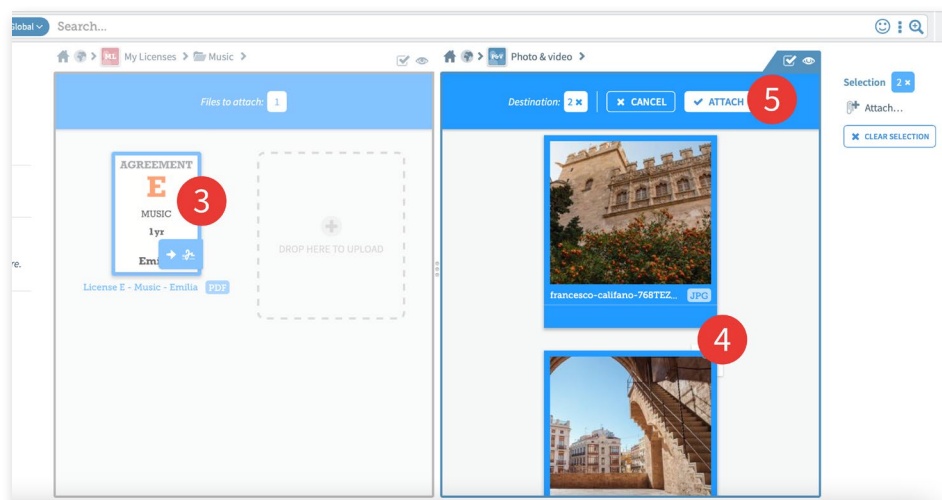
3. A two pane view will open. The file you selected will be highlighted.
4. In the other pane, navigate to and select all the content files you want to apply the license to.
5. Click Attach. The files will now use the license.

Note: If the agreement file contains more than one license, each of the content files will now be using all the licenses. (See 'Using intermediary proxy files to hold single licenses' below on how to avoid this.)

Using intermediary proxy files to hold single licenses

If you need to use a single license from an agreement with more than one license, and then apply it to lots of content files, you can save a lot of time by creating a proxy file to hold the license.

For instance: if a photographer used a single agreement file for two photoshoots, the agreement would contain two licenses—each for hundreds of images. Each time you attached the agreement to an image, you would need to select the correct license.

Having a single license in a single file means you never have to choose which license to use. You pick the license once, when creating the proxy file, rather than once for every file it is attached to.

1. Create a proxy license file. This file can be anything you want that can represent a single license—e.g., a document or image.
2. Attach the agreement file with the license you need to the proxy
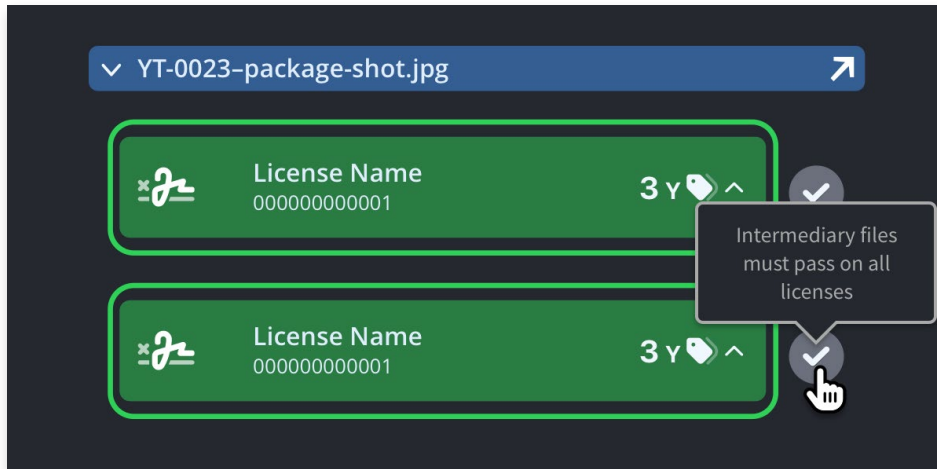

3. Untick the licenses you don't need, leaving just the one you want
4. Attach the proxy file to the files that need it. This time you don't need to pick which license you need, as there is only one license in the proxy file.

Using an intermediary file to pass-on licenses

If a license is for content in a file that will be reused as part of larger works, you can use the content file as an intermediary.

For example, if you have licensed music for a few videos, you can attach the license to the audio file, and then attach the audio file to the videos.

This is especially useful if one agreement licenses more than one piece of music. But, being that the intermediary file can also have a primary license there will be other benefits—like being able to search for the license metadata. First attach the license to the audio file:
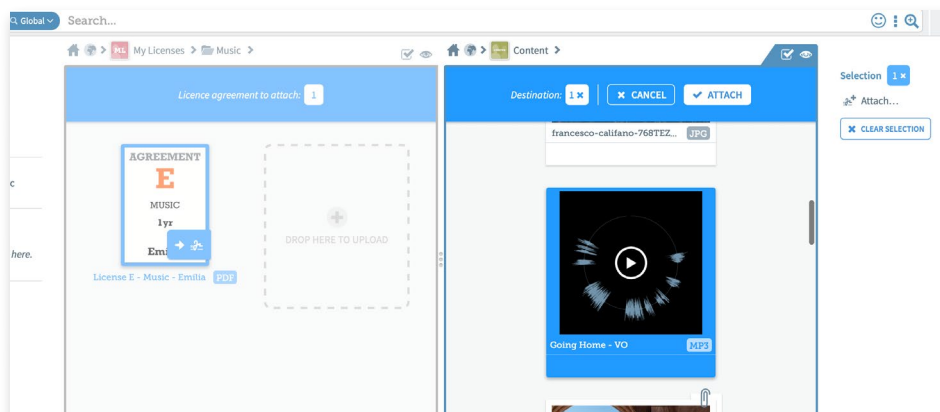
1. Upload the audio file
2. Find the agreement file with the license
3. Click Licenses > Attach licenses from...
4. A two pane view will open. The file you selected will be highlighted.
5. In the other pane, navigate to and select the audio file you have just uploaded
6. Click Attach
7. The audio file will now use the license

Next, attach the audio file to the video file:
1. Select the audio file
2. Click Licenses > Attach licenses from...
3. A two pane view will open. The file you selected will be highlighted.
4. In the other pane, navigate to and select the video file (and any other video file) that uses this music
5. Click Attach
6. The video file will now use the license from the audio file

If the music license agreement contains more than one license, you will need to remove the other licenses from the audio file. To do this:
1. Double-click on the audio file to preview it
2. Click on the licensing tab
3. Click on edit licenses
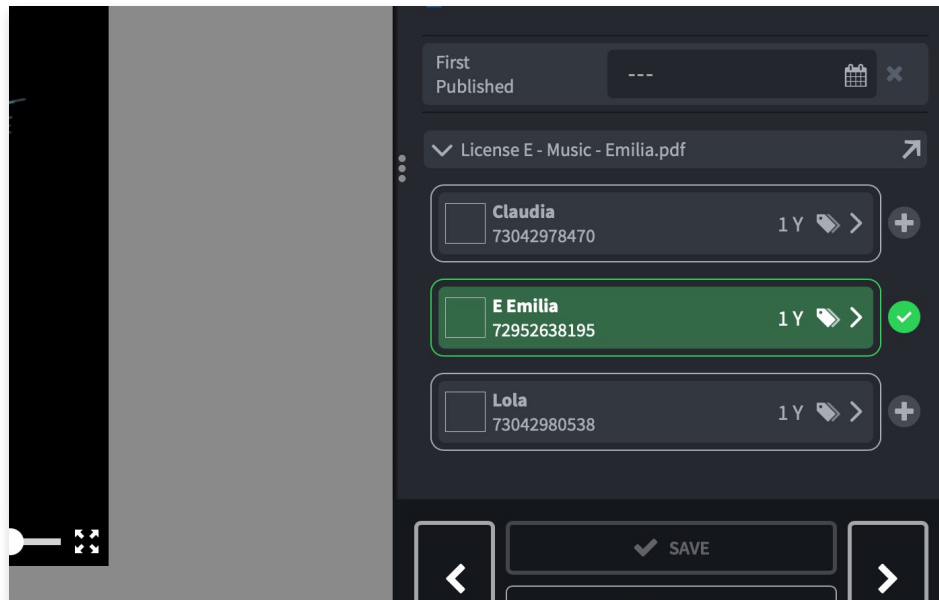
4. Deselect all the licenses for other music, leaving just the license for this audio file.
5. Click on Save

The licenses will update in all the files that use the music license from the audio file.

Using proxy files to track multiple publications

If you publish a final content file to more than one channel, it can be useful to track where it is published using proxy files.

For instance, if you publish a video to YouTube, Twitter, and Instagram you can create a proxy file for each (maybe using screenshots of the posts). You can then attach the final video file to each proxy file, and set the first published dates on the proxy files rather than the final video file.

To do this when you post a video to YouTube:
1. Take a screenshot of the post
2. Upload it into Chorus and give it a suitable name
3. Find and select the final video file
4. Click Licenses > Attach licenses from…
5. A two pane view will open. The video you selected will be highlighted.
6. In the other pane, navigate to and select the YouTube screenshot you have just uploaded
7. Click Attach
8. Double-click on the YouTube screenshot to open the preview
9. Click on the licensing tab
10. Click edit licenses
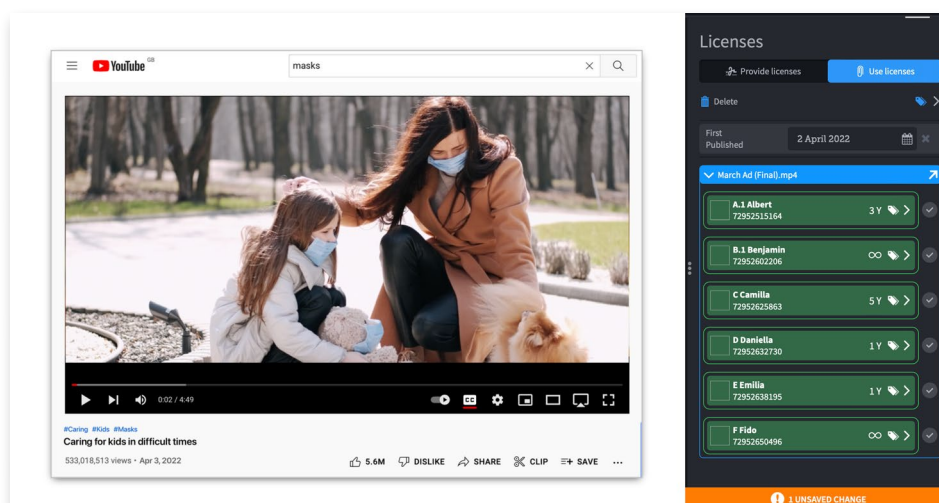
11. Enter the date for the YouTube post
12. Click save

The date of the YouTube post will now be used to determine the expiry dates of all the licenses used by the final video.
If you create proxies for all the social media posts that use this video, you will be able to track all the places where you published content using a license. This will be useful if a license expires and any post using it has to be taken down.

This same technique can be used to track any kind of publishing. For instance, you could use a scan of a magazine advert to track when and where you published the ad.

Detaching content files from a license

You can view all the files that use a license by clicking the uses arrow in the license. This opens a collection containing all the files that use the license. If you remove files from this collection, they will be detached and no longer use the license.

1. Select the agreement file with the license you want to edit
2. The license will have a section that shows how many files use it. Click on the arrow.
3. A browser will open, showing all the files that use the license.
4. Select the files you intend to remove and Click remove
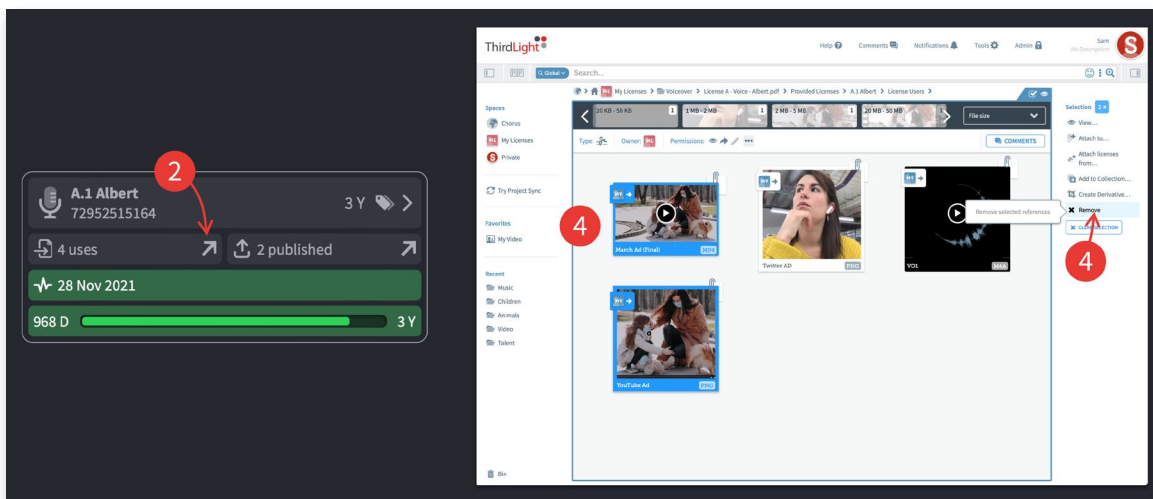
Batch-removing licenses from a content file

1. Select the file you wish to remove licenses from
2. Double-click to open it
3. Click on the licensing tab
4. Click on Edit Licenses

5. Hold down the cmd key (ctrl on Windows)
6. Select the agreement files you wish to remove
7. Click on Delete and on Save

Batch removing files from a license

You can remove multiple files from licenses by clicking on the "**uses**" arrow. It will take you to a collection of the files that use that license. By selecting the files you want to remove, and then choosing "**remove**" you will unattach the files from the license.

Addenda

If you renew a license agreement, the agreement file can be addended. You can upload a new PDF file, and it will be merged into the front of the original agreement.
You should update the licenses to match the new terms. You must not delete the licenses, as this will detach the files that use the license. Instead, edit the licenses to change the terms and the expiry date will recalculate.
Note that the PDF document is actually addended. If you download it, you will get the original PDF and the addenda in one file.

Addending an agreement

To addend an agreement:
1. Select the agreement file you want to addend
2. Click on the licensing tab
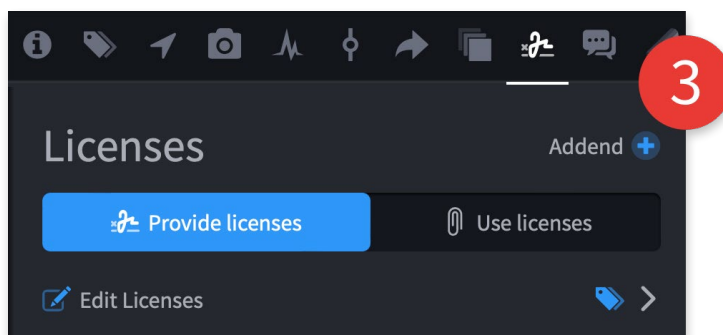
3. Click on Addend
4. Upload the new agreement PDF file
5. Edit the license data to reflect the new terms
6. Click Save

Reverting an addendum

If you need to undo an addendum, you can use the revisions tab to return the agreement file to a previous revision.

Searching for licenses

Metadata in primary licenses will appear in searches.
Advanced search has two new search conditions in the Chorus Metadata section: License Expiry and License State.

Allowing non-license managers to view licenses

You can let users who aren't license managers view licenses by giving their role the View Licenses permission. Similarly, you can hide licenses from them by removing it.
Users with the View Licenses permission will be able to see licenses in whatever space you grant them the permission.
1. Select the space
2. Click on Manage Space...
**3.** Click on the people tab
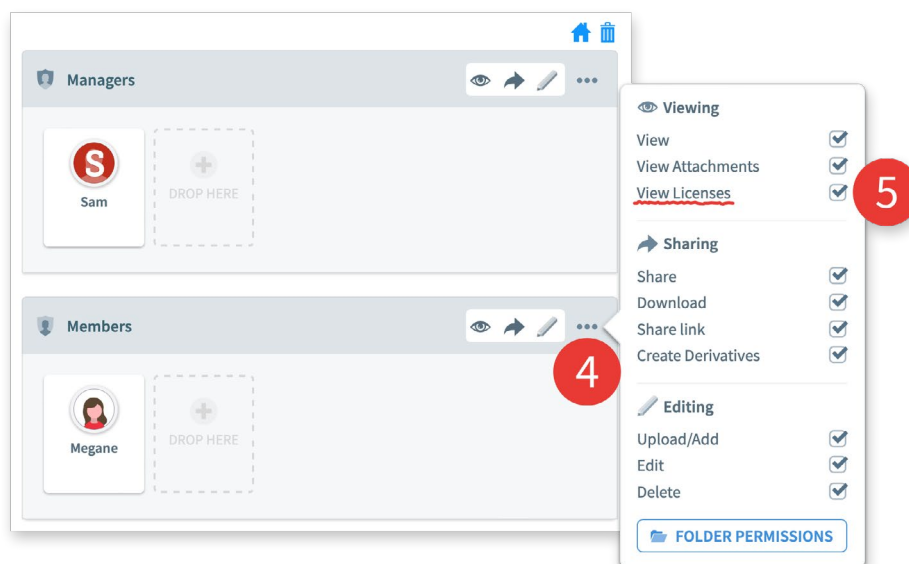
4. For the role you want to view licenses, click on the three dots to reveal the detailed permissions view
5. Check (or uncheck) the View Licenses permission
6. Click Save

Reports

The licensing reports show all the licenses that are about to turn amber or red, and any licenses that are already amber and red.

1. To open the report, open your space manager, click on the licensing tab, and click the reports button.
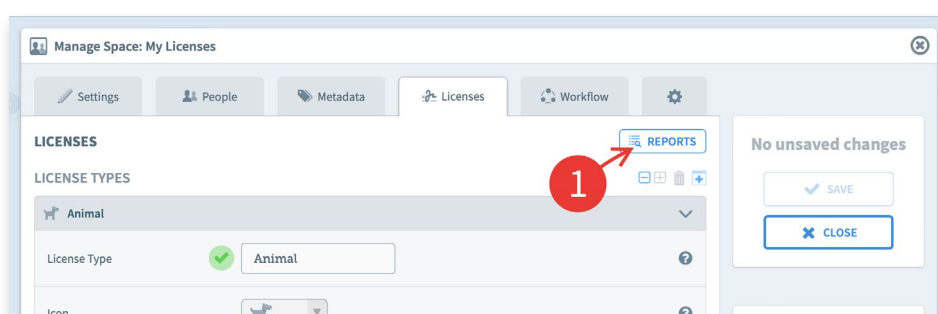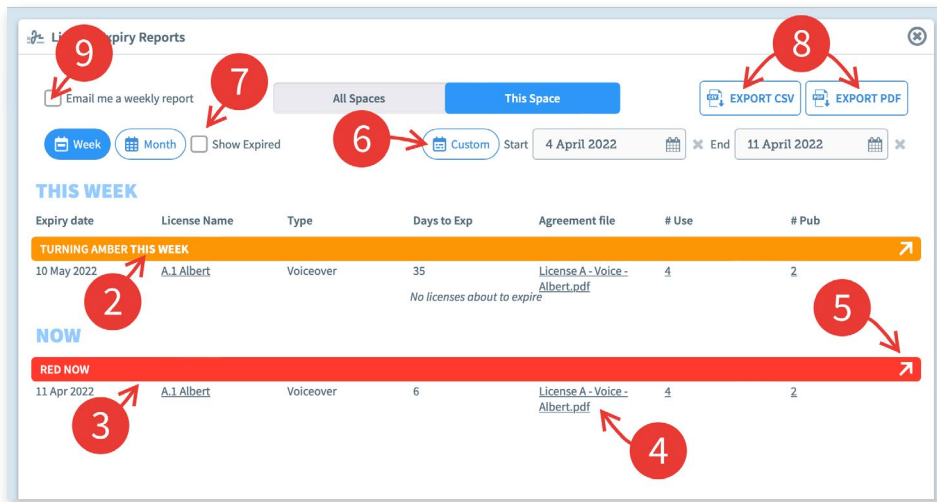
2. By default, the report shows you the files that will turn amber this week (or this month).

3. It also displays any licenses that are currently amber or red.

4. You can click on the agreement file to open it.

5. You can click on the arrows in the headings to view all the files listed under it.

6. You can select a custom range instead of this week (or this month).

7. You can display expired files in the listing

8. The data can be downloaded as a CSV or PDF document

9. You can subscribe to a weekly report that will list all the files about to turn amber this week and any files already amber or red.

More help

If you have any other questions, feel free to contact Sam Phillips who will try to answer them.
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