Configuration Guide

Version 17.4

Thank You for Choosing Ross

You've made a great choice. We expect you will be very happy with your purchase of Ross Technology.

Our mission is to:

1. Provide a Superior Customer Experience
   - offer the best product quality and support
2. Make Cool Practical Technology
   - develop great products that customers love

Ross has become well known for the Ross Video Code of Ethics. It guides our interactions and empowers our employees. I hope you enjoy reading it below.

If anything at all with your Ross experience does not live up to your expectations be sure to reach out to us at *solutions@rossvideo.com*.

David Ross
CEO, Ross Video
dross@rossvideo.com

Ross Video Code of Ethics

Any company is the sum total of the people that make things happen. At Ross, our employees are a special group. Our employees truly care about doing a great job and delivering a high quality customer experience every day. This code of ethics hangs on the wall of all Ross Video locations to guide our behavior:

1. We will always act in our customers' best interest.
2. We will do our best to understand our customers' requirements.
3. We will not ship crap.
4. We will be great to work with.
5. We will do something extra for our customers, as an apology, when something big goes wrong and it's our fault.
6. We will keep our promises.
7. We will treat the competition with respect.
8. We will cooperate with and help other friendly companies.
9. We will go above and beyond in times of crisis. *If there's no one to authorize the required action in times of company or customer crisis - do what you know in your heart is right. (You may rent helicopters if necessary.)*

Inception · Configuration Guide

- Ross Part Number: **4950DR-005-17.4**
- Release Date: June 12, 2025. Printed in Canada.
- Software Issue: **17.4**

The information contained in this Guide is subject to change without notice or obligation.

Copyright

Patents

Patent numbers 4,205,346; 5,115,314; 5,280,346; 5,561,404; 7,034,886; 7,508,455; 7,602,446; 7,834,886; 7,914,332; 8307284, 2039277; 1237518; 1127289 and other patents pending.

Warranty and Repair Policy

Ross Video Limited (Ross) warrants its Inception Server systems to be free from defects under normal use and service a time period of 15 months from the date of shipment:

If an item becomes defective within the warranty period Ross will repair or replace the defective item, as determined solely by Ross.

Warranty repairs will be conducted at Ross, with all shipping FOB Ross dock. If repairs are conducted at the customer site, reasonable out-of-pocket charges will apply. At the discretion of Ross, and on a temporary loan basis, plug in circuit boards or other replacement parts may be supplied free of charge while defective items undergo repair. Return packing, shipping, and special handling costs are the responsibility of the customer.

This warranty is void if products are subjected to misuse, neglect, accident, improper installation or application, or unauthorized modification.

In no event shall Ross Video Limited be liable for direct, indirect, special, incidental, or consequential damages (including loss of profit). Implied warranties, including that of merchantability and fitness for a particular purpose, are expressly limited to the duration of this warranty.

This warranty is TRANSFERABLE to subsequent owners, subject to Ross' notification of change of ownership.

Extended Warranty

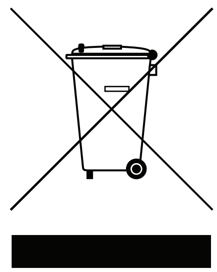
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Inception Server system, contact your regional sales manager.

Environmental Information

The equipment that you purchased required the extraction and use of natural resources for its production. It may contain hazardous substances that could impact health and the environment.

To avoid the potential release of those substances into the environment and to diminish the need for the extraction of natural resources, Ross Video encourages you to use the appropriate take-back systems. These systems will reuse or recycle most of the materials from your end-of-life equipment in an environmentally friendly and health conscious manner.

The crossed-out wheeled bin symbol invites you to use these systems.



If you need more information on the collection, reuse, and recycling systems, please contact your local or regional waste administration.

You can also contact Ross Video for more information on the environmental performances of our products.

Use of Hazardous Substances in Electrical and Electronic Products (China RoHS)

Ross Video Limited has reviewed all components and processes for compliance to:

"Management Methods for the Restriction of the Use of Hazardous Substances in Electrical and Electronic Products" also known as China RoHS.

The "Environmentally Friendly Use Period" (EFUP) and Hazardous Substance Tables have been established for all products. We are currently updating all of our Product Manuals.

The Hazardous substances tables are available on our website at:

http://www.rossvideo.com/about-ross/company-profile/green-practices/china-rohs.html

电器电子产品中有害物质的使用

Ross Video Limited 按照以下的标准对所有组件和流程进行了审查：

“电器电子产品有害物质限制使用管理办法”也被称为中国RoHS。

所有产品都具有“环保使用期限”（EFUP）和有害物质表。目前，我们正在更新我们所有的产品手册。

有害物质表在我们的网站：

http://www.rossvideo.com/about-ross/company-profile/green-practices/china-rohs.html

Company Address

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Introduction

A Word of Thanks

Thank you for choosing Ross Video Inception as your newsroom and social media management solution.

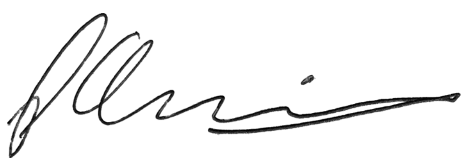
We are committed to providing you with the highest level of customer satisfaction possible. If, for any reason, you have questions or comments, please call Ross Video at +1-613-652-4886 or send us an e-mail at techsupport@rossvideo.com.

We hope that you visit our website www.rossvideo.com to stay up to date with ongoing software releases, join our customer forum and learn more about the complete range of Ross Video products.

Note that software maintenance and extended warranties are available for your system to protect and extend the life of your investment. Our sales team are more than happy to provide further information on the plans available. Members of our sales team promptly respond to e-mails sent to: solutions@rossvideo.com.

Again, thank you for your purchase of an Inception management solution from Ross Video. We are confident of your future pleasure with your choice.

Yours Sincerely,



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About This Guide

This guide contains the following chapters that cover configuration of the Inception Server:

1. "**Introduction**" summarizes the guide and provides important terms, conventions, and features.
2. "**Monitoring the System**" provides instructions on how to monitor the health of your Inception Server.
3. "**Setting Personal User Preferences**" provides instruction on how to set the default language, time zone, and font sizes for the all the Inception users on an Inception Server.
4. "**Configuring System Properties**" provides instructions on how to configure an Inception Server.
5. "**Managing Inception Nodes**" provides instructions on how to mange the nodes in a Redundant Node Inception system.
6. "**Managing Inception Apps**" provides instructions on how to install and uninstall Inception apps.
7. "**Configuring User Permissions**" provides instructions on how to set role-base user permissions for Inception users.
8. "**Modifying Folder Permissions**" provides instructions on how to set role-base user permissions for Inception users for the folders in a panel Folders tree view.
9. "**Configuring LDAP Authentication**" provides instructions on how to use LDAP to create Inception user accounts and roles.
10. "**Managing Perspectives**" provides instructions on how to create global perspectives available to all Inception users.
11. "**Enabling Cloud Services**" provides instructions on how to enable Inception Mobile apps to connect to an Inception Server.
12. "**Configuring MOS Connections**" provides instructions on how to configure the MOS protocol connection between Inception and a Newsroom Computer System (NCS).
13. "**Configuring Editorial Properties**" provides instructions on how to edit entries in the Inception dictionary.
14. "**Configuring Custom Metadata**" provides instructions on how to define attributes to associate wit Inception entities.
15. "**Configuring Spelling Properties**" provides instructions on how to configure spelling properties.
16. "**Configuring Media Sources**" provides instructions on how to configure network file storage locations that contain video clips and images for use in stories.
17. "**Configuring OverDrive Integration**" provides instructions on how to enable Overdrive to control playout of Inception running orders.
18. "**Configuring Accounts**" provides instructions on how to create and modify the accounts that Inception uses to publish and ingest content.
19. "**Configuring Feeds**" provides instructions on how to ingest content from RSS, Spredfast, and wires.
20. "**Configuring Web Content Resources**" provides instructions on how to enable Inception users to open web sites without leaving Inception.
21. "**Configuring DataLinq™ Server Connections**" provides instructions on how to connect to XPression DataLinq Servers.
22. "**Importing Contacts**" provides instructions on how to import contacts from a Comma Separated Values (CSV) file into a global contact list shared by all Inception users.

If you have questions pertaining to the operation of the Ross Video product, please contact us at the numbers listed in the section "**Contacting Technical Support**" on page 1–4. Our technical staff is always available for consultation, training, or service.

Documentation Conventions

This guide uses special text formats to identify parts of the user interface, text that a user must enter, or a sequence of menus and sub-menus that a user must follow to reach a particular command.

Interface Elements

Bold text identifies a user interface element such as a dialog box, a menu item, or a button. For example:

In the **Media Manager Client**, click **Channel 1** the **Channels** section.

User Entered Text

Courier text identifies text that a user must enter. For example:

In the **File Name** box, enter `Channel01.property`.

Referenced Guides

Italic text identifies the titles of referenced guides, manuals, or documents. For example:

For more information, refer to the section "**WordPress Account Configuration**" on page 18–33 in the ***Inception Configuration Guide***.

Menu Sequences

Menu arrows identify a sequence of menu items that a user must follow to reach a particular command. For example: if a procedure step contains "**Server** > **Save As**," a user should click the **Server** menu and then click **Save As**.

Important Instructions

Star icons identify important instructions or features. For example:

✶ After installing Inception Server software, you must obtain Inception feature licenses from Ross Video Technical Support before users can access Inception features.

Getting Help

To access the Inception Server Online Help system, click the **Help** icon in the main toolbar. For help about the currently open panel, click he **Help** button in a panel title bar to view a help topic about the panel.

The Online Help system contains the following navigation tabs to locate and access Online Help topics:

- **Contents** — table of contents
- **Search** — full text search
- **Favorites** — preferred information storage and access

Ross Video also supplies print-ready PDF files of the ***Inception Server Installation Guide***, ***Inception Server Configuration Guide***, and the ***Inception User Guides*** on the Inception Server Software Installation DVD.

Contacting Technical Support

Technical Support is staffed by a team of experienced specialists ready to assist you with any question or technical issue.

Ross Video has technical support specialists strategically located around the globe to ensure a prompt response to technical inquiries. Our primary technical support center is located in Ottawa, Ontario, Canada. In addition, we have offices in The United Kingdom (London), Australia (Sydney), and Singapore with satellite locations in New York City, The Netherlands, and China. As we expand our presence globally, we are constantly evaluating other key locations to have a local technical support specialist in order to better service our customers.

North America

Our North America center located in Ottawa, Ontario, Canada and is open Monday to Friday 8:30 a.m. to 6:00 p.m. EST, with 24/7/365 on-call service after hours.

Our telephone number is: +1-613-686-1557

Toll free within North America: +1 833-859-0499

EMEA

Our EMEA center is open Monday to Friday 8:30 a.m. to 5:00 p.m. GMT. After hours support is provided by our North America location.

International toll free: +800 3540 3545

If the local support specialist is not available, your call will be transferred automatically to our North America center.

Australia

Our Sydney, Australia office is located in Alexandria, NSW.

Our local support telephone number is: 1300 007 677

If the local support specialist is not available, your call will be transferred automatically to our North America center.

Online

E-mail: techsupport@rossvideo.com

Website: use the link https://support.rossvideo.com/ to open a support request.

Monitoring the System

Inception system monitors enable you to quickly view the health of your Inception Server system. If your Inception Server falters, you can use system monitors to help diagnose the cause of the system fault. Along with monitoring the health of your Inception Server, you can also monitor and control the users connected to your Inception Server.

This chapter discusses the following topics:

- Monitor System Health
- User Defined System Monitors
- View and Manage User Sessions
- Manage the Inception SNMP Agent

Monitor System Health

As an Inception administrator, you can monitor the health of your Inception Server through the Configuration window of Inception.

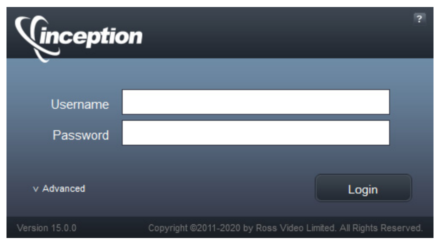
Inception Server Configuration Window

The Inception Server Configuration window is only accessible from a desktop computer, you cannot access the Configuration window from a mobile device.

To access the Inception Server Configuration window

1. In a one of the following supported web browsers, navigate to the Inception web page.
   - Microsoft Edge
   - Google Chrome™ browser version 51 or greater
   - Mozilla Firefox® version 52 or greater
   - Apple Safari® version 10.2 or greater

   The **Login** panel opens.



2. In the **Login** panel, enter your Inception administrator login credentials in the **Username** and **Password** boxes.

   The default Inception administrator login credentials are as follows:
   - **Username** — `root`
   - **Password** — `password`
3. Click **Login**.

   Inception opens.

✶ When Inception displays a message indicating that the system is in maintenance mode, an Inception administrator must establish a database connection before you can log in to your Inception Server.

4. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
5. For Inception configuration information, click the **Help** icon on the **Configuration** window title bar.

System Health

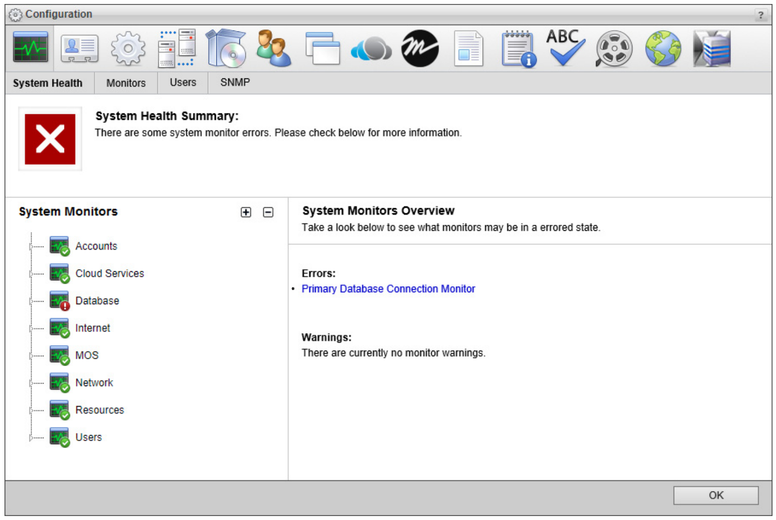
After accessing the Configuration window on your Inception Server, you can monitor the health of your Inception Server through the System Monitor tab in the Configuration window.

To monitor system health

1. On the **Configuration** window toolbar, click the **System Monitor** icon.

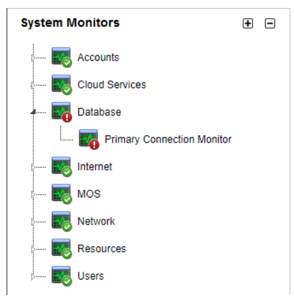
   The **System Monitor** panel opens.
2. Click the **System Health** tab.

The **System Health** tab opens.



The **System Health** Summary field displays a description of the current overall state of the Inception Server. The monitors in the **System Monitors** tree view report details about the state of the Inception Server.

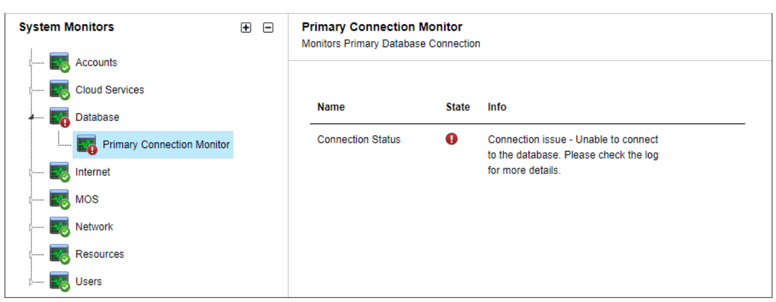
3. Double-click a **folder** in the **System Monitors** tree view to open the folder and display the monitors contained in the folder.



The icon in the lower right corner of System Monitors tree view nodes indicate the following health levels:

- — **Healthy**
- — **Warning**
- — **Error**

4. Click a monitor in the **System Monitors** tree view to view health details reported by the selected monitor.



User Defined System Monitors

Inception enables to add your own monitors to monitor the remaining storage space on a disk or the connectivity between your Inception Server and a web site. The Monitors tab of the System Monitor panels enables you to add, edit, and delete user defined monitors.

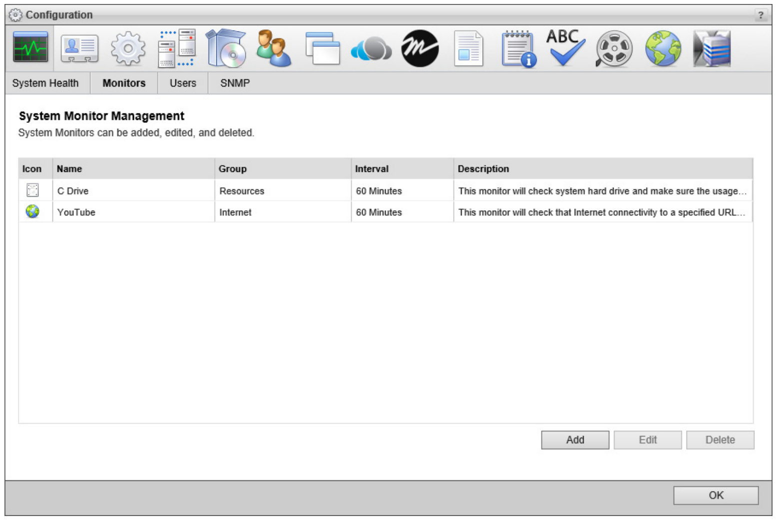
To add a user defined monitor to the System Health tab

1. On the **Configuration** window toolbar, click the  **System Monitor** icon.

   The **System Monitor** panel opens.

2. Click the **Monitors** tab.

   The **Monitors** tab opens.



3. Click **Add**.

   The **Create New System Monitor** page opens.

4. Use the **Monitor** list to select the type of monitor to add. The available monitor types are as follows:

   - **Disk Usage Monitor** — check a selected hard drive to make sure that the available storage does not fall below a set level.
   - **Internet Connectivity Monitor** — check that there is connectivity between the Inception Server and a selected web site.

5. Click **Next**.

   Depending on the type of monitor you are adding, the **Add a Disk Usage Monitor** or **Add an Internet Connectivity Monitor** page opens.

6. Define the selected monitor as follows:

   Disk Usage Monitor

   a. In the **Name** box, enter a name for the monitor.

   b. In the **Interval** box, enter the amount of time to wait between checks of available hard disk space.

   c. Use the list to the right of the **Interval** box to select **Minute(s)** or **Second(s)** as the time unit for the time entered in the **Interval** box.

   d. Use the **Drive** list to select the Inception Server computer hard drive to monitor.

   e. In the **Minimum Free Space** box, enter the minimum amount of disk space that the selected Drive must contain. The monitor reports an **Error** when the available space on a **Drive** drops below the set minimum disk space.

   f. Use the list to the right of the **Minimum Free Space** box to select **Gigabyte(s)** or **Megabyte(s)** as the disk space unit for the amount entered in the **Minimum Free Space** After box.

Internet Connectivity Monitor

a. In the **Name** box, enter a name for the monitor.

b. In the **Interval** box, enter the amount of time to wait between connectivity checks for a web site.

c. Use the list to the right of the **Interval** box to select **Minute(s)** or **Second(s)** as the time unit for the time entered in the **Interval** box.

d. In the **URL** box, enter the web address (for example: http://www.rossvideo.com) of the web site that you want to check connectivity with the Inception Server.

7. Click **Save**.

   Inception adds the new monitor to the **System Monitor Management** list.

To edit a user defined monitor

1. In the **System Monitor Management** list, select the monitor to edit.
2. Click **Edit**.

   Depending on the type of monitor you are editing, the **Edit Disk Usage Monitor** or **Edit Internet Connectivity Monitor** page opens.

3. Edit production monitor settings as required.
4. After completing the required monitor setting edits, click **Save**.

To delete a user defined monitor

1. In the **System Monitor Management** list, select the monitor to delete.
2. Click **Edit**.

   A confirmation message opens, asking whether you want to delete the selected monitor. To keep the monitor, click **Cancel**.

3. In the confirmation message, click **OK**.

   Inception deletes the selected monitor from the **System Monitor Management** list and the **System Monitors** tree view on the **System Health** tab.

View and Manage User Sessions

The Users tab of the System Monitor panel enables you to view and manage the user sessions running on your Inception Server.

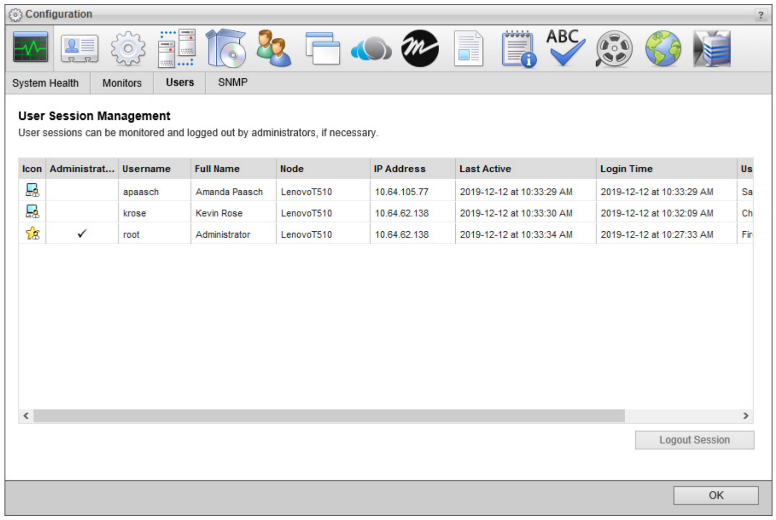
To view the user sessions running on an Inception Server

1. On the **Configuration** window toolbar, click the  **System Monitor** icon.

   The **System Monitor** panel opens.

2. Click the **Users** tab.

The **Users** tab opens.



The columns in the **User Session Management** table displays the following information about the users connected to the Inception Server:

- **Icon** — this column displays an icon that identifies the user associated with the user session.
- **Administrator** — this column displays a check mark for users that are Inception administrators.
- **Username** — this column displays the Inception username of the user associated with the user session.
- **Full Name** — this column displays the first and last name of the user associated with the user session.
- **Node** — this column displays the hostname of the Inception Server to which the user is connected for the user session.
- **IP Address** — this column displays the IP address and hostname of the computer that the user is using for the user session.
- **Last Active** — this column displays the date and time that the user last made a change to Inception during the user session.
- **Login Time** — this column displays the date and time that the user logged into the Inception Server to start the user session.
- **User Agent** — this column displays the web browser and operating system that the user is using for the user session.

Logout a User Session

When required, you can logout a user session from your Inception Server. The user associated with the logged out sessions sees their session close and the Login panel open in their web browser. Inception saves user changes before logging the user off the Inception Server.

To logout a user session

1. In the **User Session Management** table, select the user session to logout.
2. Click **Logout Session**.

   A confirmation message opens, asking whether you want to logout the selected user session. To keep the session running, click **Cancel**.
3. In the confirmation message, click **OK**.

   Inception logs out the selected user session. The user associated with the logged out sessions sees their session close and the Login panel open in their web browser.

Manage the Inception SNMP Agent

Ross Video uses two Simple Network Management Protocol (SNMP) agents to monitor the software and hardware of your Inception system. SNMP traps enable an agent to send unsolicited SNMP messages to the Network Management Station (NMS) to notify the station of significant events.

The Inception SNMP agent monitors the Inception Server and reports significant events to your NMS as SNMP traps. Inception Server hardware changes and errors are monitored by the Windows SNMP agent running on the Inception Server computer. The Inception SNMP agent forwards SNMP traps from the Windows SNMP agent to your NMS (**Figure 2.1**).

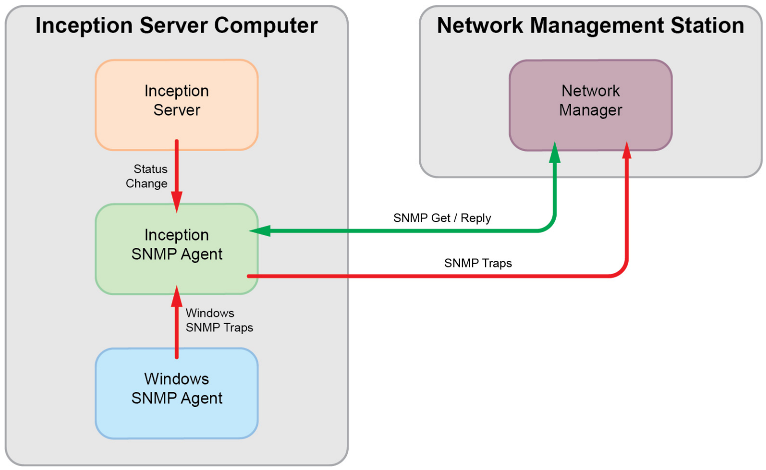


Figure 2.1 SNMP Connections

Configure the Inception SNMP Agent

The SNMP tab of the System Monitor panel enables you to configure the Inception SNMP agent to send SNMP trap messages to your NMS.

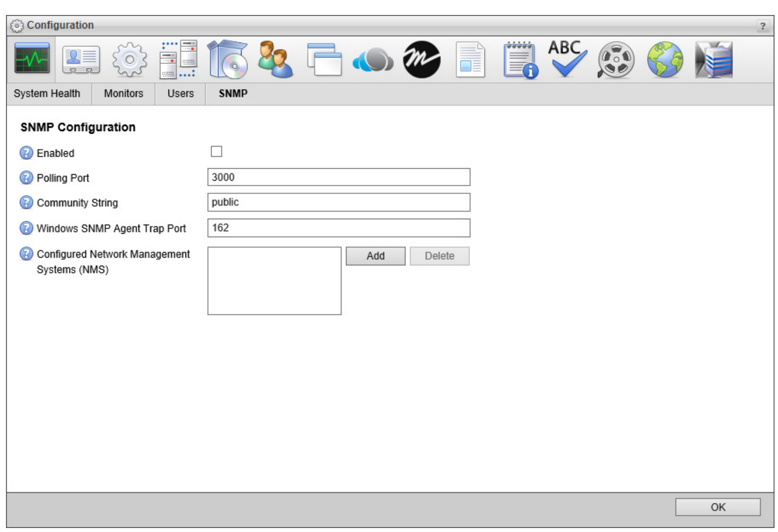
To configure the Inception SNMP agent

1. On the **Configuration** window toolbar, click the  **System Monitor** icon.

   The **System Monitor** panel opens.

2. Click the **SNMP** tab.

   The **SNMP** tab opens.



3. Select the **Enabled** check box to send SNMP trap messages from the Inception SNMP agent to your NMS.
4. In the **Polling Port** box, enter the port number through which the Inception SNMP agent receives commands from and replies to the NMS.
5. In the **Community String** box, enter the password that allows your NMS to access the Inception SNMP agent on your Inception server.

✶ When you change the **Community String** from `public` to your own password, you must enter your password on the NMS to allow access to your Inception server.

6. In the **Windows SNMP Agent Trap Port** box, enter the port number that the Windows SNMP agent running on the Inception Server computer uses to send SNMP trap messages.

   The Inception SNMP agent forwards SNMP trap messages from the Windows SMNP agent to your NMS through the NMS Trap Port.
7. To send SNMP trap message from the Inception SNMP agent to one or more NMSs, add NMSs as follows:
   a. Click **Add** to the right of the **Configured Network Management Systems (NMS)** box.

      An **Alert** dialog box opens.
   b. Enter the IP address and port number (`<IP Address>:<Port Number>`) of an NMS to receive SNMP trap message from the Inception SNMP agent. For example:

      `10.0.2.160:3000`
   c. To add an additional NMS, repeat step **a** to step **b**.

Delete an NMS

When you no longer require an NMS, you can delete the NMS configuration.

To delete an NMS

1. In the **Configured Network Management Systems (NMS)** box, select the NMS to delete.
2. Click **Delete** to the right of the **Configured Network Management Systems (NMS)** box.

   An **Alert** dialog box opens.
3. Click **OK** to delete the NMS.

   Inception deletes the selected NMS from the **Configured Network Management Systems (NMS)** box.

Configure Your NMS for Inception

You must load the Ross Video and Inception Management Information Base (MIB) files into your NMS to enable it to interpret the SNMP trap messages it receives from an Inception SNMP agent. The Inception MIB file describes the SNMP trap messages sent by the Inception SNMP agent.

To load the Ross Video and OverDrive MIB files into your NMS

1. Get the **ROSS-VIDEO.mib** and **RWP-MIB.mib** files from one of the following locations:
   - Copy from the Inception Server (`C:\Program Files\Ross Video\Inception\utilities\snmp`)
   - Download from the Ross Video web site (www.rossvideo.com)
2. Load the **ROSS-VIDEO.mib** file into your NMS.
3. Load the **RWP-MIB.mib** file into your NMS.

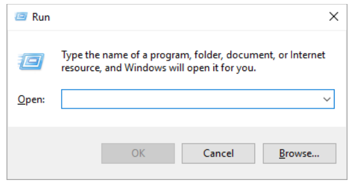
Configure the Windows SNMP Agent

To enable the Inception SNMP agent to forward hardware SNMP trap messages to your NMS, you need to configure the Windows SNMP agent.

To configure the Windows SNMP agent:

1. From the Windows Desktop, press **Windows Key+R**.

   The **Run** dialog box opens.

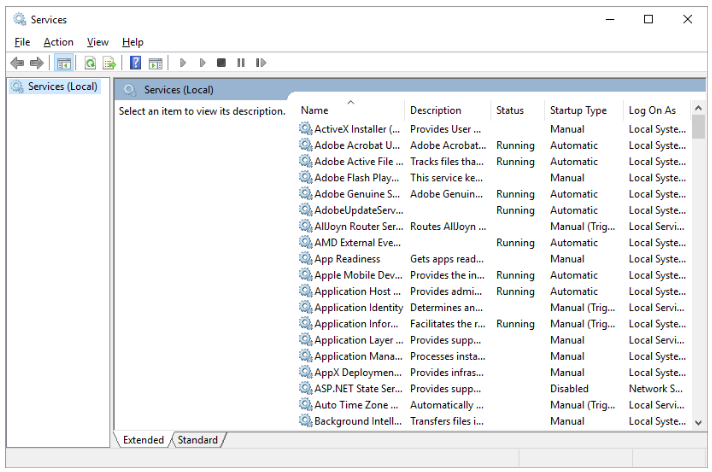


2. In the **Open** box, type the following application name:

   `services.msc`

3. Click **OK**.

   The **Services** window opens.

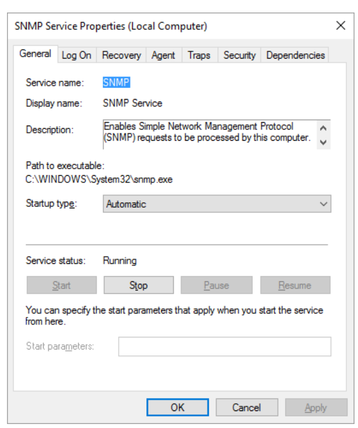


4. In the **Services** list, locate the **SNMP Service** service.

✶ If you cannot find the **SNMP Service** service in the **Services** list, install the **SNMP Service** on your Inception Server computer.

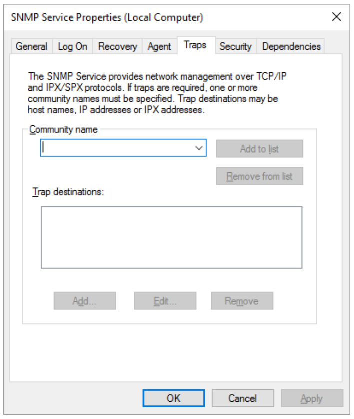
5. Right-click the **SNMP Service** service and select **Properties** from the shortcut menu.

   The **SNMP Service Properties** dialog box opens.



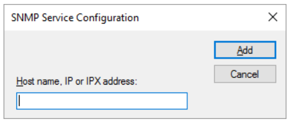
6. Click the **Traps** tab.

   The **Traps** tab opens.



7. In the **Community name** box, enter the password that you set for the **Community String** in step **5** of the procedure "**To configure the Inception SNMP agent**" on page 2–7.
8. Click **Add to list**.
9. In the **Trap destinations** section, click **Add**.

   The **SNMP Service Configuration** dialog box opens.



10. In the **Host name, IP or IP address** box, enter `localhost`.
11. Click **Add**.

    The **SNMP Service Configuration** dialog box closes.
12. In the **SNMP Service Properties** dialog box, click **OK**.

    The **SNMP Service Properties** dialog box closes.
13. In the **Services** window, click **Restart** for the **SNMP Service** service.
14. Use the **File** menu to select **Exit**.

    The **Services** window closes.

Setting Personal User Preferences

The Inception administrator sets the default user interface language, time zone, time format, font sizes, and the first day of the week for all users of an Inception Server. Default user preferences are set in the System tab of the User Preferences panel of the Configuration window. Inception users can individually override the default user preferences set by the Inception administrator.

This chapter discusses the following topic:

- Set Personal User Preferences

Set Personal User Preferences

When the default user preferences do not work for an individual Inception user, the user can set their own personal user preferences.

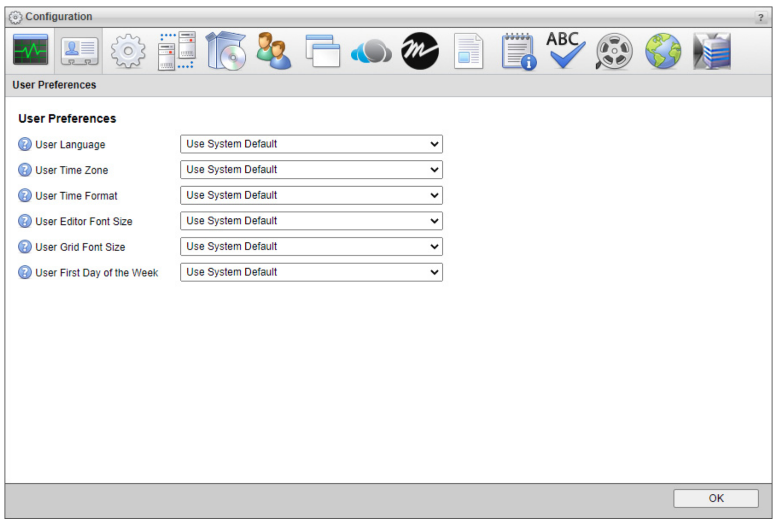
✶ You cannot can set user preferences from a mobile device, you must use a desktop computer to access the Configuration window.

To set your own user preferences

1. Use your Inception username and password to log in to the Inception Server.
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Preferences** icon.

   The **User Preferences** panel of the **Configuration** window opens.



4. In the **User Preferences** tab, use the **User Language** list to select the user interface language that you want to use with Inception. Select **Use System Default** to use the language set by the Inception administrator.
5. Use the **User Time Zone** list to select the time zone which matches your physical location. Select **Use System Default** to use the time zone set by the Inception administrator.
6. Use the **User Time Format** list to select the format in which to display the time, **12 hr** (2:45pm) or **24 hr** (14:45) format.
7. Use the **User Editor Font Size** list to select the font size that you want Inception to display text in editor panels. You can select a font size from **6** to **32** points. Select **Use System Default** to use the editor font size set by the Inception administrator.
8. Use the **User Grid Font Size** list to select the font size that you want Inception to display text in panel grids. You can select a font size from **6** to **32** points. Select **Use System Default** to use the grid font size set by the Inception administrator.
9. Use the **User First Day of the Week** list to select the first day of the week to display in the **Calendar** view of the **Assignment Manager**, **Task Schedule**, and **Custom Entity Manager** panels, and in the **Calendar Date** tool used to select dates. Select **Use System Default** to use the first day of the week set by the Inception administrator.
10. Click **OK**.

    The **Configuration** window closes.
11. Log out of Inception and then log back in to activate your new user preference settings.

Configuring System Properties

This chapter provides instructions for configuring the general system properties of your Inception Server using the following tabs on the System configuration panel:

- **Database** — How Inception accesses the database that stores application data
- **Mail Server** — How Inception communicates with an e-mail server to send and receive approval messages and notifications.
- **Approvals** — Control e-mail story approval and configure the e-mail address used to send and receive approval messages and notifications.
- **Archive** — Control the automatic archiving of running orders, and when it occurs.

This chapter discusses the following topics:

- Access Inception Server System Properties
- Configure Database Connectivity
- Select a Search Index
- Activate a Product Key
- Reactivate a Product Key
- Deactivate a Product Key
- Manage File Systems
- Configure System Settings
- Configure the E-mail Server
- Enable Story Approval via E-mail
- Enable Story Creation via E-mail
- Configure Life Cycle Settings
- Configure Advanced Settings

Access Inception Server System Properties

As an Inception administrator, you access and configure system settings through the Configuration window of Inception.

✶ You cannot configure Inception from a mobile device. The Configuration window is only accessible from a desktop computer.

To access Inception Server system properties

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.

3. For Inception configuration information, click the **Help** icon on the **Configuration** window title bar.

Configure Database Connectivity

Database connectivity settings enable you to set the database used by Inception and the user account that Inception uses to connect with the database.

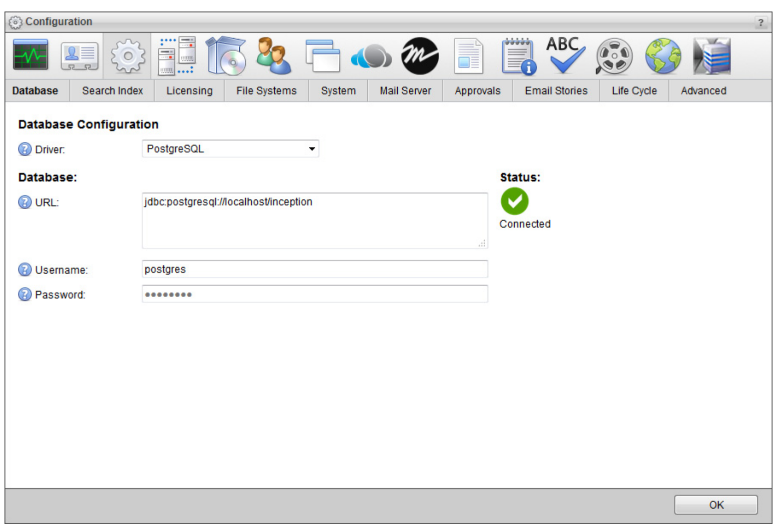
To configure database connectivity

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Database** tab.

   The **Database** tab opens.



3. Use the **Driver** list to select the database driver used to connect to the Inception Database.

4. In the **URL** box, enter the JDBC URL that connects your Inception Server with the Inception Database. For example, for a database named inception on PostgreSQL, use the following URL:

```
jdbc:postgresql://localhost/inception
```

5. In the **Username** box, enter the username that Inception uses to access the database.
6. In the **Password** box, enter the password associated with the username.

   For security purposes, dots replace the entered password.
7. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Select a Search Index

Your Inception Server uses to an index to increase search performance. By default, Inception uses an internal file system index. You can also select optional external search index services to improve Inception search performance on you Inception Server.

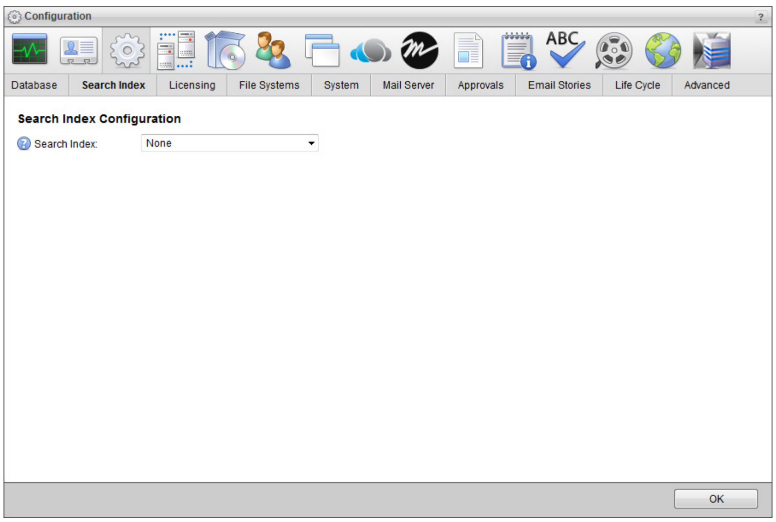
✶ You must select a search index to enable users to search the content stored on your Inception Server.

To select a search index

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.
2. Click the **Search Index** tab.

   The **Search Index** tab opens.



3. Use the **Driver** list to select the index that the Inception Server uses to increase search performance. The available search indexes are as follows:
   - **Elasticsearch** — an optional external search index based on Lucene.
   - **File System** — the default internal search index.
   - **None** — do not use a search index.

4. When you select **Elasticsearch** as you search index, configure **Elasticsearch** as follows:
   a. In the **URL** box, enter the URL and port number (`http://<search server>:<port number>`) that the Inception Server uses to connect to an external search service. When entering more than one search service URL, use a space to separate consecutive URLs.
   b. In the **Username** box, enter the username that Inception uses to access the external search service.
   c. In the **Password** box, enter the password associated with the username.

      For security purposes, dots replace the entered password.
5. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Activate a Product Key

Ross Video uses a product key and feature license keys to control user access to Inception features. You can obtain an Inception product key from Ross Video Technical Support. Refer to the **Getting Technical Support** Online Help topic for Ross Video Technical Support contact information.

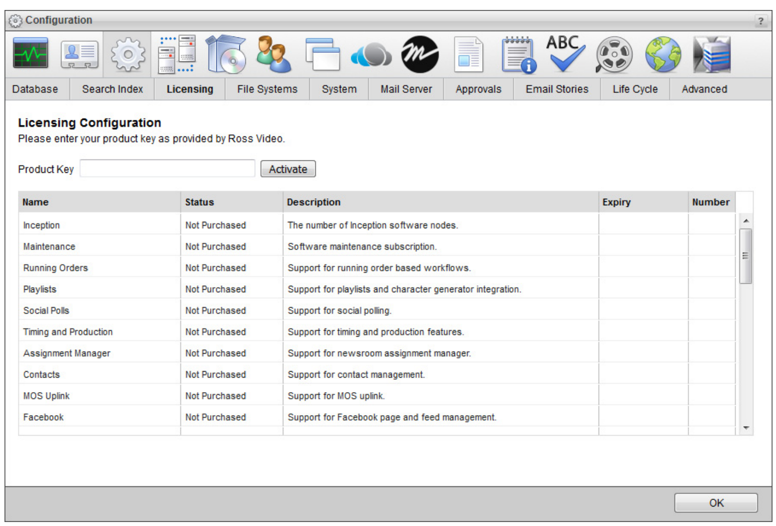
✶ When you activate an Inception Server software product key, your Inception computer must contact the Ross Video Activation Server.

To activate an Inception product key

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.
2. Click the **Licensing** tab.

   The **Licensing** tab opens.



3. Obtain an Inception product key from Ross Video Technical Support.
4. In the **Product Key** box, enter the product key obtained from Ross Video Technical Support.
5. Click **Activate**.

   After activating the entered product key, an **Alert** dialog box opens requesting a web browser window refresh.

6. Click **OK**.

   The **Alert** dialog box closes and the **Licensing Configuration** tab updates to display the new feature licenses associated with the activated product key. The **Status** column displays one of the following states:

Background	Status	Description
Green	**Active d**	The feature is active and available to Inception users.
Yellow	**Expires in # days**	The feature availability for Inception users expires in the displayed number of days.
Red	**Expired**	The feature has expired and is no longer available to Inception users.
Red	**Invalid MAC**	The feature license key is invalid for the active network interface card of the Inception computer.
White	**Not Purchased**	The feature is not accessible to Inception users, but it is available for purchase.

7. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

8. Refresh your web browser window.

   Inception adds icons to the toolbar for the newly activated features, making the features accessible to Inception users.

Reactivate a Product Key

After purchasing new features for an Inception Server, the Inception product key requires a reactivation to make the purchased features available to Inception users.

To reactivate an Inception product key

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing** tab opens.

3. Click **License Options**.

   The **Product Key** field displays the currently activate product key.

4. Click **Reactivate**.

   After reactivating the product key, an **Alert** dialog box opens requesting a refresh of the web browser window.

5. Click **OK**.

   The **Alert** dialog box closes, and the **Licensing Configuration** tab is updates to display with new feature licenses associated with the reactivated product key.

6. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

7. Refresh your web browser window.

   Inception adds icons to the toolbar for the newly activated features, making the features accessible to Inception users.

Deactivate a Product Key

When you want to move Inception Server software on another computer, you must first deactivate the Inception Server software on the current Inception computer.

To deactivate an Inception product key

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing** tab opens.

3. Click **License Options**.

   The **Product Key** field displays the currently activate product key.

4. Click **Deactivate**.

   After deactivating the product key, an **Alert** dialog box opens.

5. Click **OK**.

   The **Alert** dialog box closes, and the product key shown in the **Product Key** box deactivates. You can use the deactivated product key to activate Inception Server software on another computer.

   Deactivating a product key unlicenses and removes Inception user access to all the Inception features associated with the product key.

Manage File Systems

Inception uses files systems to store the media files contained in Inception media sources. You can define file systems to store media files on a local disk, a network accessible file share, or an external cloud storage service.

You should define a file system for each of your Inception media sources. After you define a file system, you can use the Media Sources tab to associate a file system with a media source.

For More Information on...

- associating a file system with a media source, refer to chapter "**Configuring Media Sources**" on page 16–1.

Add a File System

When you add a file system, you name the file system and select the location to store media source media files.

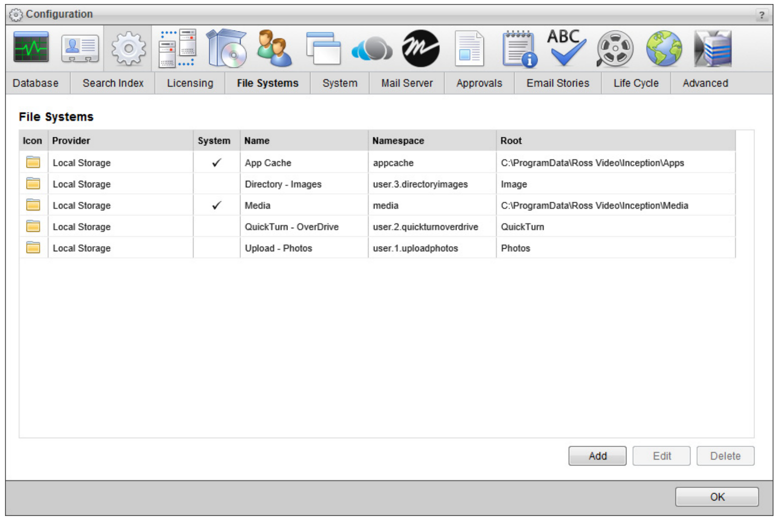
To add a file system

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **File Systems** tab.

The **File Systems** tab opens.



3. Click **Add**.

   The **Create File System** settings open.

4. Use the **Provider** list to select the type of file system to add:

   - **Abekas** — a shared directory on an Abekas Mira or Tria video server.
   - **Amazon S3** — a directory on the Amazon Simple Storage Service, an external service that you require an account to use.
   - **Azure Blob Storage** — a directory on the Microsoft Azure Blob storage service, an external service that you require an account to use.
   - **Cloud Gateway** — a file system configured on a Ross Cloud Gateway.
   - **FTP** — a directory on an FTP server.
   - **Google Cloud Storage** — a directory on the Google Cloud Storage service, an external service that you require an account to use.
   - **Grass Valley Stratus** — use Grass Valley Stratus Media Asset Management as a file system.
   - **Local Storage** — a directory on your Inception Server local disk or a network accessible file share.

5. Click **Next**.

   The **Create File System** settings open for the selected **Provider**.

6. Use the steps for the selected **Provider** to define the file system.

   Abekas

   a. In the **Namespace** box, enter the name that Inception uses to access the file system.

      Once you create a file system, you cannot change the **Namespace** set for the file system.

   b. In the **Name** box, enter a name for the file system.

   c. In the **Root** box, enter the directory path for the root directory of the Abekas video server.

   d. In the **Host** box, enter the hostname or IP address of the Abekas video server.

   e. In the **Port** box, enter the port number that the Abekas video server uses to communicate with your Inception Server.

   f. Select the **Enable Direct Access** check box to allow external devices to directly access files on this file system via a network share. When you select this option, you must also create a public network share that maps to the file system root directory.

Amazon S3

a. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

b. In the **Name** box, enter a name for the file system.

c. In the **Bucket** box, enter the name of the Amazon S3 bucket in which to store file system files.

d. In the **Access Key** box, enter the access key for the selected Amazon S3 bucket.

e. In the **Access Secret** box, enter the access secret for the selected Amazon S3 bucket.

f. In the **Root** box, enter the directory path for the file system root directory in the selected Amazon S3 bucket.

g. Select the **Enable Direct Access** check box to allow external devices to directly access files on this file system via a network share. When you select this option, you must also create a public network share that maps to the file system root directory.

Azure Blob Storage

a. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

b. In the **Name** box, enter a name for the file system.

c. In the **Container** box, enter the name of the Microsoft Azure Blob Storage container in which to store file system files.

d. In the **Account Name** box, enter the account name for the selected Microsoft Azure Blob Storage container.

e. In the **Account Key** box, enter the account key for the selected Microsoft Azure Blob Storage container.

f. In the **Root** box, enter the directory path for the file system root directory in the selected Microsoft Azure Blob Storage container.

g. Select the **Enable Direct Access** check box to allow external devices to directly access files on this file system via a network share. When you select this option, you must also create a public network share that maps to the file system root directory.

Cloud Gateway

a. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

b. In the **Name** box, enter a name for the file system.

c. In the **Gateway ID** box, enter the ID of the Ross Cloud Gateway that contains the file system access.

d. In the **Remote Namespace** box, enter the name that Inception uses to access the remote file system on a Ross Cloud Gateway.

FTP

a. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

b. In the **Name** box, enter a name for the file system.

c. In the **Host** box, enter the hostname or IP address of the FTP server.

d. In the **Port** box, enter the port number that the FTP server uses to communicate with your Inception Server.

e. In the **Username** box, enter the username for the FTP account that Inception uses to access the FTP server.

f. In the **Password** box, the password for the FTP account.

g. In the **Root** box, the path to the directory on the FTP server to open upon initial connection.

h. Select the **Enable Direct Access** check box to allow external devices to directly access files on this file system via a network share. When you select this option, you must also create a public network share that maps to the file system root directory.

Google Cloud Storage

a. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

b. In the **Name** box, enter a name for the file system.

c. In the **Bucket** box, enter the name of the Google Cloud Storage bucket in which to store file system files.

d. Click **Browse** to the right of the **Credentials** box to use the **Open** dialog box to select a file that contains Google Cloud JSON credentials for your Google Cloud Storage.

e. In the **Project ID** box, enter the Google Cloud project ID for the selected Google Cloud Storage bucket

f. In the **Private Key ID** box, enter the private key ID for the selected Google Cloud Storage bucket.

g. In the **Private Key** box, enter the private key for the selected Google Cloud Storage bucket.

h. In the **Client ID** box, enter the Google Cloud client ID for the selected Google Cloud Storage bucket.

i. In the **Client E-Mail** box, enter the Google Cloud client email address for the selected Google Cloud Storage bucket.

j. In the **Root** box, enter the directory path for the file system root directory in the selected Google Cloud Storage bucket.

k. Select the **Enable Direct Access** check box to allow external devices to directly access files on this file system via a network share. When you select this option, you must also create a public network share that maps to the file system root directory.

Grass Valley Stratus

a. In the **Name** box, enter a name for the file system.

b. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

c. In the **Host** box, the hostname or IP address of your Grass Valley Stratus system.

d. In the **Username** box, the username for the Grass Valley Stratus account that Inception uses to access your Grass Valley Stratus system.

e. In the **Password** box, the password for the Grass Valley Stratus account.

f. In the **Device** box, enter the name of the device on your Grass Valley Stratus system. In most instances the device name is **SummitMDI**.

g. In the **Root** box, the path to the directory on your Grass Valley Stratus system to open upon initial connection.

h. Select the **Preserve File References** check box to preserve original references to files in the MAM, even when files move. For example: when an asset moves to a new location in the MAM, Inception maintains the file reference in the new location as not to break the link.

i. Select the **Enable MOS Object Source** check box to enable the file system to be configured as a source for MOS objects.

Local Storage

a. In the **Name** box, enter a name for the file system.

b. In the **Namespace** box, enter the name that Inception uses to access the file system.

   Once you create a file system, you cannot change the **Namespace** set for the file system.

c. In the **Root** box, enter the directory path for the file system root directory on your Inception Server local disk or a network accessible file share.

d. Select the **Preserve File References** check box to preserve original references to files in the MAM, even when files move. For example: when an asset moves to a new location in the MAM, Inception maintains the file reference in the new location as not to break the link.

7. Click **Create**.

   Inception adds the new file system to the **File Systems** list.

For More Information on...

- media sources, refer to the chapter "**Configuring Media Sources**" on page 16–1
- how to edit file systems, refer to the section "**Edit a File System**" on page 4–10
- how to delete file systems, refer to the section "**Delete a File System**" on page 4–11

Edit a File System

✶ You cannot edit the Namespace of an existing file system.

To edit a file system

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **File Systems** tab.

   The **File Systems** tab opens, listing all the available file systems.

3. From the **File Systems** list, select the file system to edit.

4. Click **Edit**.

   The **Create File System** settings open.

5. Use the **Provider** list to select a file system type for the selected file system:

6. Click **Next**.

   The **Edit File System** settings open for the selected **Provider**.

7. Edit the file system settings as required.

8. Click **Save**.

For More Information on...

- how to create file systems, refer to the section "**Add a File System**" on page 4–6
- how to delete file systems, refer to the section "**Delete a File System**" on page 4–11

Delete a File System

Deleting a file system disconnects it from associated media sources but does not delete the media files contained in the file system root directory.

To delete a file system

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.
2. Click the **File Systems** tab.

   The **File Systems** tab opens, listing all the available file systems.
3. From the **File Systems** list, select the file system to delete.
4. Click **Delete**.

   A confirmation dialog box opens.
5. Click **OK**.

   Inception deletes the selected file system.

For More Information on...

- how to create file systems, refer to the section “**Add a File System**” on page 4–6
- how to edit file systems, refer to the section “**Edit a File System**” on page 4–10

Configure System Settings

Inception administrators can set the default user interface language, time zone, time format, font sizes, and the first day of the week for all users of an Inception Server. Inception users can use the User Preferences tab of the Preferences panel to override the default user preference values set on this tab.

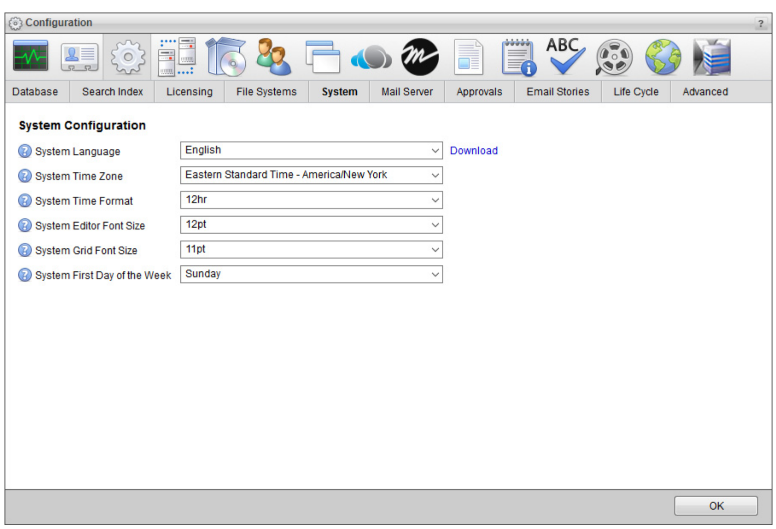
✶ Changes made to the default user preference values take effect the next time a user logs into the Inception Server.

To set the default user preferences for an Inception Server

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.
2. Click the **System** tab.

   The **System** tab opens.



3. Use the **System Language** list to select the Inception user interface language for all users of an Inception Server. Inception users can override the selected **System Language** by selecting a **User Language** in the **Preferences** panel.

   If you want to download an Inception language pack, follow these steps.

   a. Click the **Download** link.

      The **Download Selected Language Pack** and **Download Empty Language Pack** buttons display below the **System Language** list.

   b. Click **Download Selected Language Pack** to download the selected **System Language** to your computer as an Inception language pack file.

   c. Click **Download Empty Language Pack** to download a template that you can use to create an Inception language pack file.

4. Use the **System Time Zone** list to select the time zone which matches the physical location of the Inception Server computer. Inception users can override the selected **System Time Zone** by selecting a **User Time Zone** in the **Preferences** panel.

5. Use the **System Time Format** list to select **12hr** or **24hr** as the time format for all users of an Inception Server. Inception users can override the selected **System Time Format** by selecting a **User Time Format** in the **Preferences** panel.

6. Use the **System Editor Font Size** list to select the font size, 6 to 32 points, that Inception uses to display text in editor panels. Inception users can override the selected **System Editor Font Size** by selecting a **User Editor Font Size** in the **Preferences** panel.

7. Use the **System Grid Font Size** list to select the font size, 6 to 32 points, that Inception uses to display text in panel grids. Inception users can override the selected **System Grid Font Size** by selecting a **User Grid Font Size** in the **Preferences** panel.

8. Use the **System First Day of the Week** list to select the first day of the week to display in the **Calendar** view of the **Assignment Manager**, **Task Schedule**, and **Custom Entity Manager** panels, and in the **Calendar Date** tool used to select dates. Inception users can override the selected **System First Day of the Week** by selecting a **User First Day of the Week** in the **Preferences** panel.

For More Information on...

- overriding default user preferences, refer to the section "**Set Personal User Preferences**" on page 3–2.

Configure the E-mail Server

The following Inception features require the configuration of an e-mail server.

- Story approval via e-mail
- System notifications sent to Inception administrators
- Story creation via e-mail
- Assignment notifications sent to Inception users assigned to an assignment

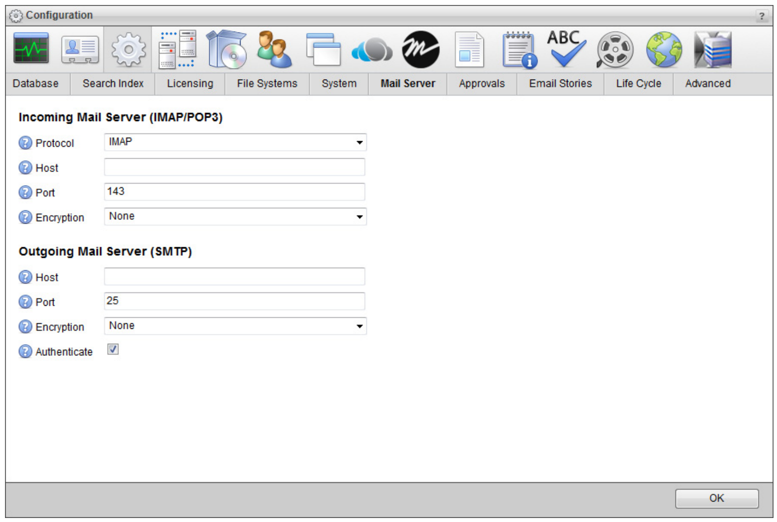
To configure the e-mail server

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Mail Server** tab.

   The **Mail Server** tab opens.



3. In the **Incoming Mail Server** section, use the **Protocol** list to select the e-mail handling protocol for the incoming e-mail server.
4. In the **Host** box, enter the host name of the incoming e-mail server.
5. In the **Port** box, enter the port number used for communicating with the incoming e-mail server.
6. Use the **Encryption** list to select the encryption method used by the incoming e-mail server.
7. In the **Outgoing Mail Server** section, enter the host name of the outgoing e-mail server in the **Host** box.
8. In the **Port** box, enter the port number used for communicating with the outgoing e-mail server.
9. Use the **Encryption** list to select the encryption protocol used by the outgoing e-mail server.
10. Select the **Authenticate** check box to enable authentication for the outgoing e-mail server.

    Clear this check box to not use authentication for outgoing e-mail.

Enable Story Approval via E-mail

With story approval via email enabled, Inception can send approval request e-mails to users that approve stories. An approving user can reply to the received e-mail to approve or reject the story. Enabling story approval also enables Inception to send system notifications to Inception administrators. Approving users must have permission to receive approval requests via e-mail and permission to approve stories.

Ross Video recommends creating a dedicated e-mail account with a descriptive name and e-mail address to send story approval request e-mails. Approving users will see the sending e-mail address when they receive an approval request e-mail.

✶ The e-mail account used for story approval via e-mail must be different from the ones used for story creation or assignment notification.

Before you can configure story approval via e-mail you must create an account for the e-mail address that sends out approval requests. To create an e-mail account for story approval via email, refer to the section “**E-mail Account Configuration**” on page 18–37.

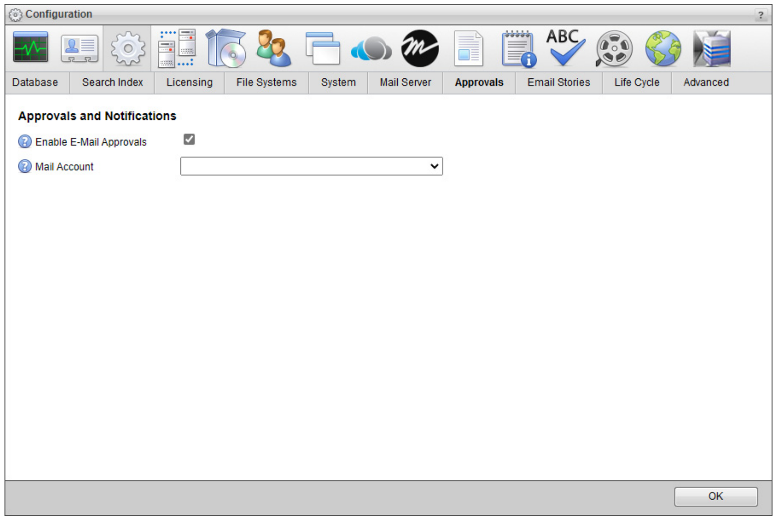
To enable story approval via e-mail

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Approvals** tab.

   The **Approvals** tab opens.



3. Select the **Enable E-mail Approvals** check box to enable Inception to send approval request e-mails to approving users and system notification e-mails to Inception administrators.

4. Use the **Mail Account** list to select the e-mail account that Inception uses to send approval request and system notification e-mails.

   This list only contains the e-mail accounts defined on your Inception Server.

✶ The e-mail account used for story approval via e-mail must be different from the ones used for story creation or assignment notification.

For More Information on...

- how to create an e-mail account, refer to the section “**E-mail Account Configuration**” on page 18–37.

Enable Story Creation via E-mail

With story creation via e-mail enabled, users can create Drupal, Facebook, Frankly, TownNews, and WordPress stories in an e-mail and send them to Inception to create the story. Users must have permission to create stories via e-mail.

✶ At least one Upload Media Source must exist to enable e-mail story creation. For information about creating an Upload Media Source, refer to the section “**Add a Media Source**” on page 16–2.

Ross Video recommends creating a dedicated e-mail account with a descriptive name and e-mail address to receive story creation e-mails. Users will use the receiving e-mail address to send their story to Inception and they will see the e-mail when they receive a confirmation e-mail for the story.

✶ The e-mail account used for story creation via e-mail must be different from the ones used for story approval or assignment notification.

Before you can configure story creation via e-mail you must create an account for the e-mail address that receives stories for creation. To create an e-mail account for story creation via email, refer to the section “**E-mail Account Configuration**” on page 18–37.

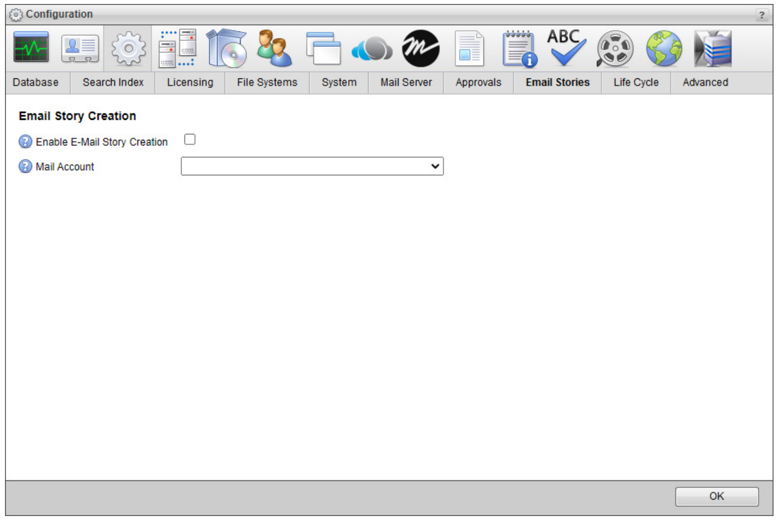
To enable story creation via e-mail

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Email Stories** tab.

   The **Email Stories** tab opens.



3. Select the **Enable E-Mail Story Creation** check box to create stories from the content of e-mails received from Inception users who have the permission to create stories via e-mail.

4. Use the **Mail Account** list to select the e-mail account that Inception uses to receive stories for creation and send story confirmation e-mails.

   This list only contains the e-mail accounts defined on your Inception Server.

✶ The e-mail account used for story creation via e-mail must be different from the ones used for story approval or assignment notification.

For More Information on...

- how to create an e-mail account, refer to the section "**E-mail Account Configuration**" on page 18–37.

Configure Life Cycle Settings

Life cycle settings enable you to control the automatic archiving of running orders and the automatic purging of content from the Recycle Bin folder.

Users can choose not to archive a running order by adding the word **hold** (case insensitive) to the start of the running order name. For example, Inception will not archive a running order named **hold News Night 9**.

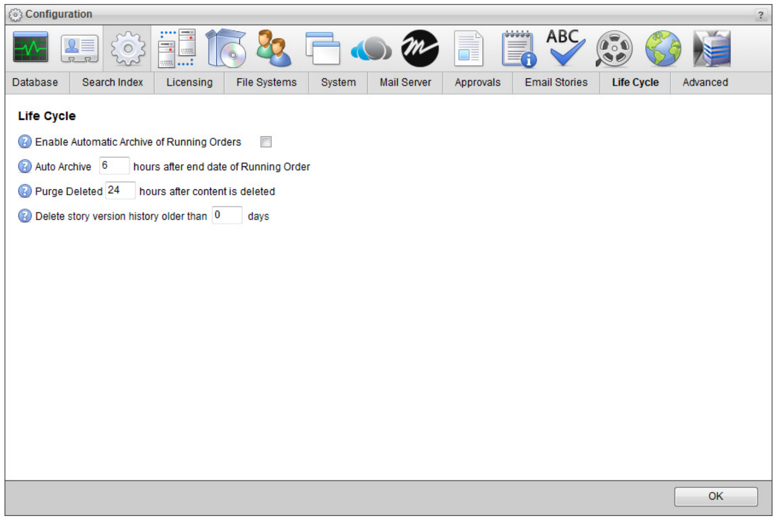
To configure life cycle settings

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

2. Click the **Life Cycle** tab.

The **Life Cycle** tab opens.



3. Select the **Enable Automatic Archive of Running Orders** check box to automatically archive running orders after the end date of a running order.
4. In the **Auto Archive** box, enter the number of hours to wait after the end date of a running order before automatically archiving the running order.

   If the running order is monitored, Inception automatically unmonitors the running order before archiving the running order.
5. In the **Purge Deleted** box, enter the number of hours to wait before Inception permanently deletes the running orders and stories contained in the Recycle Bin.
6. In the **Delete story version history older than** box, enter the number of days to wait before Inception permanently deletes versions of a story that are older than the set number of days. Enter 0 to never delete story versions.

   Inception users can only access versions of story that are newer than the set number of days.

Configure Advanced Settings

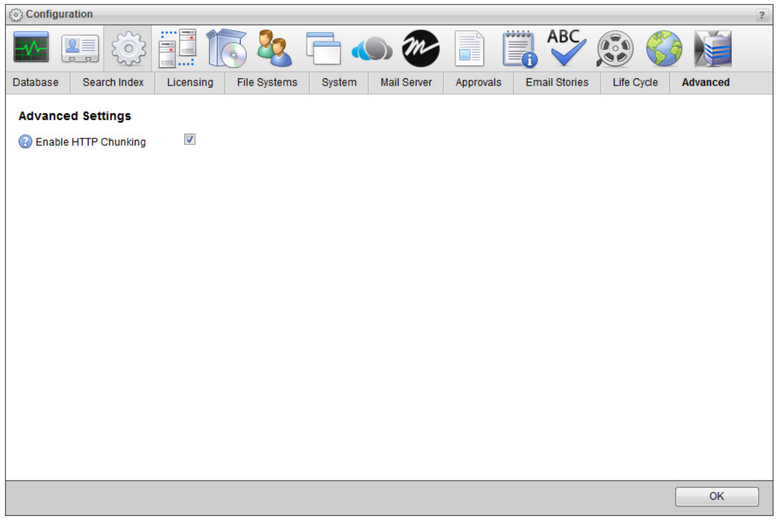
Advance settings enable you to control HTTP chunking on your Inception Server.

To configure advanced settings

1. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.
2. Click the **Advanced** tab.

The **Advanced** tab opens.



3. Select the **Enable HTTP Chunking** check box to use chunked transfer encoding to upload files to the Inception Server. Inception enables this option by default.

   Some firewalls and proxies do not support chunked transfer encoding. Only clear this option if you are experiencing problems when uploading large media files to the Inception Server.

4. Click **OK** in the lower toolbar to save your configuration changes.

   Inception saves your configuration changes and closes the **Configuration** panel.

Managing Inception Nodes

Multiple Inception Servers can connect to a single database to form a Redundant Node Inception system. Each Inception Server in a Redundant Node Inception system acts as a node to run one or more Inception services to load balance the overall system.

✶ To configure a Redundant Node Inception system, you must have licenses for two or more Inception Servers. Please contact Ross Video to purchase additional Inception Servers licenses for your Redundant Node Inception system.

This chapter discusses the following topics:

- Configure Database Connectivity
- View the Nodes in Your System
- Manage Inception Services

Configure Database Connectivity

Each Inception Server acting as a node in your Redundant Node Inception system must connect to the same database. You must log in to each Inception Server as an Inception administrator and configure the server to connect to the same database as the other servers in your Redundant Node Inception system.

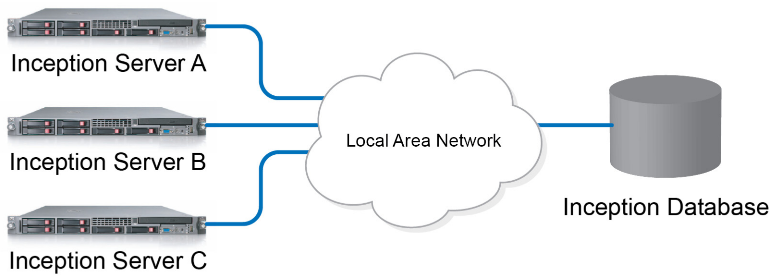


Figure 5.1 Database Connection in a Redundant Node Inception System

To configure database connectivity for each node

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

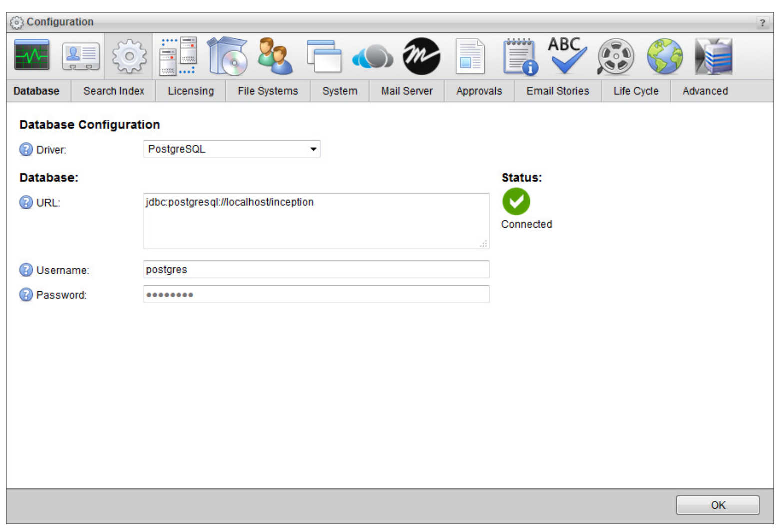
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **System** icon.

   The **System** panel opens.

4. Click the **Database** tab.

   The **Database** tab opens.



5. Use the **Driver** list to select the database driver used to connect to the Inception Database.

   Select the same Driver for each Inception Server node in your Redundant Node Inception system.

6. In the **URL** box, enter the JDBC URL that connects your Inception Server with Inception Database. For example, for a database named inception on PostgreSQL, use the following URL:

   ```
   jdbc:postgresql://localhost/inception
   ```

   Enter the same URL for each Inception Server node in your Redundant Node Inception system.

7. In the **Username** box, enter the username that Inception uses to access the database.

   Enter the same Username for each Inception Server node in your Redundant Node Inception system.

8. In the **Password** box, enter the password associated with the username.

   For security purposes, dots replace the entered password. Enter the same Password for each Inception Server node in your Redundant Node Inception system.

9. Repeat this procedure on each Inception Server node in your Redundant Node Inception system.

View the Nodes in Your System

After you configure all the Inception Server nodes in your Redundant Node Inception system to connect to the same database, you can view the nodes through the Node Management tab in the Configuration window.

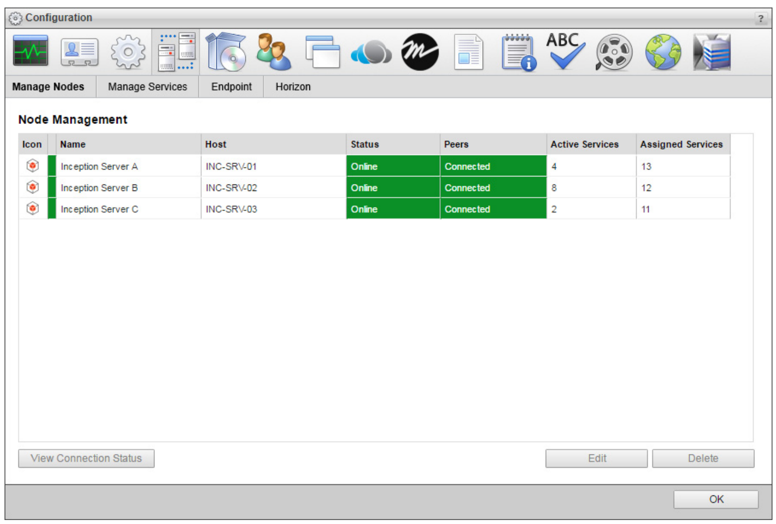
To view the nodes in your system

1. On the **Configuration** window toolbar, click the  **Network** icon.

   The **Node Management** panel opens.

2. Click the **Manage Nodes** tab.

   The **Manage Nodes** tab opens.

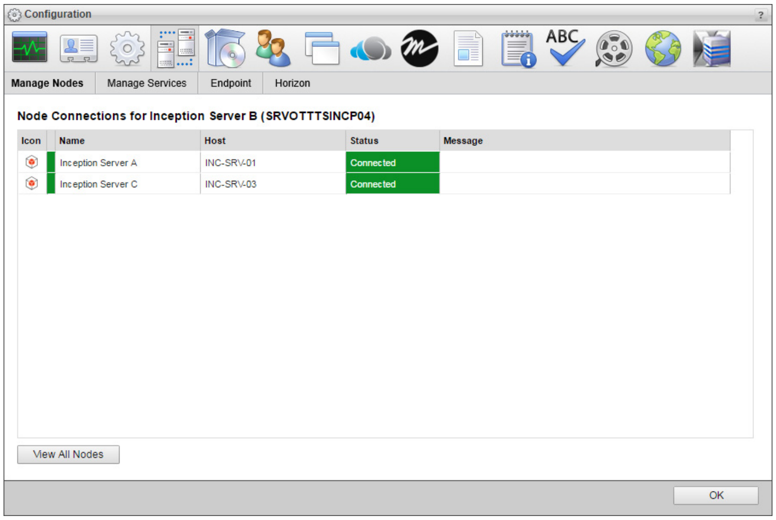


The **Node Management** table displays the following information about the nodes in a Redundant Node Inception system:

- **Icon** — this column displays an icon that identifies the node.
- **Name** — this column displays the name of the node.
- **Host** — this column displays the host name of the node computer.
- **Status** — this column displays the current status of the node.
- **Peers** — this column displays the current connection status between the node and the other nodes in the Redundant Node Inception system.
- **Active Services** — this column displays the number of Inception services currently running on the node.
- **Assigned Services** — this column displays the number of Inception services assign to run on the node.

3. To view the nodes connected to a selected node, select the node in the **Node Management** table and then click **View Connection Status**.

   The **Node Connections** page opens for the selected node.



   The **Node Connections** table displays the following information about the nodes connected to a selected node:

   - **Icon** — this column displays an icon that identifies the node.
   - **Name** — this column displays the name of the node.
   - **Host** — this column displays the host name of the node computer.
   - **Status** — this column displays the current connection status between the selected node and the listed node.
   - **Message** — this column displays additional information about the connection between nodes.

4. Click **View All Nodes** to return to the **Node Management** page of the **Manage Nodes** tab.

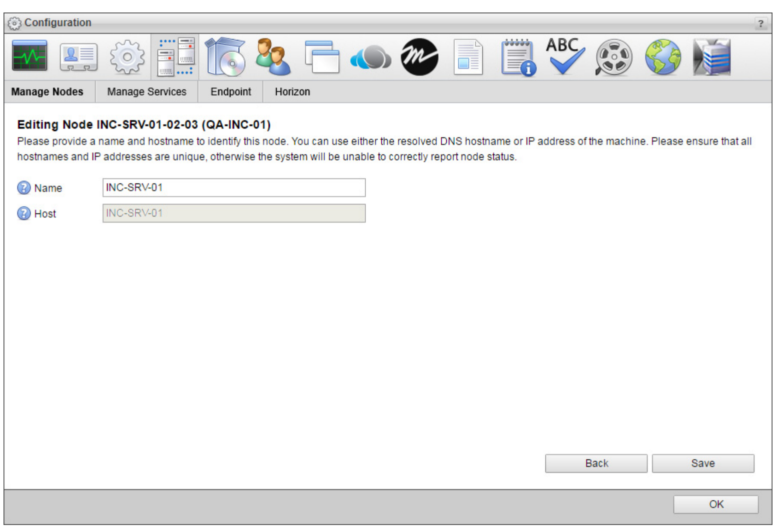
Change Node Names

To help you keep track of the nodes in your Redundant Node Inception system, you can edit the node names.

To change the name of a node

1. In the **Node Management** table, select the node that you want to change the name.
2. Click **Edit** tab.

   The **Editing Nodes** page opens.



3. In the **Name** box, enter a name for the node.
4. Click **Save** to save the new node name.

   The **Node Management** page opens.

Manage Inception Services

Each Inception Server in a Redundant Node Inception system acts as a node to run one or more Inception services to load balance the overall system. For each available Inception service, you can choose the node to run the service and the nodes that the Inception service can use to continue running if the active node were to falter.

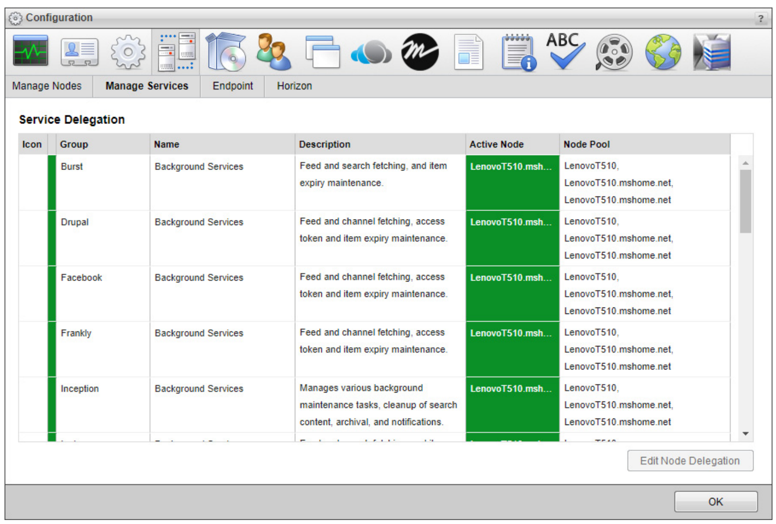
✶ You must assign an Inception service to at least one node to make it available to Inception users.

To assign Inception services to nodes

1. On the **Configuration** window toolbar, click the  **Network** icon.

   The **Node Management** panel opens.
2. Click the **Manage Services** tab.

   The **Manage Services** tab opens.

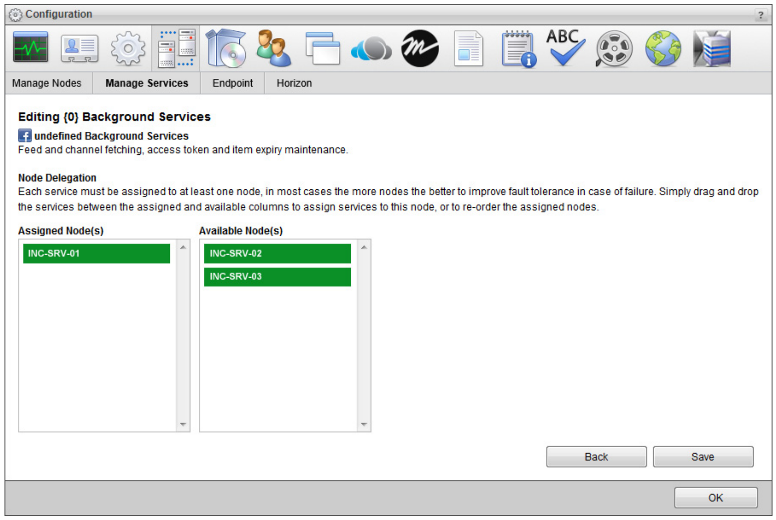


   The **Service Delegation** table displays the following information about Inception services and the nodes that the services run on in a Redundant Node Inception system:

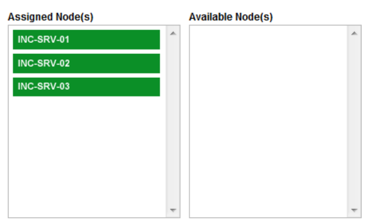
   - **Icon** — this column displays an icon that identifies the group to which the Inception service belongs.
   - **Group** — this column displays the name of the group to which the Inception service belongs.
   - **Name** — this column displays the name of the Inception service.
   - **Description** — this column displays a description of the Inception service.
   - **Active Node** — this column displays the hostname of the node that is currently running the Inception service.
   - **Node Pool** — this column lists the hostnames of the nodes that the Inception service can use to continue running if the active node were to falter.
3. In the **Service Delegation** table, select the Inception service to assign to a node.

4. Click **Edit Node Delegation**.

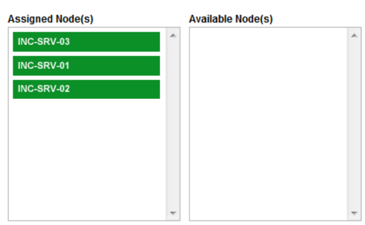
   The **Editing Background Services** page open for the selected Inception service.



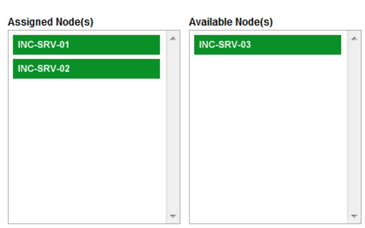
5. To assign the selected Inception Service to a node, drag the node to assign from the **Available Node(s)** list to the **Assigned Node(s)** list.



6. To change the priority of a node, drag the node up or down in the **Assigned Node(s)** list. The selected Inception service starts running on the he node at the top of the **Assigned Node(s)** list, the active node.



7. To unassign the selected Inception Service from a node, drag the node to unassign from the **Assigned Node(s)** list to the **Available Node(s)** list.



8. After assigning the selected Inception services to the appropriate nodes, click **Save**.

   Inception displays the updated Inception service in the **Service Delegation** table.

Managing Inception Apps

Inception apps enable you to offer new features, extended functionality, or customization to the users of your Inception Server. After you install an app on your Inception Server, access to the app depends on the user permissions set for a user. Ross Video, third party developers, or your own in-house developers can create Inception apps.

This chapter discusses the following topics:

- Install Apps
- Uninstall Apps
- Configure x.news for Assignments

Install Apps

Inception apps are contained in .app files that you can install on your Inception Server. The availability of installed Inception apps depends on the user permissions set for a user.

To install an Inception app

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

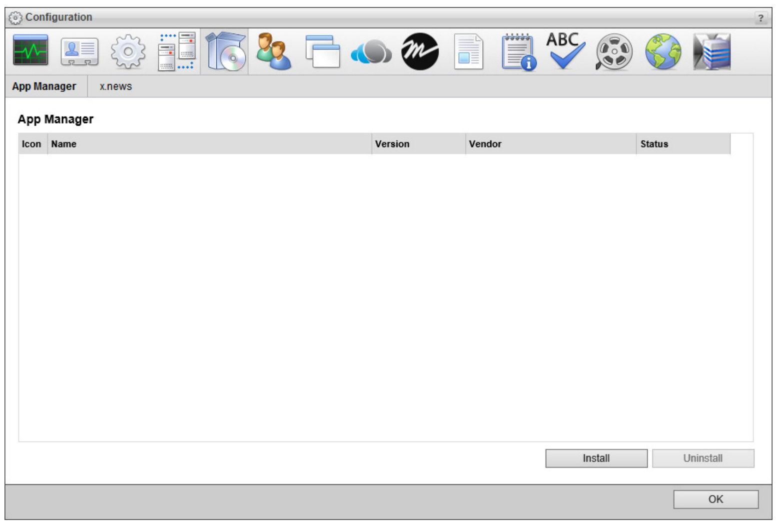
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Apps** icon.

   The **Apps** panel opens.

4. Click the **App Manager** tab.

   The **App Manager** tab opens.



5. Click **Install**.

   The **Install App** page opens.

6. Click **Browse** to the right of the **App File** box.

   The **Open** dialog box opens displaying the local file system of your computer.

7. Locate and select the **App** file (.app) that contains the Inception app to install on your Inception Server.

8. Click **Open**.

   Inception installs the selected app. The **Install App** page closes and Inception adds the app to the **App Manager** list.

Uninstall Apps

When you no longer require an Inception app on your Inception Server, you can uninstall the app.

To uninstall an Inception app

1. On the **Configuration** window toolbar, click the **Apps** icon.

   The **Apps** panel opens.
2. In the **App Manager** list, select the app to uninstall.
3. Click **Uninstall**.

   Inception uninstalls the selected app. The **Install App** page closes and Inception removes the app to the **App Manager** list.
4. Click **OK** to close the **Configuration** window.

Configure x.news for Assignments

Inception uses the x.news information aggregation tool to gather content across multiple platforms for assignments.

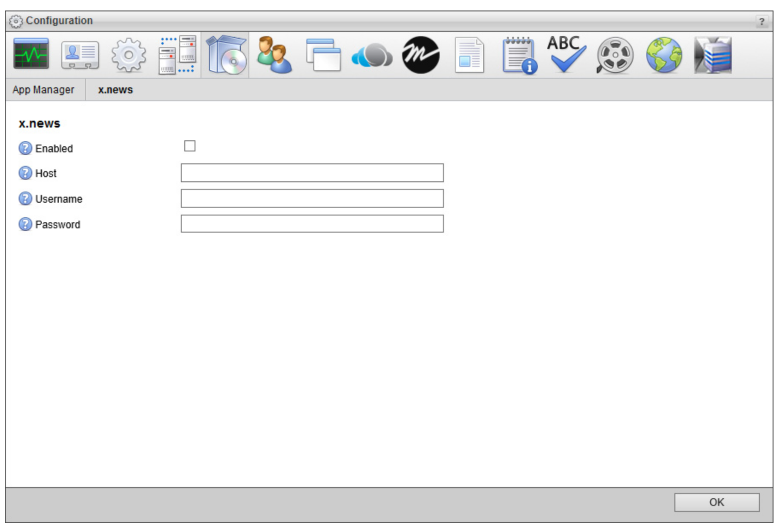
✶ You must have a valid x.news account before configuring Inception to use x.news to gather assignment content.

To configure x.news for assignments

1. On the **Configuration** window toolbar, click the **Apps** icon.

   The **Apps** panel opens.
2. Click the **x.news** tab.

   The **x.news** tab opens.



3. Select the **Enabled** check box to enable Inception to access x.news using the configured account. Clear this check box to disable x.news access.
4. In the **Host** box, enter the URL of your x.news server.
5. In the **Username** box, enter the username for logging in to your x.news account.
6. In the **Password** box, enter the password for logging in to your x.news account.
7. Click **OK**.

   Inception saves the x.news configuration.

Configuring User Permissions

User permissions define the actions users have permission to perform and determine which buttons, messages, and controls they see in the Inception user interface. In most Inception Server systems, the Inception administrator assigns users with the user permissions that are appropriate for their role in using Inception.

User permissions are role-based. Each user account has one or more user roles, such as journalist or producer. Each user role has a set of permissions. The role-based permissions model enables Inception administrators to precisely define user permissions for each user, to ensure conformance to your organization's business processes.

An Inception administrator can create user accounts and roles within Inception or imported them from a Lightweight Directory Access Protocol (LDAP) server. Inception can use a combination of created and imported user accounts and roles.

To configure user permissions, you create user roles and assign permissions to them, and then create user accounts and assign user roles to them.

User permission settings belong to the following categories, represented by tabs on the Users configuration panel:

- **Manage Users** — Properties related to individual users, including role assignments.
- **Manage Roles** — Properties related to user roles, including permissions associated with user roles.
- **LDAP Configuration** — Properties related to establishing connectivity with an LDAP directory server.
- **LDAP User Configuration** — Mappings to enable Inception to import user accounts from an LDAP directory server.
- **LDAP Role Configuration** — Mappings to enable Inception to import user roles (groups) from an LDAP directory server.

This chapter discusses the following topics:

Create a User Role

To create a user role

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure "**To access the Inception Server Configuration window**" on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

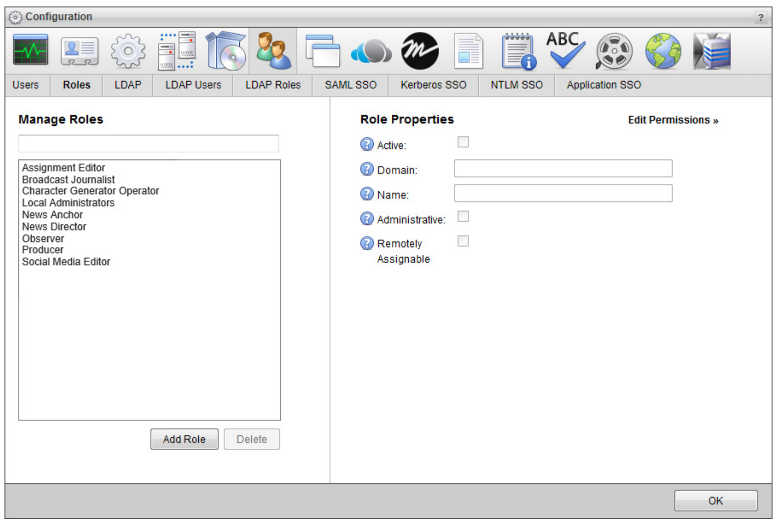
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

4. Click the **Roles** tab.

   The **Roles** tab opens.



5. In the **Manage Roles** section, click **Add Role**.

   Inception automatically saves property values set for a new user role.

6. In the **Role Properties** section, select the **Active** check box to make the role operational.

   Clear this check box to deactivate a user role. Inactive roles cannot convey permissions to user accounts.

7. In the **Name** box, enter a name for the user role.

8. Select the **Administrative** check box to grant the user role all user permissions and enable the user role to configure all administrative settings.

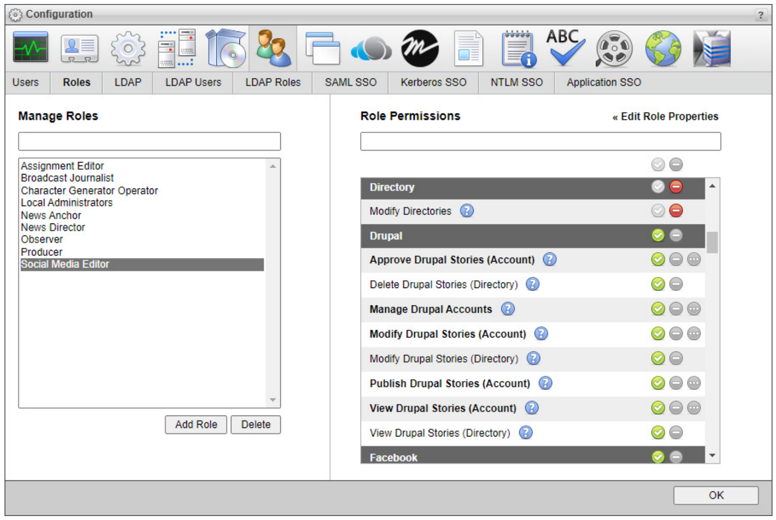
   Clear this check box to only include selected permissions with the user role.

9. Select the **Remotely Assignable** check box to enable Horizon to use the user role to assign remote user permissions on the Inception Server.

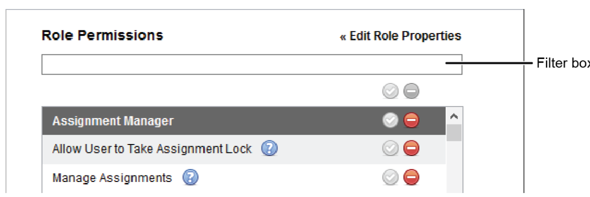
   Clear this check box to only use the user role to assign local user permissions.

10. Click **Edit Permissions**.

The **Role Permissions** list opens. Hover the mouse pointer over a  icon to the right of a permission to view a description of the permission.



You can filter the **Role Permission** list by typing any part of a role permission name in the **Filter** box. As you enter a role permission name, the list automatically updates to only show the role permissions that match what you have entered.



11. In the **Role Permissions** list, set the role permissions for the user role as follows:

- **Role Permissions** — use the following icons displayed to the right of a role permission to grant or deny the role permission to the selected role:

   — click this icon to grant the role permission to the selected role.

   — click this icon to deny the role permission from the selected role.

- **Categories** — the Role Permissions list is divided into categories to make it easier to find the role permissions to set for the selected role. Inception uses a dark gray shading to highlight category headings in the list. Use the following icons displayed in a category heading to grant or deny all category role permissions to the selected role:

   — click this icon to grant all category role permissions to the selected role. Sometimes it is quicker to grand all role permissions and deny the unwanted role permissions than to just grant the required role permissions.

   — click this icon to deny all category role permissions from the selected role.

- **Accounts** — role permissions displayed in bold text are account-based role permissions. Use the following icons displayed to the right of an account-based role permission to grant or deny the role permission to all accounts for the selected role:

  — click this icon to grant the role permission to all accounts for the selected role. Sometimes it is quicker to grand a role permission to accounts and deny the role permission from unwanted accounts than to just grant the role permission to required accounts.

  — click this icon to deny the role permission from all accounts for the selected role.

  You can also control the role permission for individual accounts by clicking the icon to the right of an account-based role permission to view the individual accounts controlled by the role permission. Use the following icons displayed to the right of an account:

  — click this icon to grant the role permission to the account for the selected role.

  — click this icon to deny the role permission from the account for the selected role.

Inception automatically saves account permission assignment changes. After finishing the configuration of a user role, you can assign it to a user.

For More Information on...

- user roles, refer to the sections “**Modify a User Role**” on page 7–4, and “**Delete a User Role**” on page 7–10.
- user accounts, refer to the sections “**Create a User Account**” on page 7–11, “**Modify a User Account**” on page 7–12, and “**Delete a User Account**” on page 7–13.
- typical user permissions, refer to the section “**Typical User Role Permissions**” on page 7–5.

Modify a User Role

Within Inception you are only able to modify the properties of user roles created in Inception. To modify roles (groups) imported from an LDAP directory server, you must modify them on the LDAP directory server.

To modify a user role

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

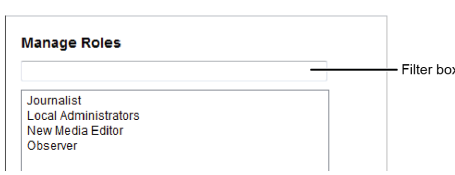
2. Click the **Roles** tab.

   The **Roles** tab opens.

3. In the **User Role** list, select the name of the user role to modify.

   You can filter the **User Role** list by typing any of the following information in the **Filter** box above the list:

   - Any part of a user role name. As you enter a user role name, the list automatically updates to only show user roles that match what you have entered.
   - Enter `local` to list only the user roles created in Inception.
   - Enter `LDAP` to list only the user roles imported from an LDAP directory.



4. In the **Role Properties** section, edit the user role properties as required.

   Inception automatically saves property value changes made to a user role.

5. Click **Edit Permissions**.

   The **Role Permissions** list opens.

6. In the **Role Permissions** list, edit the user role permission assignments as required.

   Inception automatically saves permission assignment changes made to a user role and applies the changes to all the users assigned to the user role.

For More Information on...

- user roles, refer to the sections "**Create a User Role**" on page 7–2, and "**Delete a User Role**" on page 7–10.
- user accounts, refer to the sections "**Create a User Account**" on page 7–11, "**Modify a User Account**" on page 7–12, and "**Delete a User Account**" on page 7–13.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 7–5.

Typical User Role Permissions

The following tables list the available user role permissions and typical user role assignments.

Table 7.1 Assignment Manager

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Allow User to Take Assignment Lock	✓			✓	✓		
Manage Assignments	✓			✓			
Modify Assignments	✓			✓	✓		
View Assignments	✓			✓	✓		

Table 7.2 Broadcast

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Approve Broadcast Stories	✓			✓			
Modify Broadcast Stories	✓			✓	✓		
Modify MOS Objects	✓			✓	✓		
Publish Broadcast Stories	✓			✓	✓		
View Broadcast Stories	✓	✓		✓	✓	✓	✓

Table 7.3 Configuration

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Denylist	✓	✓	✓	✓	✓		
Modify Dictionary	✓	✓		✓	✓		✓

Table 7.4 Contact Manager

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Contacts	✓	✓	✓	✓	✓		
View Contacts	✓	✓	✓	✓	✓	✓	✓

Table 7.5 Directory

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Directories	✓	✓		✓	✓		
View Directories	✓	✓	✓	✓	✓	✓	✓

Table 7.6 Drupal

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Approve Drupal Stories	All Accounts	Selected Accounts		All Accounts			
Manage Drupal Accounts	All Accounts	Selected Accounts		All Accounts			
Modify Drupal Stories	All Accounts	Selected Accounts		All Accounts	Selected Accounts		Selected Accounts
Publish Drupal Stories	All Accounts	Selected Accounts		All Accounts			Selected Accounts
View Drupal Stories	All Accounts	All Accounts		All Accounts	All Accounts	All Accounts	All Accounts

Table 7.7 Facebook

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Approve Facebook Stories	All Accounts	Selected Accounts		All Accounts			
Manage Facebook Accounts	All Accounts	Selected Accounts		All Accounts			
Modify Facebook Stories	All Accounts	Selected Accounts		All Accounts	Selected Accounts		Selected Accounts
Publish Facebook Stories	All Accounts	Selected Accounts		All Accounts			Selected Accounts
View Facebook Stories	All Accounts	All Accounts		All Accounts	All Accounts	All Accounts	All Accounts

Table 7.8 Feed

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Feeds	All Accounts	Selected Accounts		All Accounts	Selected Accounts		Selected Accounts
View Feeds	All Accounts	All Accounts	All Accounts	All Accounts	All Accounts	All Accounts	All Accounts

Table 7.9 Metadata

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Configure Metadata	✓			✓			
Modify Custom Entity Instances	✓			✓			
View Custom Entity Instances	✓	✓	✓	✓	✓	✓	✓

Table 7.10 Playlist

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Playlists	✓	✓	✓	✓			
Playout Playlists	✓	✓	✓				
View Playlists	✓	✓	✓	✓	✓	✓	✓

Table 7.11 Playlist Item

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Allow User to Take Playlist Item Lock	✓	✓	✓	✓			
Approve Playlist Items	✓	✓	✓	✓			
Modify Playlist Items	✓	✓	✓	✓			
View Playlist Items	✓	✓	✓	✓	✓	✓	✓

Table 7.12 Poll

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Polls	✓	✓	✓	✓	✓		
View Polls	✓	✓	✓	✓	✓	✓	✓

Table 7.13 Running Order

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Delete Running Orders	✓			✓	✓		
Modify Running Orders	✓			✓	✓		
Monitor Running Orders	✓						
Playout Running Orders	✓						
View Running Orders	✓	✓	✓	✓	✓	✓	✓

Table 7.14 Search

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
View Search Manager	✓	✓	✓	✓	✓	✓	✓

Table 7.15 Spelling

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Modify Spellcheck Dictionaries	✓	✓		✓	✓		

Table 7.16 Story (Broadcast, Drupal, Facebook, WordPress, and YouTube)

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Allow Story Creation via E-Mail	✓	✓		✓	✓		✓
Allow User to Take Story Lock	✓	✓		✓	✓		
Modify Story Template	✓	✓		✓			
Notify via E-Mail for Approval	✓	✓		✓			
View Story History	✓	✓		✓	✓		✓

Table 7.17 WordPress

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Approve WordPress Stories	All Accounts	Selected Accounts		All Accounts			
Manage WordPress Accounts	All Accounts	Selected Accounts		All Accounts			
Modify WordPress Stories	All Accounts	Selected Accounts		All Accounts	Selected Accounts		Selected Accounts
Publish WordPress Stories	All Accounts	Selected Accounts		All Accounts			Selected Accounts
View WordPress Stories	All Accounts	All Accounts		All Accounts	All Accounts	All Accounts	All Accounts

Table 7.18 YouTube

Permission	Producer	Social Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Observer	News Anchor
Approve YouTube Stories	All Accounts	Selected Accounts		All Accounts			
Modify YouTube Stories	All Accounts	Selected Accounts		All Accounts	Selected Accounts		Selected Accounts
Publish YouTube Stories	All Accounts	Selected Accounts		All Accounts			Selected Accounts
View YouTube Stories	All Accounts	All Accounts		All Accounts	All Accounts	All Accounts	All Accounts

New Account Role Permissions

When you create a new account such as a Facebook or WordPress account, it is a good idea to review account role permissions set for user roles. When you create several accounts at the same time, it is most efficient to create all accounts and then assign permissions to manage them.

To assign account role permissions to a user role

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **Roles** tab.

   The **Roles** tab opens.

3. In the **User Role** list, select the name of the user role to assign account management permissions.
4. Click **Edit Permissions**.

   The **Role Permissions** list opens.

5. In the **Role Permissions** list, scroll down to an account role permission.

   For example, **Facebook**.

6. Use the following icons displayed to the right of an account-based role permission to grant or deny the role permission to all accounts for the selected role:

   — click this icon to grant the role permission to all accounts for the selected role. Sometimes it is quicker to grand a role permission to accounts and deny the role permission from unwanted accounts than to just grant the role permission to required accounts.

   — click this icon to deny the role permission from all accounts for the selected role.

7. You can also control the role permission for individual accounts by clicking the icon to the right of an account-based role permission to view the individual accounts controlled by the role permission. Use the following icons displayed to the right of an account:

   — click this icon to grant the role permission to the account for the selected role.

   — click this icon to deny the role permission from the account for the selected role.

   After you finish editing a user role, Inception applies the account permission assignment changes to all the users assigned to the user role.

Delete a User Role

You can delete user roles created in Inception.

✶ You cannot delete user roles (groups) imported from an LDAP directory server.

To delete a user role

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **Roles** tab.

   The **Roles** tab opens.

3. In the **User Role** list, select the name of the user role to delete.

4. Click **Delete**.

   A confirmation message opens, asking you if you want to delete the selected user role.

5. Click **OK**.

   Inception deletes the selected user role from the system and from assigned users. Deleting a user role from a user removes the permissions contained in the user role from the user.

For More Information on...

- user roles, refer to the sections "**Create a User Role**" on page 7–2, and "**Modify a User Role**" on page 7–4.
- user accounts, refer to the sections "**Create a User Account**" on page 7–11, "**Modify a User Account**" on page 7–12, and "**Delete a User Account**" on page 7–13.

Create a User Account

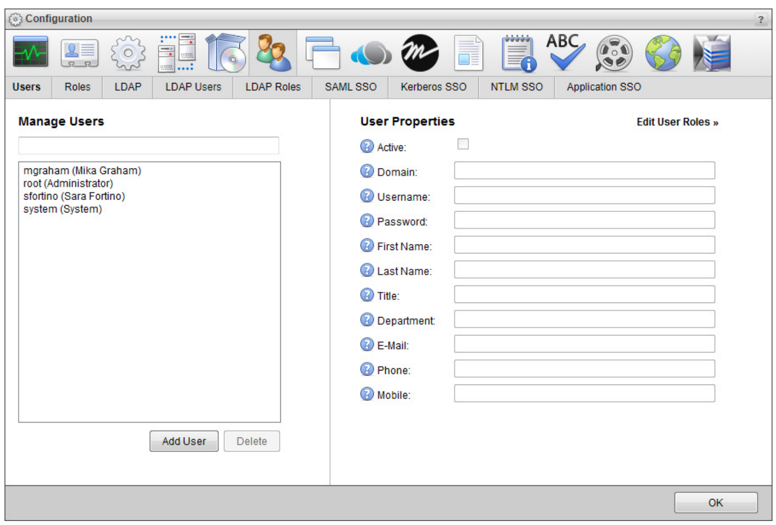
To create a user account

1. On the **Configuration** window toolbar, click the  **Users** icon.

   The **Users** panel opens.

2. Click the **Users** tab.

   The **Users** tab opens.



3. In the **Manage Users** section, click **Add User**.

   Inception automatically saves property values set for a new user.

4. In the **User Properties** section, select the **Active** check box to make the user operational.

   Clear this check box to deactivate a user. Inception retains information associated with an inactive user account but does not allow you to use the account to log in to your Inception Server.

5. In the **Username** box, enter a name for the user.

   Use this username to log in to your Inception Server. Usernames are case sensitive.

6. In the **Password** box, enter a password of at least five characters for the user. All user accounts must have a password.

   Use this password is along with the set username to log in to your Inception Server. Passwords are case sensitive.

7. In the **First Name** box, enter the first or proper name of the user.

8. In the **Last Name** box, enter the last or family name of the user.

   After logging in to Inception with a username and password, the status bar displays the first and last name associated with the username.

9. In the **Title** box, enter the job title of the user within the organization.
10. In the **Department** box, enter the department to which the user belongs within the organization.
11. In the **E-Mail** box, enter the corporate e-mail address of the user.
12. In the **Phone** box, enter the corporate telephone number of the user.
13. In the **Mobile** box, enter the mobile telephone number of the user.
14. Click **Edit User Roles**.

    The **User Roles** list opens.

15. In the **User Roles** list, select the check boxes associated with the user roles to assign to the user. Clear the check box associated with a user role to unassign it from the user.
16. Select the **Enable API** check box to enable the user to make API requests.

    The **API Key** field displays the API key that Inception automatically assigned to the user.

For More Information on...

- user accounts, refer to the sections "**Modify a User Account**" on page 7–12, and "**Delete a User Account**" on page 7–13.
- user roles, refer to the sections "**Create a User Role**" on page 7–2, "**Modify a User Role**" on page 7–4, and "**Delete a User Role**" on page 7–10.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 7–5.

Modify a User Account

You can modify the properties of user accounts created in Inception. If you want to modify users imported from an LDAP directory server, you must change them on the LDAP directory server.

To modify a user account

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

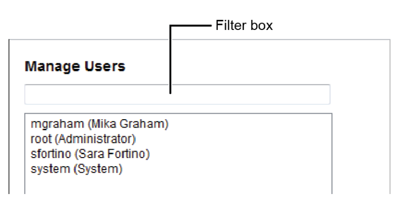
2. Click the **Users** tab.

   The **Users** tab opens.

3. In the **User s** list, select the name of the user to modify.

   You can filter the **Users** list by typing any of the following information in the **Filter** box above the list:

   - Any part of a user name. As you enter a user name, the list automatically updates to only show user names that match what you have entered.
   - Enter `local` to list only the users created in Inception.
   - Enter `LDAP` to list only the users imported from an LDAP directory.



4. In the **User Properties** section, edit the user properties as required.

   Inception automatically saves property value changes made to a user.

5. Click **Edit User Roles**.

   The **User Roles** list opens.

6. In the **User Roles** list, edit the user roles assignments as required.

   Inception automatically saves user role assignment changes made to a user.

For More Information on...

- user accounts, refer to the sections “**Create a User Account**” on page 7–11, and “**Delete a User Account**” on page 7–13.
- user roles, refer to the sections “**Create a User Role**” on page 7–2, “**Modify a User Role**” on page 7–4, and “**Delete a User Role**” on page 7–10.
- typical user permissions, refer to the section “**Typical User Role Permissions**” on page 7–5.

Delete a User Account

You can delete user accounts created in Inception.

✶ You cannot delete user accounts imported from an LDAP directory server.

To delete a user account

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **Users** tab.

   The **Users** tab opens.

3. In the **Users** list, select the name of the user to delete.
4. Click **Delete**.

   A confirmation message opens, asking you if you want to delete the selected user.

5. Click **OK**.

   Inception deletes the selected user.

6. After completing your configuration tasks, click **OK** in the lower toolbar to close the **Configuration** panel.

For More Information on...

- user accounts, refer to the sections “**Create a User Account**” on page 7–11, and “**Modify a User Account**” on page 7–12.
- user roles, refer to the sections “**Create a User Role**” on page 7–2, “**Modify a User Role**” on page 7–4, and “**Delete a User Role**” on page 7–10.

SAML Single Sign-On Configuration

SAML (Security Assertion Markup Language) SSO enables Inception to act as a SAML Service Provider (SP). Users can automatically log in or “sign-on” to Inception by authenticating with a SAML Identity Provider (IdP) like Microsoft Azure AD or Okta.

✶ SAML SSO requires LDAP to be enabled, and it cannot be enabled at the same time as Kerberos or NTLM SSO.

Configure Inception to Use SAML SSO

After you create an authentication domain account and register all the SPNs to the user account, you can configure Inception to use SAML SSO.

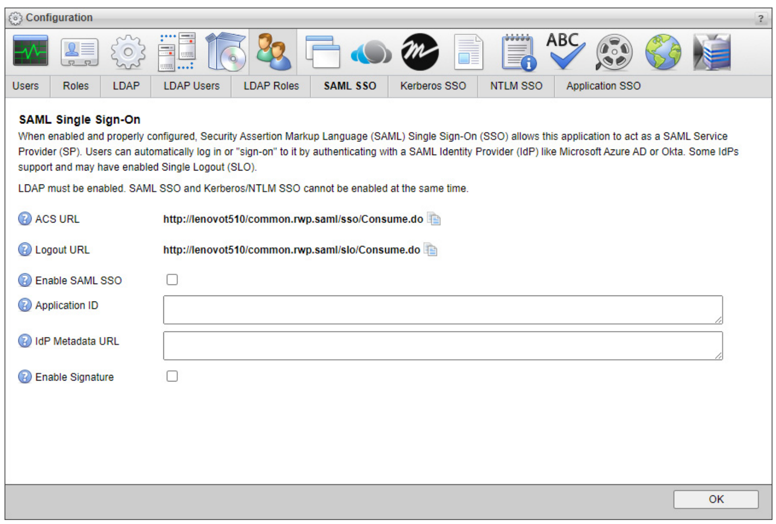
To configure Inception to use SAML SSO

1. Log in to your Inception Server as an administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.
3. On **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.
4. Click the **SAML SSO** tab.

   The **SAML SSO** tab opens.



5. In the **ACS URL** field, click the **Copy** icon to copy the displayed ACS URL to the clipboard.
6. Paste the copied **ACS URL** into your Identity Provider's configuration application.
7. In the **Logout URL** field, click the **Copy** icon to copy the displayed Logout URL to the clipboard.
8. Paste the copied **Logout URL** into your Identity Provider's configuration application.
9. Select the **Enable SAML SSO** check box to redirect Inception user logins to the configured Identity Provider SSO URL for authentication.

   Authenticated logins are automatically redirected back to Inception and logged in when the user exists in the Inception LDAP database
10. Enter in the **Application ID** box the ID of the SAML Service Provider application as configured in the Identity Provider's configuration application.
11. Enter in the **IdP Metadata URL** box the URL, provided by the Identity Provider, to obtain the metadata required for secure communication between the Identity Provider and Service Provider.
12. Select the **Enable Signature** check box to sign logout requests to the Identity Provider. Clear this check box when signed logout requests are not required.

13. In the bottom toolbar, click **OK**.

    The **Configuration** window closes.

14. Logout of Inception and then log back in to confirm that SAML SSO is working correctly.

    If you are working on a domain connected computer, Inception should prompt you to login with your username pre-filled in the **Username** box.

SAML Mobile Single Sign-On Configuration

SAML (Security Assertion Markup Language) SSO enables Inception Mobile to act as a SAML Service Provider (SP). Users can automatically log in or “sign-on” to Inception Mobile by authenticating with a SAML Identity Provider (IdP) like Microsoft Azure AD or Okta.

✶ When LDAP is enabled, users and roles are imported from the configured LDAP server and users signing in with SAML mobile SSO must match. When LDAP is not enabled, user account records are created on first time sign in with SAML mobile SSO.

✶ SAML mobile SSO cannot be enabled at the same time as Kerberos or NTLM SSO.

Configure Inception to Use SAML Mobile SSO

After you create an authentication domain account and register all the SPNs to the user account, you can configure Inception Mobile to use SAML Mobile SSO.

To configure Inception Mobile to use SAML Mobile SSO

1. Log in to your Inception Server as an administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

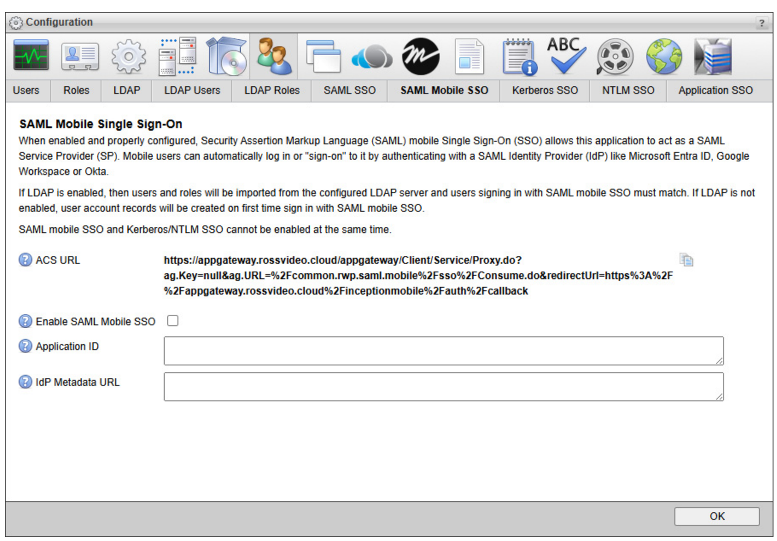
    The **Configuration** window opens.

3. On **Configuration** window toolbar, click the **Users** icon.

    The **Users** panel opens.

4. Click the **SAML Mobile SSO** tab.

    The **SAML Mobile SSO** tab opens.



5. In the **ACS URL** field, click the **Copy** icon to copy the displayed ACS URL to the clipboard.
6. Paste the copied **ACS URL** into your Identity Provider's configuration application.
7. Select the **Enable SAML Mobile SSO** check box to redirect Inception Mobile user logins to the configured Identity Provider SSO URL for authentication.

   Authenticated logins are automatically redirected back to Inception and logged in when the user exists in the Inception LDAP database
8. Enter in the **Application ID** box the ID of the SAML Service Provider application as configured in the Identity Provider's configuration application.
9. Enter in the **IdP Metadata URL** box the URL, provided by the Identity Provider, to obtain the metadata required for secure communication between the Identity Provider and Service Provider.
10. In the bottom toolbar, click **OK**.

    The **Configuration** window closes.
11. Use the Inception Mobile app to confirm that SAML SSO is working correctly.

Kerberos Single Sign On Configuration

Kerberos is a network authentication protocol supported by all the major browsers and integrates with the most common ActiveDirectory installations. Kerberos SSO uses strong cryptography and a Key Distribution Center (KDC) to authenticate users without sharing passwords.

✶ Kerberos SSO and SAML SSO cannot be enabled at the same time.

Before You Begin

You require the following information to configure Kerberos SSO:

- **Kerberos Key Distribution Center** — the hostname or IP address of the server that performs Kerberos authentication. In most cases it is your ActiveDirectory domain controller server that preforms Kerberos authentication.
- **Realm** — usually, but not always, your domain in uppercase. For example, for a domain of mydomain.com you would enter MYDOMAIN.COM. This box is case sensitive.
- **Service Principle Name (SPN) Account** — the username and password for the Service Principle Name (SPN) account. You must get a domain administrator to create a user account in your ActiveDirectory, and delegate it as the Service Principle Name for the specific hostname(s) of your application server and/or load balancer.

Domain Configuration / SPN Creation

You must create or have a user account created in your ActiveDirectory for Kerberos authentication. The example in this section use the KerberosUser account.

The list of SPNs to create should comprise all possible aliases for the service. You should register all the hostnames for your application servers and load balancers. For example: for an Inception or Streamline Server running with the hostname of myserver, and a load balancer running with the name myloadbalancer, you should register the following SPNs:

- HTTP/myserver
- HTTP/myserver.mydomain.com
- HTTP/myloadbalancer
- HTTP/myloadbalancer.mydomain.com
- HTTP/mydnsalias
- HTTP/mydnsalias.mydomain.com

You should also register any DNS aliases created for either the load balancer or application servers.

✶ If you are running with SSL/HTTPS, do not change HTTP to HTTPS for you SPNs.

To register your SPNs, someone from your organization with domain administration privileges can run the setspn.exe command to link your SPNs with your SPN user. Run the setspn.exe command for each SPN from a domain attached computer.

Using the example KerberosUser account, your domain administrator would run the following setspn.exe commands for a Command Prompt window on a domain attached computer:

- `setspn.exe -A HTTP/myserver KerberosUser`
- `setspn.exe -A HTTP/myserver.mydomain.com KerberosUser`
- `setspn.exe -A HTTP/myloadbalancer KerberosUser`
- `setspn.exe -A HTTP/myloadbalancer.mydomain.com KerberosUser`
- `setspn.exe -A HTTP/mydnsalias KerberosUser`
- `setspn.exe -A HTTP/mydnsalias.mydomain.com KerberosUser`

You only need to register SPNs for the user account authenticates against the domain. Your domain administrator only needs to run the listed setspn.exe commands. Do not add any additional flags or commands to the examples.

✶ Do not register a SPN with more than one username. Registering more than one username with a SPN prevents Kerberos authentication from working for Inception.

Configure Inception to Use Kerberos SSO

After you create an authentication domain account and register all the SPNs to the user account, you can configure Inception to use Kerberos SSO.

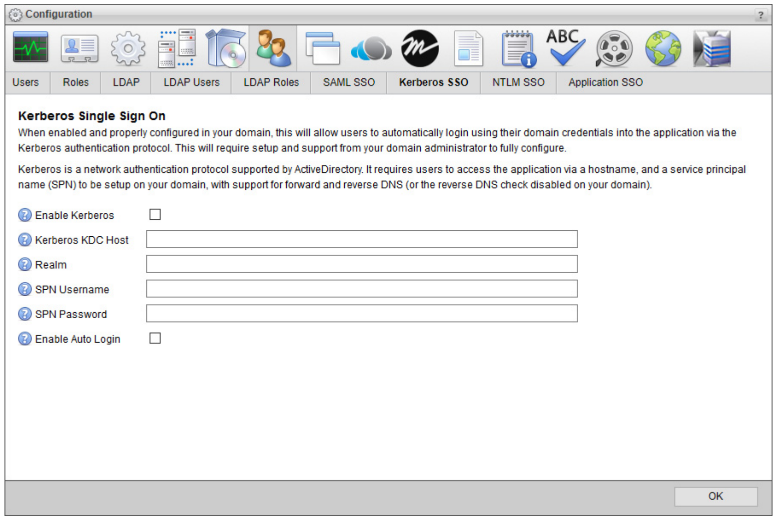
To configure Inception to use Kerberos SSO

1. Log in to your Inception Server as an administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.
3. On **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.
4. Click the **Kerberos SSO** tab.

The **Kerberos SSO** tab opens.



5. Select the **Enable Kerberos** check box to have Inception attempt to lookup the domain user when provided a Kerberos token.
6. Enter in the **Kerberos KDC Host** box the hostname of the server that performs Kerberos authentication.

   In most cases it is your ActiveDirectory domain controller server that preforms Kerberos authentication.
7. Enter in the **Realm** box your domain in uppercase.

   For example, for a domain of mydomain.com you would enter MYDOMAIN.COM. This box is case sensitive. Sometimes the Realm is not your domain.
8. Enter in the **SPN Username** box the username for the Service Principle Name (SPN) account.
9. Enter in the **SPN Password** box the password for the Service Principle Name (SPN) account.
10. Select the **Enable Auto Login** check box to automatically log in users using their domain credentials when authenticating through Kerberos SSO. Users do not see a login screen when this check box is selected.

    Clear this check box to display a login screen from which users can use one-click sign on.
11. In the bottom toolbar, click **OK**.

    The **Configuration** window closes.
12. Logout of Inception and then log back in to confirm that Kerberos SSO is working correctly.

    If you are working on a domain connected computer, Inception should prompt you to login with your username pre-filled in the **Username** box.

Google Chrome Configuration for Kerberos SSO

Google Chrome does not require additional configuration to use Kerberos SSO.

Mozilla Firefox Configuration for Kerberos SSO

Firefox requires additional configuration to work with Kerberos SSO.

To configure Firefox for Kerberos SSO

1. Open Firefox.
2. In the Firefox **Address Bar**, enter `about:config` and then press return.

   The **about:config** web page opens. If the **Here be dragons!** web page opens, click **I accept the risk!**.

3. In the **Search** box, enter `negotiate`.

   The **Preference** list updates to display only the **negotiate** preferences.

4. Double-click the **network.negotiate-auth.trusted-uris** preference.

   The **Enter string value** dialog box opens.

5. In the **Enter string value** dialog box, enter the fully qualified domain name for your service.

   For example, `myserver.com` or `myserver.mydomain.com`. Separate multiple domain names with commas.

6. Click the **OK**.

   The **Enter string value** dialog box closes and the **Preference** list updates to display the hostnames that you entered for the **network.negotiate-auth.trusted-uris** preference.

Troubleshooting

Some of the common mis-configurations which can prevent Kerberos from working are as follows:

- Kerberos requires both forward and reverse DNS enabled on all application servers. When I do a forward resolve of http://myhostname I can resolve to an IP address, and doing a reverse lookup of that IP will point to the same server or load balancer. When reverse DNS is not properly configured properly, web browsers do not send the Kerberos tokens. This misconfiguration prevents Kerberos from working in most Cloud environments, unless you disable the unnecessary reverse DNS Kerberos lookup in your browser and/or on your domain, which may or may not be possible based on your configuration.
- Another common misconfiguration is registering more than one username to a SPN. For example: a specific URL/host can only be registered against one username, otherwise you will not be able to decrypt the Kerberos token properly (checksum error). You should remove any SPNs aside from your Kerberos authentication user from those SPNs.
- Users must access the Inception Server from a PC on the same domain, and they must use the hostname/registered SPN name to access the server. Using localhost or the IP address of the Inception Server does not work with Kerberos SSO.

NTLM Single Sign On Configuration

NTLM (NT Logon Manager) is an older Microsoft-based protocol that is used to authenticate users inside of an ActiveDirectory domain. All the major browsers supported NTLM. When Kerberos is unavailable, browsers negotiate to using NTLM. When you configure Kerberos for your system it is strongly recommended that you also configure NTLM as a fall-back for an optimal user experience.

✱ NTLM SSO and SAML SSO cannot be enabled at the same time.

Before You Begin

You require the following information to configure NTLM SSO:

- **Domain Controller** — the hostname or IP address of your actual domain controller, not the hostname or IP address of load balancer in front of the domain controller.
- **NETBIOS Domain Controller** — the NETBIOS hostname of your actual domain controller, not the NETBIOS hostname of load balancer in front of the domain controller.
- **NETBIOS Domain Name** — the NETBIOS domain name for your domain. This name is not necessarily the same as the fully-qualified domain name, or the Kerberos Realm. For example, if your domain name is mydomain.com, your NETBIOS name be MYDOMAIN.
- **Computer Account** — the username and password for the ActiveDirectory computer account.

Domain Configuration / Computer Account Creation

You must create a computer account in your ActiveDirectory in order to use NTLM-based authentication. This computer account is not the same as a normal user account.

To create a computer account in your ActiveDirectory

1. Start the **Server Manager** in **ActiveDirectory**.
2. Open **ActiveDirectory Domain Servers** under Roles.
3. Expand the **ActiveDirectory Users and Computers** node.
4. Expand the specific directory.
5. Right click the **Computers** node to create a new computer account.
6. Select the **Domain Computers** group in the **Member of** tab, if not set by default.
7. Configure all the setting in the **General** tab.

   Ensure that you enter a name the **Computer Name** box.

Add Delegation to the Computer Account

After you create a computer account in your ActiveDirectory, you can add delegation to the account.

To add delegation to the computer account

1. Open your new computer account.
2. Select the **Delegation** tab.
3. Select **Trust this computer for delegation to specified services only** check box.
4. For the trust, select **Use any authentication protocol** option.
5. Click **Add**.
6. In the **Add Services** dialog box, click **Users or Computers**.
7. Use the **search results** list to select the **server** on which the **netlogon** service is running.

   In most systems the netlogon service runs on the domain controller.
8. Click **OK**.
9. In add services, select **netlogon** under the **Service Type** column.
10. Click **OK**.

    The **Delegation** tab updates to display the available **netlogon** service for the computer account.

Assign a Password to the Computer Account

For security purposes you should assign a password to the computer account.

The assign a password to the computer account

1. Use a text editor to create a script file named **setpassword.vbs**.
2. Add the following commands the **setpassword.vbs** script file, replacing `<domain>`, `<computerAccountName>`, and `<password>` with your system values.

```
Dim objComputer

Set objComputer = GetObject("WinNT://<domain>/<computerAccountName>$")

objComputer.SetPassword "<password>"

Wscript.Quit
```

3. Save the script file and close the text editor.
4. Open a Command Prompt window.
5. Run the **setpassword.vbs** script file from inside the Command Prompt window.

   The **setpassword.vbs** script file sets a password for the computer account.

Configure Inception to Use NTLM SSO

After you have created a computer account in your ActiveDirectory, set delegation, and assign a password to the computer account, you can configure Inception to use NTLM SSO.

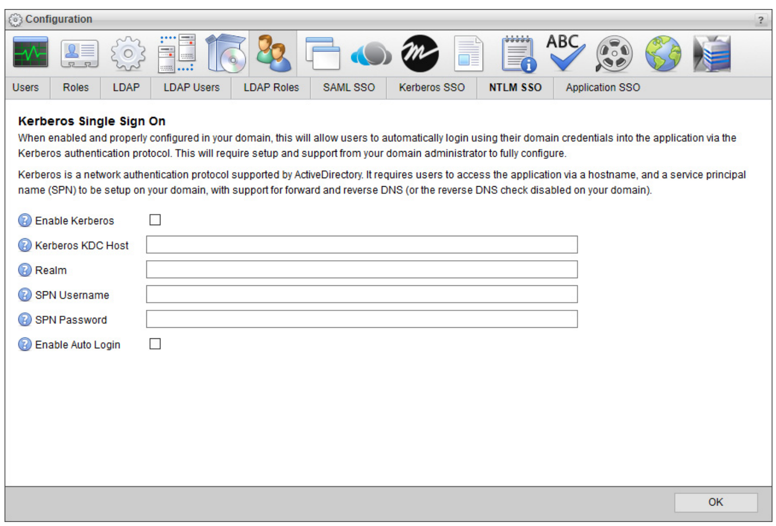
To configure Inception to use NTLM SSO

1. Log in to your Inception Server as an administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.
3. On **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.
4. Click the **NTLM SSO** tab.

   The **NTLM SSO** tab opens.



5. Select the **Enable NTLM** check box to use NTLM SSO if Kerberos in unavailable.

   The first time a user accesses a site via NTLM SSO they may need to enter their domain credentials.
6. Enter in the **Domain Controller** box the hostname or IP address of your actual domain controller.

✶ Do not enter the hostname or IP address of load balancer in front of the domain controller.

7. Enter in the **Domain Controller Name** box the NETBIOS hostname of your actual domain controller.

✶ Do not enter the NETBIOS hostname of load balancer in front of the domain controller.

8. Enter in the **NETBIOS Domain Name** box the NETBIOS domain name for your domain.

   This name is not necessarily the same as the fully-qualified domain name, or the Kerberos Realm. For example, if your domain name is mydomain.com, your NETBIOS name be MYDOMAIN.

   To confirm your NETBIOS domain name, enter the following command in a **Command Prompt** window on any domain connected computer:

   ```
   echo %userdomain%
   ```

   Your NETBIOS domain name displays below the entered command.

9. Enter in the **Computer Account Username** box the username for the ActiveDirectory computer account. Usernames always end with a $ character.

10. Enter in the **Computer Account Password** box the password for the ActiveDirectory computer account.

11. Select the **Enable Auto Login** check box to automatically log in users using their domain credentials when authenticating through NTLM SSO. Users do not see a login screen when this check box is selected.

    Clear this check box to display a login screen from which users can use one-click sign on.

12. In the bottom toolbar, click **OK**.

    The **Configuration** window closes.

13. Logout of Inception and then log back in to confirm that NTLM SSO is working correctly.

    If you are working on a domain connected computer, Inception should prompt you to login with your username pre-filled in the **Username** box.

14. Since NTLM is used as a fall-back to Kerberos, you should also you temporarily disable Kerberos. After disabling Kerberos, open the Inception login screen to verify if your credentials negotiate properly. If all is well, enable Kerberos as your primary login mechanism with NTLM as a fall-back.

    If a Windows or browser logon dialog box opens, you enter your domain credentials in the dialog box. This can happen if the client you use to access the Inception Server is not connected to the domain.

Google Chrome Configuration for NTLM SSO

Google Chrome does not require additional configuration to use NTLM SSO:

Mozilla Firefox Configuration for NTLM SSO

Firefox requires additional configuration to work with NTLM SSO.

To configure Firefox for NTLM SSO

1. Open Firefox.
2. In the Firefox **Address Bar**, enter `about:config` and then press return.

   The **about:config** web page opens. If the **Here be dragons!** web page opens, click **I accept the risk!**.

3. In the **Search** box, enter `ntlm`.

   The **Preference** list updates to display only the **ntlm** preferences.

4. Double-click the **network.automatic-ntlm.auth.trusted-uris** preference.

   The **Enter string value** dialog box opens.

5. In the **Enter string value** dialog box enter the hostnames for your service.

   For example, `myserver` or `myserver.mydomain.com`. Separate multiple server names with commas.

6. Click the **OK**.

   The **Enter string value** dialog box closes and the **Preference** list updates to display the hostnames that you entered for the **network.negotiate-auth.trusted-uris** preference.

Troubleshooting

Some of the common mis-configurations which can prevent NTLM from working are as follows:

- Ensure you are using an actual domain controller address, and not a load balancer in front of the DC. Load balancers will not work for single sign on and will result in an error in the logs
- Ensure that you are using an ActiveDirectory computer account (not a standard user account), and that you've run the necessary script to set a password against that account. If that is not set, then the authentication will fail.
- Ensure the computer account has been granted NETLOGON permission on your domain.
- Ensure that the server running your application is joined to the domain.
- You must access your application server from a PC on your domain, and must use the hostname/registered SPN name to access the server. Localhost and using the IP address will not work.

Application Single Sign On Configuration

Application Single Sign On enables you to configure trust relationships between Ross Web Platform (RWP) based applications; such as Inception and Streamline. Application SSO enables users to sign into one application and open a window, view, or plugin from another application inside of the user interface without having to login once again. Single Sign On (SSO) is commonly used with MOS plugins.

✶ SSO cannot authenticate the Inception administrator **root** user. You must use a standard user account that exists on both applications for SSO to function properly.

Configuring single sign-on between an Inception Server and a Streamline system involves the following:

- “**Verify Matching Inception and Streamline Users**” on page 7–23
- “**Add a Single Sign-On Trust Relationship to Both Servers**” on page 7–23
- “**Create a Streamline MOS device on the Inception Server**” on page 7–26

Verify Matching Inception and Streamline Users

Log in to the Inception Server and Streamline system to verify that the Inception user that uses the Streamline plugin also exists on the Streamline system. Users can be manually created or added through LDAP on the Inception Server and the Streamline system.

For More Information on...

- manually creating user accounts on an Inception Server, refer to the section “**Create a User Account**” on page 7–11.
- using LDAP to add user accounts to an Inception Server, refer to the chapter, “**Configuring LDAP Authentication**” on page 9–1.
- adding user accounts to Streamline, refer to the ***Streamline Configuration Guide*** or **Online Help** system.

Add a Single Sign-On Trust Relationship to Both Servers

Single sign-no requires a trust relationships be added to both the Inception Server and the Streamline system. On the Inception server you need to add a single sign-on trust relationship with the Streamline system. On the Streamline system you need to add a single sign-on trust relationship with the Inception Server.

Inception Server

To add a single sign-on trust relationship with the Streamline Server

1. Log in to your Inception Server as an administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

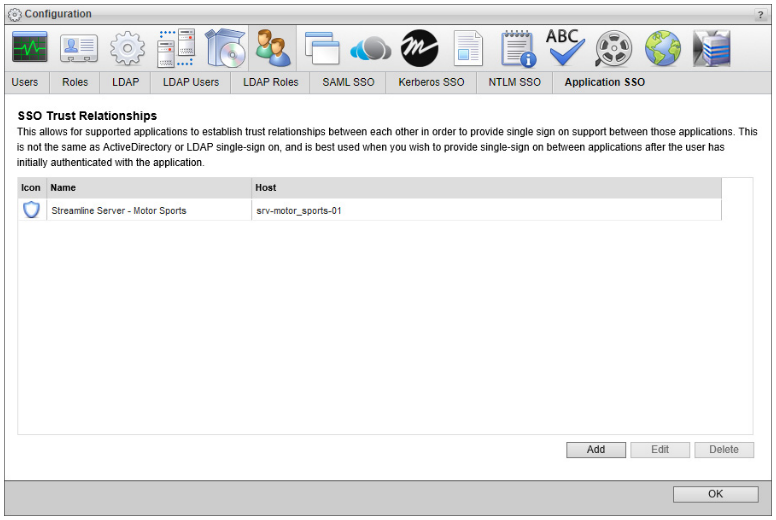
   The **Configuration** window opens.

3. On **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

4. Click the **Application SSO** tab.

   The **Application SSO** tab opens.



5. Click **Add**.

   The **Create SSO Trust Relationship** page opens.

6. In the **System Name** box, enter a name for the Streamline Server to trust.
7. In the **Trusted Host** box, enter the hostname or IP address of the Streamline Server to trust.
8. Click **Save**.

   The **Create SSO Trust Relationship** page closes and Inception adds the new single sign-on trust relationship to the **SSO Trust Relationship** list.

9. When building a single sign-on trust relationship with a redundant or enterprise Streamline system that contains multiple Streamline Servers, complete the following steps:

   a. For each Streamline Server in the Streamline system, repeat step **5** to step **8** to create a single sign-on trust relationship for the Streamline Server.

   b. Click **Add** to open the **Create SSO Trust Relationship** page.

   c. In the **System Name** box, enter a name for the load balancer in the Streamline system.

   d. In the **Trusted Host** box, enter the hostname or IP address of the load balancer in the Streamline system.

   e. Click **Save**.

10. In the bottom toolbar, click **OK**.

    The **Configuration** window closes.

Streamline Server

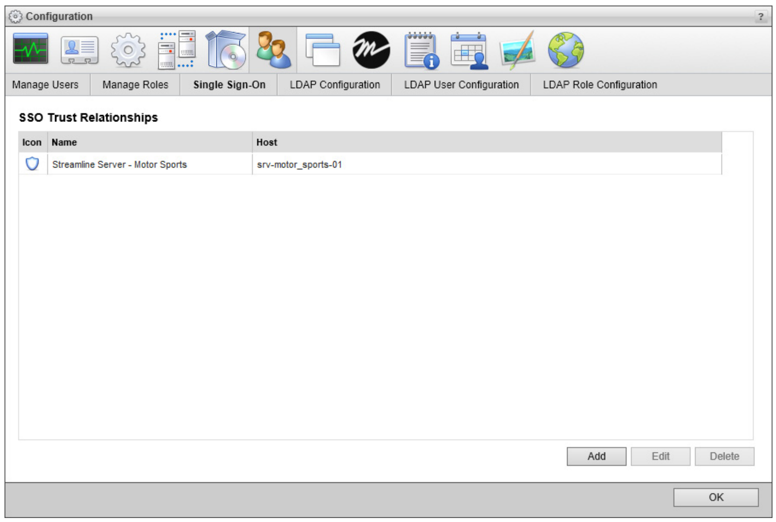
To add a single sign-on trust relationship with the Inception Server

1. Log in to your Streamline Server as an administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.
3. On **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.
4. Click the **Single Sign-On** tab.

   The **Single Sign-On** tab opens.



5. Click **Add**.

   The **Create SSO Trust Relationship** page opens
6. In the **System Name** box, enter a name for the Inception Server to trust.
7. In the **Trusted Host** box, enter the hostname or IP address of the Inception Server to trust.
8. Click **Save**.

   The **Create SSO Trust Relationship** page closes and Streamline adds the new single sign-on trust relationship to the **SSO Trust Relationship** list.
9. When building a single sign-on trust relationship with a redundant or enterprise Inception system that contains multiple Inception Servers, complete the following steps:

   a. For each Inception Server in the Inception system, repeat step **5** to step **8** to create a single sign-on trust relationship for the Inception Server.

   b. Click **Add** to open the **Create SSO Trust Relationship** page.

   c. In the **System Name** box, enter a name for the load balancer in the Inception system.

   d. In the **Trusted Host** box, enter the hostname or IP address of the load balancer in the Inception system.

   e. Click **Save**.

10. In the bottom toolbar, click **OK**.

    The **Configuration** window closes.

11. Exit from the Streamline Server.

Create a Streamline MOS device on the Inception Server

After configuring matching users and trust relationships on both servers for single sign-on, create a Streamline MOS device that uses single sign-on to complete single sign-on configuration. With single sign-on configured, Inception users can open Streamline in Inception without having to enter login credentials for Streamline.

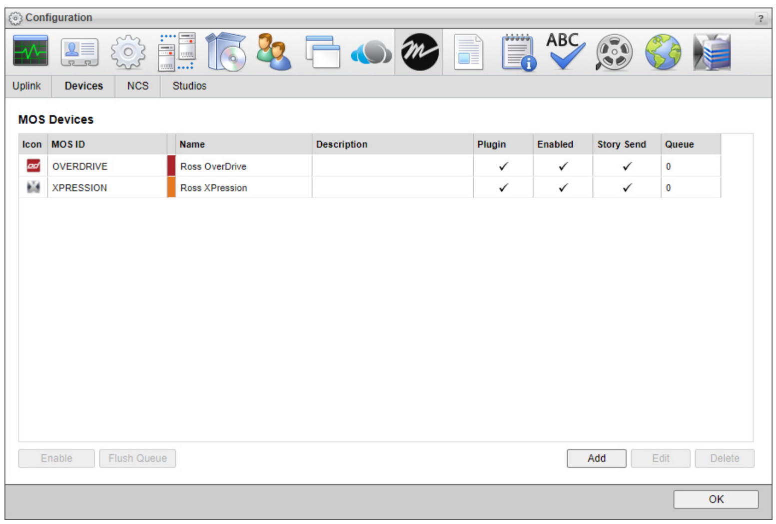
To add a Streamline MOS device to Inception

1. On the Inception Server, click the **MOS** icon in the **Configuration** window toolbar.

   The **MOS** panel opens.

2. Click the **Devices** tab. If the **Devices** tab is not visible, you do not have an NCS license for your Inception Server and you cannot add MOS devices to your server.

   The **Devices** tab opens.



3. Click **Add**.

   The **Create MOS Device** page opens and displays the **Device Settings** section for a new MOS device.

4. Use the **Device** list to select **Streamline**.

   Inception updates the **Device Settings** section with default MOS device settings for a Streamline system.

5. In the **MOS ID** box, enter the MOS ID of the Streamline system.

6. In the **Host** box, enter the hostname or IP address of the Streamline.

7. In the **Description**, enter a description for the Streamline MOS device.

8. Click **Next**.

   The next page opens and displays the **MOS Plugin** and the **Web Plugin** sections for the Streamline MOS device.

9. In the **Web Plugin** section, select the User Single Sign-On check box.

10. Click **Next**.

    The next page opens and displays the **Appearance** and the **MOS Settings** sections for the Streamline MOS device.

11. Click **Save**.

    Inception adds the new Streamline MOS device to the **MOS Devices** list.

Manage Single Sign-On Trust Relationships

Managing the single sign-on relationships between the current Inception Server and Streamline systems includes the following procedures:

- Edit Single Sign-On Trust Relationship Properties
- Delete Single Sign-On Trust Relationships

Edit Single Sign-On Trust Relationship Properties

To maintain system security, ensure that the hostname or IP address of the Streamline system in a single sign-on trust relationship is entered correctly and kept up to date.

To edit the properties of a single sign-on trust relationship

1. From the **SSO Trust Relationships** table in the **Application SSO** tab of the **Users** panel, select the single sign-on trust relationship to edit.
2. Click **Edit**.

   The **Edit SSO Trust Relationship** page opens.

3. In the **Edit SSO Trust Relationship** page, edit the single sign-on trust relationship properties as required.
4. Click **Save**.

   Inception updates the single sign-on trust relationship and returns to the **SSO Trust Relationships** page.

Delete Single Sign-On Trust Relationships

Deleting out of date single sign-on trust relationships from an current Inception Server helps maintain system security.

To delete a single sign-on trust relationship

1. From the **SSO Trust Relationships** table in the **Application SSO** tab of the **Users** panel, select the single sign-on trust relationship to delete.
2. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected single sign-on trust relationship. To keep the single sign-on trust relationship, click **Cancel**.

3. In the confirmation message, click **OK**.

   Inception deletes the selected single sign-on trust relationship from the current Inception Server.

Modifying Folder Permissions

Folder permissions define the actions users have permission to perform in the Folders tree view of the following panels:

- **Running Order Manager**
- **Playlist Manager**
- **Story Browser**
- **Assignment Manager**
- **Contact Manager**

Only administrators can assigns users with the folder permissions that are appropriate for their role in using Inception.

Folder permissions are role-based. Each user account has one or more user roles, such as journalist or producer. Each user role has a set of folder permissions. The role-based folder permissions model enables administrators to precisely define user permissions for each user, to ensure conformance to your organization's business processes.

This chapter discusses the following topics:

- Modify Folder Permissions

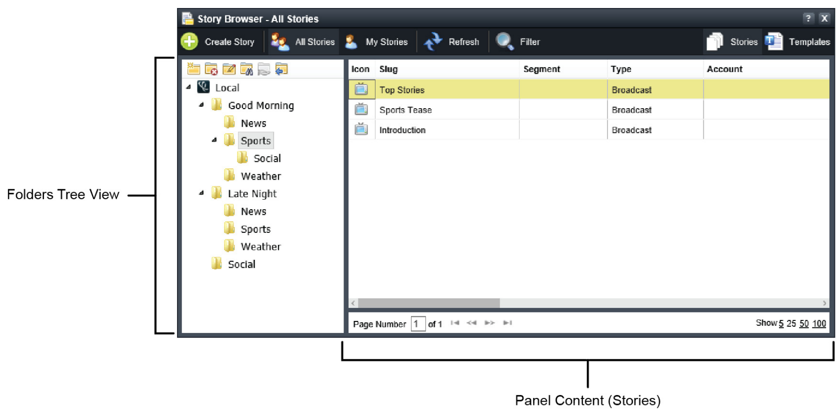
Modify Folder Permissions

The Folders tree view in each panel contains an independent group of folders. The folders in each panel Folders tree view also have specific folder permissions. When you modify folder permissions, you modify the folder permissions of individual folders in a panel Folders tree view.

To modify the permissions for a folder

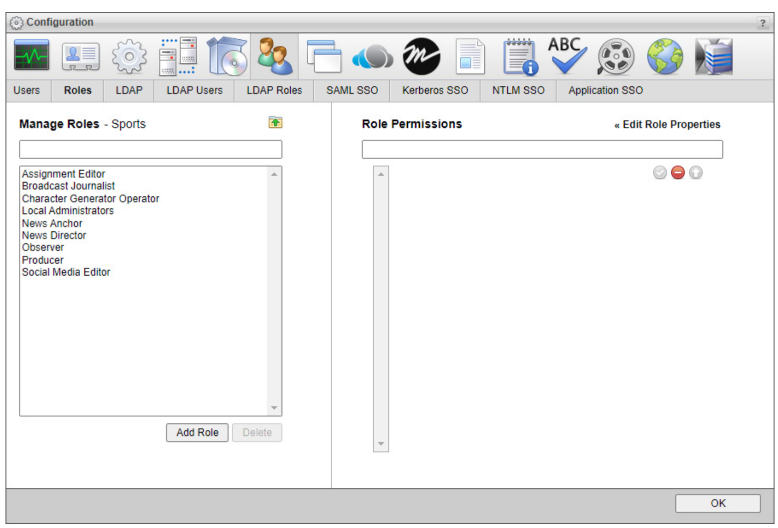
1. Log in to your Inception Server as a system administrator.
2. Open one of the following panels that contains the folder for which to modify permissions:
   - **Running Order Manager**
   - **Playlist Manager**
   - **Story Browser**
   - **Assignment Manager**
   - **Contact Manager**

   The selected panel opens.



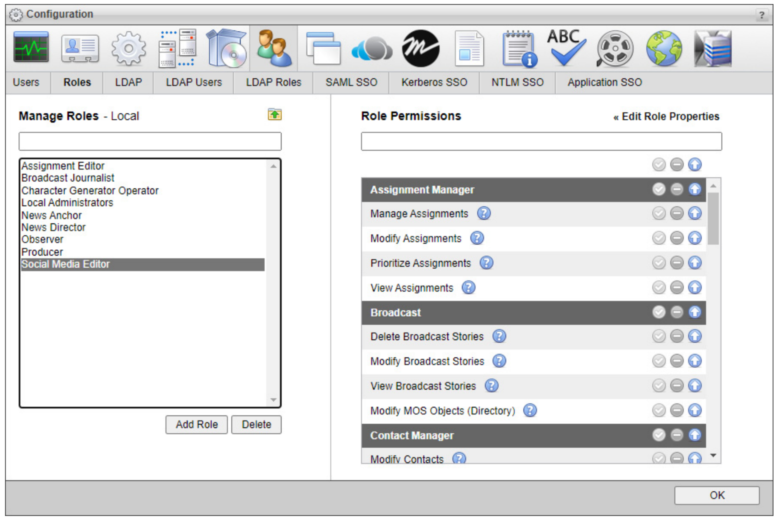
3. In the **Folders** tree view, select the folder for which to modify folder permissions.
4. In the **Folders** tree view toolbar, click the **Modify Permissions** icon.

   The **Manage Roles** tab opens for the selected folder, displayed to the right of the **Manage Roles** title.

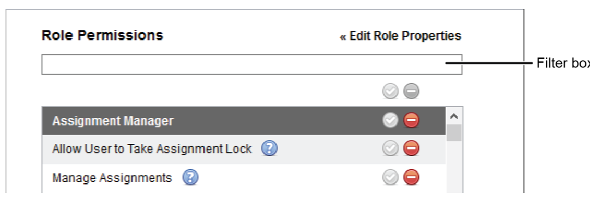


5. In the **User Role** list, select the user role for which to modify folder permissions for the selected folder.

   The **Role Permissions** list opens. Hover the mouse pointer over a icon to the right of a permission to view a description of the permission.



   You can filter the **Role Permission** list by typing any part of a role permission name in the **Filter** box. As you enter a role permission name, the list automatically updates to only show the role permissions that match what you have entered.



6. In the **Role Permissions** list, set the role permissions for the selected user role and folder as follows:

   - **All Role Permissions** — click one of the following icons displayed above the Role Permissions list to set all roll permissions for the selected role and folder to the same setting:

     — grant all role permissions to the selected role for the selected folder.

     — deny all role permissions from the selected role for the selected folder.

     — inherit all role permission settings from the parent folder that contains the selected folder.

     Sometimes it is quicker to grand all role permissions and deny the unwanted role permissions than to just grant the required role permissions.

   - **Individual Role Permissions** — click one of the following icons displayed to the right of a role permission to set the role permission for the selected role and folder:

     — grant the role permission to the selected role for the selected folder.

     — deny the role permission from the selected role for the selected folder.

     — inherit the role permission settings from the parent folder that contains the selected folder.

- **Categories** — the Role Permissions list is divided into categories to make it easier to find role permissions. A dark gray shading highlights the category headings in the list. Click one of the following icons displayed in a category heading to set all category role permissions for the selected role and folder to the same setting:

  — grant all category role permissions to the selected role and folder.

  — deny all category role permissions from the selected role and folder.

  — inherit all category role permission settings from the parent folder that contains the selected folder.

  Sometimes it is quicker to grand all role permissions and deny the unwanted role permissions than to just grant the required role permissions.

  Inception automatically saves account permission assignment changes.

7. To modify the folder permissions of the current folder's parent folder, click the icon to the right of the **Manage Roles** title.

   Inception displays the name of the current folder to the right of the **Manage Roles** title.

For More Information on...

- creating user roles, refer to the section "**Create a User Role**" on page 7–2.
- modifying user roles, refer to the section "**Modify a User Role**" on page 7–4.
- deleting user roles, refer to the section "**Delete a User Role**" on page 7–10.

Configuring LDAP Authentication

Lightweight Directory Access Protocol (LDAP) is a protocol for accessing and maintaining distributed directory information services over a network. Inception can import data related to user accounts and user roles (groups) from an LDAP directory server. The **Manage Users** and **Manager Roles** tabs lists users and user roles imported from LDAP directory servers alongside user accounts and user roles created in Inception. You cannot alter the properties of imported user accounts and user roles.

Inception configuration settings related to LDAP belong to the following categories, represented by tabs on the Users configuration panel:

- **LDAP Configuration** — Properties related to establishing connectivity with an LDAP directory server.
- **LDAP User Configuration** — Mappings to enable Inception to import user accounts from the LDAP directory server.
- **LDAP Role Configuration** — Mappings to enable Inception to import user roles (groups) from the LDAP directory server.

This chapter discusses the following topics:

- Connect to an LDAP Directory Server
- Map to LDAP User Data
- Map to LDAP Group (Role) Data

Connect to an LDAP Directory Server

To connect to an LDAP directory server

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

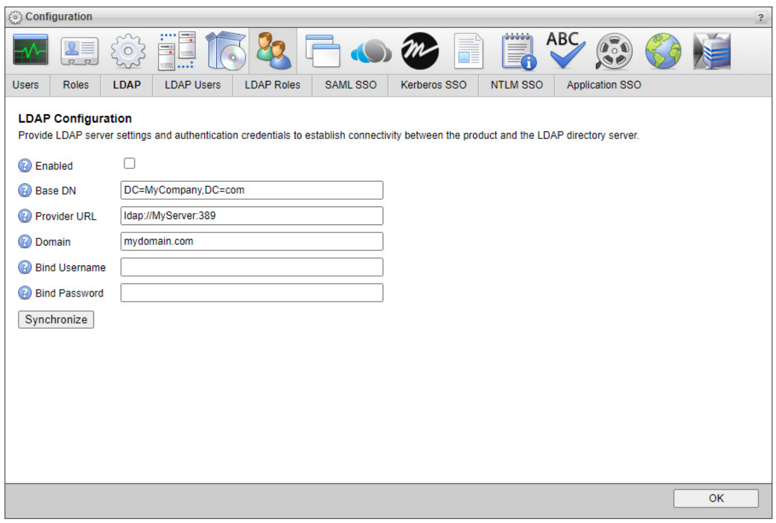
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

4. Click the **LDAP** tab.

   The **LDAP** tab opens.



5. Select the **Enabled** box to enable LDAP user authentication.

   If you clear this box, users are only able to log in to your Inception Server with user accounts created by Inception.

6. In the **Base DN** box, enter the name of the root LDAP node for user data.

   Example: `DC=MyCompany,DC=com`

7. In the **Provider URL** box, enter the URL of the LDAP provider, with optional port.

   Example: `ldap://MyServer:389`

8. In the **Domain** box, enter the domain name to append to users upon login.

   Example: `rossvideo.com`

9. In the **Bind Username** box, enter the distinguished name (DN) used to log in to the directory server.

10. In the **Bind Password** box, enter the password used to log in to the directory server.

11. Click **Synchronize** to synchronize your Inception Server with the LDAP directory server used by your system.

For More Information on...

- LDAP Authentication, refer to the chapter “**Configuring LDAP Authentication**” on page 9–1
- how to import LDAP user account data, refer to the section “**Map to LDAP User Data**” on page 9–3
- how to Import LDAP user role data, refer to the section “**Map to LDAP Group (Role) Data**” on page 9–4

Map to LDAP User Data

You can synchronize users between an LDAP directory server and the Users table of the Inception Database.

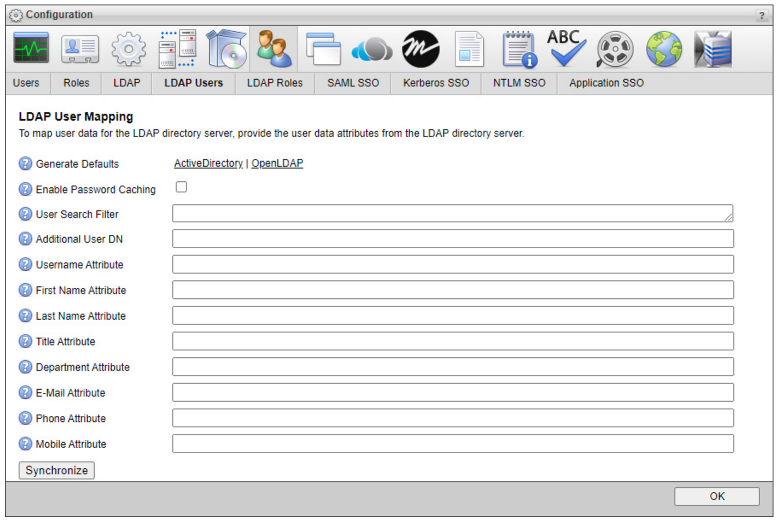
To map to LDAP user data

1. On the **Configuration** window toolbar, click the  **Users** icon.

   The **Users** panel opens.

2. Click the **LDAP User** tab.

   The **LDAP User** tab opens.



3. To populate the **LDAP User** tab with editable default values, click one of the following **Generate Defaults** links:

   - **Active Directory** — your organization uses Active Directory.
   - **OpenLDAP** — your organization uses an OpenLDAP directory server.

4. Select the **Enable Password Caching** check box to cache encrypted user password data on the Inception server and use this data for user authentication when Inception is unable to contact the directory server.

5. In the **User Search Filter** box, enter a valid LDAP query to define the filter that returns a list of potential Inception users.

   During LDAP user synchronization, Inception only imports LDAP users who meet the criteria of the LDAP User Search filter into the Inception Database. During LDAP user synchronization, Inception deletes LDAP users imported by previous User Search filter queries from the Inception Database.

6. In the **Additional Group DN** box, enter the distinguished name (DN) of the user to optimize efficiency of the search defined in the **User Search Filter** box.

7. In the **Username Attribute** box, enter the attribute for the user account login on the LDAP directory server.

   Example: `uid` or `sAMAccountName`

8. In the **First Name Attribute** box, enter the attribute for the user first name on the LDAP directory server.

   Example: `givenName`

9. In the **Last Name Attribute** box, enter the attribute for the user surname on the LDAP directory server.

   Example: `sn`

10. In the **Title Attribute** box, enter the attribute for the user organizational title on the LDAP directory server.

    Example: `title`

11. In the **Department Attribute** box, enter the attribute for the user department on the LDAP directory server.

    Example: `department`

12. In the **E-Mail Attribute** box, enter the attribute for the user e-mail on the LDAP directory server.

    Example: `mail`

13. In the **Phone Attribute** box, enter the attribute for the user telephone number on the LDAP directory server.

    Example: `telephoneNumber`

14. In the **Mobile Attribute** box, enter the attribute for the user mobile phone number on the LDAP directory server.

    Example: `mobile`

15. Click **Synchronize** to synchronize your Inception Server with the LDAP directory server used by your system.

For More Information on...

- LDAP Authentication, refer to the chapter "**Configuring LDAP Authentication**" on page 9–1
- how to connect to an LDAP directory server, refer to the section "**Connect to an LDAP Directory Server**" on page 9–2
- how to import LDAP user role data, refer to the section "**Map to LDAP Group (Role) Data**" on page 9–4

Map to LDAP Group (Role) Data

You can synchronize roles between an LDAP directory server and the Roles table of the Inception Database.

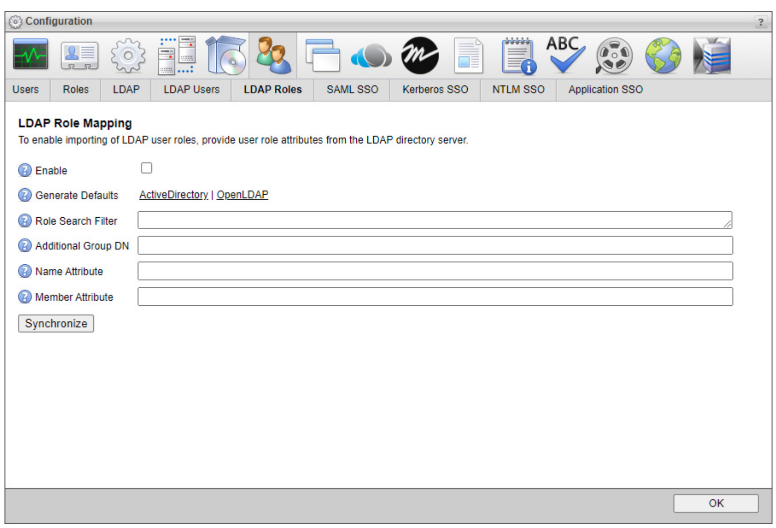
To map to LDAP group (role) data

1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.

2. Click the **LDAP Role** tab.

   The **LDAP Role** tab opens.



3. To populate the **LDAP Roles** tab with editable default values, click one of the following **Generate Defaults** links:

   - **Active Directory** — your organization uses Active Directory.
   - **OpenLDAP** — your organization uses an OpenLDAP directory server.

4. In the **Role Search Filter** box, enter a valid LDAP query to filter group (role) data to limit the list of roles available in Inception.

   During LDAP role synchronization, Inception only imports LDAP roles that meet the criteria of the LDAP Role Search filter into the Inception Database. During LDAP role synchronization, Inception deactivates LDAP roles imported by previous Role Search filter queries.

5. In the **Additional Group DN** box, enter the distinguished name (DN) of the group (role) to optimize efficiency of the search defined in the **Role Search Filter** box.

6. In the **Name Attribute** box, enter the attribute for the role name on the LDAP directory server.

   Example: `cn`

7. In the **Member Attribute** box, enter the user attribute that indicates group (role) membership on the LDAP directory server.

   Example: `memberOf`

8. After completing your configuration tasks, click **OK** in the lower toolbar to close the **Configuration** panel.

9. Click **Synchronize** to synchronize your Inception Server with the LDAP directory server used by your system.

For More Information on...

- LDAP Authentication, refer to the chapter “**Configuring LDAP Authentication**” on page 9–1
- how to connect to an LDAP directory server, refer to the section “**Connect to an LDAP Directory Server**” on page 9–2
- how to import LDAP user account data, refer to the section “**Map to LDAP User Data**” on page 9–3

Managing Perspectives

A user perspective is a customized view of the Inception user interface. It is a mapping of Inception panel types to positions in the user interface layout. Perspectives also save the columns displayed in the Running Order, Playlist, and Social Polls panels

For example, you can create a perspective that includes a feed in the left column, a playlist in the top middle, and a RSS feed in the right column. When you later use this perspective, any feeds you open display in the left column. Playlists open in the middle. RSS feeds open in the right column.

Perspectives are especially useful for people who perform many different tasks in Inception. For example, a producer may create one perspective for working with running orders and the story editor panel, and another perspective for working with playlists and feeds.

Perspectives can include any or all panel types:

- Running Orders (Including panel columns)
- Playlists (Including panel columns)
- Feeds (RSS, Spredfast, and Wire)
- Story Editor
- My Stories
- Task Schedule
- Approval Manager
- Video Player
- Social Polls (Including panel columns)
- Social Polls Editor

All Inception users can create perspectives for their own use. Inception administrators can also create global perspectives available to all users.

✶ Panels may not always open exactly where you expect. As you open and close panels, Inception adjusts the layout to optimize use of the available space. For example, if the current perspective includes a feed in the left column and you use it to open only a feed, the feed occupies all the available space. As you open more panel types, Inception adjusts the layout to conform with the perspective.

✶ Perspectives are not available on mobile devices.

This chapter discusses the following topics:

- Create a New Perspective
- Open a Saved Perspective
- Edit a Perspective
- Change the Layout of a Perspective
- Make a User Perspective Global
- Set the Default Perspective
- Revert a Perspective to the Default Layout
- Delete a Perspective

Create a New Perspective

To create a new perspective for your own use

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. Open one of each type of panel you want to include in the new perspective.

3. Rearrange the panels to the positions you want them to occupy in the perspective.

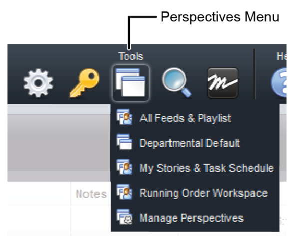
   For more information about repositioning panels, refer to the ***Inception User Guide***.

4. In **Running Order**, **Playlist**, and **Social Polls** panels, display the panel columns to include in the perspective.

   For more information about displaying panel columns, refer to the ***Inception User Guide***.

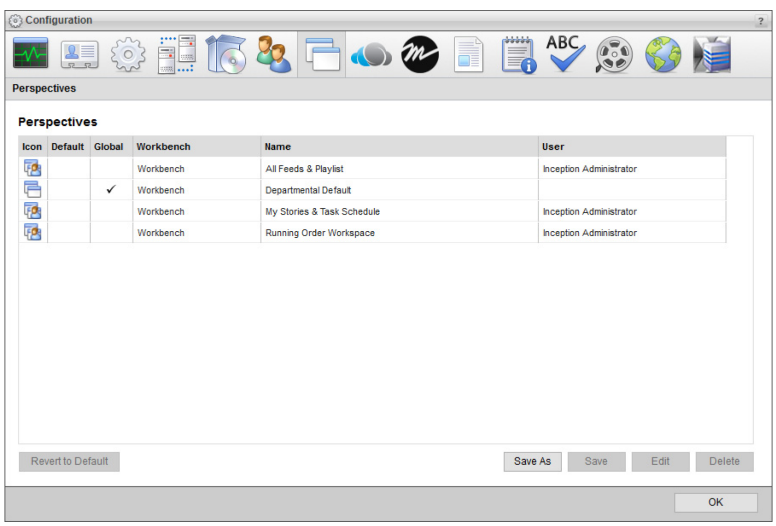
5. On the main toolbar, point to the  **Perspectives** icon.

   A list of saved perspectives opens.



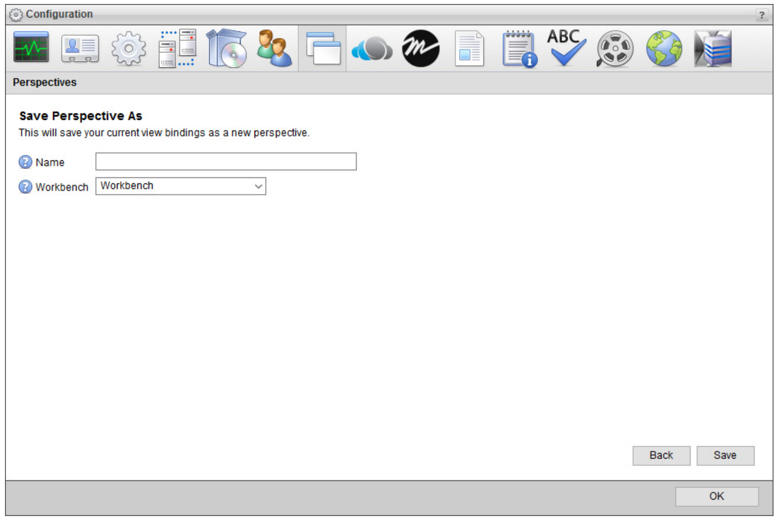
6. In the list, click **Manage Perspectives**.

   The **Configuration** window opens, showing the **Perspectives** tab.



7. Click **Save As**.

   The **Save Perspective As** page opens.



8. In the **Name** box, enter a name for the new perspective.
9. Use the **Workbench** list to select the environment in which to use the new perspective. The available options are as follows:
   - **Workbench** — use the perspective in Inception.
   - **Plugin** — use the perspective in the Inception plugin.
10. Click **Save**.

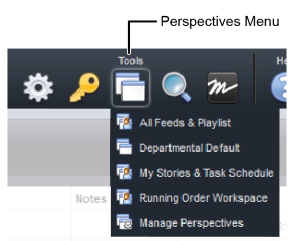
    The **Save Perspective As** page closes and Inception adds the new perspective to the **Perspectives** list.
11. Click **OK** to close the **Configuration** window.

Open a Saved Perspective

To open a saved perspective

1. On the main toolbar, point to the  **Perspectives** icon.

   A list of saved perspectives opens. The last item on the list, **Manage Perspectives**, is not a perspective.



2. In the list, click the perspective to open.

   Inception repositions the open panels to conform to the layout in the selected perspective.

Edit a Perspective

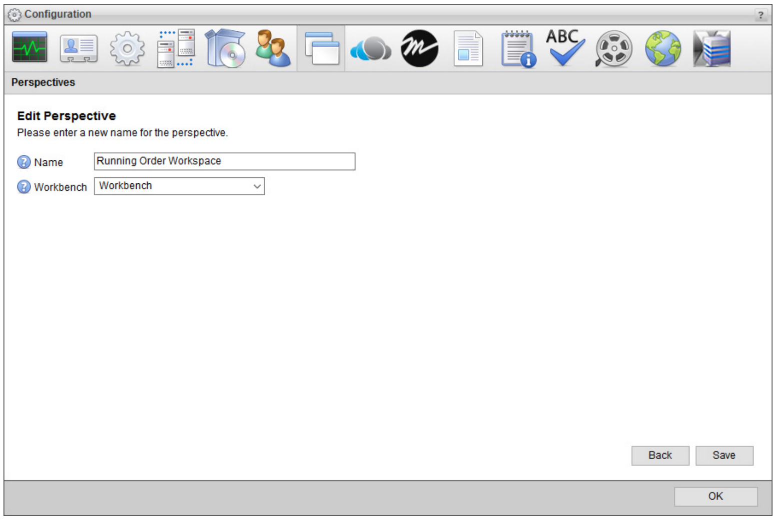
To edit a perspective

1. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspectives** list, select the perspective to rename.
3. Click **Edit**.

   The **Edit Perspective** page opens.



4. In the **Name** box, enter a new name for the selected perspective.
5. Use the **Workbench** list to select the environment in which to use the new perspective. The available options are as follows:
   - **Workbench** — use the perspective in Inception.
   - **Plugin** — use the perspective in the Inception plugin.
6. Click **Save**.

   The name of the perspective updates in the **Perspectives** list.

7. Click **OK** to close the **Configuration** window.

Change the Layout of a Perspective

To change the layout of a perspective

1. Rearrange the panels in a perspective to form the new layout for the perspective.
2. In **Running Order**, **Playlist**, and **Social Polls** panels, display the panel columns to include in the perspective.
3. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

4. In the **Perspective** list, select the perspective for the new panel layout.
5. Click **Save**.

   A confirmation message opens, asking whether you want to overwrite the perspective.

6. In the confirmation message, click **OK**.

   The confirmation message closes and Inception saves the set panel layout to the selected perspective.

7. Click **OK** to close the **Configuration** window.

Make a User Perspective Global

A user-specific perspective is only available to the Inception user who created it. Global perspectives are available to all Inception Server users. If you are an Inception administrator, you can make a user-specific perspective global.

To make a user-specific perspective global

1. Log in to Inception as an Inception administrator.

   Only Inception administrators can make a perspective available to all users.

2. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

3. In the **Perspectives** list, select the user-specific perspective to make available to all users.

   Perspectives that do not have a check mark in the **Global** column of the **Perspectives** list are user-specific and only available to the users that created them. A check mark in the **Global** column of the **Perspectives** list indicates that a perspective is global and available to all users.

4. Click **Set as Global**. This option is only available to Inception administrators.

   A check mark displays in the **Global** column of the selected perspective, which indicates that all users now have access the perspective from the **Perspectives** icon.

5. Click **OK** to close the **Configuration** window.

To make a global perspective user-specific

1. As an Inception administrator, use the **Perspectives** to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspectives** list, select the global perspective to make user-specific.

   A check mark in the **Global** column of the **Perspectives** list indicates that a perspective is global and available to all users. Perspectives that do not have a check mark are user-specific.

3. Click **Set as User**. This button is only available to Inception administrators.

   Inception removes the check mark from the **Global** column of the selected perspective, which indicates that only the user who created the perspective can use it.

4. Click **OK** to close the **Configuration** window.

Set the Default Perspective

You can select an existing perspective to be the Default layout for your Inception Server. An Inception Server only has one Default perspective.

To set the Default perspective

1. As an Inception administrator, create and save a **Global** perspective that you want to use as your **Default** perspective.

   Only Inception administrators can set a perspective as the **Default** perspective.

2. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

3. In the **Perspective** list, select the **Global** perspective to use as your **Default** perspective.

4. Click **Set as Default**.

   A check mark displays in the **Default** column of the selected perspective to highlight it as the Default perspective on the Inception Server. When the **Perspectives** list already contains a **Default** perspective, the **Default** perspective changes to the newly selected **Default** perspective. An Inception Server only has one **Default** perspective.

To remove a perspective from being the Inception Server Default perspective

1. In the **Perspective** list, select the **Default** perspective.

   A check mark in the **Default** column of the **Perspectives** list identifies a perspective as the Default perspective for the Inception Server.

2. Click **Remove as Default**. This button is only available to Inception administrators when the **Default** perspective is selected.

   Inception removes the check mark from the **Default** column of the selected perspective, which indicates that perspective is no longer the Default perspective for the Inception Server.

Revert a Perspective to the Default Layout

When you first use Inception, it opens certain types of panels in certain panel positions by default. Inception continues to use the default layout until you move a panel or open a saved perspective.

You can revert a saved perspective to Inception's default layout. This is useful if you want to make the default layout permanently available as a perspective, or if you want to use it as a starting point for creating a new customized perspective. When a user reverts to the default layout Inception also reverts the columns displayed in the Running Order, Playlist, and Social Polls panels to their default columns.

The following illustration describes the default layout.

Figure 10.1 Default Panel Layout

Default layout positions are as follows:

- Grid-based panels open in the top middle box. These include running orders, playlists, the My Stories panel, the Task Schedule panel, and the Approval Manager panel.
- Editor panels, such as the story editor, open in the bottom left box.
- The Video Player panel, which previews pictures and video, opens in the bottom right box.
- Feed-based panels open in the right column.

By default, Inception does not occupy all eight positions with a panel. Inception does optimize a layout by expanding open panels to fill all available space.

When you use the default layout and open instances of every type of panel, panels display as follows:

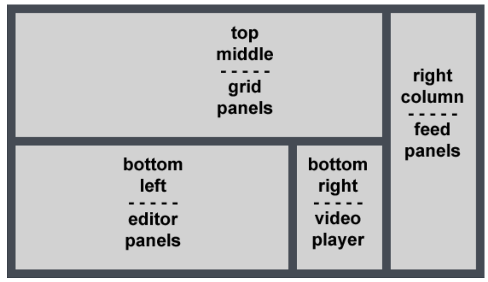


Figure 10.2 Actual Layout with all Panel Types Open

To revert a perspective to the default layout

1. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspective** list, select the perspective to apply the default layout.
3. Click or tap **Revert to Default**.

   A confirmation message opens, asking whether you want to revert the perspective to the default layout.

✶ There is no undo for this change. When you revert to the default layout Inception also reverts the columns displayed in the Running Order, Playlist, and Social Polls panels to their default columns. Click or tap **Cancel** to keep the current perspective layout.

4. In the confirmation message, click or tap **OK**.

   The confirmation message closes and Inception saves the default panel layout with the selected perspective.

5. Click **OK** to close the **Configuration** window.

Delete a Perspective

Inception users can only delete perspectives that they created. You must log in to Inception as an Inception administrator to delete global perspectives.

To delete a perspective

1. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.

2. In the **Perspectives** list, select the perspective to delete.
3. Click or tap **Delete**.

   A confirmation message opens, asking whether you want to delete the perspective. Click or tap **Cancel** to keep the perspective.

4. In the confirmation message, click **OK**.

   Inception deletes the selected perspective from the **Perspectives** list.

5. Click **OK** to close the **Configuration** window.

Enabling Cloud Services

Inception Servers use Ross Cloud Services to enable Inception Mobile apps to connect.

✶ Inception Mobile app connection requires a valid Ross Cloud Services subscription.

This chapter discusses the following topics:

- Enable Cloud Services
- Enable Inception Mobile App Connection
- View Mobile Device Connection Information

Enable Cloud Services

Your Inception Server uses Ross Cloud Services to enable Inception Mobile apps to connect to it.

✶ Before you can enable Ross Cloud Services, your Inception Server must have a valid Ross Cloud Services subscription.

To enable cloud services

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure "**To access the Inception Server Configuration window**" on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

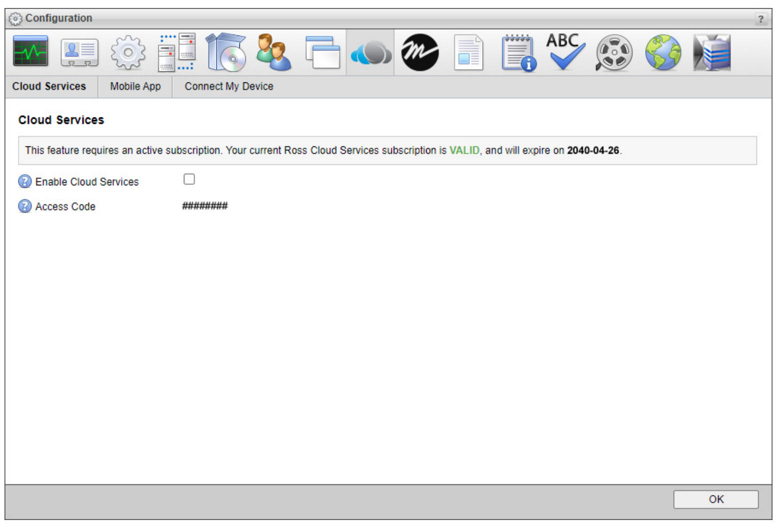
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Cloud Services** icon.

   The **Cloud Services** panel opens.

4. Click the **Cloud Services** tab.

   The **Cloud Services** tab opens.



5. Select the **Enable Cloud Services** check box to enable your Inception Server to use Ross Cloud Services supported integrations. Clear this check box to disconnect your Inception server from Ross Cloud Services.

   After enabling Ross Cloud Services, the **Access Code** field displays the access code that identifies your Inception Server for all Ross Cloud Services.

Enable Inception Mobile App Connection

With Ross Cloud Services enabled, you can enable Inception Mobile app connection to your Inception Server.

✶ Before you can enable Inception Mobile app connection, you must have a valid Ross Cloud Services subscription and Ross Cloud Services enabled.

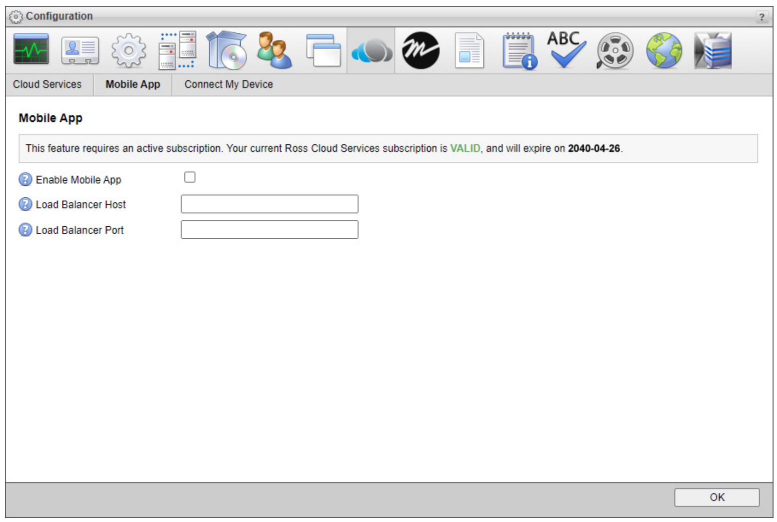
To enable the Inception Mobile app

1. On the **Configuration** window toolbar, click the **Cloud Services** icon.

   The **Cloud Services** panel opens.

2. Click the **Mobile App** tab.

   The **Mobile App** tab opens.



3. Select the **Enable Mobile App** check box to enable the Inception Mobile app to connect to your Inception Server. Clear this check box to stop the Inception Mobile app from connecting to your Inception server.

   This check box is only available when the **Enable Cloud Services** check box is selected on the **Cloud Services** tab.

4. On multi-node Inception systems, enter the hostname of the system load balancer in the **Load Balancer Host** box. For-single node Inception systems, clear this box.

5. When the load balancer in your multi-node Inception system uses a port other than the default port, enter the port number in the **Load Balancer Port** box. Clear this box for load balancers that use the default port or single-node Inception systems.

Load Balancer Configuration

When users will use the Inception Mobile app to connect to a multi-node Inception system through a load balancer, you must configure the load balancer to use a cookie-based persistence mode. Ross Video recommends using an application-based cookies, or equivalent, persistence mode setting for your load balancer. In this type of configuration the load balancer does not add its own cookie, but uses the cookie set by Inception. Use the **JSESSIONID** application cookie with the application-based cookies persistence mode.

✶ **Application-based cookie persistence mode** is not universal setting name. Other load balancers use **application-controlled session persistence** or **cookie-based persistence** setting name.

View Mobile Device Connection Information

The access code set for an Inception Server enables Inception Mobile app users to access an Inception Server without having to know the server hostname or IP address.

To view the access code for your Inception Server

1. Use a web browser and your Inception user credentials to log in to your Inception Server as a regular user.

   For information about Inception Server log in, refer to the procedure "**To access the Inception Server Configuration window**" on page 2–2.

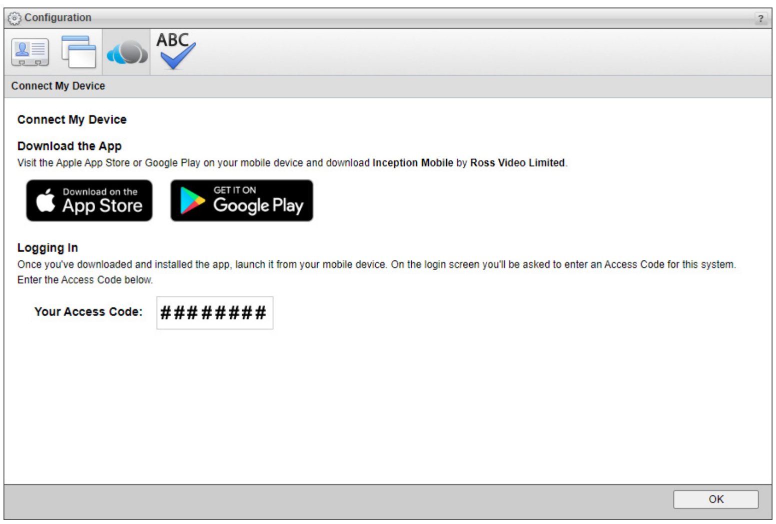
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Cloud Services** icon.

✶ The **Cloud Services** icon is only available when your Inception administrator has selected the **Enable Cloud Services** check box on the **Cloud Services** tab and the **Enable Mobile App** check box on the **Mobile App** tab.

   The **Connect My Device** tab for Inception users opens in the **Cloud Services** panel.



4. In the **Download the App** section use the following links to view information about the Inception Mobile app:
   - **Download on the Apple Store** — click this link to view the Inception Mobile app in the **Apple App Store**. Use this link on an **Apple iPhone** or **iPad** to download the Inception Mobile app to your device.
   - **GET IT ON Goggle Play** — click this link to view the Inception Mobile app on **Google Play**. Use this link on an **Android phone** or **tablet** to download the Inception Mobile app to your device.
5. In the **Logging In** section, record the access code for your Inception Server displayed in the **Your Access Code** field.
6. After downloading the **Inception Mobile** app to your mobile device, use your **Access Code** with your **Inception user credentials** to access the current **Inception Server** through the Inception Mobile app.

Configuring MOS Connections

Inception uses the Media Object Server (MOS) protocol to connect with Newsroom Computer System (NCS) systems and MOS media devices in the following ways:

- **Uplink** — Inception uses MOS to import rundowns from an NCS and make the rundowns available in Inception as running orders.
- **Devices** — When using Inception as a NCS, Inception uses MOS to enable journalists to see, use, and control MOS devices inside of a Broadcast story
- **NCS** — When using Inception as a NCS, Inception uses MOS to publish running orders to MOS devices.

This chapter discusses the following topics:

- Add MOS Media Devices
- Manage Available MOS Media Devices
- Use Inception as Your NCS
- Connect Inception with an NCS
- Manage Studios

Add MOS Media Devices

When you use Inception as your NCS, Inception uses MOS to enable journalists to see, use, and control MOS media devices inside of a Broadcast story. Journalists use a plugin associated with a MOS device to insert and control the device in a Broadcast story.

✶ You require an NCS license for your Inception Server to access the **Devices** tab and add MOS devices to your server. Please contact Ross Video to purchase an NCS license for your Inception Server.

To add a new MOS media device to Inception

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure "**To access the Inception Server Configuration window**" on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

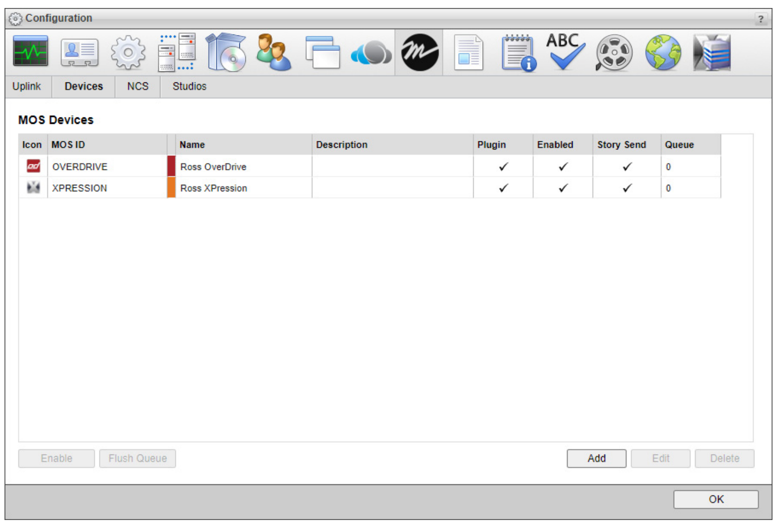
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

4. Click the **Devices** tab. If the **Devices** tab is not visible, you do not have an NCS license for your Inception Server and you cannot add MOS devices to your server.

   The **Devices** tab opens.



5. Click **Add**.

   The **Create MOS Device** page opens.

6. In the **Device Settings** section, use the **Device** list to select the MOS device. If your MOS device is not included in the **Device** list, select **Uncertified Device**.

   The **Device Settings** section updates with setting values for the selected MOS device.

7. In the **MOS ID** box, enter the MOS ID of the MOS device.
8. In the **Host** box, enter the hostname or IP address of the MOS device.
9. Use the **MOS Version** list to select the version of the MOS protocol used by the MOS device.
10. In the **Name** box, enter a name for the MOS device.
11. In the **Description**, enter a description for the MOS device.

12. In the **Advanced Options** section, click **Add** to add a host from which Inception allows connection to the **Inbound Hosts** list. Enter the hostname or IP address of the host to allow connection in the **Alert** box that opens after you **Add**.

    To delete a host from the **Inbound Hosts** list, selected the host to delete and then click **Delete**. Click **OK** in the **Alert** that opens after you click **Delete**.

13. In the **MOS Redirection** section, enter a pattern of characters and the * wild card to match the MOS ID of one or more MOS devices of the same type in different locations in the **Redirection Mask** box. The * wild card matches zero or more characters in a MOS ID. Leave this box blank for devices that do not support MOS redirection.

    Profile 6 of the MOS Protocol recommends using the following naming convention for MOS IDs for MOS redirection:

    <family>.<machine>.<location>.<enterprise>.mos

    MOS redirection example,

MOS Device 1	MOS Device 2
• **MOS ID**: `Ross.CG.Ottawa.CBC.mos` • **MOS ID Mask**: `Ross.CG.*.CBC.mos`	• **MOS ID**: `Ross.CMS.Ottawa.CBC.mos` • **MOS ID Mask**: none
• The **Device 1** MOS plugin opens for MOS objects with the MOS ID **`Ross.CG.Ott.CBC.mos`**. • The **Device 1** MOS plugin opens for MOS objects with the MOS ID **`Ross.CG.Van.CBC.mos`**. • The **Device 2** MOS plugin opens for MOS objects with the MOS ID **`Ross.CMS.Ott.CBC.mos`**. • A MOS plugin does not open for MOS objects with the MOS ID **`Ross.CMS.Van.CBC.mos`**.	

14. In the **Cloud Options** section, select the **Use Passive Connection Via Cloud Gateway** check box to configure the MOS Device to only listen for connections via a Cloud Gateway and not automatically establish outbound connections to a device.

15. Click **Next**.

    The next page opens and displays the **MOS Plugin** sections for the new MOS device.

16. Use the **Plugin** list in the **MOS Plugin** section to select the type of plugin to use with by your MOS device.

17. When you select to use an **ActiveX Plugin** with your MOS device, configure the following settings:

    a. In the **Class ID** box, enter the Class ID of the ActiveX plugin used by your MOS device.

    b. In the **Parameters** box, enter the parameter settings for the ActiveX plugin.

    c. Select the **Use ActiveX Proxy** check box to run the plugin inside the Inception proxy container to improve plugin stability. You must select this check box to run some older MOS plugins.

18. When you select to use a **Web Plugin** with your MOS device, configure the following settings:

    - In the **URL** box, enter the URL with which to access the MOS device web plugin.
    - Select the **Use Web Proxy** check box to enable Inception to attempt to proxy the base HTML5 plugin for your MOS device. Selecting this check box can enable drag and drop for certain web browsers that do not support drag and drop.
    - Select the **Use Single Sign-On** check box to enable users with matching logins on Inception and MOS device systems to automatically log in to MOS device when they use the MOS device web plugin with Inception.

19. Click **Next**.

    The next page opens and displays the **Appearance** and the **MOS Settings** sections for the new MOS device.

20. In the **Appearance** section, use the **Icon** list to select an icon to identify the MOS device.

    If the icons in the list are not appropriate for your MOS device, do the following:

    a. Use the **Icon** list to select **Upload an Icon**.

       Inception displays a **Browse** button.

    b. Click **Browse**.

       The **File Upload** dialog box opens.

    c. Use the **File Upload** dialog box to select the image file to use as the icon for your MOS Device.

    d. Click **Open**.

       Inception adds the image contained in the selected image file to the **Icon** list as the **Uploaded Icon** option, and automatically selects the uploaded image as the icon for your MOS device. You can only upload one image to the **Icon** list at a time. Uploading another image to the **Icon** list replaces the current uploaded image with the new image.

21. Click the **Background** or **CG Background** color square to use a color picker to select the background color that Inception uses to display the MOS device in a Broadcast story.

    As you click in the color picker, the box to the right of the color square displays the HTML color code of the selected color. You can also enter an HTML color code in the box to the right of the color square. As you enter an HTML color code, the color square displays the color of the entered code.

22. Click the **Foreground** or **CG Foreground** color square to use a color picker to select the text color that Inception uses to display the MOS device in a Broadcast story.

    As you click in the color picker, the box to the right of the color square displays the HTML color code of the selected color. You can also enter an HTML color code in the box to the right of the color square. As you enter an HTML color code, the color square displays the color of the entered code.

23. Click the **Clip Background** color square to use a color picker to select the background color that Inception uses to display the MOS device in a Broadcast story when it is a clip. This setting is only available for Ross XPression devices.

24. Click the **Clip Foreground** color square to use a color picker to select the text color that Inception uses to display the MOS device in a Broadcast story when it is a clip. This setting is only available for Ross XPression devices.

25. In the **MOS Settings** section, select the **Enable Story Send** check box to send story text and MOS items in a Broadcast story to the MOS device.

26. Select the **Send On-Air Status to Device** check box to send the on-air status of the running order to the MOS device. This check box is only available for MOS devices that you select a **MOS Version** of **2.8.5** or greater.

27. Select the **Send Formatted Text** check box to include HTML markup with story text sent to the MOS device.

    For MOS devices that do not use HTML formatting, clear this check box to not send HTML markup with the story text.

28. Select the **Enable Object Browsing** check box to use the **MOS Objects** panel to add MOS objects from the MOS device to a Broadcast story.

    To make the **MOS Objects** panel available in Inception, you must select this option for at least one MOS device.

29. Use the **Synchronize Objects** list to select the method Inception uses to synchronize the contents of the **MOS Objects** panel with the MOS device. The available options are as follows:
    - **Disable Synchronization** — update the **MOS Objects** panel when a MOS device sends update information to Inception. When you select this option, Inception does not request update information from MOS devices.
    - **Synchronization via MOS Protocol** — set the delay parameter in the **Synchronization Interval** box for the mosReqAll message that Inception sends to a MOS device to request a list of MOS objects from the device.
        - › **Synchronization Interval** — enter in this box the amount of time for the delay parameter in the mosReqAll message that Inception sends to a MOS device to request a list of MOS objects from the device. The time unit for this setting depends on the MOS device. This box is only available after selecting **Synchronization via MOS Protocol** from the **Synchronize Objects** list.

      For more information about the mosReqAll message, refer to the section "**3.2.1 mosReqAll - Request All Object Data from MOS**" in the MOS Protocol.
    - **Synchronize via File System** — update the **MOS Objects** panel when a MOS objects are generated from media items added to a file system associated with a MOS device.
        - › **File System**— use this list to select the file system associated with the MOS device.
30. Select the **Enable Placeholders** check box to enable users to add placeholders to Broadcast stories for MOS objects that do not yet exist on the MOS device.

    Inception exchanges the placeholder with the requested MOS object when the MOS object is created on the MOS device.
31. Use the **Send Placeholders in Floated Stories** check box to control sending a mosObjCreates command for placeholders. This check box is only available when the Enable Placeholders check box is selected.
    - **Select** — select this check box to send a mosObjCreates command for placeholders as follows:
        - › **On Monitor** — regardless of whether a story is floating or not, send a mosObjCreates command for each placeholder in a rundown set for this MOS device.
        - › **On Story Save** — regardless of whether a story is floating or not, send a mosObjCreates command for each placeholder in a rundown set for this MOS device.
    - **Clear** — clear this check box to send a mosObjCreates command for placeholders as follows:
        - › **On Monitor** — only send a mosObjCreates command for placeholders set for this MOS device in unfloated stories of a rundown.
        - › **On Story Save** — only send a mosObjCreate command for placeholders set for this MOS device in unfloated stories of a rundown.
        - › **On Unfloat** — send a mosObjCreate command for placeholders set for this MOS device in the unfloated story.

    When a linked story has an associated unfloated rundown element, placeholders should be created on monitor or on save based on the setting of this check box.
32. Select the **Require Item Status** check box for MOS devices that send RO Element Status messages to display the status of the MOS device in the **MOS Status** and **MOS Device** columns of the table in the **Running Order** panel.

    Clear this check box for MOS devices that do not send RO Element Status messages to stop the display of the default **Not Ready** status in the **MOS Status** and **MOS Device** columns in the **Running Order** panel.
33. Select the **Enable Timing Control** check box to allow the MOS device to take the next or previous story in a running order on air during running order playout.
34. Select the **Enable Queue Optimization** check box to remove duplicate and unnecessary story updates, and flush operations to update running orders that are replaced by a full resynchronization later in the queue. Selecting this check box also prioritizes the roList responses to the head of the queue to increase roReq message responsiveness.

35. Select the **Enable Hide from Device** check box to enable Inception users to hide stories from the MOS device.

    A story is only hidden from the MOS device when a user selects the check box in the Running Order or the Story Browser panel Hide From Devices column for the story to hide.

36. Click **Save**.

    Inception adds the new MOS device to the **MOS Devices** list.

To edit a MOS media device

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **Devices** tab.

   The **Devices** tab opens.

3. In the **MOS Devices** list, select the MOS device to edit.

4. Click **Edit**.

   The **Edit MOS Device** page opens and displays the **Device Settings** section for the selected MOS device.

5. Edit settings in the **Device Settings** section as required.

6. Click **Next**.

   The next page opens and displays the **MOS Plugin** and the **Web Plugin** or **ActiveX Plugin** sections for the selected MOS device.

7. Edit settings in the **MOS Plugin** and the **Web Plugin** or **ActiveX Plugin** sections as required.

8. Click **Next**.

   The next page opens and displays the **Appearance** and the **MOS Settings** sections for the selected MOS device.

9. Edit settings in the **Appearance** and the **MOS Settings** sections as required.

10. After completing the required MOS device setting edits, click **Save**.

To delete a MOS media device

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **Devices** tab.

   The **Devices** tab opens.

3. In the **MOS Devices** list, select the MOS device to delete.

4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected MOS device. To keep a MOS device, click **Cancel**.

5. In the confirmation message, click **OK**.

   Inception deletes the selected MOS device from the **MOS Devices** list. Deleting a MOS device does not delete existing MOS devices from Broadcast stories.

6. Click **OK** to close the **Configuration** window.

Manage Available MOS Media Devices

You can create any number of MOS devices for your Inception Server, but the terms of your Inception license limit the number of channels that you can enable for MOS devices at one time. You can enable or disable the MOS devices on your Inception Server match the requires of your users and the terms of your Inception license.

✶ You require an NCS license for your Inception Server to access the **Devices** tab and manage MOS devices on your server. Please contact Ross Video to purchase an NCS license for your Inception Server.

To enable or disable a MOS media device

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **Devices** tab. If the **Devices** tab is not visible, you do not have an NCS license for your Inception Server and you cannot manage MOS devices on your server.

   The **Devices** tab opens.

3. In the **MOS Devices** list, select the MOS device to enable or disable.

   Depending on the state of the selected MOS device, Inception displays either the **Enable** or **Disable** button below the **MOS Devices** list.

4. Do one of the following to control the availability of the selected MOS device on your Inception Server:

   - **Enabled Devices** — if the selected MOS device is currently enabled, click **Disable**.

     Inception frees the channel used by the disabled MOS device, but the disabled MOS device is no longer available to users to insert into Broadcast stories.

   - **Disabled Devices** — if the selected MOS device is currently disabled, click **Enable**.

     Inception enables the selected MOS device and makes it available to users to insert into Broadcast stories.

5. Click **OK** to close the **Configuration** window.

Use Inception as Your NCS

When you want to use your Inception Server as a NCS to publish running orders to MOS media devices, you need to set an NCS ID for your Inception Server.

✶ You require an NCS license for your Inception Server to access the **NCS** tab and set an NCS ID for your server. Please contact Ross Video to purchase an NCS license for your Inception Server.

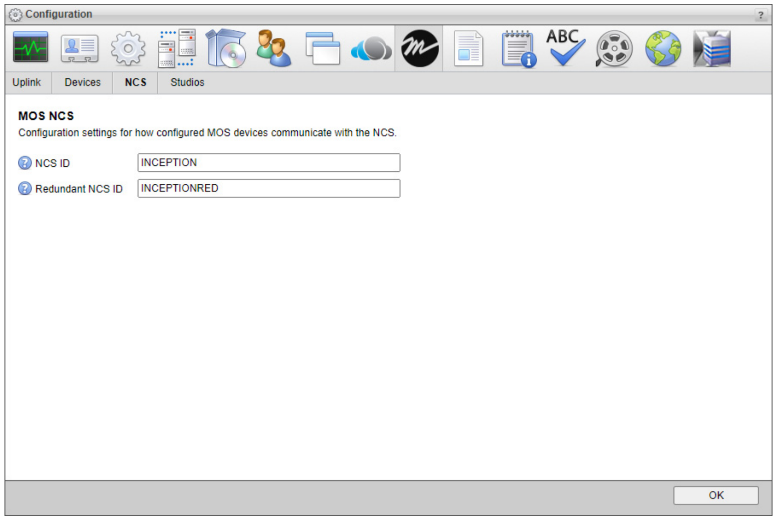
To set an NCS ID for your Inception Server

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **NCS** tab. If the **NCS** tab is not visible, you do not have an NCS license for your Inception Server and you cannot manage MOS devices on your server.

The **NCS** tab opens.



3. In the **NCS ID** box, enter the NCS ID for your Inception NCS.

✶ The NCS ID that you set for your Inception NCS must be different than the MOS ID set in the Uplink tab.

On a MOS device that you want to ingest running orders published by the Inception NCS, enter the following information:

- NCS ID set for the Inception NCS
- Hostname or IP address of the Inception Server

4. For Redundant Inception Systems, enter the NCS ID for your redundant Inception NCS in the **Redundant NCS ID** box.

5. Click **OK** to close the **Configuration** window.

Connect Inception with an NCS

You can configure a Media Object Server (MOS) protocol connection between Inception and a Newsroom Computer System (NCS). After establishing a MOS connection, Inception can import NCS rundowns and associate social media stories with the NCS broadcast stories. Compatible NCSs enable Inception to play out running orders in lock-step with NCS rundowns.

You can also control playout of the Inception Social running order using OverDrive. For more information, refer to the chapter “**Configuring OverDrive Integration**” on page 17–1.

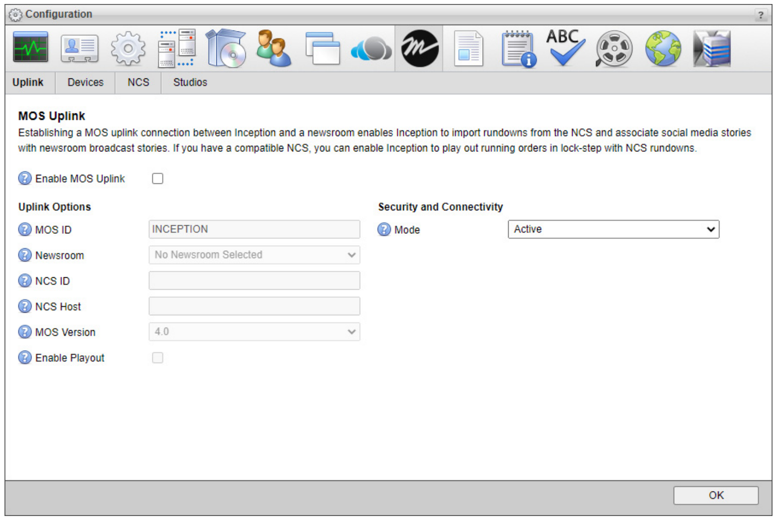
To configure a MOS connection between Inception Social and an NCS

1. In your NCS, create a MOS device.
2. Record the MOS device identifier (MOS ID) of your new device.
3. Log in to your Inception Server as an Inception administrator.
4. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.

5. On the **Configuration** window toolbar, click the **MOS** icon.

   The **Uplink** tab of the **MOS** panel opens.



6. Select the **Enable MOS Uplink** check box to enable a MOS uplink between your Inception Server and an external NCS.
7. In the **Uplink Options** section, enter the MOS ID of the MOS device you created on your NCS in the **MOS ID** box.
8. Use the **Newsroom** list to select the MOS newsroom with which to connect Inception.
9. In the **NCS ID** box, enter the NCS ID of your newsroom.
10. In the **NCS Host** box, enter the host or IP address of the newsroom or NCS gateway.
11. Use the **MOS Version** list to select the MOS protocol version that Inception uses to communicate with the selected newsroom.
12. If your organization uses an iNEWS NCS, select the **Enable Playout** check box to enable iNEWS to control the playout of Inception running orders that you based on an NCS rundown.

✶ This option only works with an iNEWS NCS.

13. When you select a **MOS Version** less than 4.0 to communicate with the selected newsroom, select the **Use Passive Connection Via Cloud Gateway** check box if you want to configure the uplink to only listen for connections via the Cloud Gateway.
14. When you select **4.0** as the **MOS Version** less than 4.0 to communicate with the selected newsroom, configure the settings displayed in the **Security and Connectivity** section. The available settings are as follows:
    - **Mode** — use this list to select Active or Passive as the mode for your end of the device to newsroom connection. As of MOS v4.0, you must configure one end of the device to newsroom connection to run in Active mode and the other end to run in Passive mode.
    - **API Key** — enter in this box the API key for the selected newsroom.
    - **Username** — enter in this box the username for the selected newsroom.
    - **Password** — enter in this box the password for the selected newsroom.
    - **Endpoint** — enter in this box the endpoint for the selected newsroom.
    - **Endpoint Port** — enter in this box the endpoint port number for the selected newsroom.
    - **Allow Untrusted Certificates** — select this check box to allow untrusted certificates in the secure MOS protocol.
15. After completing your configuration tasks, click **OK** in the lower toolbar to close the **Configuration** panel.

Manage Studios

It is common for a news room to have multiple studios with multiple sets of devices for different playouts of running orders. Inception enables you to create and mange studios to associate with running orders. When you monitor a running order, Inceptions sends out the associated studio to any MOS device monitoring the running order.

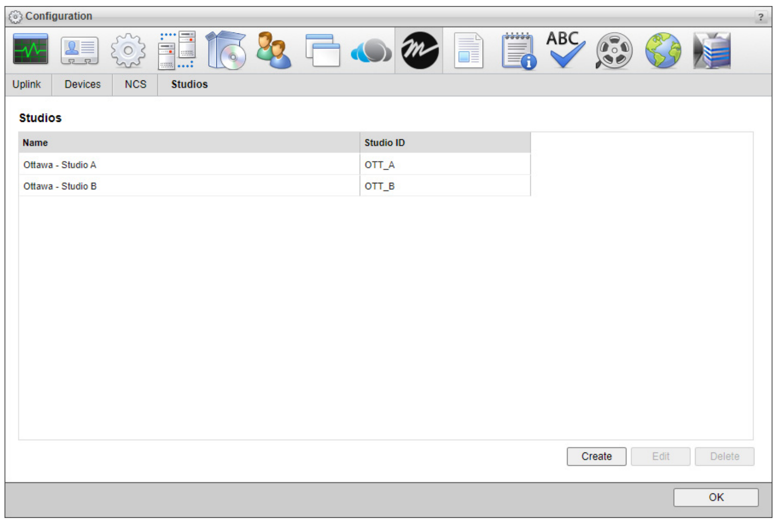
To create a studio

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **Studios** tab. If the **Studios** tab is not visible, you do not have an NCS license for your Inception Server and you cannot create studio for your server.

   The **Studios** tab opens.



3. Click **Create**.
4. In the **Name** box, enter a name for the studio.
5. In the **Studio ID** box, enter the studio identifier that Inceptions sends through MOS.
6. Click **Create**.

   Inception creates the new studio and adds it to the **Studios** list.

Edit a Studio

To edit a studio

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **Studios** tab.

   The **Studios** tab opens.

3. In the **Studios** list, select the studio to edit.
4. Click **Edit**.

   The **Edit Studio** page opens.

5. Edit settings on the **Edit Studio** page as required.
6. Click **Save**.

Delete a Studio

To delete a studio

1. On the **Configuration** window toolbar, click the **MOS** icon.

   The **MOS** panel opens.

2. Click the **Studios** tab.

   The **Studios** tab opens.

3. In the **Studios** list, select the studio to delete.

4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected studio. To keep a studio, click **Cancel**.

5. In the confirmation message, click **OK**.

   Inception deletes the selected studio from the **Studios** list. Deleting a studio also deletes the studio for all the running orders that were associated with the studio.

6. Click **OK** to close the **Configuration** window.

Configuring Editorial Properties

Inception uses editorial properties to configure or set production cues, timing read rates, anchor read rates, text capitalization, denylisted words, and assignment manager communication. Use the Editorial panel to configure or set editorial properties.

This chapter discusses the following topics:

- Define Production Cues
- Set Global Timing
- Define Anchors
- Enable Assignment Notification via E-mail
- Define Assignment Color Schemes

Define Production Cues

Inception contains several default productions cues that users can quickly insert into a Broadcast story by selecting the required production cue from a list. You can edit the default production cues or add new production cues to meet your requirements.

To add a new production cue for Broadcast stories

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

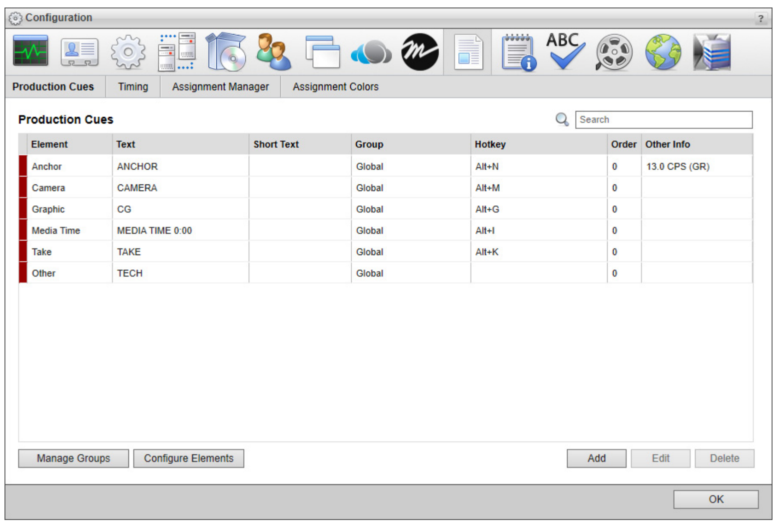
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

4. Click the **Production Cues** tab.

   The **Production Cues** tab opens.



   To search for a production cue, enter text in the **Search** box that matches any part of the Text or Short Text associated with the production to locate. While you enter text in the Search box, the list of available production cues automatically updates to display only the production cues that match the entered text.

5. Click **Add**.

   The **Create Production Cue** page opens.

6. Use the **Element** list to select the production element to associate with the new production cue.

   The selected production element classifies the production cue and sets the color of the production cue in a Broadcast story.

7. In the **Text** box, enter the text for the production cue to display in a Broadcast story.

   The story word count does not include production cue text.

8. When you select **Anchor** from the **Element** list, you can enter a short form for the production cue in the **Short Text** box.

   For production cues that you entered a short form in the **Short Text** box, Inception displays the short form in the **Production Cues** column of the Running Order table instead of the full production cue text.

9. Use the **Hotkey** list to select the key combination to add the production cue to a Broadcast story.

   You can assign the same hotkey to multiple production cues and MOS favorites to insert the assigned production cues and MOS favorites at the same time. When you assign multiple production cues or MOS favorites to a hotkey, use the Hotkey Order box to set the insertion order for the assigned items.

10. When using the key combination selected from the **Hotkey** list as a compound hotkey to add multiple production cues and MOS objects to a story, enter a number in the **Hotkey Order** box to set the addition order for the production cue. A hotkey adds items to a Broadcast story starting with the lowest **Hotkey Order** number and finishing with the highest number.

11. Use the **Group** list to select the production cure group for the new production cue. When you do not selected a group, Inception assigns the new production cue to the **Global** group. The production cues assigned to the **Global** group also assigned to all the other production cue groups on your Inception Server.

    The **Group** list contains only the groups defined on your Inception Server. Groups enable you to organize your productions cues to match your workflow. A group contains the productions cues assigned to the group and the production cues assigned to the **Global** group.

12. When you select **Anchor** from the **Element** list, do the following to set the read rate for the anchor:

    a. Use the **Units** list to select the timing unit for the anchor read rate.

    b. Depending on the timing unit selected from the **Units** list, use one of the following boxes to enter the read rate for the anchor:

       - **Characters Per Second** — enter in this box the number of characters per second than an anchor reads. This box is only available when **Characters per second** is selected from the **Units** list.
       - **Words Per Minute** — enter in this box the number of words per minute that an anchor reads. This box is only available when **Words per minute** is selected from the **Units** list.

13. Click **Save**.

    Inception adds the new production cue to the **Production Cues** list.

For More Information on...

- defining production cue groups, refer to the section “**Define Production Cue Groups**” on page 13–4.

To edit a production cue

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. In the **Production Cues** list, select the production cue to edit.

4. Click **Edit**.

   The **Edit Production Cue** page opens.

5. Edit production cue settings as required.

6. After completing the required production cue setting edits, click **Save**.

To delete a production cue

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. In the **Production Cues** list, select the production cue to delete.

4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected production cue. To keep the production cue, click **Cancel**.

5. In the confirmation message, click **OK**.

   Inception deletes the selected production cue from the **Production Cues** list. Deleting a production cue does not delete existing production cues from Broadcast stories.

Define Production Cue Groups

Production cue groups enable you to organize your productions cues to match your workflow. Before you can assign production cues to a production cue group, you must define the groups for your Inception Server. The Default production cue group is the only group defined by Inception.

When you create or edit a production cue you can assign the production cue to a production cue group. If you do not selected a production cue group for a production cue, Inception assigns the production cue to the Default group. While editing a broadcast story, select the production cue group that contains the production cues that you want to add to the story.

✶ Only Inception users with a Local Administrators role or a role that has Modify Directories and Modify Editorial Configurations permissions can define, edit, or delete production cue groups.

To define a production cue group

1. On the **Configuration** window toolbar, click the  **Editorial** icon.

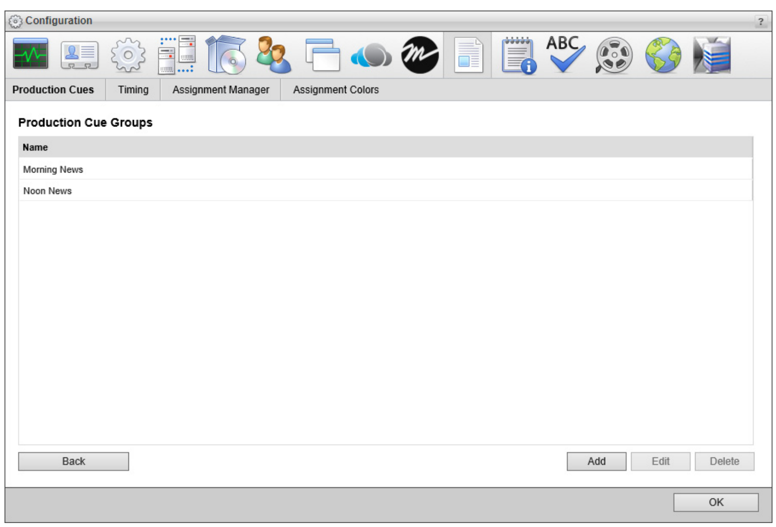
   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. Click **Manage Groups**.

   The **Production Cue Groups** page opens.



4. Click **Add**.

   The **Create Production Cue Group** page opens.

5. In the **Name** box, enter a name for the production cue group to display in the **Production Cue Group** list of the **Story Editor**.

6. Click **Save**.

   Inception adds the new production cue group to the **Production Cue Groups** list.

7. Click **Back** to return to the **Production Cues** page.

To edit a production cue group

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. Click **Manage Groups**.

   The **Production Cue Groups** page opens.

4. In the **Production Cue Groups** list, select the production cue list to edit.

5. Click **Edit**.

   The **Edit Production Cue Group** page opens.

6. Edit production cue groups settings as required.

7. After completing the required production cue group setting edits, click **Save**.

To delete a production cue group

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. Edit the production cues contained in the production cue group to delete and assign the production cues to another production cue group.

   You can only delete empty production cue groups, groups that do not contain production cues.

4. Click **Manage Groups**.

   The **Production Cue Groups** page opens.

5. In the **Production Cue Groups** list, select the production cue list to delete.

6. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected production cue group. To keep the production cue group, click **Cancel**.

7. In the confirmation message, click **OK**.

   Inception deletes the selected production cue group from the **Production Cue Groups** list.

Configure Colors

Inception uses the color of the production element associated with a production cue to display the production cue in a Broadcast story. To change the color of a production cue, change the color of the production element associated with the production cue. Changing the color of a production element also changes the color of existing production cues associated with the changed production element.

You can also choose which type of production elements to send to MOS devices when monitoring a rundown.

To change the color of production elements

1. On the **Configuration** window toolbar, click the **Editorial** icon.

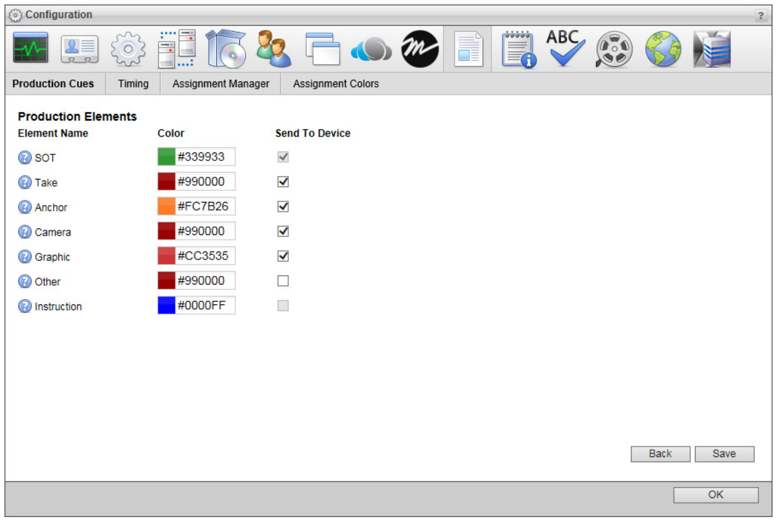
   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. Click **Configure Elements**.

   The **Production Elements** page open.



4. For the production element to edit, use one of the following methods to change the production element color:

   - Click the color square to right of the production element to edit, and then use the color picker to select a new color for the production element.

     As you click in the color picker, the color square displays the selected color and the box to the right of the color square displays the HTML color code of the selected color.

   - Enter an HTML color code in the box to the right of the color square to set the production element color.

     As you enter an HTML color code, the color square displays the color of the entered code.

   For instructions, Inception uses the color of the **Instruction Color** production element to display the instructions in a Broadcast story. To change the display color for instructions, change the color of the **Instruction Color** production element. Changing the color of the **Instruction Color** production element also changes the color of existing instructions in Broadcast stories.

5. After selecting a new color for the selected production element, click **Save**.

   Inception displays the new production element color in the **Production Cues** list. Inception also updates the color of all the production cues that use the revised production element.

6. Click **OK** to close the **Configuration** window.

Choose the Production Element Types to Send to MOS Devices

You can choose which type of production elements to send to MOS devices when monitoring a rundown.

To choose the production elements to send to MOS Devices

1. On the **Configuration** window toolbar, click the **Editorial** icon.

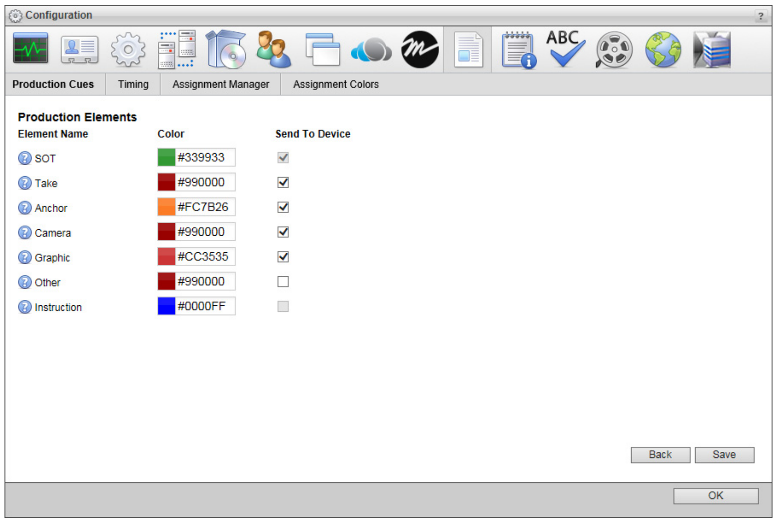
   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. Click **Configure Elements**.

   The **Production Elements** page open.



4. For each type of production that you want to send to MOS devices when monitoring a rundown, select the **Send To Device** check box for the production element.

   Clear the **Send To Device** check box for the production element types that you do not want sent to MOS devices when monitoring a rundown.

5. Click **OK** to close the **Configuration** window.

Set Global Timing

Inception uses a global timing read rate to estimate the time required to playout a Broadcast stories that do not have an assigned anchor. When you assign an anchor to a Broadcast story, Inception sets story timers using the read rate set for the anchor instead of the global timing read rate. Inception bases Broadcast story timers on the amount of content in a story and the read rate set for the story.

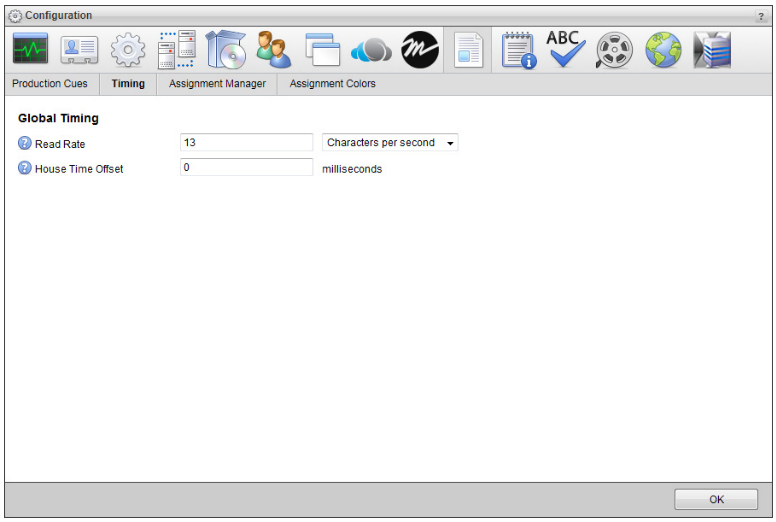
To set the global timing read rate

1. On the **Configuration** window toolbar, click the  **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Timing** tab.

   The **Timing** tab opens.



3. In the **Read Rate** box, enter the global timing read rate that Inceptions uses to estimate the time required to playout Broadcast stories that do no have an assigned anchor.
4. Use the list to the right to select the timing units for the entered read rate, Characters per second or Words per second.
5. In the **House Time Offset**, enter the difference in milliseconds between the house time clock and the Inception Server clock.

   Setting a value for the House Time Offset synchronizes Inception timers with your house time.

6. Click **OK** to close the **Configuration** window.

Define Anchors

Inceptions uses the set global timing read rate to estimate the time required to playout a Broadcast story. Story timers are set using the estimated playout time for the Broadcast story.

To increase the accuracy of Broadcast story playout time estimations, you can set reading rates for individual anchors. When you insert one or more anchor production cues into a Broadcast story, the read rate for the selected anchors overrides the set global timing read rate.

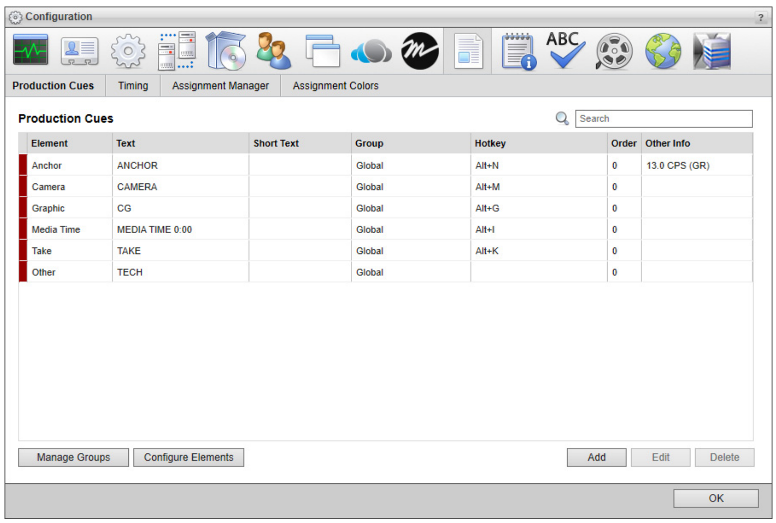
To create a new anchor production cue for Broadcast stories

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.



3. Click **Add**.

   The **Create Production Cue** page opens.

4. Use the **Element** list to select **Anchor**.
5. In the **Text** box, enter the name of the anchor.
6. Use the **Hotkey** list to select the key combination to insert the anchor into a Broadcast story.

   Key combinations selected for other production cue are grayed out and not available for current anchor production cue.

7. Use the **Units** list to select the timing units for the anchor read rate.

   The name of the box below the **Units** list changes to match the timing units selected for the anchor.

8. Depending on the selected timing units, use one of the following boxes to set the read rate for the anchor:

   - **Characters Per Minute** — enter in this box the number of characters per minute than an anchor reads. This box is only available when Characters per minute is the selected timing unit.
   - **Words Per Minute** — enter in this box the number of words per minute that an anchor reads. This box is only available when Words per minute is the selected timing unit.

9. Click **Save**.

   Inception adds the new anchor to the **Production Cues** list.

To edit an anchor

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. In the **Production Cues** list, select the anchor to edit.
4. Click **Edit**.

   The **Edit Production Cue** page opens.

5. Edit anchor settings as required.
6. After completing the required anchor setting edits, click **Save**.

To delete an anchor

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Production Cues** tab.

   The **Production Cues** tab opens.

3. In the **Production Cues** list, select the anchor to delete.
4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected anchor. To keep the anchor, click **Cancel**.

5. In the confirmation message, click **OK**.

   Inception deletes the selected anchor from the **Anchors** list. When you delete an anchor, Inception also removes the anchor from all the Broadcast stories that used the anchor. Broadcast stories without an anchor use the global timing read rate to estimate story playout time.

6. Click **OK** to close the **Configuration** window.

Enable Assignment Notification via E-mail

An assignment editor can use the Assignment Manager to assign stories to reporters. With assignment notifications via email enabled, the Assignment Manager can send notification e-mails to the Inception users assigned to an assignment.

Ross Video recommends creating a dedicated e-mail account with a descriptive name and e-mail address to send assignment notification e-mails. Assignment users will see the sending e-mail address when they receive a notification e-mail.

✶ The e-mail account used for assignment notification via e-mail must be different from the ones used for story creation or story approval.

Before you can configure assignment notification via e-mail you must create an account for the e-mail address that sends out assignment notifications. To create an e-mail account for assignment notification via email, refer to the section "**E-mail Account Configuration**" on page 18–37.

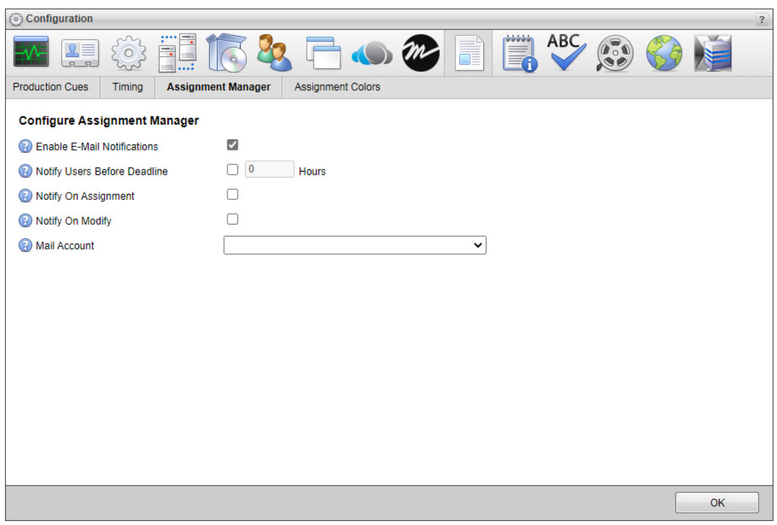
To enable assignment notification via email

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Assignment Manager** tab.

   The **Assignment Manager** tab opens.



3. Select the **Enable E-Mail Notifications** check box to enable the **Assignment Manager** to send assignment notification e-mails to the users assigned to an assignment.

   The times in the assignment notifications sent to assignees are displayed in the assignee's local time zone.

4. Select the **Notify Users Before Deadline** check box to send an assignment notification e-mail to the assignee before the assignment deadline.

5. In the **Hours** box, enter the number of hours before the assignment deadline to send an assignment notification to the assignee.

6. Select the **Notify On Assignment** check box to send a notification e-mail to the assigning Inception user when the assignee receives an assignment from the Assignment Manager.

7. Select the **Notify On Modify** check box to send a notification e-mail to the assigning Inception user when the assignee updates their assignment.

✶ To manually send notifications by clicking the **Notify** icon in the **Assignment Manager Grid view** or **Assignment Editor** tool bar you must clear the **Notify Users Before Deadline**, **Notify On Assignment**, and **Notify On Modify** check boxes.

8. Use the **Mail Account** list to select the e-mail account that the **Assignment Manager** uses to send assignment notification e-mails to the users assigned to an assignment.

   This list only contains the e-mail accounts defined on your Inception Server.

✶ The e-mail account used for assignment notification via e-mail must be different from the ones used for story creation or story approval.

9. Click **OK** to close the **Configuration** window.

For More Information on...

- how to create an e-mail account, refer to the section "**E-mail Account Configuration**" on page 18–37.

Define Assignment Color Schemes

To highlight assignments in the Assignment Manager, you can define color schemes for the ribbon column, foreground (text), and background of an assignment. When you create an assignment, you can select the color schemes to apply to the new assignment.

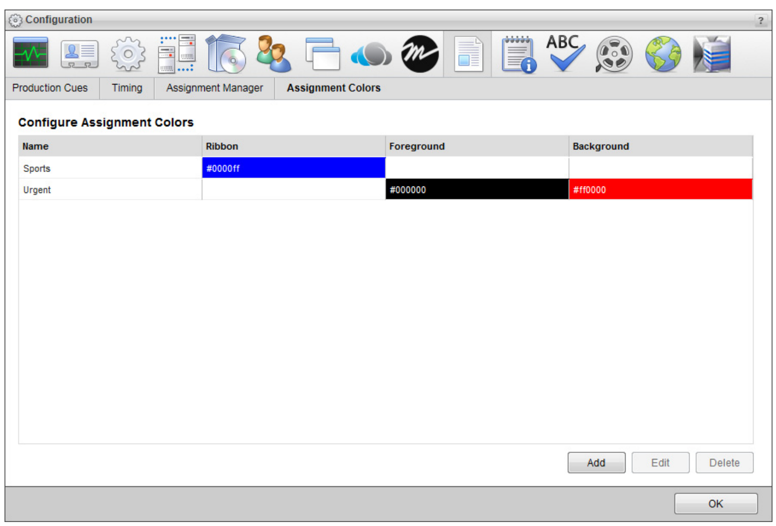
To add a new color scheme for assignments

1. On the **Configuration** window toolbar, click the  **Editorial** icon.

   The **Editorial** panel opens.

2. Click the **Assignment Colors** tab.

   The **Assignment Colors** tab opens.



3. Click **Add**.

   The **Create Assignment Color Scheme** page opens.

4. In the **Name** box, enter a name for the color scheme.

5. Use the **Type** list to select the type of color scheme to create. The available color scheme types are as follows:

   - **Ribbon** — color scheme for the ribbon column of an assignment in the **Assignment Manager** panel.
   - **Foreground/Background** — color scheme for the text and row background of an assignment in the **Assignment Manager** panel.

6. To select the color for a **Ribbon** type color scheme, click the **Ribbon** color square to use a color picker to select the ribbon column color for the color scheme. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color. This setting is only available when **Ribbon** is the selected color scheme **Type**.
7. To select the colors for a **Foreground/Background** color scheme:
   a. Click the **Foreground Color** color square to use a color picker to select the assignment text color for the color scheme. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color. This setting is only available when **Foreground/Background** is the selected color scheme **Type**.
   b. Click the **Background Color** color square to use a color picker to select the assignment row background color for the color scheme. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color. This setting is only available when **Foreground/Background** is the selected color scheme **Type**.
8. Click **Save**.

   Inception adds the new color scheme to the **Configure Assignments Colors** list.

To edit a color scheme

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.
2. Click the **Assignment Colors** tab.

   The **Assignment Colors** tab opens.
3. In the **Configure Assignments Colors** list, select the color scheme to edit.
4. Click **Edit**.

   The **Edit Assignment Color Scheme** page opens.
5. Edit assignment color settings as required.
6. After completing the required assignment color setting edits, click **Save**.

   Inception automatically applies the edits made to the select color scheme to the assignments in the **Assignment Manager** that use the color scheme.

To delete a color scheme

1. On the **Configuration** window toolbar, click the **Editorial** icon.

   The **Editorial** panel opens.
2. Click the **Assignment Colors** tab.

   The **Assignment Colors** tab opens.
3. In the **Configure Assignments Colors** list, select the color scheme to delete.
4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected color scheme. To keep the color scheme, click **Cancel**.
5. In the confirmation message, click **OK**.

   Inception deletes the selected color scheme from the **Configure Assignments Colors** list. When you delete a color scheme, Inception also removes the color scheme from the assignments in the **Assignment Manager** that used the color scheme.
6. Click **OK** to close the **Configuration** window.

Configuring Custom Metadata

Custom metadata configuration enables you to define attributes to associate with following Inception entities:

- Assignments
- Contacts
- Playlists
- Playlist elements
- Running Orders
- Running Order Element
- Stories

The custom attributes that you define are local to your Inception system and independent of standard Inception attributes. Custom attributes are included in MOS messages and RSS feeds sent out from your Inception Server. This feature also provides a method of representing cross-product metadata.

✶ You require an NCS license for your Inception Server to configure custom metadata. Please contact Ross Video to purchase an NCS license for your Inception Server.

This chapter discusses the following topics:

- Create Custom Entities
- Manage Custom Entities
- Custom Attributes Planning
- Create Custom Attributes
- Manage Attributes
- Create Choice Lists for Custom Attributes
- Manage Choice Lists and Choices
- Customize Input Forms
- Create Managers
- Manage Managers
- Create Connections
- Manage Connections
- Use a Choice Attribute to Highlight Running Order Stories

Create Custom Entities

Custom entities enable you to design Inception grids to store information that is particular to your organization. After you create a custom entity, you can specify the metadata to store in the entity by adding custom attributes to the entity.

To create a custom entity

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

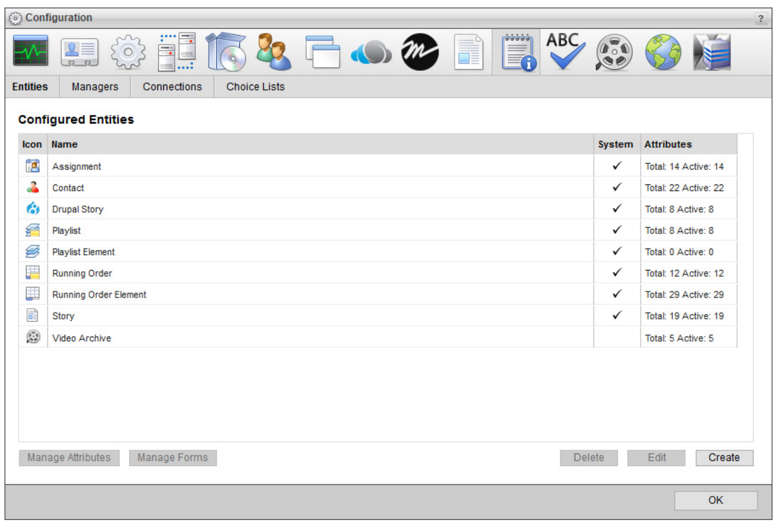
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

4. Click the **Entities** tab.

   The **Entities** tab opens.



5. Click **Create**.

   The **Create Entity** page opens.

6. In the **Name** box, enter the name to display for the custom entity in the **Create** list of the **Manager** toolbar.

7. Select the **Globally Searchable** check box to include the information contained in the custom entity in global searches of Inception content.

   The more entities that you include in global searches, the longer it takes Inception to report the results of a global search.

8. Use the **Title Attribute** list to select the attribute that contains the information to display as the entity title.

   This list only displays the **Single-Line** text attributes defined for the entity. You can edit the **Title Attribute** after you define the attributes for your entity.

9. Click **Next**.

   The next page opens and displays the **Icon** list for you to select an icon to identify your custom entity.

10. Use the **Icon** list to select an icon to identify your custom entity and display in the **Create** list of the **Manager** toolbar.

    If the icons in the list are not appropriate for your custom entity, do the following:

    a. Use the **Icon** list to select **Upload an Icon**.

       Inception displays a **Browse** button.

    b. Click **Browse**.

       The **File Upload** dialog box opens.

    c. Use the **File Upload** dialog box to select the image file to use as the icon for your custom entity.

    d. Click **Open**.

       Inception adds the image contained in the selected image file to the **Icon** list as the **Uploaded Icon** option, and automatically selects the uploaded image as the icon for your custom entity. You can only upload one image to the **Icon** list at a time. Uploading another image to the **Icon** list replaces the current uploaded image with the new image.

11. Click **Save**.

    Inception adds the new custom entity to the **Configured Entities** page. Inception automatically adds the **ID**, **Modified**, **Modified By**, **Created**, and **Created By** attributes to all custom entities. You can also add your own custom attributes to your new custom entity.

12. Complete your entity by defining attributes to associated with it, creating forms to manage it, and adding it to a Manager so that you can access it.

For More Information on...

- defining custom attributes for entities, refer to the sections "**Custom Attributes Planning**" on page 14–4 and "**Create Custom Attributes**" on page 14–5.
- creating forms for entities, refer to the section "**Customize Input Forms**" on page 14–19.
- creating managers, refer to the section "**Create Managers**" on page 14–22.

Manage Custom Entities

Managing the custom entities in your Inception system includes the following procedures:

- Edit Custom Attribute Properties
- Delete Custom Attributes

Edit Custom Entity Properties

Inception enables you to edit all the properties of an existing custom entity.

To edit the properties of a custom entity

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the custom entity to edit.
2. Click **Edit**.

   The **Edit Entity** page opens.

3. In the **Edit Entity** page, edit the custom entity properties as required.
4. Click **Next**.

   The next page of custom entity properties opens.

5. In the second **Edit Entity** page, edit the custom entity properties as required.

6. Click **Save**.

   Inception updates the custom entity and opens the **Configured Entities** page.

7. To view the updated custom entity, select the manager that contains the entity from the **Custom Managers** list on the main toolbar.

Delete Custom Entities

✶ When you delete a custom entity you also delete the custom attributes and attribute data associated with the custom entity.

To delete a custom entity

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the custom entity to delete.
2. To be able to restore a custom entity after you delete it, record the **Name** and **Grid Name** of the selected custom entity. You can use the recorded **Name** and **Grid Name** to recreate the deleted custom entity.
3. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected custom entity. To keep the custom entity, click **Cancel**.

4. In the confirmation message, click **OK**.

   Inception deletes the selected custom entity from the **Configured Entities** page.

Custom Attributes Planning

Before you start using the Metadata panel to add custom attributes to Inception, you should answer the following questions to help you plan the definition of your custom attributes:

- In which Inception grid do you want users to enter or view data for the custom attribute?

  The association between Inception entities and grids is as follows:

  › **Assignments** — the **Assignment Manager** displays defined attributes in custom columns.
  › **Contacts** — the **Contact Manager** displays defined attributes in custom columns.
  › **Playlists** — the **Playlist Manager** displays defined attributes in custom columns.
  › **Playlist elements** — a **Playlist** displays defined attributes in custom columns.
  › **Running Orders** — the **Running Order Manager** displays defined attributes in custom columns.
  › **Running Order Element** — a **Running Order** displays defined attributes in custom columns.
  › **Stories** — the **Story Browser** displays defined attributes in custom columns.

- What type of data do you want to save in the custom attribute: text, numeric, date, time, true/false, or Inception user?

✶ Changing the data type for a custom attribute that contains data can cause loss of data.

- Do you want users to select custom attribute values from a choice list?

✶ Editing the choice list used to select data for a custom attribute that contains data can cause loss of data.

Create Custom Attributes

After completing your custom attribute plan, you are ready to start the process of adding custom attributes to your Inception system. The following diagram (**Figure 14.1**) illustrates the different phases of the custom attribute creation workflow.

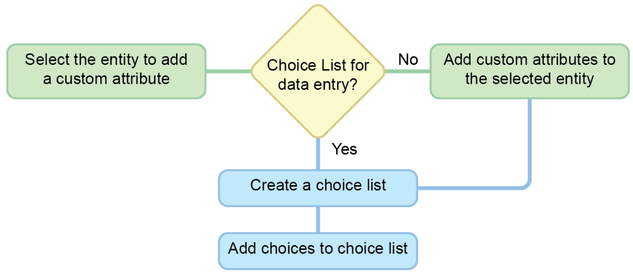
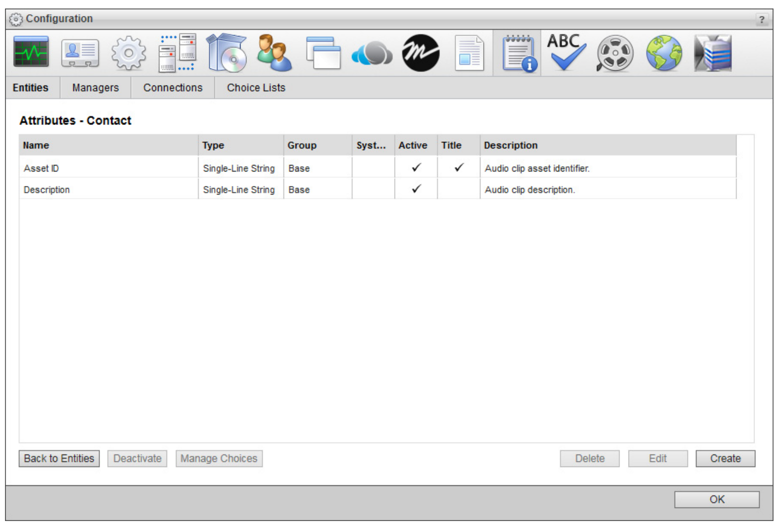


Figure 14.1 Custom Attribute Creation Workflow

To create a custom attribute for an Inception entity

1. In the **Configured Entities** table, select the Inception entity to add a custom attribute.
2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.



3. Click **Create**.

   The **Create Attribute** page opens.

4. In the **Name** box, enter the column name to display for the custom attribute in the Inception grid associated with the entity.
5. In the **Key Name** box, enter the name to use as the identifier for the custom attribute. When you click in this box, Inception enters a suggested key name that you can edit.

✶ You cannot change the **Key Name** of a custom attribute after you save the custom attribute.

Key Names also identify the custom attribute values in MOS messages and RSS feeds sent out from your Inception Server.

6. Use the **Type** list to select the type of data that users can enter in the custom attribute.

✶ You cannot change the **Type** of a custom attribute after you save the custom attribute.

The available data types are as follows:

- **Single-Line String** — character string on a single line.
- **Multi-Line String** — character string on multiple lines, press Enter to start a new line.
- **Integer** — whole number without a fractional part.
- **Decimal** — decimal number that may contain a fractional part.
- **Date** — calendar date (year, month, day).
- **Duration** — duration time (hh:mm:ss).
- **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).
- **Boolean** — logical Boolean (true or false).
- **User** — a single Inception user.
- **Multiple User** — one or more Inception users.
- **Choice** — a single selection from a choice list.
- **Multiple Choice** — one or more selections from a choice list.

7. Depending on the selected **Type** for the custom attribute, continue creating your custom attribute with the following steps or procedures:

- **Single-Line String** — continue with step **8** in this procedure.
- **Multi-Line String** — continue with step **8** in this procedure.
- **Integer** — continue with step **8** in this procedure.
- **Decimal** — continue with step **8** in this procedure.
- **Date** — continue with step **8** in this procedure.
- **Duration** — continue with step **8** in this procedure.
- **Date & Time** — continue with step **8** in this procedure.
- **Boolean** — refer to the section "**Boolean Type Configuration**" on page 14–8.
- **User** — refer to the section "**User Type Configuration**" on page 14–8.
- **Multiple User** — refer to the section "**Multiple User Type Configuration**" on page 14–9.
- **Choice** — refer to the section "**Choice Type Configuration**" on page 14–10.
- **Multiple Choice** — refer to the section "**Multiple Choice Type Configuration**" on page 14–11.

8. Depending on the selected **Type** for the custom attribute, enter one of the following values to set the **Minimum** for the custom attribute:

Type	Minimum Value
Single-Line String	Enter the minimum number of characters that the entered text must contain.
Multi-Line String	Enter the minimum number of characters that the entered text must contain.
Integer	Enter the minimum value for the entered whole number.
Decimal	Enter the minimum value for the entered decimal number.
Date	Use the Calendar tool to select the start date of the valid date range for the custom attribute.
Time	Enter the minimum duration for the entered time (hh:mm:ss).
Date & Time	Use the Calendar tool to select the start date and time of the valid date and time range for the custom attribute.

9. Depending on the selected **Type** for the custom attribute, enter one of the following values to set the **Maximum** for the custom attribute:

Type	Value
Single-Line String	Enter the maximum number of characters that the entered text must contain.
Multi-Line String	Enter the maximum number of characters that the entered text must contain.
Integer	Enter the maximum value for the entered whole number.
Decimal	Enter the maximum value for the entered decimal number.
Date	Use the Calendar tool to select the end date of the valid date range for the custom attribute.
Time	Enter the maximum duration for the entered time (hh:mm:ss).
Date & Time	Use the Calendar tool to select the end date and time of the valid date and time range for the custom attribute.

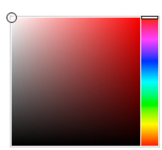
10. Depending on the selected **Type** for the custom attribute, enter one of the following values to set the **Default** for the custom attribute:

Type	Value
Single-Line String	Enter the default text for the custom attribute.
Multi-Line String	Enter the default text for the custom attribute.
Integer	Enter the default whole number value for the custom attribute.
Decimal	Enter the default decimal number value for the custom attribute.
Date	Use the Calendar tool to select the default date for the custom attribute.
Time	Enter the default time (hh:mm:ss) for the custom attribute.
Date & Time	Use the Calendar tool to select the default date and time for the custom attribute.

✶ Default Values must fall within the **Minimum** and **Maximum** values set for the custom attribute.

11. Click the **Empty Cell Color** color square.

    The **Color Picker** opens.



12. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

    Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

13. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that contain data.

14. Click the **Fore** color square to use the **Color Picker** to select the text color that Inception uses to display custom attribute cells that contain data.

15. In the **Description** box, enter a description of the custom attribute.

    Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.

16. Click **Save**.

    Inception adds the new custom attribute to the **Attributes** page of the selected entity.

17. To view the new custom attribute, open the Inception grid associated with the entity to which you added the custom attribute.

Boolean Type Configuration

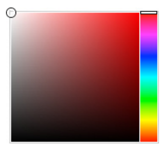
When you select Boolean as the Type for a custom attribute, you need to configure settings that are specific to the Boolean data type.

To configure a Boolean type custom attribute

1. Select the **Default Value** check box to set **true** as the default value for the custom attribute. Clear the **Default Value** check box to set **false** as the default value for the custom attribute.

2. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.



3. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

4. Click the **Checked Cell Color** color square to use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that contain a selected check box.

5. In the **Description** box, enter a description of the custom attribute.

   Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.

6. Click **Save**.

   Inception adds the new custom attribute to the **Attributes** page of the selected entity.

7. To view the new custom attribute, open the Inception grid associated with the entity to which you added the custom attribute.

User Type Configuration

When you select User as the Type for a custom attribute, you need to configure settings that are specific to the User data type.

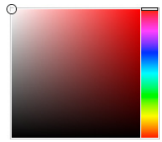
To configure a User type custom attribute

1. Use the **Included Roles** list to select one or more roles that contain the Inception users that are suitable for the custom attribute.

2. Select the **Exclude Inactive** check box to exclude inactive Inception users from the list of available users for the custom attribute. Clear this check box to include inactive Inception users in the list of available users for the custom attribute.

3. Use the **Default Value** list to select the default Inception user for the custom attribute.
4. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.



5. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.
6. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that contain a selected Inception user.
7. Click the **Fore** color square to use the **Color Picker** to select the text color that Inception uses to display custom attribute cells that contain a selected Inception user.
8. In the **Description** box, enter a description of the custom attribute.

   Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
9. Click **Save**.

   Inception adds the new custom attribute to the **Attributes** page of the selected entity.
10. To view the new custom attribute, open the Inception grid associated with the entity to which you added the custom attribute.

Multiple User Type Configuration

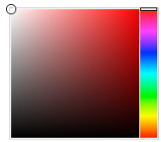
When you select Multiple User as the Type for a custom attribute, you need to configure settings that are specific to the Multiple User data type.

To configure a Multiple User type custom attribute

1. Use the **Included Roles** list to select one or more roles that contain the Inception users that are suitable for the custom attribute.
2. Select the **Exclude Inactive** check box to exclude inactive Inception users from the list of available users for the custom attribute. Clear this check box to include inactive Inception users in the list of available users for the custom attribute.
3. In the **Minimum** box, enter the minimum number of Inception users that a user must select for the custom attribute.
4. In the **Maximum** box, enter the maximum number of Inception users that a user can select for the custom attribute.
5. Use the **Default Value** list to select the default Inception user or users for the custom attribute.

6. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.

7. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

8. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that contain a selected Inception user or users.

9. Click the **Fore** color square to use the **Color Picker** to select the text color that Inception uses to display custom attribute cells that contain a selected Inception user or users.

10. In the **Description** box, enter a description of the custom attribute.

    Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.

11. Click **Save**.

    Inception adds the new custom attribute to the **Attributes** page of the selected entity.

12. To view the new custom attribute, open the Inception grid associated with the entity to which you added the custom attribute.

Choice Type Configuration

When you select Choice as the Type for a custom attribute, you need to configure settings that are specific to the Choice data type.

To configure a Choice type custom attribute

1. Use the **Choice List** list to select the choice list that contains applicable values for the custom attribute.

   If the Choice List list does not contain a suitable choice list, follow these steps to create a new choice list:

   a. Click **Create** to the left of the **Choice List** list.

      The **Choice List** list changes to the **Choice List Name** box.

   b. In the **Choice List Name** box, enter a name for the new choice list.

   c. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:

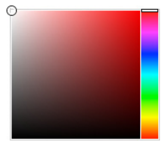
      - **Single-Line String** — character string on a single line.
      - **Integer** — whole number without a fractional part.
      - **Decimal** — decimal number that may contain a fractional part.
      - **Date** — calendar date (year, month, day).
      - **Duration** — duration time (hh:mm:ss).
      - **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).

   d. New choice lists do not contain choices. After you save the custom attribute, refer to the procedure "**To add choices to a choice list**" on page 14–15 to add choices to a new choice list.

2. Use the **Order** list to select how to order the choices in the selected choice list. The available ordering methods are as follows:
   - **As Entered** — the order in which choices where added to the choice list.
   - **Alphabetical Ascending By Name** — A to Z by choice name.
   - **Alphabetical Descending By Name** — Z to A by choice name.
   - **Natural Ascending By Value** — lowest to highest choice value.
   - **Natural Descending By Value** — highest to lowest choice value.
3. Use the **Default Value** list to select a choice from the choice list as the default value for the custom attribute.

   This list is not available when you create a new choice list.
4. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.

5. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.
6. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that contain a selected choice.
7. Click the **Fore** color square to use the **Color Picker** to select the text color that Inception uses to display custom attribute cells that contain a selected choice.
8. In the **Description** box, enter a description of the custom attribute.

   Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
9. Click **Save**.

   Inception adds the new custom attribute to the **Attributes** page of the selected entity.
10. To view the new custom attribute, open the Inception grid associated with the entity to which you added the custom attribute.

Multiple Choice Type Configuration

When you select Multiple Choice as the Type for a custom attribute, you need to configure settings that are specific to the Multiple Choice data type.

To configure a Multiple Choice type custom attribute

1. Use the **Choice List** list to select the choice list that contains applicable values for the custom attribute.

   If the Choice List list does not contain a suitable choice list, follow these steps to create a new choice list:

   a. Click **Create** to the left of the **Choice List** list.

      The **Choice List** list changes to the **Choice List Name** box.

   b. In the **Choice List Name** box, enter a name for the new choice list.

c. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:

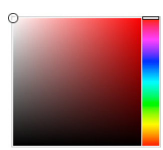
- **Single-Line String** — character string on a single line.
- **Integer** — whole number without a fractional part.
- **Decimal** — decimal number that may contain a fractional part.
- **Date** — calendar date (year, month, day).
- **Duration** — duration time (hh:mm:ss).
- **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).

d. New choice lists do not contain choices. After you save the custom attribute, refer to the procedure "**To add choices to a choice list**" on page 14–15 to add choices to a new choice list.

2. Use the **Order** list to select how to order the choices in the selected choice list. The available ordering methods are as follows:
   - **As Entered** — the order in which choices where added to the choice list.
   - **Alphabetical Ascending By Name** — A to Z by choice name.
   - **Alphabetical Descending By Name** — Z to A by choice name.
   - **Natural Ascending By Value** — lowest to highest choice value.
   - **Natural Descending By Value** — highest to lowest choice value.
3. In the **Minimum** box, enter the minimum number of choices that a user must select for the custom attribute.
4. In the **Maximum** box, enter the maximum number of choices that a user can select for the custom attribute.
5. Use the **Default Value** list to select the default choice or choices for the custom attribute.

   This list is not available when you create a new choice list.
6. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.



7. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.
8. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that contain a selected choice.
9. Click the **Fore** color square to use the **Color Picker** to select the text color that Inception uses to display custom attribute cells that contain a selected choice.
10. In the **Description** box, enter a description of the custom attribute.

    Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
11. Click **Save**.

    Inception adds the new custom attribute to the **Attributes** page of the selected entity.
12. To view the new custom attribute, open the Inception grid associated with the entity to which you added the custom attribute.

Manage Attributes

Managing the custom attributes associated with an Inception entity includes the following procedures:

- Change the Active Status of a System or Custom Attribute
- Edit Custom Attribute Properties
- Delete Custom Attributes

Change the Active Status of a System or Custom Attribute

Inception displays all Active system and custom attributes in their associated grids. Inactive system or custom attributes are hidden from their associated grids. Inactive system or custom attributes do not lose user entered data.

To change the active status of a system or custom attribute

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the Inception entity that contains the system or custom attribute to change.
2. Click **Manage Attributes**.

   The **Attributes** opens for the selected entity.
3. In the **Attributes** table, select the system or custom attribute to change.
4. Change the active status for the selected attribute as follows:
   - If the selected attribute is active, click **Deactivate**.

     Inception removes the check mark from the **Active** column of the selected attribute, which indicates that the attribute is inactive and hidden from grids.
   - If the selected attribute is inactive, click **Activate**.

     Inception adds a check mark to the **Active** column of the selected attribute, which indicates that the attribute is active and available in grids.

Edit Custom Attribute Properties

To maintain data integrity, Inception only allows you to edit some of the properties of an existing custom attribute.

To edit the properties of a custom attribute

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the Inception entity that contains the custom attribute to edit.
2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.
3. In the **Attributes** table, select the custom attribute to edit.

   The **Edit Attribute** page opens.
4. In the **Edit Attribute** page, edit the custom attributes properties as required.

   Properties that you cannot edit are grayed out.
5. Click **Save**.

   Inception updates the custom attribute and opens the **Attributes** page of the selected entity.
6. To view the updated custom attribute, open the Inception grid associated with the entity that contains the updated custom attribute.

Delete Custom Attributes

After you delete a custom attribute, you can restore the custom attribute data by creating a new custom attribute with the same Key Name and Type as the deleted custom attribute.

To delete a custom attribute

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the Inception entity that contains the custom attribute to delete.
2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.
3. In the **Attributes** table, select the custom attribute to delete.
4. To be able to restore custom attribute data after you delete a custom attribute, record the **Key Name** and **Type** of the selected custom attribute. Use the recorded **Key Name** and **Type** to create a new custom attribute to restore the data from the deleted custom attribute.
5. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected custom attribute. To keep the custom attribute, click **Cancel**.
6. In the confirmation message, click **OK**.

   Inception deletes the selected custom attribute from the Inception entity.

Create Choice Lists for Custom Attributes

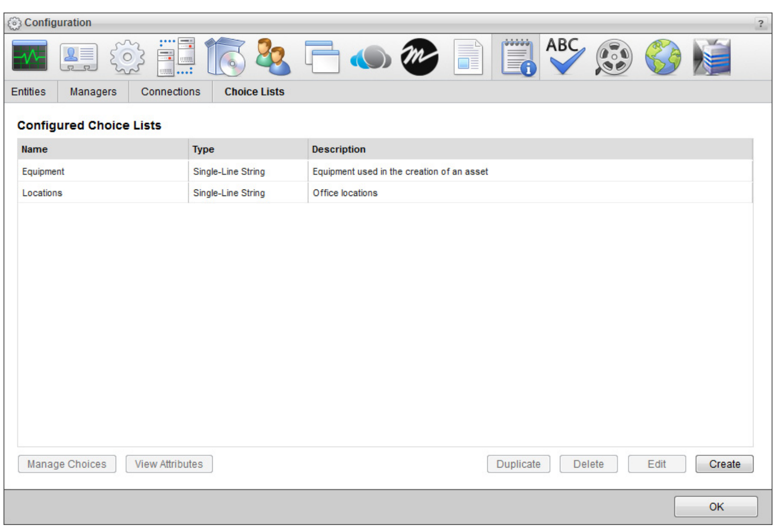
A choice lists contains a list of choices from which users can select for a value for custom attributes with a data type of Choice or Multiple Choice. Choice lists help simplify data entry and control the data entered for a custom attribute.

To create a choice list

1. On the **Configuration** window toolbar, click the  **Metadata** icon.

   The **Metadata** panel opens.
2. Click the **Choice Lists** tab.

   The **Choice Lists** tab opens.



3. Click **Create**.

   The **Create Choice** page opens.

4. In the **Name** box, enter a name for the new choice list.
5. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:
   - **Single-Line String** — character string on a single line.
   - **Integer** — whole number without a fractional part.
   - **Decimal** — decimal number that may contain a fractional part.
   - **Date** — calendar date (year, month, day).
   - **Duration** — duration time (hh:mm:ss).
   - **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).
6. In the **Description** box, enter a description of the choice list.

   Only the **Configured Choice Lists** page displays the description of a choice list.
7. Click **Save**.

   Inception adds the new choice list to the **Configured Choice Lists** page.

New choice lists do not contain choices, refer to the procedure "**To add choices to a choice list**" on page 14–15 to add choices to a new choice list.

Add Choices to Choice Lists

New choice lists created from the Create Attribute or Create Choice List pages of the Metadata panel do not contain choices. After you create a choice list you need to add choices to the choice list.

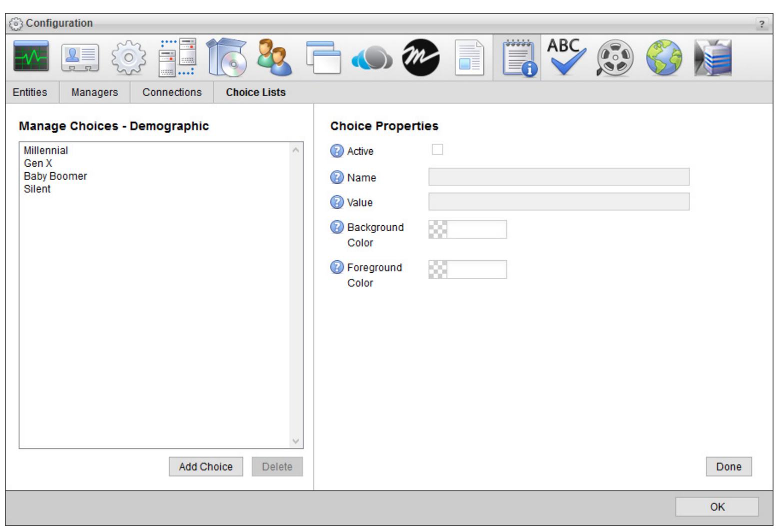
To add choices to a choice list

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.
2. Click the **Choice Lists** tab.

   The **Choice Lists** tab opens.
3. In the **Configured Choice Lists** table, select the choice list to add choices.
4. Click **Manage Choices**.

   The **Manage Choices** page opens.



5. In the **Manage Choices** section, click **Add Choice**.

   Inception creates a new choice named "New Choice" and saves the property values set for the new choice.

6. In the **Choice Properties** section, select the **Active** check box to activate the new choice and enable users to select this choice from the choice list. Clear this box to deactivate the choice and remove it from the choice list.

✶ Deactivating a choice also removes the choice from all the custom attributes assigned the choice.

7. In the **Name** box, enter the name to display in the choice list that a user selects to choose this choice for a custom attribute.
8. In the **Value** box, enter the value that Inception stores when a use selects this choice. When you click in this box, Inception enters a suggested value that you can edit.

   This value is sent as the value for a custom attribute when your Inception Server sends out MOS messages and RSS feeds.
9. Click the **Background Color** color square to use a color picker to select the background color for rows that use this choice. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color.
10. Click the **Foreground Color** color square to use a color picker to select the text color for rows that use this choice. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color.
11. In the **Manage Choices** section, click **Add Choice**. to add another choice to the choice list. To finish adding choices to a choice list, click **Done** in the **Choice Properties** section.

Manage Choice Lists and Choices

Managing choice lists includes the following procedures:

- View Choice List Usage
- Duplicate Choice Lists
- Edit Choice List Properties
- Delete Choice Lists

Managing the choices in a choice list includes the following procedures:

- Edit Choices in a Choice List
- Delete Choices from a Choice List

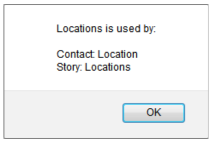
View Choice List Usage

Viewing the attributes of a choice list shows you the custom attributes that use the selected choice list, which is good information to check before editing a choice list.

To view the custom attributes that use a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to view usage information about.
2. Click **View Attributes**.

   A message opens with a list of the custom attributes that use the selected choice list.



3. Click **OK** to close the usage message.

Duplicate Choice Lists

Duplicating existing choices lists is a quick method of creating new choice lists.

To duplicate a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to duplicate.
2. Click **Duplicate**.

   Inception adds a duplicate of the selected choice list to the **Configured Choice Lists** table, and names the new choice list "New Choice List" or "New Choice List (#)". You can edit the new choice list to change the name of the choice list. Manage the new choice list to add choices to the choice list.

Edit Choice List Properties

To maintain data integrity, Inception only allows you to edit some of the properties of an existing choice list.

To edit the properties of a choice list

1. From the **Configured Choice Lists** table in the **Metadata** panel **Choice Lists** tab, select the choice list to edit.
2. In the **Attributes** table, select the custom attribute to edit.

   The **Edit Attribute** page opens.
3. In the **Edit Attribute** page, edit the custom attributes properties as required.

   Properties that you cannot edit are grayed out.
4. Click **Save**.

   Inception updates the custom attribute and opens the **Attributes** page of the selected entity.

Delete Choice Lists

To maintain data integrity, Inception only allows you to delete choice lists that are not used to enter data in a custom attribute.

To delete a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to delete.
2. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected choice list. To keep the choice list, click **Cancel**.
3. In the confirmation message, click **OK**.

   Inception deletes the selected choice list from the **Configured Choice Lists** table.

Edit Choices in a Choice List

Inception allows you to edit all the properties of a choice.

✶ Changing the value of a choice may cause data loss if the choice is assigned to custom attributes.

To edit the properties of a choice in a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list that contains the choice to edit.
2. Click **Manage Choices**.

   The **Manage Choices** page opens.
3. In the **Choices** list, select the choice to edit.

   The **Choice Properties** section displays the properties of the selected choice.
4. Edit the choice properties as required. When you edit a choice, keep in mind the following conditions:
   - Clearing the **Active** check box removes the selected choice from the choice list and from all the custom attributes assigned the choice.
   - Changing the **Name** of a choice changes the choice name displayed in the choice list and all the custom attributes assigned the choice.
   - Changing the **Value** of a choice may cause data loss if the choice is assigned to custom attributes.
5. Click **Done** or select another choice in the **Choices** list to save the edited choice.

   When you edit the **Value** of a choice, an alert opens warning that changing the choice value may cause data loss if the choice is assigned to custom attributes. Click **OK** to save the new value for the choice or click **Cancel** to keep the old value for the choice.

Delete Choices from a Choice List

After you delete a choice from a choice list, you can restore the choice by re-adding it to the choice list using the same Name and Value.

To delete a choice from a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list that contains the choice to edit.
2. Click **Manage Choices**.

   The **Manage Choices** page opens.
3. In the **Choices** list, select the choice to delete.
4. To be able to restore a choice after you delete it, record the **Name** and **Value** of the selected choice. Use the recorded **Name** and **Value** to re-add the choice to the choice list.
5. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected choice. To keep the choice, click **Cancel**.
6. In the confirmation message, click **OK**.

   Inception deletes the selected choice attribute from the **Choices** list.

Customize Input Forms

Inception enables you to customize the fields available on the input forms used by the Assignment Manager, Contact Manager, Drupal Story Content, Playlist Manager, Running Order Manager, and Store Editor.

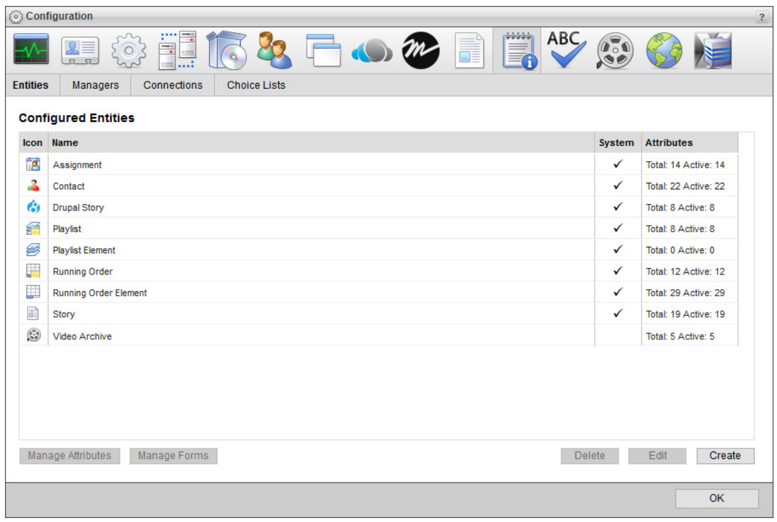
To customize the fields on an input form

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Entities** tab.

   The **Entities** tab opens.

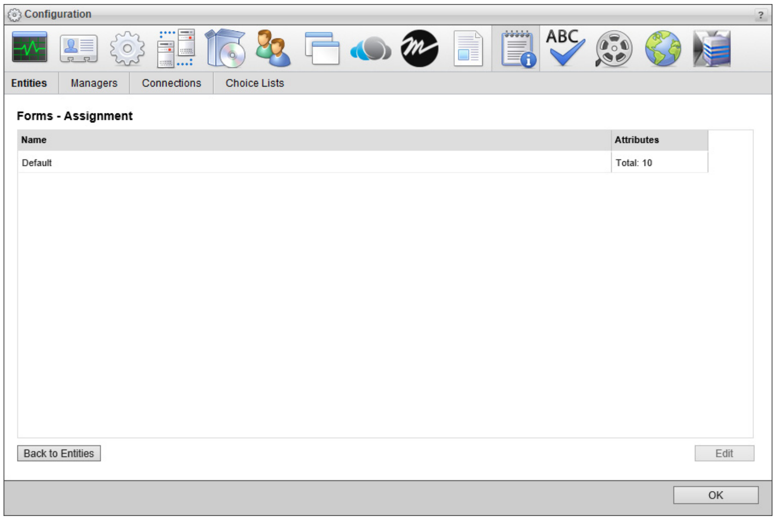


3. In the **Configured Entities** table, select the entity that contains the input form to customize. Inception system entities contain the following input forms:

Entity	Form
Assignment Manager	New Assignment
	Edit Assignment Settings
Contact Manager	Add Contact
	Edit Contact
Drupal Story Content	Default form
	Edit Running Order
Playlist Manager	New Playlist
	Edit Playlist
Running Order Manager	New Running Order
	Edit Running Order
Playlist Manager	New Playlist
	Edit Playlist
Story Editor	Edit Assignees

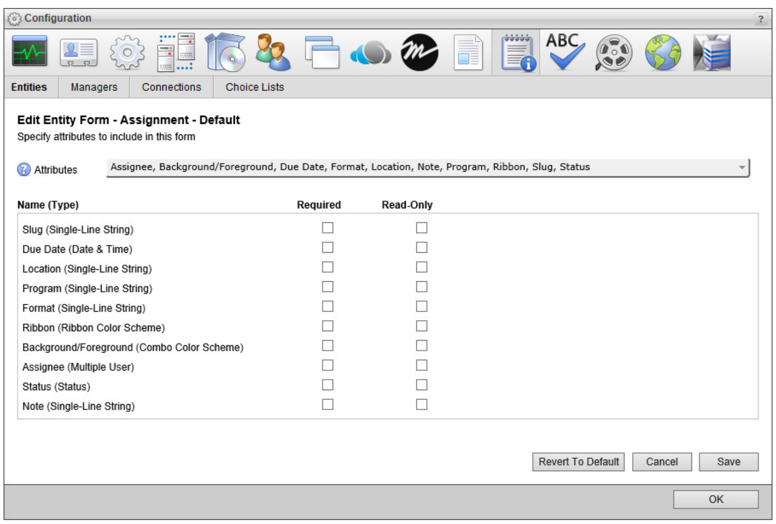
4. Click **Manage Forms**.

   The **Forms** page opens for the selected entity and lists the forms associated with the entity.



5. In the **Forms** list, select **Default**.
6. Click **Edit**.

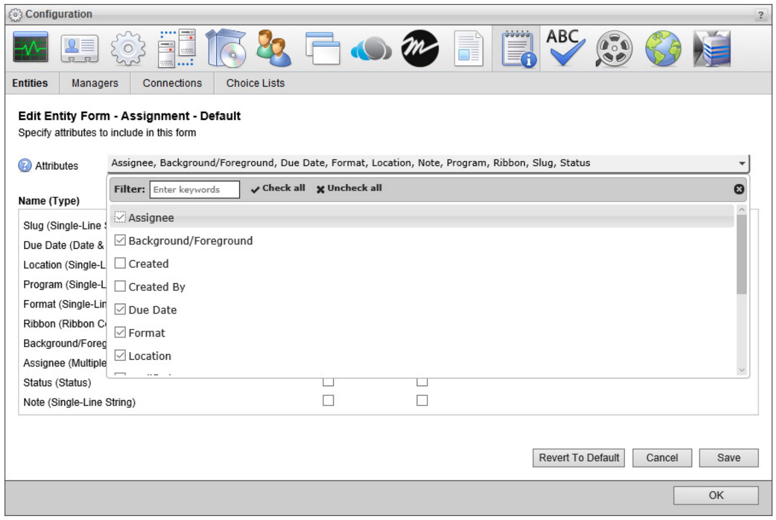
   The **Edit Entity Form** settings open for the **Default** form, the input form associated with the selected entity.



7. For the **Assignment** entity you can use the **Require Form** check box as follows to control the use of the **New Assignment** dialog box when creating new assignments:
   - **Ask Users to Define Settings** — select the **Require Form** check box to display the **New Assignment** dialog box for users to define assignment settings when creating new assignments.
   - **Use Default Settings** — clear the **Require Form** check box to not display the **New Assignment** dialog box and create new assignments with default settings. Users can later edit assignments if required.
8. For the **Drupal Story** entity you can use the **Name** box to change the name of the entity form.

9. Click the **Attributes** list.

   The **Attribute** list opens and lists attributes that you can add to the input form. The Attributes list includes custom attributes created for the entity associated with the input form.



10. To filter the **Attributes** list, enter in the **Filter** box a portion of the attribute name you want to select.

    You do not need to enter the start of an attribute name, just any portion of the name filters the **Attributes** list. The **Attributes** list automatically updates to display only the attributes with names that contain the text entered in the **Filter** box. Clear the **Filter** box to display all the available attributes in the **Attributes** list.

11. In the **Attributes** list, select the check box to the left of each attribute that you want to include on the input form. Clear the check boxes associated with attributes to remove from the input form.

    Click **Check All** to select all the attributes in the **Attributes** list, click **Uncheck All** to deselect all attributes.

12. After you select the attributes to include on the input form, click the **Close** icon.

    The **Attributes** list closes, and the **Name** list displays the selected attributes.

13. In the **Name (Type)** list, drag the attributes in the list to set the display order in the input form.
14. For attributes that users must enter a value, select the **Required** check box to the right of the attribute.
15. For attributes that you do not want users to edit, select the **Read Only** check box to the right of the attribute.
16. To reset the input form to the default attributes assigned to the form, click **Revert To Default**.
17. Click **Save**.

    Inception updates the input form for the selected entity and opens the **Forms** page.

Create Managers

After you create your custom entities and forms you must add them to a manager so that Inception users can access them from the Custom Managers list on the main toolbar. A manager can contain one or more custom entities. From a manger users can create and manage custom entity content.

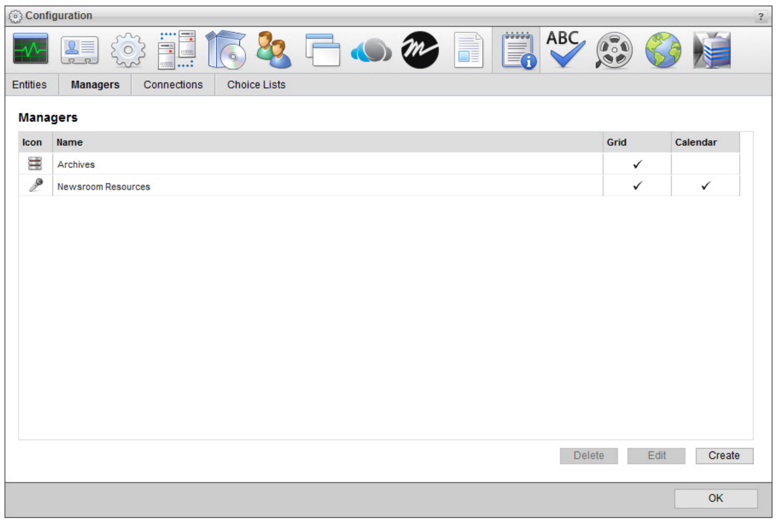
To associate custom entities with a manager

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Managers** tab.

   The **Managers** tab opens.



3. Click **Create**.

   The **Create Manager** page opens.

4. In the **Name** box, enter the name to display for the manager in the **Custom Managers** list on the main toolbar and in the title bar of the **Manager** panel.

5. Use the **Icon** list to select an icon to identify the manager and display in the title bar of the Inception grid associated with the manager.

If the icons in the list are not appropriate for your manager, do the following:

   a. Use the **Icon** list to select **Upload an Icon**.

      Inception displays a **Browse** button.

   b. Click **Browse**.

      The **File Upload** dialog box opens.

   c. Use the **File Upload** dialog box to select the image file to use as the icon for your manager.

   d. Click **Open**.

      Inception adds the image contained in the selected image file to the **Icon** list as the **Uploaded Icon** option, and automatically selects the uploaded image as the icon for your manager. You can only upload one image to the **Icon** list at a time. Uploading another image to the **Icon** list replaces the current uploaded image with the new image.

6. Select the **Show in Main Toolbar** check box to place the icon used to access the **Manager** panel in the main toolbar **Custom** section instead of in the **Custom** list. Clear this check box to place the **Manager** panel icon in the **Custom** list.

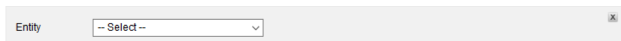
✶ When you place all **Manager** icons in the main toolbar **Custom** section Inception removes the **Custom** list icon from the main toolbar.

7. Click **Next**.

   The **Entity Selection** page opens.

8. Click **Add**.

   Inception adds a new blank entity to the **Entity Association List** box.

   To delete an entity from the **Entity Association List** box, click the icon in the upper right corner of the entity to delete.

9. Use the **Entity** list to select the entity to add to the manager.

   Inception adds the **Create Form** and **Edit Form** lists to the entity.

10. Use the **Create Form** list to select the form that Inception users use to create new custom entity records. This list only displays the forms created for the custom entity selected in the **Entity** list. Select **None** to use the **Manager** grid to create records.

11. Use the **Edit Form** list to select the form that Inception users use to edit custom entity records. This list only displays the forms created for the custom entity selected in the **Entity** list. Select **None** to use the **Manager** grid to edit records.

12. When you selected an **Edit Form**, use the **Open In** list to set the location to open the edit form. The available options are as follows:

    - **Dialog** — open the selected form in a pop-up dialog box.
    - **View** — open the selected form in an **Editor** panel.

13. To add another entity to the manager, repeat step **8** to step **12**.

14. Click **Next**.

    The **Displays** page opens.

15. Select the **Enable Grid** check box to enable the manager and add it to the **Custom Managers** list on the main toolbar. Clear this check box to remove the Grid view from the panel.

    This check box is only available after selecting the **Enable Calendar** check box.

16. Select the **Manual Sort** check box to manually sort entity information in the manager by drag and drop. Clear this check box to enable automatic column sorting for the manager.

    This check box is only available after selecting the **Enable Grid** check box.

17. Select the **Paged Grid** check box to use pages to display the information contained in the custom entities associated with the manager. When you select this option, Inception adds paging controls to the bottom of the **Manager** panel. Clear this check box to scroll the information contained in the manager.

    This check box is only available after selecting the **Enable Grid** check box

18. Select the **Enable Calendar** check box to enable the **Calendar** view for the **Manager** panel. Clear this check box to remove the Calendar view from the panel.

    This check box is only available after selecting the **Enable Grid** check box.

19. Use each **Entity Type** list to select the attribute that contains the date used by the **Calendar** view to display instances of the associated entity type. The **Enable Calendar** section contains an **Entity Type** list for each entity associated with the manager.

    Entity Type lists are only available after selecting the **Enable Calendar** check box.

20. Click **Save**.

    Inception adds the new manager to the **Managers** page and to the **Custom Managers** list on the main toolbar.

Manage Managers

Managing the managers in your Inception system includes the following procedures:

- Edit Managers
- Delete Managers

Edit Managers

Inception enables you to edit all the properties of an existing manager.

To edit the properties of a manager

1. From the **Managers** table in the **Managers** tab of the **Metadata** panel, select the manager to edit.
2. Click **Edit**.

   The **Edit Manager** page opens.
3. In the **Edit Manager** page, edit the manager properties as required.
4. Click **Next**.

   The **Entity Selection** page opens.
5. In the **Entity Selection** page, edit the custom entity properties as required.
6. Click **Next**.

   The **Displays** page opens.
7. In the **Displays** page, edit the display properties as required.
8. Click **Save**.

   Inception updates the manager and opens the **Managers** page.
9. To view the updated manager, select the manager from the **Custom Managers** list on the main toolbar.

Delete Managers

✶ When you delete a manager you also remove access to the custom entities associated with the manager. Inception does not delete the information contained in the associated custom entities.

To delete a manager

1. From the **Managers** table in the **Managers** tab of the **Metadata** panel, select the manager to delete.
2. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected manager. To keep the manager, click **Cancel**.
3. In the confirmation message, click **OK**.

   Inception deletes the selected manager from the **Managers** page.

Create Connections

Connections enable Inception users to add custom entities to a story while working in the Story Editor panel. The custom entities that a user can connect to a story are accessed from the Add list in the Story Editor panel.

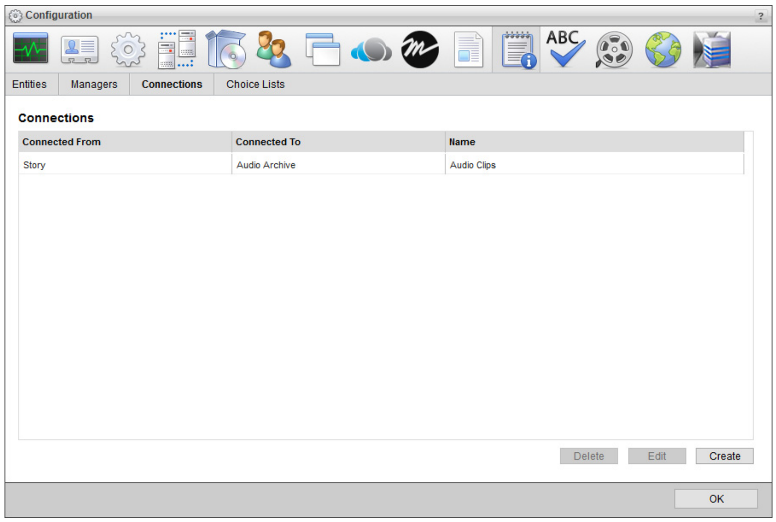
To connect custom entities with the Story Editor panel

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Connections** tab.

   The **Connections** tab opens.



3. Click **Create**.

   The **Create Connection** page opens.

4. In the **Name** box, enter a name for the connection.

5. Use the **Connected From** list to select the entity to connect to a custom entity.

   Currently you can only select **Story** to connect the Story Editor panel to a custom entity.

6. Use **Connected To** list to select the custom entity to connect to the entity selected in the **Connected From** list. This list is only available after selecting an entity from the **Connected From** list.

   Inception displays the **Connection Create Form**, **Connection Edit Form**, and **Opens In** lists.

7. Use the **Create Form** list to select the form that Inception users use to create connected custom entity records. This list only displays the forms created for the custom entity selected in the **Connected To** list.

8. Use the **Edit Form** list to select the form that Inception users use to edit connected custom entity records. This list only displays the forms created for the custom entity selected in the **Connected To** list.

9. When you selected an **Edit Form**, use the **Open In** list to set the location to open the edit form. The available options are as follows:

   - **Dialog** — open the selected form in a pop-up dialog box.
   - **View** — open the selected form in an **Editor** panel.

10. Click **Next**.

    The **Mappings** page opens.

11. Use the list in the **Story Attribute** column to select the story attribute to map to the custom entity attribute selected in the associated **Custom Attribute** list to the right.

    When you create a connected custom entity from the **Story Editor**, Inception automatically fills the new custom entity record with information from the mapped story attributes.

12. Use the list in the **Custom Entity Attribute** column to select the custom entity attribute to map to the story attribute selected in the associated **Story Attribute** list to the left.

13. Click **Add** to add another mapping between a **Story Attribute** and a **Custom Entity Attribute**.

    To delete a mapping, click the associated **Delete** icon to the left of a mapping.

14. Repeat step **11** to step **13** for each mapping that you want to define for a creating connected custom entities.

15. Click **Save**.

    Inception adds the new connection to the **Connections** page and to the **Add** list in the **Story Editor** panel.

Manage Connections

Managing the connections in your Inception system includes the following procedures:

- Edit Connections
- Delete Connections

Edit Connections

Inception enables you to edit all the properties of an existing connection.

To edit the properties of a connection

1. From the **Connections** table in the **Connections** tab of the **Metadata** panel, select the connection to edit.

2. Click **Edit**.

   The **Edit Connection** page opens.

3. In the **Edit Connection** page, edit the connection properties as required.

4. Click **Save**.

   Inception updates the connection and opens the **Connections** page.

5. To view the updated connection, open the **Add** list in the **Story Editor** panel.

Delete Connections

✶ When you delete a connection you also remove access to from the Story Editor panel to the associated custom entity. Inception does not delete the information contained in the associated custom entities.

To delete a connection

1. From the **Connections** table in the **Connections** tab of the **Metadata** panel, select the connection to delete.

2. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected connection. To keep the connection, click **Cancel**.

3. In the confirmation message, click **OK**.

   Inception deletes the selected connection from the **Connections** page.

Use a Choice Attribute to Highlight Running Order Stories

You can configure a choice custom attribute for the Running Order Element entity that enables Inception users to change the background and foreground colors of a story in a Running Order based on a selected value. Individual cell, floated, break, and selected colors take priority over the row color set by the selected value (**Figure 14.2**).

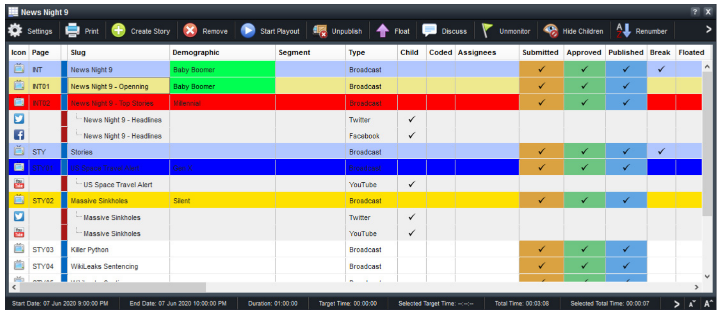


Figure 14.2 Demographic Custom Attribute Row Color Priority

To enable Inception users to color running order stories based on a selected value, you must create the following:

- **Choice List** — each value in the choice list should be assigned a background and or a foreground color.
- **Custom Attribute** — you must add a choice custom attribute to the Running Order Element entity. The choice custom attribute must use the choice list created with colors assigned to its values.

Choice List

The colors assigned to the values in the choice list will set the background and or a foreground color of running order stories.

To create a choice list to set running order story colors

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Choice Lists** tab.

   The **Choice Lists** tab opens.

3. Click **Create**.

   The **Create Choice** page opens.

4. In the **Name** box, enter a name for the new choice list.

5. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:

   - **Single-Line String** — character string on a single line.
   - **Integer** — whole number without a fractional part.
   - **Decimal** — decimal number that may contain a fractional part.
   - **Date** — calendar date (year, month, day).
   - **Duration** — duration time (hh:mm:ss).
   - **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).

6. In the **Description** box, enter a description of the choice list.

   Only the **Configured Choice Lists** page displays the description of a choice list.

7. Click **Save**.

   Inception adds the new choice list to the **Configured Choice Lists** page.

8. Click the **Choice Lists** tab.

   The **Choice Lists** tab opens.

9. In the **Configured Choice Lists** table, select the choice list to add choices.
10. Click **Manage Choices**.
11. In the **Manage Choices** section, click **Add Choice**.

    Inception creates a new choice named “New Choice” and saves the property values set for the new choice.

12. In the **Choice Properties** section, select the **Active** check box to activate the new choice and enable users to select this choice from the choice list. Clear this box to deactivate the choice and remove it from the choice list.

✶ Deactivating a choice also removes the choice from all the custom attributes assigned the choice.

13. In the **Name** box, enter the name to display in the choice list that a user selects to choose this choice for a custom attribute.
14. In the **Value** box, enter the value that Inception stores when a use selects this choice. When you click in this box, Inception enters a suggested value that you can edit.

    This value is sent as the value for a custom attribute when your Inception Server sends out MOS messages and RSS feeds.

15. Click the **Background Color** color square to use a color picker to select the background color for rows that use this choice. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color.
16. Click the **Foreground Color** color square to use a color picker to select the text color for rows that use this choice. As you click in the color picker, the color square displays the selected color and the color picker displays the HTML color code of the selected color.
17. In the **Manage Choices** section, click **Add Choice**. to add another choice to the choice list. To finish adding choices to a choice list, click **Done** in the **Choice Properties** section.

Custom Attribute

You must add a choice custom attribute to the Running Order Element entity. The choice custom attribute must use the choice list created with colors assigned to its values.

To create a custom attribute for the color setting choice list

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Entities** tab.

   The **Entities** tab opens.

3. In the **Configured Entities** table, select **Running Order Element**.
4. Click **Manage Attributes**.

   The **Attributes** page opens for the **Running Order Element** entity.

5. Click **Create**.

   The **Create Attribute** page opens.

6. In the **Name** box, enter the column name to display for the custom attribute in the Inception grid associated with the entity.

7. In the **Key Name** box, enter the name to use as the identifier for the custom attribute. When you click in this box, Inception enters a suggested key name that you can edit.

✶ You cannot change the **Key Name** of a custom attribute after you save the custom attribute.

   Key Names also identify the custom attribute values in MOS messages and RSS feeds sent out from your Inception Server.

8. Use the **Type** list to select **Choice**.

9. Click **Next**.

   The **Edit Choice Attribute** page opens.

10. Use the **Choice List** list to select the choice list you created with colors assigned to its values

11. Use the **Order** list to select how to order the choices in the selected choice list. The available ordering methods are as follows:

    - **As Entered** — the order in which choices where added to the choice list.
    - **Alphabetical Ascending By Name** — A to Z by choice name.
    - **Alphabetical Descending By Name** — Z to A by choice name.
    - **Natural Ascending By Value** — lowest to highest choice value.
    - **Natural Descending By Value** — highest to lowest choice value.

12. Use the **Default Value** list to select a choice from the choice list as the default value for the custom attribute.

    This list is not available when you create a new choice list.

13. Click the **Empty Cell Color** color square.

    The **Color Picker** opens.

14. Use the **Color Picker** to select the background color that Inception uses to display custom attribute cells that do not contain data.

    Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

15. Select the **Use Choice List Colors** check box.

16. Click **Save**.

    Inception adds the new custom attribute to the **Attributes** page of the **Running Order Element** entity.

17. To use the new custom attribute set story colors, open a running order and add the custom attribute to the **Running Order** panel. Changing the custom attribute value changes the background and or foreground of the associated story.

For More Information on...

- on working with running orders, refer to the ***Inception User Guide***.

Configuring Spelling Properties

Inception uses spelling properties to configure or set text capitalization, denylisted words, and story content spell checking. Use the Spelling panel to configure or set spelling properties.

This chapter discusses the following topics:

- Edit the Recase Dictionary
- Configure Content Denylisting
- Select the Default System Dictionary
- Add Words to a Dictionary
- Import a Dictionary
- Delete a Dictionary

Edit the Recase Dictionary

The recase dictionary contains a list of words and phrases that use customized capitalization. When Inception users recase story text in the Story Editor, Inception recapitalizes story text to mixed case and uses the recase dictionary to correct the capitalization of words and phrases in the recase dictionary. For example, the Ross Video product name OverDrive uses custom capitalization.

To edit the recase dictionary

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure "**To access the Inception Server Configuration window**" on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

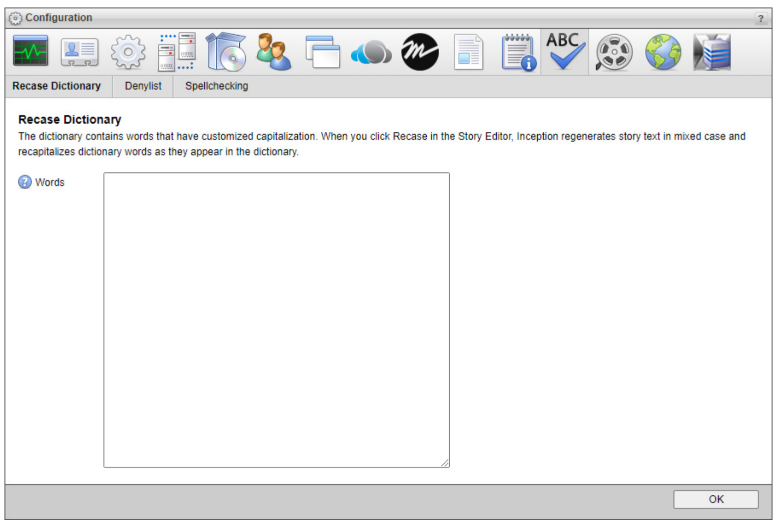
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Spelling** icon.

   The **Spelling** panel opens.

4. Click the **Recase Dictionary** tab.

   The **Recase Dictionary** tab opens.



5. In the **Words** list, add or edit words and phrases as follows:

   - **Add** — enter a word or phrase on a new line, then press the **Enter** key.
   - **Edit** — select the word or phrase to edit, then edit the selected text.
   - **Delete** — select the word or phrase to delete, then press the **Delete** key.

   Inception sorts the **Words** list alphabetically after the **Recase Dictionary** tab closes.

6. Click **OK** to save the updated **Words** list and close the **Configuration** window.

Configure Content Denylisting

Inception uses a denylist and a allowlist to identify inappropriate content in feeds, playlists, stories, and social polls. Inception uses the following lists to cleanse Inception content:

- **Denylist** — a list of words and regular expressions that Inceptions uses to identify inappropriate content in feeds, playlists, stories, and social polls.
- **Allowlist** — a list of words and regular expressions that you consider appropriate but the denylist censors. Inception always publishes words in the allowlist.

You can configure Inception to do the following:

- Gray out inappropriate content in Feed Viewers.
- Hide inappropriate content from Feed Viewers.
- Prevent the approval of playlists or stories that contain inappropriate content.
- Prevent the user from saving social polls that contain inappropriate content.

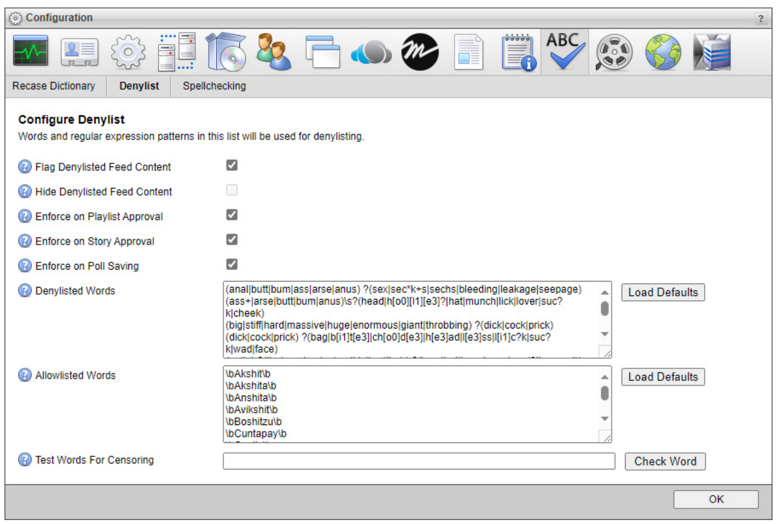
To configure denylisting

1. On the **Configuration** window toolbar, click the **Spelling** icon.

   The **Spelling** panel opens.

2. Click the **Denylist** tab.

   The **Denylist** tab opens.



3. Select the **Flag Denylisted Feed Content** check box to gray out content in a Feed Viewer that contains a word from the denylist.

   This option does not prevent approval and publishing of flagged content.

4. Select the **Hide Denylisted Feed Content** check box to hide content in a Feed Viewer that contains a word from the denylist.

5. Select the **Enforce on Playlist Approval** check box to prevent the approval of playlists that contain a word from the denylist.

6. Select the **Enforce on Story Approval** check box to prevent the approval of stories that contain a word from the denylist.

7. Select the **Enforce on Poll Saving** check box to prevent saving social polls that contain a word from the denylist.

8. The **Denylisted Words** list displays the words and regular expressions that Inceptions uses to identify inappropriate content in feeds, playlists, stories, and social polls. Edit the **Denylisted Words** list as follows:
   - **Add** — enter a word or expression pattern on a new line, then press the **Enter** key.
   - **Edit** — select the word or expression pattern to edit, then edit the selected text.
   - **Delete** — select the word or expression pattern to delete, then press the **Delete** key.
   - **Default Denylist** — click **Load Defaults** to the right of the **Denylisted Words** list. Loading the default Ross Video denylist deletes all changes made to the current denylist. To save denylist changes, copy and paste the contents of the **Denylisted Words** list to a text file before clicking **Load Defaults**.

   Inception sorts the **Denylisted Words** list alphabetically after the **Denylist** tab closes.
9. The **Allowlisted Words** list displays the words and regular expressions that you consider appropriate but the denylist censors. Edit the **Allowlisted Words** list as follows:
   - **Add** — enter a word or expression pattern on a new line, then press the **Enter** key.
   - **Edit** — select the word or expression pattern to edit, then edit the selected text.
   - **Delete** — select the word or expression pattern to delete, then press the **Delete** key.
   - **Default Allowlist** — click **Load Defaults** to the right of the **Allowlisted Words** list. Loading the default Ross Video allowlist deletes all changes made to the current allowlist. To save allowlist changes, copy and paste the contents of the **Allowlisted Words** list to a text file before clicking **Load Defaults**.

   Inception sorts the **Allowlisted Words** list alphabetically after the **Denylist** tab closes.

For More Information on...

- defining regular expression patterns, refer to "**Appendix A. Regular Expressions**" on page A–1.

Test the Effectiveness of a Denylist

You can test the effectiveness of your denylist by entering words to see if they match or not in the denylist. Inception identifies words that match in the denylist as inappropriate for publishing.

To test words against the denylist

1. In the **Test Word For Censoring** box, enter the word to test.
2. Click **Check Word**.

   An alert opens to report if the test word matched or not matched in the denylist. If a word that you consider good matches in the denylist, add the word to the allowlist to prevent Inception from censoring the word.
3. Click **OK** to close the alert.
4. Click **OK** to close the **Configuration** window.

Select the Default System Dictionary

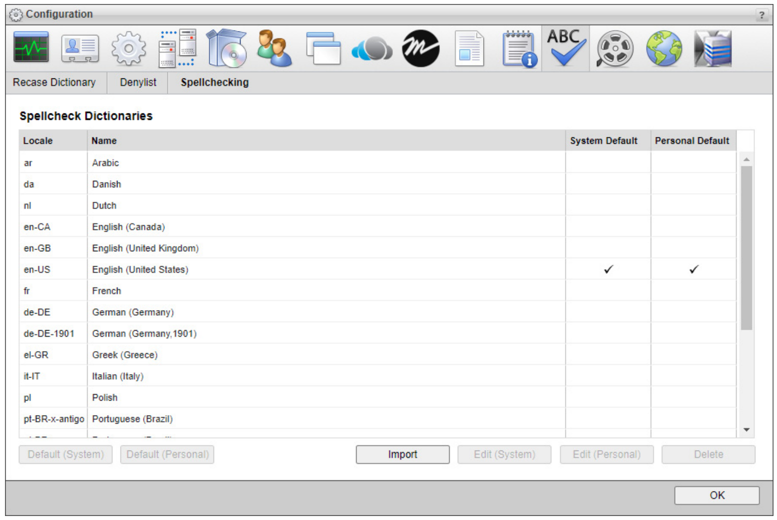
The Inception spelling checker uses Hunspell dictionary files to suggest the correct spelling for text entered in a Story Editor panel. The Inception administrator sets the Default System dictionary used by the spelling checker. If the set dictionary does not meet the needs of a user, the user can select a Default Personal dictionary.

To select the default system dictionary

1. On the **Configuration** window toolbar, click the ABC **Spelling** icon.

   The **Spelling** panel opens.
2. Click the **Spellchecking** tab.

The **Spellchecking** tab opens.



3. In the **Spellcheck Dictionaries** table, select the dictionary to use as the Default System dictionary.
4. Click **Default (System)**.

   The **System Default** column displays a check mark for the selected dictionary. The Inception spell checker uses the selected System Default dictionary to check spelling for all Inception users that have not set a Default Personal dictionary.

Add Words to a Dictionary

Your organization may use words or phrases that are not contained in a system dictionary. Inception enables you to add additional words or phrases that your organization considers correct to a system dictionary. If the spelling checker does not find the correct spelling for entered content in the system dictionary, it then searches the additional words list associated with the dictionary before suggesting a correction. The additional words added to a system dictionary are available to all Inception users that use the dictionary to spell check their story content.

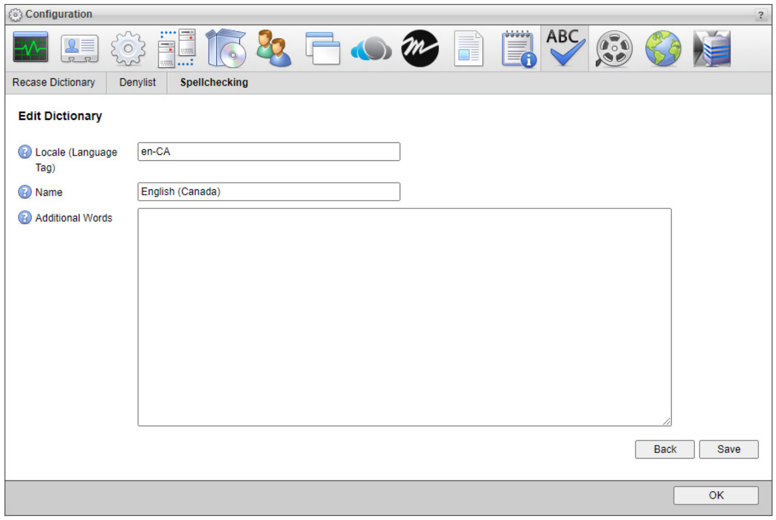
To add words or phrases to a system dictionary

1. On the **Configuration** window toolbar, click the  **Spelling** icon.

   The **Spelling** panel opens.
2. Click the **Spellchecking** tab.

   The **Spellchecking** tab opens.
3. In the **Spellcheck Dictionaries** table, select the dictionary to add additional words or phrases.
4. Click **Edit (System)**.

The **Edit Dictionary** page opens.



5. In the **Additional Words** list displays the words and phrases that your organization considers correct, but the dictionary does not. Edit the **Additional Words** list as follows:

   - **Add** — enter a word or phrase on a new line, then press the **Enter** key.
   - **Edit** — select the word or phrase to edit, then edit the selected text.
   - **Delete** — select the word or phrase to delete, then press the **Delete** key.

   Inception sorts the **Additional Words** list alphabetically after the **Edit Dictionary** page closes.

6. Click **Save** to save the updated **Additional Words** list and return to the **Spellcheck Dictionaries** page.

Import a Dictionary

When the dictionaries installed on your Inception Server do not meet the needs of your users, you can add a new dictionary by importing Hunspell format dictionary files. On the Internet you can find open source Hunspell format dictionaries in many different languages that you can import to your Inception Server.

To import a dictionary

1. On the **Configuration** window toolbar, click the  **Spelling** icon.

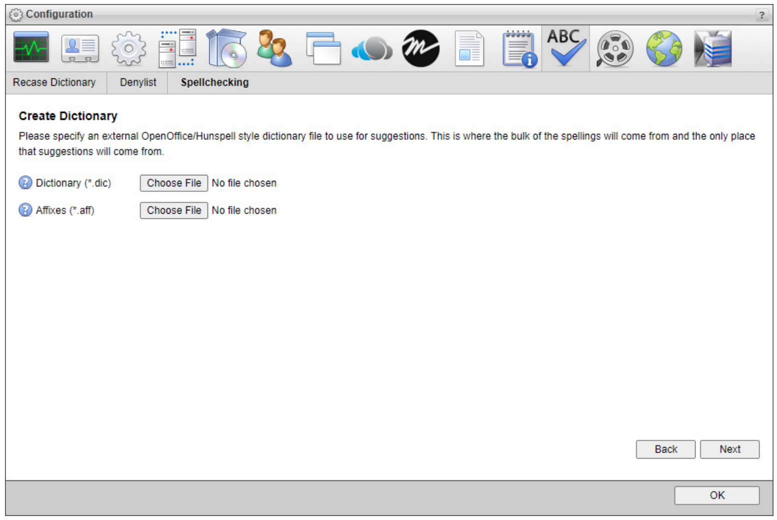
   The **Spelling** panel opens.

2. Click the **Spellchecking** tab.

   The **Spellchecking** tab opens.

3. Click **Import**.

The **Create Dictionary** page opens.



4. Click **Choose File** to the right of the **Dictionary** setting.

   The **Open** dialog box opens displaying the local file system of your computer.

5. Locate and select the Hunspell format dictionary file (.dic) that contains the words for the language of the dictionary that you want to import to your Inception Server.

6. Click **Open**.

   The **Open** dialog box closes, and the name of the selected dictionary file displays to the right of the **Open** button.

7. Click **Browse** to the right of the **Affixes** box.

   The **Open** dialog box opens displaying the local file system of your computer.

8. Locate and select the affix file (.aff) that defines the meaning of special flags in the selected dictionary file.

9. Click **Open**.

   The **Open** dialog box closes, and the name of the selected affix file displays to the right of the **Open** button.

10. Click **Next**.

    The next page of import settings opens.

11. Enter in the **Locale** box an IETF BCP 47 locale tag that defines the language and region of a dictionary.

    A locale tag is a combination of a two-character language code (ISO 639-1) and a two character region code (ISO 3166-2) separated by a hyphen, for example: en-CA defines English as the language and Canada as the region.

12. Enter in the **Name** box a name for the dictionary.

13. In the **Additional Words** list displays the words and phrases that your organization considers correct, but the dictionary does not. Edit the **Additional Words** list as follows:

    - **Add** — enter a word or phrase on a new line, then press the **Enter** key.
    - **Edit** — select the word or phrase to edit, then edit the selected text.
    - **Delete** — select the word or phrase to delete, then press the **Delete** key.

    Inception sorts the **Additional Words** list alphabetically after the **Create Dictionary** page closes.

14. Click **Save** to import the selected dictionary and return to the **Spellcheck Dictionaries** page.

    Inception adds the imported dictionary to the **Spellcheck Dictionaries** table.

15. Click **OK** to close the **Configuration** window.

Delete a Dictionary

✶ You cannot delete the Default System dictionary. If a user's Default Personal dictionary gets deleted Inception resets the user's Default Personal dictionary to the dictionary set as the Default System dictionary.

To delete a dictionary

1. On the **Configuration** window toolbar, click the **Spelling** icon.

   The **Spelling** panel opens.

2. Click the **Spellchecking** tab.

   The **Spellchecking** tab opens, listing all the available dictionaries.

3. From the **Spellcheck Dictionaries** list, select the dictionary to delete.

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Inception deletes the selected dictionary, including any words that you added to the dictionary.

For More Information on...

- how to add words to a dictionary, refer to the section "**Add Words to a Dictionary**" on page 15–5.
- how to import a dictionary, refer to the section "**Import a Dictionary**" on page 15–6.

Configuring Media Sources

Media sources enable Inception users to access file systems that contain media files for use in stories. Users select a media source when they a media file to a story. You can use the Media panel of the Configuration window to create, edit, and delete media sources.

Media sources can contain the following types of media:

- **Image Formats**
  - › **.gif** — Graphical Interchange Format
  - › **.jpg** or **.jpeg** — Joint Photographic Experts Group
  - › **.png** — Portable Network Graphic
- **Audio and Video Formats**
  - › **.3gp** or **.3gpp** — Third Generation Partnership Project
  - › **.avi** — Audio Video Interleave
  - › **.flv** — Flash Video
  - › **.mov** — Apple QuickTime Movie
  - › **.mp4** — Moving Picture Experts Group 4 Part 14
  - › **.mpg** or **.mpeg** — Moving Picture Experts Group Phase 1
  - › **.ogg** — Ogg Vorbis Audio
  - › **.wmv** — Windows Media Video

This chapter discusses the following topics:

- Add a Media Source
- Edit a Media Source
- Delete a Media Source

Add a Media Source

Media sources enable Inception users to access file systems that contain media files for use in stories. Users select a media source when they a media file to a story.

✶ Before you create a media source, remember to create the file system to store the media source media files. For information on how to create a file system, refer to the section “**Add a File System**” on page 4–6.

To add a media source

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

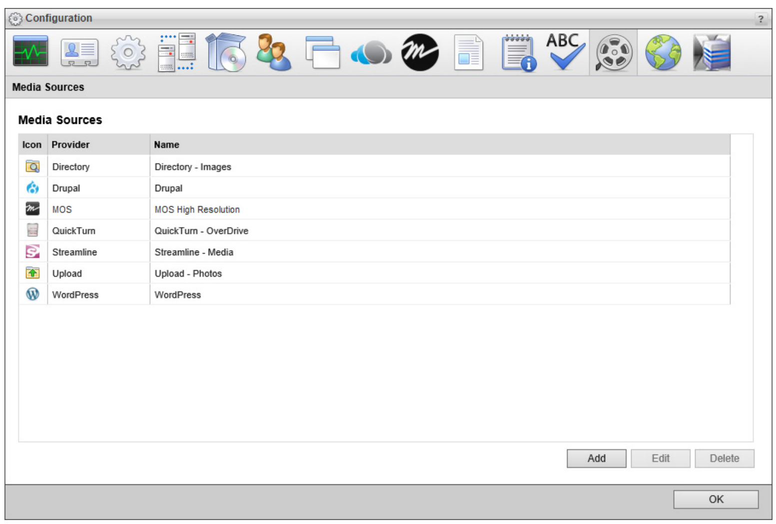
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Medial** icon.

   The **Media** panel opens.

4. Click the **Media Sources** tab.

   The **Media Sources** tab opens.



5. Click **Add**.

   The **Create Media Source** settings open.

6. Use the **Media Source** list to select the type of media source to add:
   - **Upload** — upload media to a specified directory on the Inception server.

     If you enable e-mail story creation, Inception uses the first upload media source you create to store images and video submitted with e-mailed stories.
   - **Directory** — select media from a directory share.
   - **MOS** — select media from the MOS devices connected to the Inception Server.
   - **QuickTurn** — select media from an OverDrive QuickTurn media encoder.

     When using Digital Rapids media encoder to capture QuickTurn segments you must configure the Digital Rapids computer as follows:
     - › Change the service to start as the local Inception users instead of the local system account.
     - › Change the Inception user password to match the password on the Inception Server.
   - **Streamline** — select media from a Streamline asset management system.
7. Click **Next**.

   The **Create Type of Media Source** settings open.
8. In the **Name** box, enter the name of the media source.
9. When creating an **Upload**, **Directory**, or **QuickTurn** media source, use the **File System** list to select the file system in which to store the media files contained by the media source.

   The **File System** list only lists the file systems contained in the **File Systems** tab.
10. When creating a **MOS** media source, select the **Use Proxies (low-res)** check box to use low resolution media files (objProxyPath) for the media source. Clear this check box to use high resolution media files (objPath) for the media source.
11. When creating a **Streamline** media source, configure the following settings:
    - **Host URL** — enter in this box the URL of the Streamline asset management system.
    - **API Key** — enter in this box the API Key of the Streamline user with which to communicate with the Streamline asset management system.

      The Streamline user should have the role of a **Local Administrator** and they must have **API Access** enabled.
12. Click **Create**.

    Inception adds the new media source to the **Media Sources** list.

For More Information on...

- how to create a file system, refer to the section “**Add a File System**” on page 4–6
- how to modify media sources, refer to the section “**Edit a Media Source**” on page 16–3
- how to delete media sources, refer to the section “**Delete a Media Source**” on page 16–4

Edit a Media Source

To edit a media source

1. On the **Configuration** window toolbar, click the **Media** icon.

   The **Media** panel opens.
2. Click the **Media Sources** tab.

   The **Media Sources** tab opens, listing all the available media sources.
3. From the **Media Sources** list, select the media source to edit.

4. Click **Edit**.

   The **Edit Media Source** settings open.

5. Edit the media source settings as required.

6. Click **Save**.

For More Information on...

- how to create media sources, refer to the section "**Add a Media Source**" on page 16–2
- how to delete media sources, refer to the section "**Delete a Media Source**" on page 16–4

Delete a Media Source

✶ You cannot delete a media source that Inception uses in a story.

To delete a media source

1. On the **Configuration** window toolbar, click the **Media** icon.

   The **Media** panel opens.

2. Click the **Media Sources** tab.

   The **Media Sources** tab opens, listing all the available media sources.

3. From the **Media Sources** list, select the media source to delete.

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Inception deletes the selected media source.

For More Information on...

- how to create media sources, refer to the section "**Add a Media Source**" on page 16–2
- how to modify media sources, refer to the section "**Edit a Media Source**" on page 16–3

Configuring OverDrive Integration

You can configure OverDrive and Inception Social to enable Overdrive to control playout of Inception running orders.

This chapter discusses the following topics:

- Overdrive Control of Inception Running Order Playout

Overdrive Control of Inception Running Order Playout

Enable Overdrive to control playout of Inception running orders.

To enable Overdrive integration

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure "**To access the Inception Server Configuration window**" on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

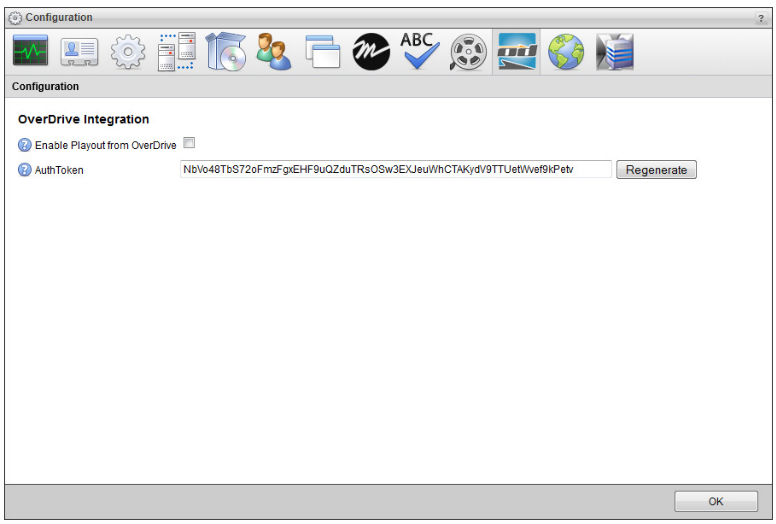
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **OverDrive** icon.

   The **OverDrive** panel opens.

4. Click the **Configuration** tab.

   The **Configuration** tab opens.



5. Select the **Enable Playout from OverDrive** check box to allow playout of Inception Social running orders from OverDrive.

6. Do one of the following to authorize Overdrive to control playout:

   - To use the existing authentication token:
     › Copy the token from the **AuthToken** box.
     › Save the token in a text file for later use configuring OverDrive to control Inception Social running orders.
   - To generate a new authentication token:
     › Click **Regenerate** to update the **AuthToken** box with a new authentication token.
     › Copy the token from the **AuthToken** box.
     › Save the token in a text file for later use configuring OverDrive to control Inception Social running orders.

✶ If you regenerate the authentication token, the previous token no longer works. Without a working token you can no longer control the playout of Inception Social running orders from OverDrive.

7. In OverDrive, use the saved authentication token to configure control of Inception Social playout.

For More Information on...

- how to configure OverDrive to control the playout of Inception Social running orders, refer to the **QuickTurn™** chapter in the ***OverDrive User Guide***.

Configuring Accounts

Creating and then publishing a story in Inception sends the story content out to one or more accounts. Use the Accounts and Feeds panel to create and modify the accounts Inception uses to publish stories.

This chapter discusses the following topics:

- Drupal Account Configuration
- Facebook Account Configuration
- Frankly Account Configuration
- TownNews Account Configuration
- Wire Account Configuration
- WordPress Account Configuration
- YouTube Account Configuration
- E-mail Account Configuration
- Enable or Disable an Account
- Delete an Account

Drupal Account Configuration

Drupal is an open-source online content management system that you can use to publish content as a blog or website. Follow the procedures in this section to create or edit an account to publish content to Drupal.

Drupal System Configuration

Before you can use a Drupal system with Inception you must complete the following setup on the Drupal system:

- Install and enable modules.
- Configure the Services module.
- Create a new admin user.

Install and Enable Modules

Install the following modules on your Drupal system:

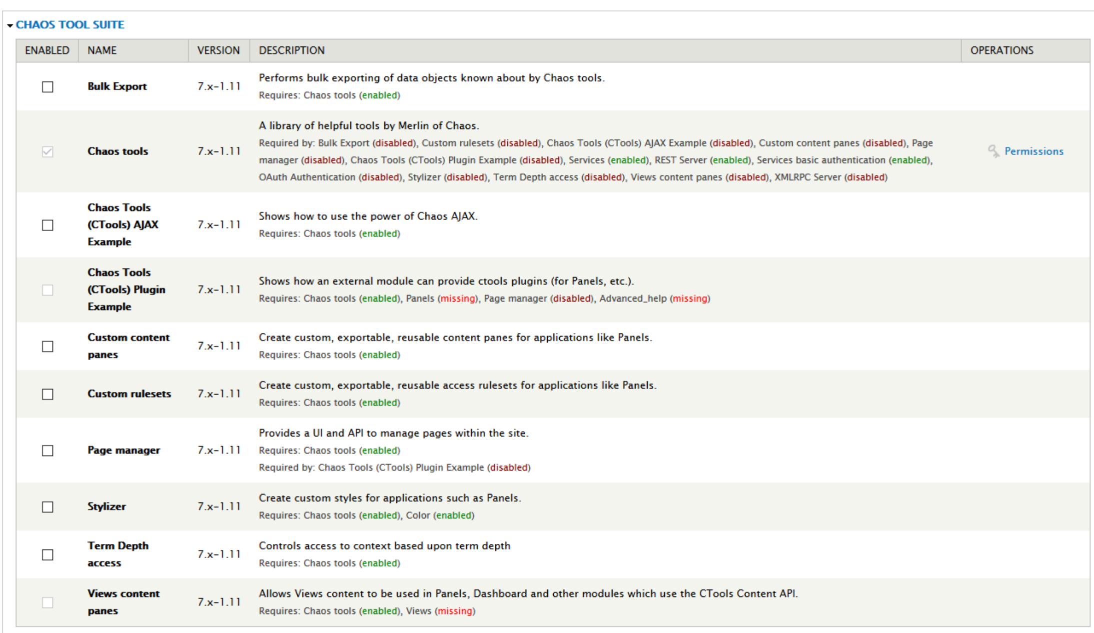
- **entity-7.x-1.8**
- **restws-7.x-2.6**
- **ctools-7.x-1.10**
- **libraries-7.x-2.3**
- **services_basic_auth-7.x-1.4**
- **services-7.x-3.17**

After you install the required modules, you must configure Drupal modules to enable Drupal to work with Inception.

To enable Drupal modules

1. In a web browser window, log in to your **Drupal Server** as an administrative user.
2. In the **Administration** toolbar, click **Modules**.

   The **Modules** panel opens.
3. In the **CHAOS TOOL SUITE** module section, configure module as follows:



CHAOS TOOL SUITE

ENABLED	NAME	VERSION	DESCRIPTION	OPERATIONS
☐	**Bulk Export**	7.x-1.11	Performs bulk exporting of data objects known about by Chaos tools. Requires: Chaos tools (enabled)	
☑	**Chaos tools**	7.x-1.11	A library of helpful tools by Merlin of Chaos. Required by: Bulk Export (disabled), Custom rulesets (disabled), Chaos Tools (CTools) AJAX Example (disabled), Custom content panes (disabled), Page manager (disabled), Chaos Tools (CTools) Plugin Example (disabled), Services (enabled), REST Server (enabled), Services basic authentication (enabled), OAuth Authentication (disabled), Stylizer (disabled), Term Depth access (disabled), Views content panes (disabled), XMLRPC Server (disabled)	Permissions
☐	**Chaos Tools (CTools) AJAX Example**	7.x-1.11	Shows how to use the power of Chaos AJAX. Requires: Chaos tools (enabled)	
	Chaos Tools (CTools) Plugin Example	7.x-1.11	Shows how an external module can provide ctools plugins (for Panels, etc.). Requires: Chaos tools (enabled), Panels (missing), Page manager (disabled), Advanced_help (missing)	
☐	**Custom content panes**	7.x-1.11	Create custom, exportable, reusable content panes for applications like Panels. Requires: Chaos tools (enabled)	
☐	**Custom rulesets**	7.x-1.11	Create custom, exportable, reusable access rulesets for applications like Panels. Requires: Chaos tools (enabled)	
☐	**Page manager**	7.x-1.11	Provides a UI and API to manage pages within the site. Requires: Chaos tools (enabled) Required by: Chaos Tools (CTools) Plugin Example (disabled)	
☐	**Stylizer**	7.x-1.11	Create custom styles for applications such as Panels. Requires: Chaos tools (enabled), Color (enabled)	
☐	**Term Depth access**	7.x-1.11	Controls access to context based upon term depth Requires: Chaos tools (enabled)	
	Views content panes	7.x-1.11	Allows Views content to be used in Panels, Dashboard and other modules which use the CTools Content API. Requires: Chaos tools (enabled), Views (missing)	

4. In the **OTHER** module section, configure module as follows:

▾ OTHER

ENABLED	NAME	VERSION	DESCRIPTION	OPERATIONS
☑	**Basic authentication login**	7.x-2.6	User login from HTTP authorization headers (part of RESTful web services).	
☑	**Entity API**	7.x-1.8	Enables modules to work with any entity type and to provide entities. Required by: Entity tokens (enabled), RESTful web services (enabled)	
☐	**Entity tokens**	7.x-1.8	Provides token replacements for all properties that have no tokens and are known to the entity API. Requires: Entity API (enabled)	
☑	**Libraries**	7.x-2.3	Allows version-dependent and shared usage of external libraries. Requires: System (enabled) Required by: REST Server (enabled)	
☑	**RESTful web services**	7.x-2.6	Provides RESTful web services. Requires: Entity API (enabled)	Permissions

5. In the **SERVICES** module section, configure module as follows:

▾ SERVICES

ENABLED	NAME	VERSION	DESCRIPTION	OPERATIONS
☑	**Services**	7.x-3.17	Provide an API for creating web services. Requires: Chaos tools (enabled) Required by: REST Server (enabled), Services basic authentication (enabled), OAuth Authentication (disabled), XMLRPC Server (disabled)	Help Permissions Configure

6. In the **SERVICES - AUTHENTICATION** module section, configure module as follows:

▾ SERVICES – AUTHENTICATION

ENABLED	NAME	VERSION	DESCRIPTION	OPERATIONS
☐	**OAuth Authentication**	7.x-3.17	Provides OAuth authentication for the services module Requires: Services (enabled), Chaos tools (enabled), Oauth_common (missing)	
☑	**Services basic authentication**	7.x-1.4	Provides HTTP basic authentication for the services module Requires: Services (enabled), Chaos tools (enabled)	

7. In the **SERVICES - SERVERS** module section, configure module as follows:

▾ SERVICES – SERVERS

ENABLED	NAME	VERSION	DESCRIPTION	OPERATIONS
☑	**REST Server**	7.x-3.17	Provides an REST server. Requires: Services (enabled), Chaos tools (enabled), Libraries (enabled), System (enabled)	
☐	**XMLRPC Server**	7.x-3.17	Provides a XMLRPC server. Requires: Services (enabled), Chaos tools (enabled)	

Configure the Services Module

You must configure the Drupal Services module to enable a Drupal system to work with Inception.

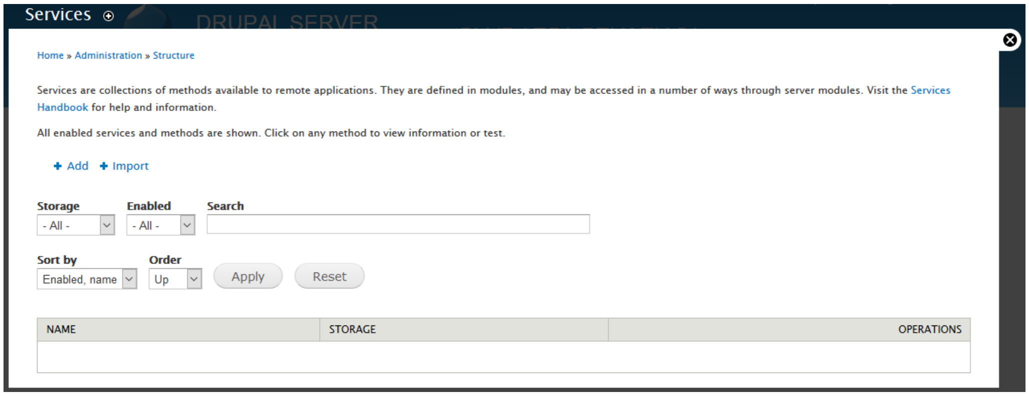
To configure the Drupal Services module for Inception.

1. In a web browser window, log in to your **Drupal Server** as an administrative user.
2. In the **Administration** toolbar, click **Modules**.

   The **Modules** panel opens.

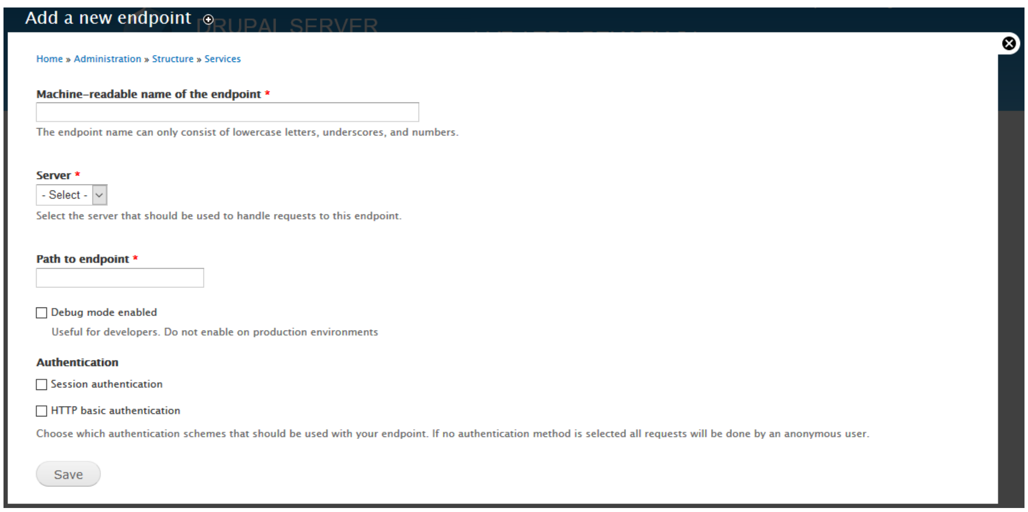
3. In the **SERVICES** module section, click **Configure**.

   The **Services** panel opens.



4. Click **Add**.

   The **Add a new endpoint** panel opens



5. In the **Machine-readable name of the endpoint** box, enter `inception`.
6. Use the **Server** list to select **REST**.
7. In the **Path to endpoint** box, enter `inception`.
8. In the **Authentication** section select the **HTTP basic authentication** option.
9. Click **Save**.

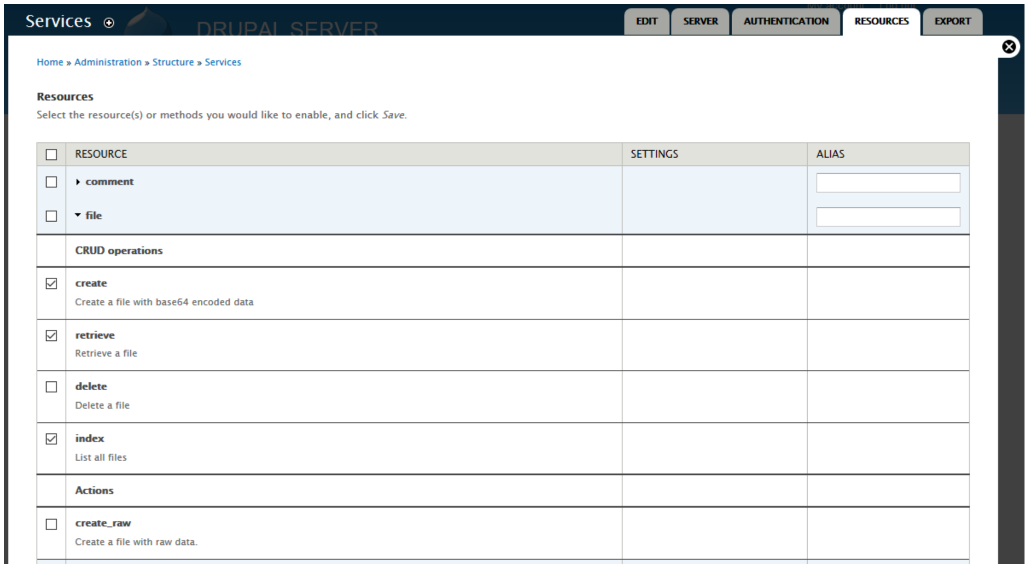
   The **Add a new endpoint** panel closes. The table at the bottom of the **Services** panel displays the new **inception** endpoint.

10. In the **OPERATION** column of the **inception** endpoint, click **Edit Resources**.

    The **Resources** panel opens.

11. In the **RESOURCE** column, expand the **file** resource.

    The **Resources** panel opens.



12. In the **RESOURCE** column, select the **create** check box.
13. Select the **index** check box.
14. Click **Save**.

Configure the Services Module

Since the Restful Web Services follows strict admin username requirements, you must create a new Drupal administrator account to enable Inception to work with the Drupal API.

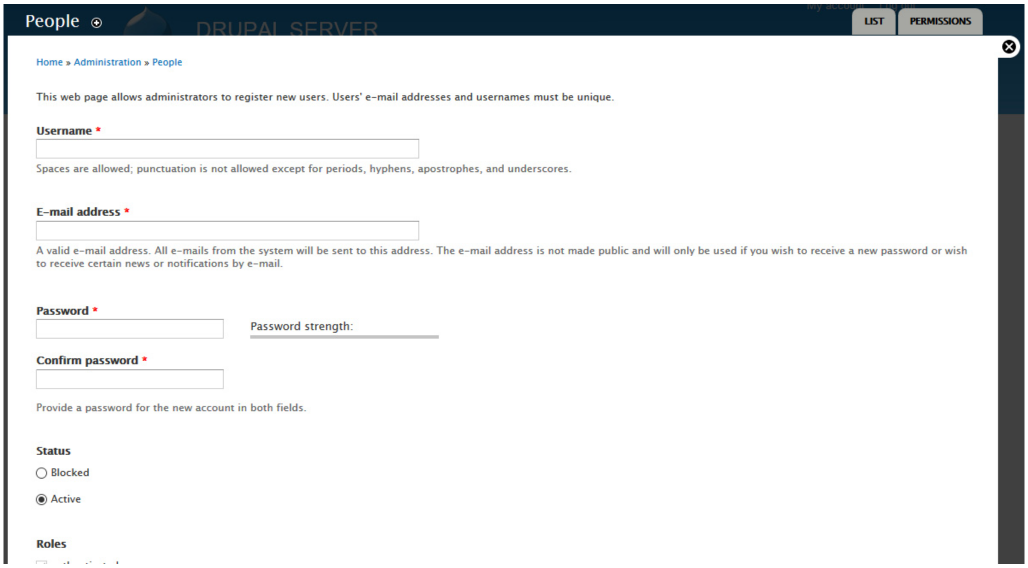
To create a new Drupal administrator account for Inception

1. In a web browser window, log in to your **Drupal Server** as an administrative user.
2. In the **Administration** toolbar, click **People**.

    The **People** panel opens.

3. Click **Add User**.

   The **New User** page opens.



4. In the **Username** box, enter `restws_admin`.
5. In the **E-mail address** box, enter an e-mail address to receive e-mails from Drupal.
6. In the **Password** box, enter a secure password for your new Drupal administrator account.
7. In the **Confirm password** box, re-enter the password you set for your new Drupal administrator account.
8. In the **Status** section, select the **Active** option.
9. In the **Roles** section, select the **Administrator** check box.
10. Click **Create New Account**.

    Drupal creates the defined account and adds it to the **People** panel.

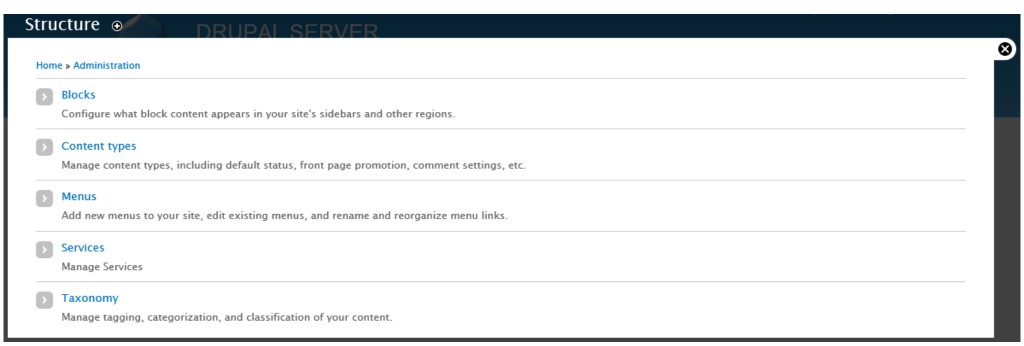
Custom Drupal Fields

If the Drupal content type that you use to create Drupal content contains custom fields, you must add the custom fields to Inception as attributes of the Drupal Story entity. Each attribute must exactly match an associated custom field in the Drupal content type.

To create Inception attributes for Drupal custom fields

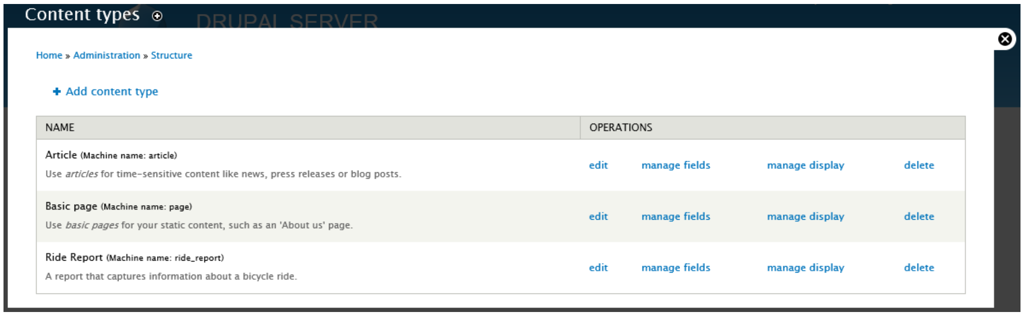
1. In a web browser window, log in to your **Drupal Server** as the **restws_admin** user.
2. In the **Administration** toolbar, click **Structure**.

   The **Structure** panel opens.



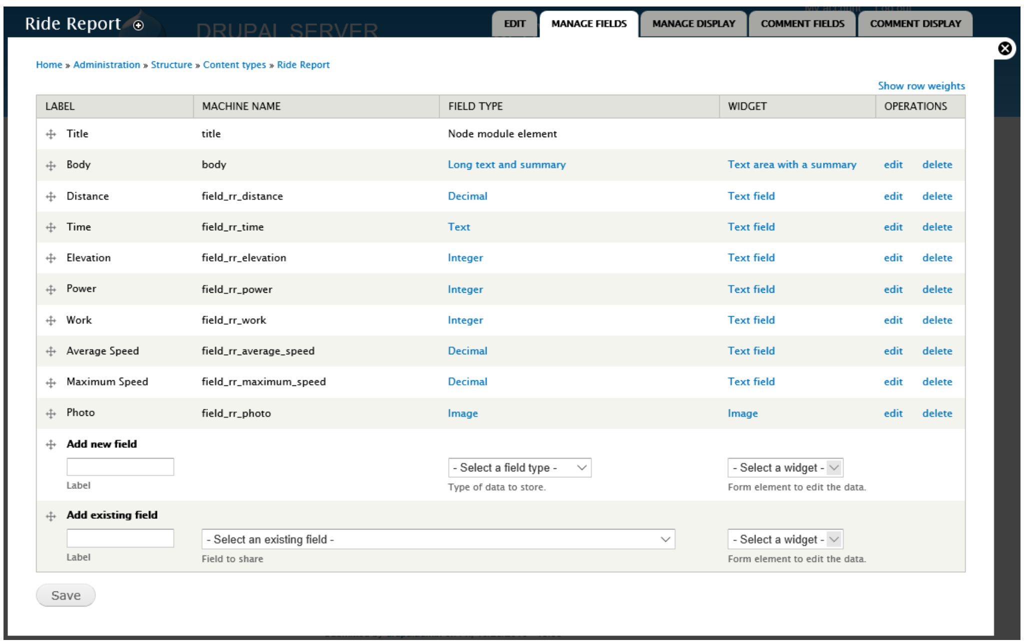
3. Click **Content types**.

   The **Content types** panel opens and displays the available content types on your Drupal Server.



4. For the **content type** that you use to post Drupal content, click **manage fields**.

   The **Content types** panel opens and displays the available content types on your Drupal Server.



5. Open a second web browser window.
6. In the second web browsers window, log in to your Inception Server as an Inception administrator.
7. On the main toolbar, click the **Configuration** icon.

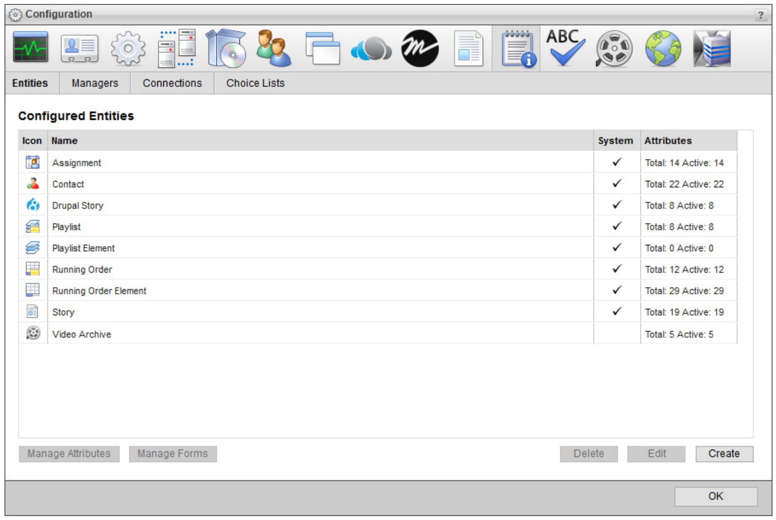
   The **Configuration** window opens.

8. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

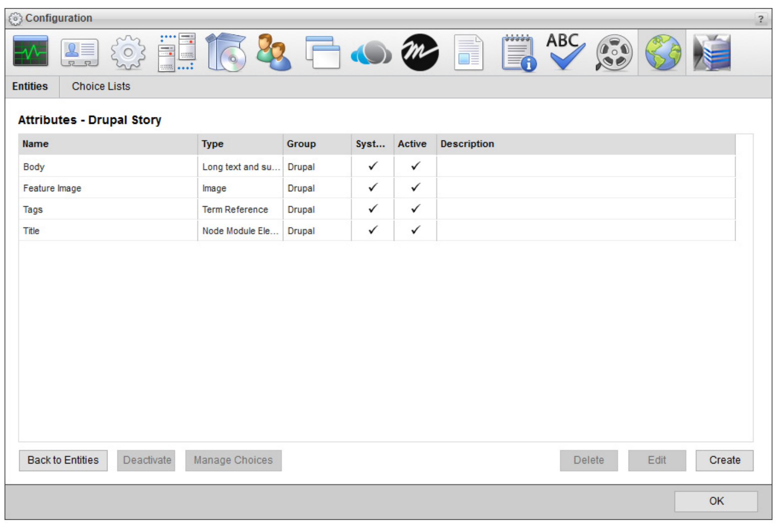
9. Click the **Entities** tab.

   The **Entities** tab opens.



10. In the **Configured Entities** table, select the **Drupal Story** entity.
11. Click **Manage Attributes**.

    The **Attributes - Drupal Story** page opens and displays the default attributes for a Drupal story.



12. For each custom field in your **Drupal content type**, complete the following steps to create a matching **attribute** for the Drupal Story entity.

    a. Click **Create**.

       The **Create Attribute** page opens.

    b. In the **Name** box, enter the **Label** name of the **Drupal custom field**.

    c. In the **Key Name** box, enter the **Machine Name** name of the **Drupal custom field**.

✶ After you create an attribute you cannot edit the attribute Key Name.

    d. Use the **Drupal** section of the **Type** list to select the **Field Type** of the **Drupal custom field**.

    e. In the **Description** box, enter a description of the attribute.

f. Click **Next**.

Depending on the selected **Type**, continue creating your attribute with the following steps or procedures:

- **Boolean** — continue with the procedure “**Boolean Type**” on page 18–9.
- **File** — continue with the procedure “**File Type**” on page 18–9.
- **Decimal** — continue with the procedure “**Decimal Type**” on page 18–9.
- **Float** — continue with the procedure “**Float Type**” on page 18–10.
- **Image** — continue with the procedure “**Image Type**” on page 18–10.
- **Integer** — continue with the procedure “**Integer Type**” on page 18–10.
- **List (float)** — continue with the procedure “**List Type**” on page 18–10.
- **List (integer)** — continue with the procedure “**List Type**” on page 18–10.
- **List (text)** — continue with the procedure “**List Type**” on page 18–10.
- **Long text and summary** — continue with the procedure “**Long Text and Summary**” on page 18–11.
- **Long Text** — continue with the procedure “**Long Text**” on page 18–11.
- **Term Reference** — continue with the procedure “**Term Reference Text**” on page 18–11.
- **Text** — continue with the procedure “**Term Reference Text**” on page 18–11.

✶ After you create an attribute you cannot edit the attribute Type.

Boolean Type

The **Edit Boolean Attribute** page opens and displays the available settings for a Boolean attribute.

1. Use the **Widget** list to select the input method for the attribute. The available methods are as follows:
   - **Single Checkbox**
   - **Multiple Checkbox**
   - **Radio Buttons**
2. In the **On Value** box, enter the value that defines the “on” state for the attribute.
3. In the **Off Value** box, enter the value that defines the “off” state for the attribute.
4. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

File Type

The **Edit File Attribute** page opens and displays the available settings for a file attribute.

1. Use the **Number of Values** list to select the number of files to attach to a story.
2. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Decimal Type

The **Edit Decimal Attribute** page opens and displays the available settings for a decimal attribute.

1. In the **Minimum** box, enter the minimum value for an entered decimal number.
2. In the **Maximum** box, enter the maximum value for an entered decimal number.
3. Use the **Decimal Marker** list to select the character to mark the decimal point in an entered decimal number.
4. Use the **Precision** list to select the total number of digits to store in the database for an entered decimal number. The selected number includes the digits to the left and right of the decimal point.
5. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Float Type

The **Edit Float Attribute** page opens and displays the available settings for a float attribute.

1. In the **Minimum** box, enter the minimum value for an entered float number.
2. In the **Maximum** box, enter the maximum value for an entered float number.
3. Use the **Decimal Marker** list to select the character to mark the decimal point in an entered float number.
4. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Image Type

The **Edit Image Attribute** page opens and displays the available settings for an image attribute.

1. Use the **Number of Values** list to select the number of images to attach to a story.
2. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Integer Type

The **Edit Integer Attribute** page opens and displays the available settings for an integer attribute.

1. In the **Minimum** box, enter the minimum value for an entered integer number.
2. In the **Maximum** box, enter the maximum value for an entered integer number.
3. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

List Type

The **Edit List Attribute** page opens and displays the available settings for a list attribute.

1. Use the **Choice List** list to select the Inception choice list that contains appropriate values for the attribute. When this list does not contain an appropriate choice list, create a new choice list as follows:

   a. Click **Create**.

      The box name changes to **Choice List Name**.

   b. In the **Choice List Name** box, enter a name for your new choice list.

      Inception creates a new empty choice list to which you can add choices.

   Refer to the section “**Create Choice Lists for Custom Attributes**” on page 14–14 for information on how to add choices to a choice list.

2. Use the **Order** list to select the order to display choice list values in a form. The available options are as follows:

   - **As Entered** — order list items as they were added to the choice list.
   - **Alphabetical Ascending by Name** — order list items by value names from A to Z and then 1 to 10.
   - **Alphabetical Descending by Name** — order list items by value names from 10 to 1 and then Z to A.
   - **Natural Ascending by Value** — order list items by increasing value based on attribute type.
   - **Natural Descending by Value** — order list items by decreasing value based on attribute type.

3. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page. When you create a new choice list Inception adds the choice list to the **Configured Choice Lists** page.

Long Text and Summary

The **Edit Long Text and Summary Attribute** page opens and displays the available settings for a long text and summary attribute.

1. Use the **Text Processing** list to select the text input method used to process entered text. The available options are as follows:
   - **Plain Text** — use a text box to enter text. You can also enter HTML markup along with text.
   - **Filtered Text** — use an WYSIWYG HTML editor to enter text.
2. Select the **Summary Input** check box to enable users to enter a summary of the attribute content.
3. Use the **Number of Values** list to select the number of text entries to add for the attribute.
4. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Long Text

The **Edit Long Text Attribute** page opens and displays the available settings for a long text attribute.

1. Use the **Text Processing** list to select the text input method used to process entered text. The available options are as follows:
   - **Plain Text** — use a text box to enter text. You can also enter HTML markup along with text.
   - **Filtered Text** — use an WYSIWYG HTML editor to enter text.
2. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Term Reference Text

The **Edit Term Reference Attribute** page opens and displays the available settings for a term reference attribute.

1. In the **Maximum Number of Values** box, enter the maximum number of values to check.
2. In the **Vocabulary Machine Name** box, enter the Drupal machine name of the vocabulary to search for terms.

   In Drupal, view the vocabulary machine name by selecting **Structure > Taxonomy > Edit/Add Vocabulary**.
3. Click **Create**.

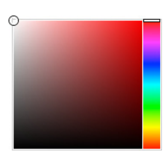
   Inception adds the new attribute to the **Attributes - Drupal Story** page.

Text

The **Edit Text Attribute** page opens and displays the available settings for a text attribute.

1. In the **Minimum** box, enter the minimum number of characters that text entered for the attribute must contain.
2. In the **Maximum** box, enter the maximum number of characters that text entered for the attribute may contain.
3. In the **Default** box, enter the default text for the attribute.
4. To select the background color that Inception uses to display empty text attribute cells, click the color square directly to the right of the **Empty Cell Color** label.

   The **Color Picker** opens.



Use the **Color Picker** to as follows to select a new background color:

a. Drag the slider on the right side of the **Color Picker** to select a color.

b. Click in the area to the left to select the color shade.

   As you work with the **Color Picker**, the color square displays the selected color and a box to the right of the color square displays the HTML color code for the selected color. You can also select a color by entering an HTML color code in the box. As you enter an HTML color code, the color square displays the color of the entered code.

5. To select the background color that Inception uses to display populated text attribute cells, click the color square directly below the **Background** label.

   The **Color Picker** opens for you to select a new background color for populated text attribute cells.

6. To select the text color that Inception uses to display text in text attribute cells, click the color square directly below the **Foreground** label.

   The **Color Picker** opens for you to select a new text color for text attribute cells.

7. Click **Create**.

   Inception adds the new attribute to the **Attributes - Drupal Story** page.

After creating an attribute for each Drupal custom field, you are ready to create a custom form with the attributes.

Edit Attributes

You cannot edit the attribute Key Name or the Type set for an attribute.

To edit attributes

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Entities** tab.

   The **Entities** tab opens.

3. In the **Configured Entities** table, select the **Drupal Story** entity.

4. Click **Manage Attributes**.

   The **Attributes - Drupal Story** page opens and displays the attributes for a Drupal story.

5. In the **Attributes - Drupal Story** list, select the **attribute** to edit.

6. Click **Edit**.

   The **Edit Attribute** settings open.

7. Edit attribute settings as required.

8. Click **Next** and **Back** to access the available attribute settings.

9. After completing the required attribute setting edits, click **Save** on the last page of attribute settings.

Delete Attributes

You cannot delete attributes that are contained in a form.

To delete an attribute

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Entities** tab.

   The **Entities** tab opens.

3. In the **Configured Entities** table, select the **Drupal Story** entity.

4. Click **Manage Attributes**.

   The **Attributes - Drupal Story** page opens and displays the attributes for a Drupal story.

5. In the **Attributes - Drupal Story** list, select the **attribute** to delete.

6. Click **Delete**.

   A confirmation dialog box opens.

7. Click **OK**.

   Inception deletes the selected attribute from the **Attributes - Drupal Story** list.

Drupal Story Editor Custom Form

The Drupal Story Editor uses a custom form to enter information into the fields of a Drupal content type from within Inception. For each Drupal content type that you want to edit from Inception, you must create an exclusive form.

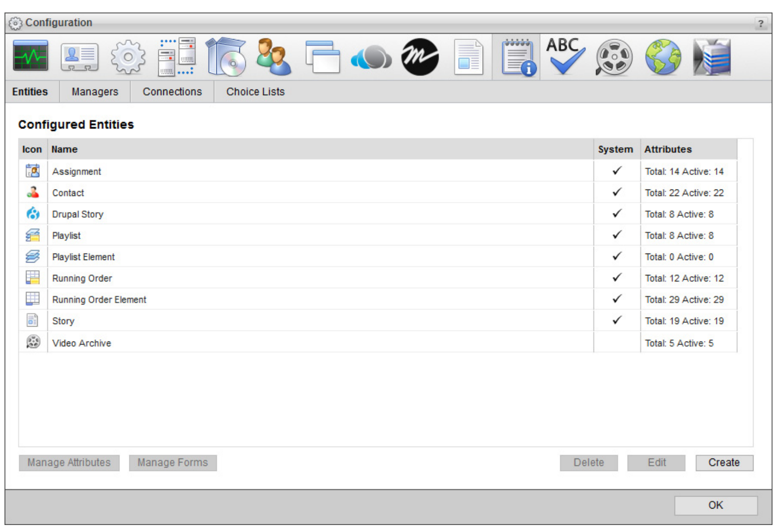
To add custom Drupal fields to a custom form

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Entities** tab.

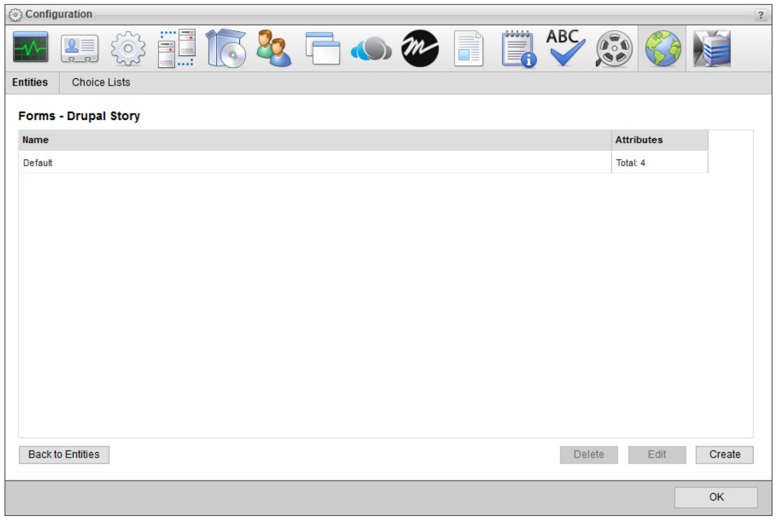
   The **Entities** tab opens.



3. In the **Configured Entities** table, select the **Drupal Story** entity.

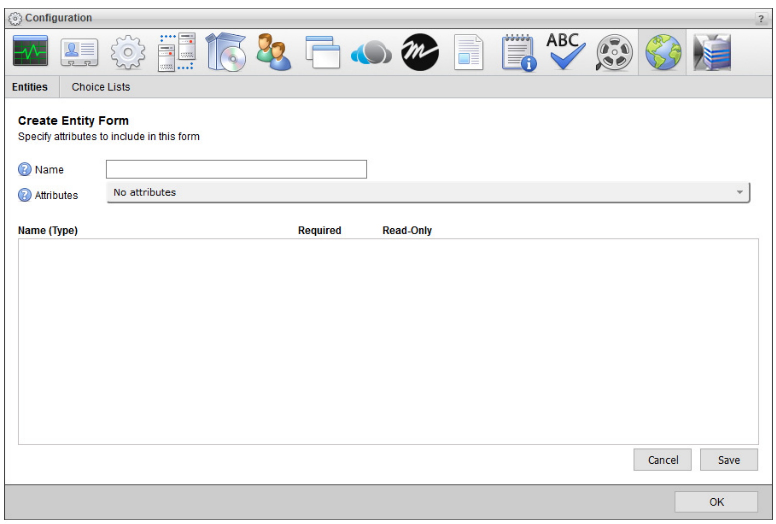
4. Click **Manage Forms**.

   The **Attributes - Drupal Story** page opens and displays the default attributes for a Drupal story.



5. Click **Create**.

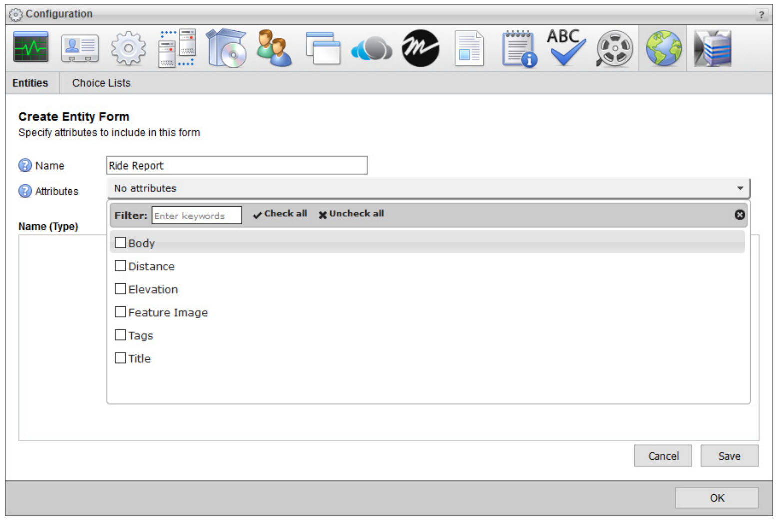
   The **Create Entity Form** page opens.



6. In the **Name** box, enter a name for the entity form.

7. Click the **Attributes** list.

   The **Attribute** list opens displaying the list attributes that you can add to the entity form.



8. To filter the **Attributes** list, enter in the **Filter** box a portion of the attribute name you want to select.

   You do not need to enter the start of an attribute name, just any portion of the name filters the **Attributes** list. The **Attributes** list automatically updates to display only the attributes with names that contain the text entered in the **Filter** box. Clear the **Filter** box to display all the available attributes in the **Attributes** list.

9. In the **Attributes** list, select the check box to the left of each attribute that you want to add the entity form.

   Click **Check All** to select all the attributes in the **Attributes** list, click **Uncheck All** to deselect all attributes.

10. After you select the attributes to add to the entity form, click the **Close** icon.

    The **Attributes** list closes, and the **Name** list displays the selected attributes.

11. In the **Name (Type)** list, drag the attributes in the list to set the display order for the **Drupal Story Editor**.

12. Click **Save**.

    Inception adds the new entity form to the **Forms - Drupal Story** page.

Edit Forms

For existing forms, you can edit the name of the form and the attributes contained in the form.

To edit a form

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.

2. Click the **Entities** tab.

   The **Entities** tab opens.

3. In the **Configured Entities** table, select the **Drupal Story** entity.

4. Click **Manage Forms**.

   The **Forms - Drupal Story** page opens and displays the forms for a Drupal story.

5. In the **Forms - Drupal Story** list, select the **form** to edit.

6. Click **Edit**.

   The **Edit Entity Form** settings open.

7. Edit form settings as required.
8. Click **Next** and **Back** to access the available form settings.
9. After completing the required form setting edits, click **Save** on the last page of form settings.

Delete Forms

You cannot delete forms that are mapped to Drupal content types.

To delete a form

1. On the **Configuration** window toolbar, click the **Metadata** icon.

   The **Metadata** panel opens.
2. Click the **Entities** tab.

   The **Entities** tab opens.
3. In the **Configured Entities** table, select the **Drupal Story** entity.
4. Click **Manage Forms**.

   The **Forms - Drupal Story** page opens and displays the forms for a Drupal story.
5. In the **Forms - Drupal Story** list, select the **form** to delete.
6. Click **Delete**.

   A confirmation dialog box opens.
7. Click **OK**.

   Inception deletes the selected form from the **Forms - Drupal Story** list.

Drupal Account

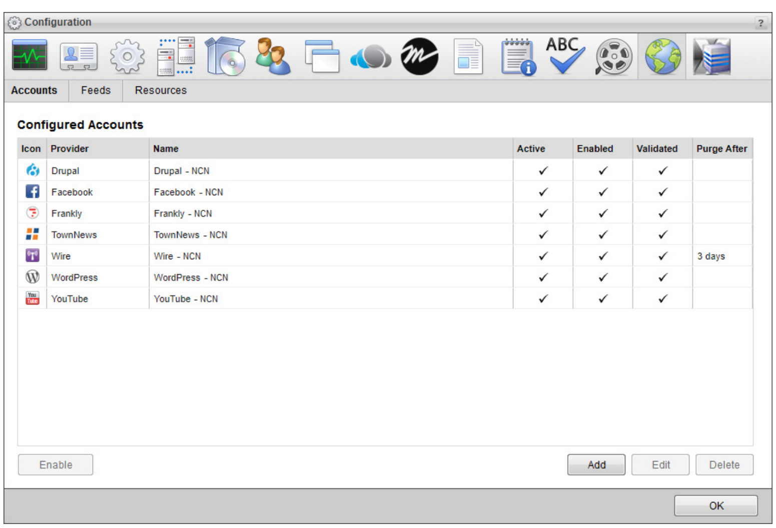
Follow the procedures in this section to create or edit an account to publish content to Drupal.

To create a Drupal account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list to select **Drupal**.

5. Click **Next**.

   The **Configure Drupal Publishing Account** settings open.

6. In the **Name** box, enter a unique name for the Drupal account.

   Drupal account names must be unique on an Inception Server.

7. Click **Next**.

   The **Drupal** connection settings open.

8. In the **Username** box, enter the Drupal administrator username, usually `restws_admin`, for logging in to your Drupal account.

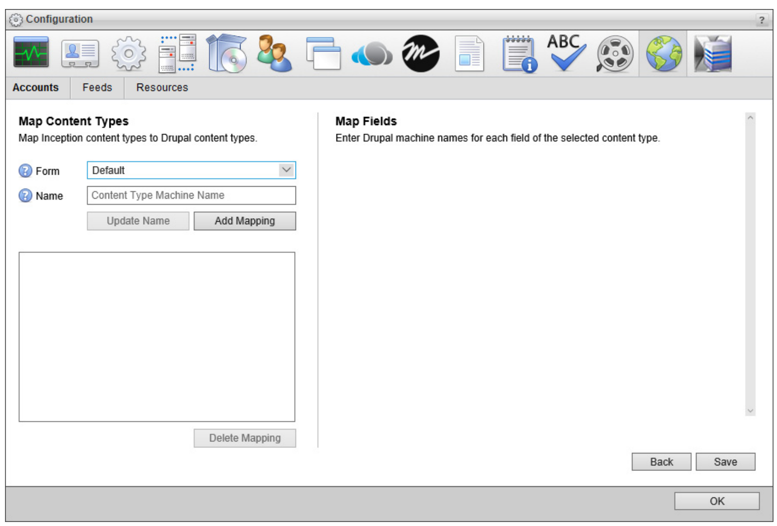
9. In the **Password** box, enter the password for logging in to your Drupal account.

10. In the **Blog URL** box, enter the URL of the target blog.

    Blog URLs must start with `http://`.

11. Click **Next**.

    The **Map Content Types** and **Map Fields** section open.



12. In the **Map Content Types** section, use the **Form** list to select the Inception form with which to enter content for a Drupal content type.

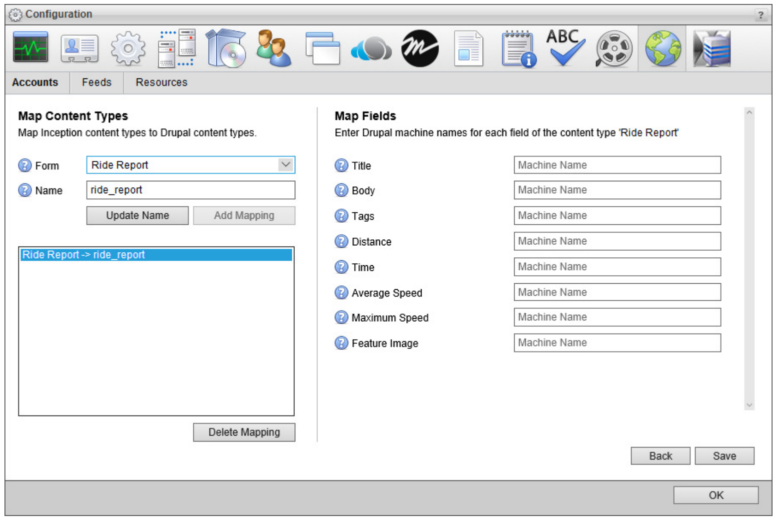
13. In the **Name** box, enter the **Machine Name** of Drupal content type to store information entered through the selected Inception form.

    In Drupal, view the machine name of your content type by selecting **Structure > Content Types**.

14. Click **Add Mapping**.

    Inception adds the form and content type mapping to the **Mappings** list.

15. Select the new form and content type mapping in the **Mappings** list.



16. For each form field enter the machine name of the corresponding field in the Drupal content type.

    Inception saves information entered in a form field to the mapped Drupal content type field.

17. Click **Save**.

    Inception adds the new Drupal account to the list of accounts and creates an identically-named managed feed.

    By default, only users with roles that include permission to manage ALL Drupal accounts can publish content using the new account. You can assign account management permissions to other user roles.

To edit a Drupal account

1. On the **Configuration** window toolbar, click the  **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the **Drupal** account to edit.

4. Click **Edit**.

   The **Edit Drupal Publishing Account** settings open.

5. Edit account settings as required.

6. Click **Next** and **Back** to access the available account settings.

7. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- account management permissions, refer to the section "**New Account Role Permissions**" on page 7–10.
- enabling or disabling accounts, refer to the section "**Enable or Disable an Account**" on page 18–44
- deleting accounts, refer to the section "**Delete an Account**" on page 18–44

Facebook Account Configuration

Facebook is a social utility that connects people with friends and others who work, study, and live around them. Follow the procedures in this section to create or edit an account to publish content to Facebook.

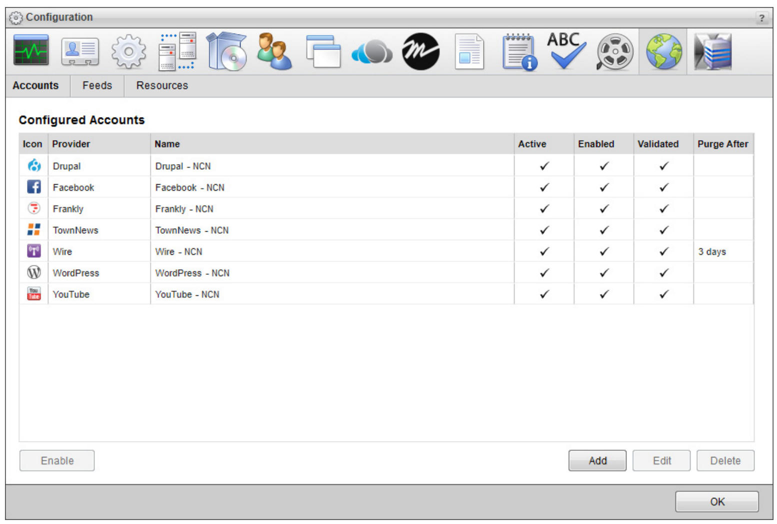
To create a Facebook account

1. Log in to your Inception Server as an Inception administrator.
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
4. Click the **Accounts** tab.

   The **Accounts** tab opens.



5. Click **Add**.

   The **Create New Account** settings open.
6. Use the **Account** list to select **Facebook**.
7. Click **Next**.

   The **Create Facebook Account** settings open.
8. In the **Name** box, enter a unique name for the Facebook account.

   Facebook account names must be unique on an Inception Server.
9. In the **Purge After** box, enter the amount of time after which to delete old content from the associated Facebook managed feed.

   The purge after time must be greater than or equal to 15 minutes and less than or equal to 180 days.
10. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
11. Click **Next**.

    The authorize your Facebook account settings open.

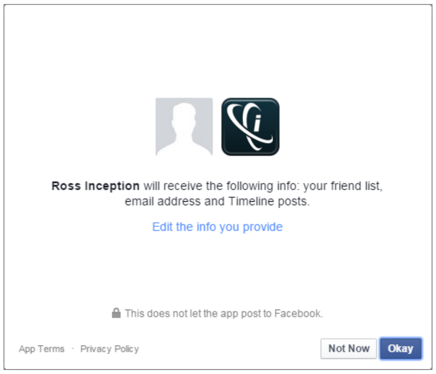
12. Click **Authorize Your Facebook Account**.

    The **Facebook Login** web page opens in a new window.

    If you have previously authorized your Facebook account with the Inception Facebook App, proceed to step **17**.

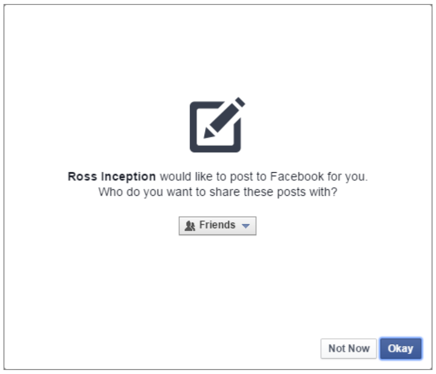
13. Log in to your Facebook account.

    The **Ross Inception Receive** dialog box opens.



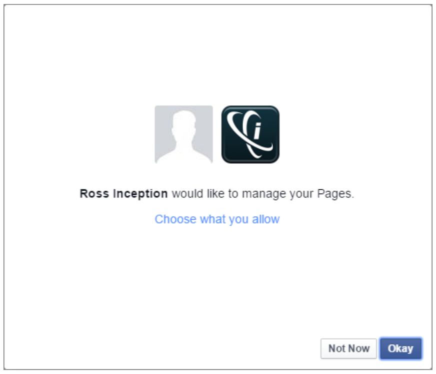
14. Click **Okay**.

    The **Ross Inception Facebook Post** dialog box opens.



15. Use the **Friends** list to select **Public**.
16. Click **Okay**.

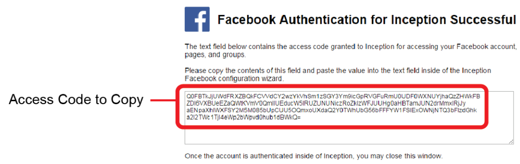
    The **Ross Inception Facebook Manage Pages** dialog box opens.



17. Click **Okay**.

    The **Facebook Authentication for Inception Successful** web page opens and displays an **Access Code** for the Inception Facebook App.

18. Copy the **Access Code** for the Inception Facebook App.



19. In **Inception**, paste the copied content into the **Access Code** box.

20. Click **Save**.

    The **Edit Facebook Account** settings open.

21. Use the **Channel Type** list to select the Facebook **Page** or Facebook **Group** to publish content.

22. Click **Save**.

    Inception adds the new Facebook account to the list of accounts and creates an identically-named managed feed.

    By default, only users with roles that include permission to manage ALL Facebook accounts can publish content using the new account. You can assign account management permissions to other user roles.

To edit a Facebook account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the **Facebook** account to edit.

4. Click **Edit**.

   The **Edit Facebook Account** settings open.

5. Edit account settings as required.

6. To edit grayed out settings, click **Deauthorize**.

   Click **Next** and **Back** to access the available account settings.

✶ You cannot use deauthorized Facebook accounts until you re-establish authentication credentials.

7. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- account management permissions, refer to the section "**New Account Role Permissions**" on page 7–10.
- enabling or disabling accounts, refer to the section "**Enable or Disable an Account**" on page 18–44
- deleting accounts, refer to the section "**Delete an Account**" on page 18–44

Frankly Account Configuration

Frankly is a content management system for innovative media companies. Your stories are a family, so keep them under one roof. Follow the procedures in this section to create or edit an account to publish content to Frankly.

✶ You must have a valid Frankly account before you can configure a Frankly publishing account for Inception.

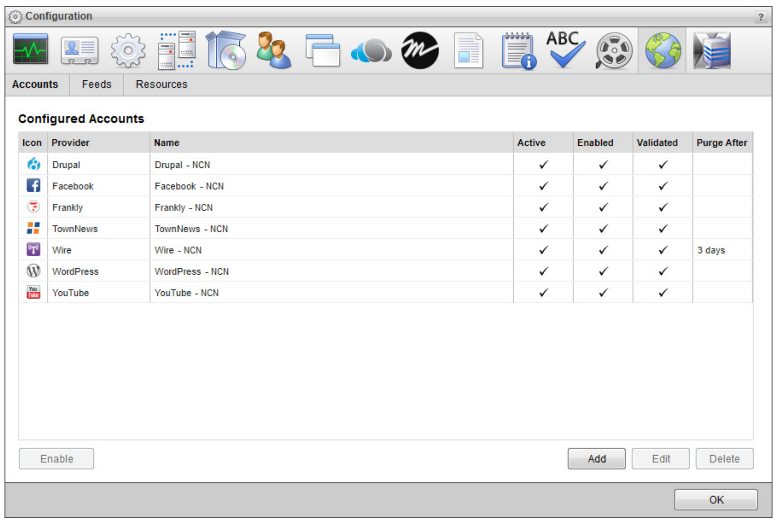
To create a Frankly account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list to select **Frankly**.
5. Click **Next**.

   The **Create Frankly Publishing Account** settings open.

6. In the **Name** box, enter a unique name for the Frankly account.

   Frankly account names must be unique on an Inception Server.

7. Click **Next**.

   The Frankly connection settings open.

8. In the **Username** box, enter the username for logging in to your Frankly account.
9. In the **Password** box, enter the password for logging in to your Frankly account.
10. In the **CMS API URL** box, enter the CMS API URL for your Frankly account.
11. In the **Frankly Image Server** — box, enter the URL of the image server for your Frankly account.
12. In the **Affiliate ID** — box, enter the affiliate ID number for your Frankly account.
13. Click **Save**.

    Inception adds the new Frankly account to the list of accounts.

    By default, only users with roles that include permission to manage ALL Frankly accounts can publish content using the new account. You can assign account management permissions to other user roles.

To edit a Frankly account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the **Frankly** account to edit.
4. Click **Edit**.

   The **Edit Frankly Publishing Account** settings open.
5. Edit account settings as required.
6. Click **Next** and **Back** to access the available account settings.
7. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- how to assign account management permissions, refer to the section "**New Account Role Permissions**" on page 7–10.
- how to enable or disable accounts, refer to the section "**Enable or Disable an Account**" on page 18–44.
- how to delete accounts, refer to the section "**Delete an Account**" on page 18–44.

TownNews Account Configuration

TownNews is a free content management system which is widely used to produce online and print products. Follow the procedures in this section to create or edit an account to publish content to TownNews.

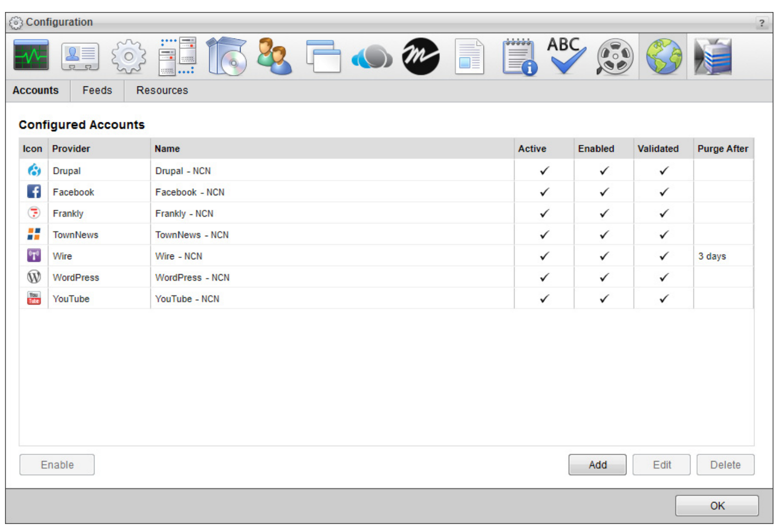
✶ You must have a valid TownNews account before you can configure a Frankly publishing account for Inception.

To create a TownNews account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list to select **TownNews**.
5. Click **Next**.

   The **Create TownNews Publishing Account** settings open.

6. In the **Name** box, enter a unique name for the TownNews account.

   TownNews account names must be unique on an Inception Server.

7. Click **Next**.

   The TownNews connection settings open.

8. In the **API Key** box, enter your TownNews account API key.
9. In the **API Secret** box, enter your TownNews account API secret.
10. In the **Website URL** box, enter the URL of your TownNews web site, staring with http://.
11. Click **Save**.

    Inception adds the new TownNews account to the list of accounts.

    By default, only users with roles that include permission to manage ALL TownNews accounts can publish content using the new account. You can assign account management permissions to other user roles.

To edit a TownNews account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the **TownNews** account to edit.
4. Click **Edit**.

   The **Edit TownNews Publishing Account** settings open.

5. Edit account settings as required.
6. Click **Next** and **Back** to access the available account settings.
7. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- account management permissions, refer to the section “**New Account Role Permissions**” on page 7–10.
- enabling or disabling accounts, refer to the section “**Enable or Disable an Account**” on page 18–44
- deleting accounts, refer to the section “**Delete an Account**” on page 18–44

Wire Account Configuration

Wire accounts enable Inception to ingest broadcast news information from various wire services to help you to build extensive newscasts. Follow the procedures in this section to create or edit an account to ingest broadcast news information from a wire service.

✶ In a Multi-Node Inception system you must create or edit Wire accounts from the node that runs the Wire service. To view the name of the Wire service node in your system, open the Manage Services tab in the Network panel of the Configuration window.

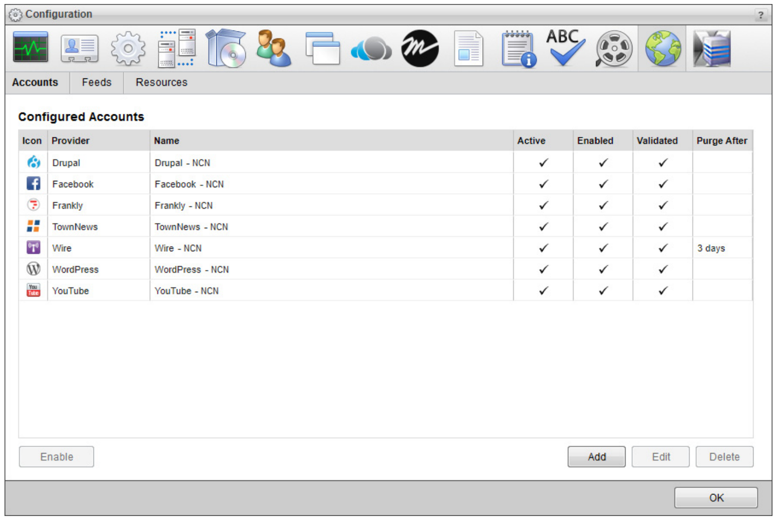
To create a Wire account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list to select **Wire**.

5. Click **Next**.

   The **Create Wire Account** settings open.

6. In the **Name** box, enter a unique name for the Wire account.

   Wire account names must be unique on an Inception Server.

7. Use the **Provider** list to select the wire service that provides content for the Wire account.

8. Use the **Transport** list to select the network protocol to communicate with the selected wire service. The available network protocols are as follows:

   - **FTP** — File Transfer Protocol over a TCP-based network.
   - **SFTP** — Secure File Transfer Protocol over a TCP-based network.
   - **Serial TCP** — Transmission Control Protocol over a serial connection.
   - **AP Web Feed** — Associated Press content feed over the web.
   - **AP Media** — Associated Press content feed access using an API Key.

9. Use the **Format** list to select the format of the content ingested from selected wire service. The available formats are as follows:
   - **NEWSML-G2** — an XML based multimedia news exchange format standard published by the International Press Telecommunications Council (IPTC).
   - **ANPA-1312** — a news agency text markup specification published by the Newspaper Association of America that standardizes the content and structure of text news articles.
   - **NITF** — News Industry Text Format is an XML specification published by the International Press Telecommunications Council to standardize the content and structure of individual text news articles.
   - **AP ATOM** — a feed structure that contains an introduction and one or more content entries. Each entry contains metadata the describes the entry content of text, graphics, photos, audio, or links to video.
10. In the **Purge After** box, enter the amount of time after which to delete old content from the associated Wire managed feed.

    The purge after time must be greater than or equal to 15 minutes and less than or equal to 180 days.
11. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
12. Select the **Send Notifications** check box to display a user notification in the message area for each wire that the wire account receives with an urgency at or above the urgency level selected from the **Minimum Urgency** list.
13. Use the **Minimum Urgency** list to select the minimum urgency level that a received wire must meet for Inception to display a notification to users. This list is only available when you select the **Send Notification** check box.

    The most urgent content has an urgency level of 1, while the least urgent content has an urgency level of 9. Selecting **3** from this list configures Inception to send notifications when it receives a wire with a urgency level of **1**, **2**, or **3**.
14. Click **Next**.

    The transport settings open.
15. The available transport settings depend on the network protocol that you selected from the **Transport** list.
    - **FTP** — when you select **FTP** from the **Transport** list, configure the following settings:
      › **Host** — enter in this box the IP address or URL of the FTP site for the selected wire service.
      › **Encryption** — use this list to select the encryption method for transferring wire data between systems over FTP. The available methods are as follows:

        - **None (FTP)** — regular unencrypted FTP.

        - **Explicit FTP over TLS (FTPS)** — the encryption method used by newer FTPS servers.

        - **Implicit FTP over SSL (FTPS)** — the encryption method used by legacy FTPS servers.

      › **Port** — enter in this box the FTP port number to connect to on the host.
      › **Username** — enter in this box the username for the wire service FTP site.
      › **Password** — enter in this box the password associated with the username.
      › **Base Folder** — enter in this box the path to the folder on the wire service FTP site to start your search for wire content. (if it differs from the folder one arrives at upon initial connection)
      › **Recurse Subfolders** — select this check box to search through the subfolders of the set Base Folder when searching for wire content. Clear this check box to only search the set Base Folder for wire content.

      After you finish setting the required **FTP** transport settings, skip to step **18**.

- **SFTP** — when you select **SFTP** from the **Transport** list, configure the following settings:
  - › **Host** — enter in this box the IP address or URL of the SFTP site for the selected wire service.
  - › **Port** — enter in this box the SFTP port number to connect to on the host.
  - › **Username** — enter in this box the username for the wire service SFTP site.
  - › **Password** — enter in this box the password associated with the username.
  - › **Base Folder** — enter in this box the path to the folder on the wire service SFTP site to start your search for wire content. (if it differs from the folder one arrives at upon initial connection)
  - › **Recurse Subfolders** — select this check box to search through the subfolders of the set Base Folder when searching for wire content. Clear this check box to only search the set Base Folder for wire content.

  After you finish setting the required **SFTP** transport settings, skip to step **18**.
- **Serial TCP** — when you select **Serial TCP** from the **Transport** list, configure the following settings:
  - › **Host** — enter in this box the host name or IP address of the server for the selected wire service. When connecting through a DeviceMaster, enter the IP address of the DeviceMaster.
  - › **Port** — enter in this box the port number to connect to on the host. When connecting through a DeviceMaster, enter the port number that the DeviceMaster uses to listen for communication from the wire service hardware.

  After you finish setting the required **Serial TCP** transport settings, skip to step **18**.
- **AP Web Feed** — when you select **AP Web Feed** from the **Transport** list, configure the following settings:
  - › **Entitlement URL** — this box displays the URL used to gather the list of content categories entitled to your Associated Press account. If required, you can edit this URL.
  - › **Content URL** — this box displays the URL used to access content from the content categories you select. If required, you can edit this URL.
  - › **Username** — enter in this box the username for your Associated Press account.
  - › **Password** — enter in this box the password associated with the username.

  After you finish setting the required **AP Web Feed** transport settings, continue with to step **16**.
- **AP Media** — when you select **AP Media** from the **Transport** list, configure the following setting:
  - › **API Key** — enter in this box the API key for your Associated Press account.

  After you finish setting the required **Serial TCP** transport settings, skip to step **18**.

16. Click **Next**.

    The **Entitlement** list opens.

17. Use the **Entitlement** list to select one or more content categories to include in the wire feed as follows:
    - **Single** — click the content category to select.
    - **Range** — click the first content category in the selection range, then **Shift-click** the last content category in the range.
    - **Multiple** — click the first content category to select, then **Ctrl-click** each additional content category to add to the selection.

18. Click **Save**.

    Inception adds the new Wire account to the list of available accounts. By default, only users with roles that include permission to view feeds can gather content using the new account. You can assign feed viewing permissions to other user roles.

To edit a Wire account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the **Wire** account to edit.
4. Click **Edit**.

   The first page of the **Edit Wire Account** settings open.
5. Edit accounts settings as required.
6. Click **Next**.

   The second page of the **Edit Wire Account** settings open.
7. Edit accounts settings as required.
8. When you need to change the password for a Wire account, complete the following steps:
   a. Select the **Change Password** check box.
   b. In the **Password** box, enter the new password for the Wire account.

      The **Password** box is only available when the Change Password check box is selected.
9. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- account management permissions, refer to the section “**New Account Role Permissions**” on page 7–10.
- enabling or disabling accounts, refer to the section “**Enable or Disable an Account**” on page 18–44
- deleting accounts, refer to the section “**Delete an Account**” on page 18–44
- hot to set up a wire service serial connection, refer to the section “**Setting Up a News Service Serial Connection**” on page 6–3 of the ***Inception Server Installation Guide***.

WordPress Account Configuration

WordPress is an open-source online content management system that you can use to publish content as a blog or website. You can create an account to publish content to the WordPress.com web site on the public Internet or to your locally hosted WordPress system. Follow the procedures in this section to create or edit an account to publish content to WordPress.

WordPress.com

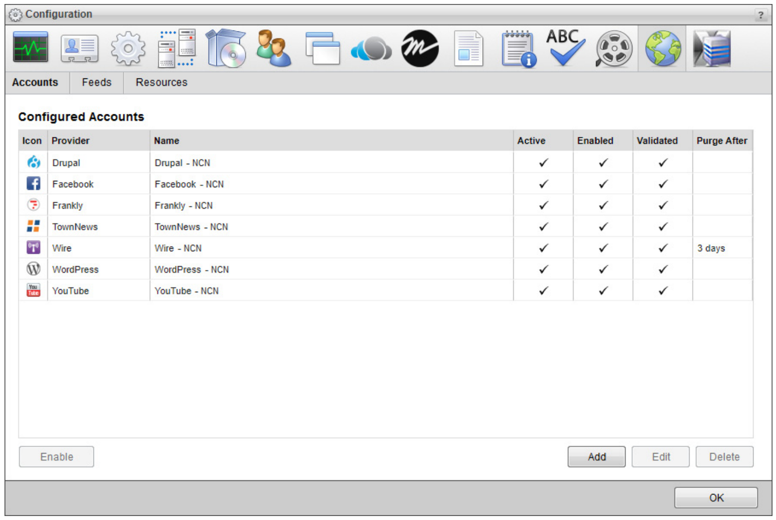
WordPress.com accounts publish content to the WordPress.com web site on the public Internet.

To create a WordPress.com account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list to select **WordPress**.

5. Click **Next**.

   The **Create WordPress Account** settings open.

6. In the **Name** box, enter a unique name for the WordPress account.

   WordPress account names must be unique on an Inception Server.

7. Click **Next**.

   The WordPress type settings open.

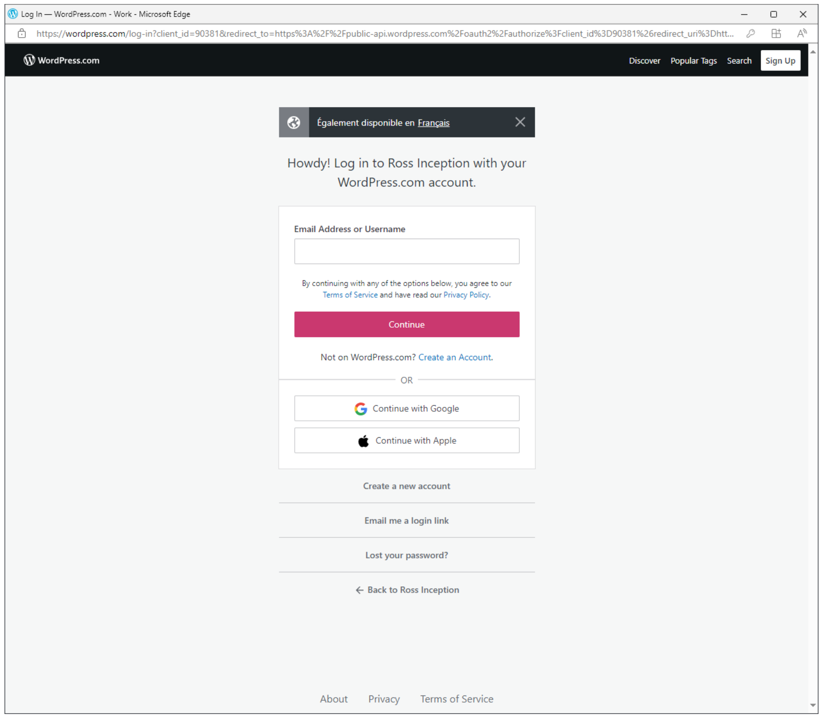
8. Use the **Type** list to select **WordPress.com**.

9. Click **Next**.

   The authorize your WordPress account settings open.

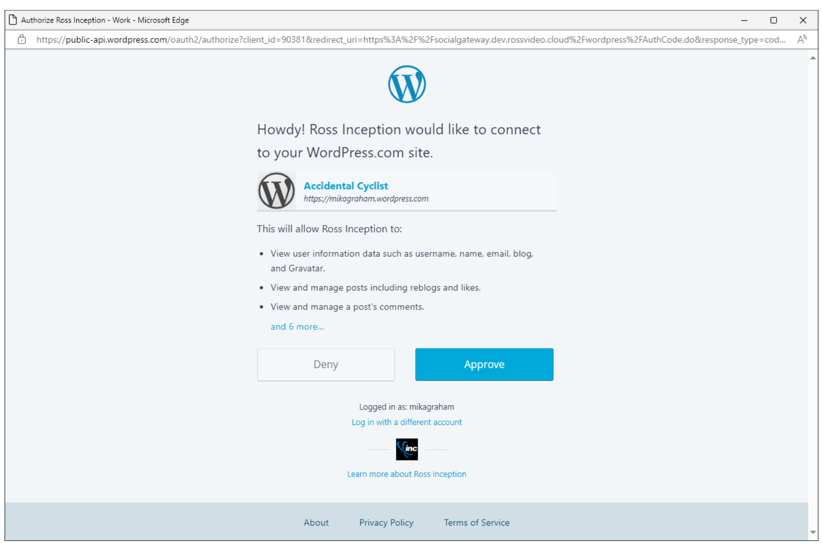
10. Click **Authorize Your Word Account**.

The **WordPress Authorize Ross Inception** web page opens. If you are currently signed in to your WordPress account, proceed to step **12**.



11. Log in to your **WordPress.com** account.

    After you successfully log in to your **WordPress.com** account, the **WordPress Approve** web page opens.



12. In the **WordPress Approve** web page opens, click **Approve**.

    WordPress approves the Ross Inception application to connect to your WordPress.com site and displays a success message.

13. Close the **WordPress Authorize Ross Inception** window.
14. Click **Next**.

    The categories to exclude setting opens.

15. Use the **Exclude Categories** list to select one or more **WordPress categories** that contain posts that you do not want Inception to ingest. Select WordPress categories as follows:
    - **Single** — click the WordPress category to select.
    - **Range** — click the first WordPress category in the selection range, then **Shift-click** the last WordPress category in the range.
    - **Multiple** — click the first WordPress category to select, then **Ctrl-click** each additional WordPress category to add to the selection.
16. Click **Done**.

    Inception adds the new WordPress.com account to the list of accounts.

    By default, only users with roles that include permission to manage ALL WordPress accounts can publish content using the new account. You can assign account management permissions to other user roles.

WordPress.org

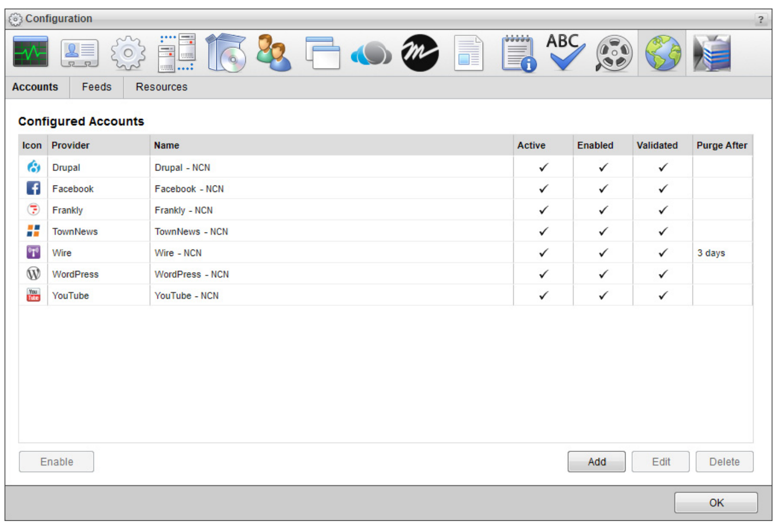
WordPress.org accounts publish content to your locally hosted WordPress system.

To create a WordPress.org account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

    The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

    The **Accounts** tab opens.



3. Click **Add**.

    The **Create New Account** settings open.
4. Use the **Account** list to select **WordPress**.
5. Click **Next**.

    The **Create WordPress Account** settings open.
6. In the **Name** box, enter a unique name for the WordPress account.

    WordPress account names must be unique on an Inception Server.
7. Click **Next**.

    The WordPress type settings open.

8. In the **Server URL** box, enter the URL address to access your locally hosted WordPress system without a / (forward slash) at the end of the URL.
9. Use the **Authentication Type** list to select the authentication type used by your WordPress system. The available authentication types are as follows:
   - **Basic** — use a WordPress username and application password for authentication. To configure Basic authentication settings, continue with step **10**.
   - **OAuth2** — to use the OAuth2 protocol for authentication, you must configure your WordPress system to use an OAuth Server plugin to authenticate accounts. You will need setting information from your OAuth Server plugin to configure this authentication type.

     To configure OAuth2 authentication settings, continue with step **11**.
10. To configure the **Basic** authentication type, complete the following steps:
    a. On your **WordPress.org** site, verify that the **WordPress user** to use for authentication has an **application password**. Add an application password to your WordPress user if it does not have one.

    b. In the **Username** box, enter the WordPress username to use for authentication.

    c. In the **Password** box, enter the WordPress application password associated with the entered WordPress username.

    d. Continue with step **12**.
11. To configure the **OAuth2** authentication type, complete the following steps:
    a. In the **Authorization Endpoint** box, enter the Authorization endpoint path configured for the OAuth Server plugin on your locally hosted WordPress system. This path begins with a / (forward slash) and does not include the Server URL.

    b. In the **Token Endpoint** box, enter the Token endpoint path configured for the OAuth Server plugin on your locally hosted WordPress system. This path begins with a / (forward slash) and does not include the Server URL.

    c. In the **Revoke Endpoint** box, enter the Revoke endpoint path configured for the OAuth Server plugin on your locally hosted WordPress system. This path begins with a / (forward slash) and does not include the Server URL. This endpoint setting is optional.

    d. In the **User Info Endpoint** box, enter the User Info endpoint path configured for the OAuth Server plugin on your locally hosted WordPress system. This path begins with a / (forward slash) and does not include the Server URL.

    e. In the **Authorization Header Name** box, enter the authorization header name configured for the OAuth Server or API Authentication plugin on your locally hosted WordPress system.

✶ Only enter a name in this box when your OAuth Server or API Authentication plugin uses a non-standard authorization header name. Leave this box empty to use the default authorization header name.

    f. In the **Client ID** box, enter the Client ID configured for the OAuth Server plugin on your locally hosted WordPress system.

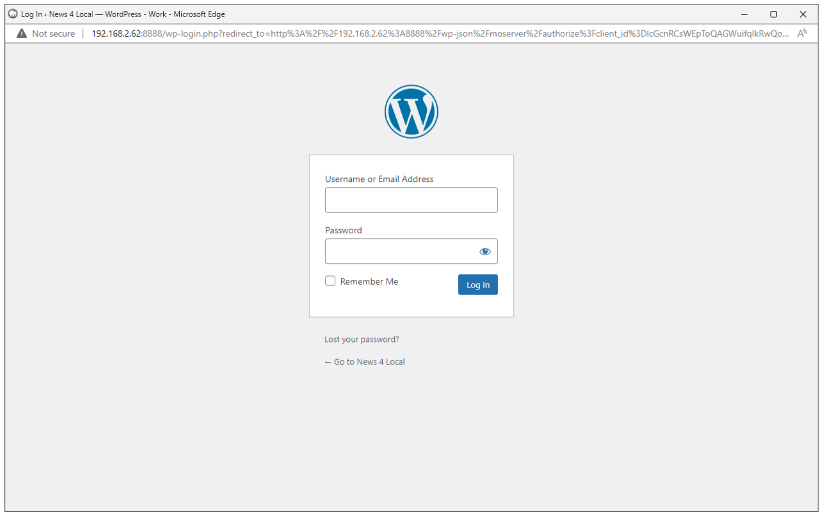
    g. In the **Client Secret** box, enter the Client Secret configured for the OAuth Server plugin on your locally hosted WordPress system.

    h. Click **Next**.

    The authorize your WordPress account settings open.

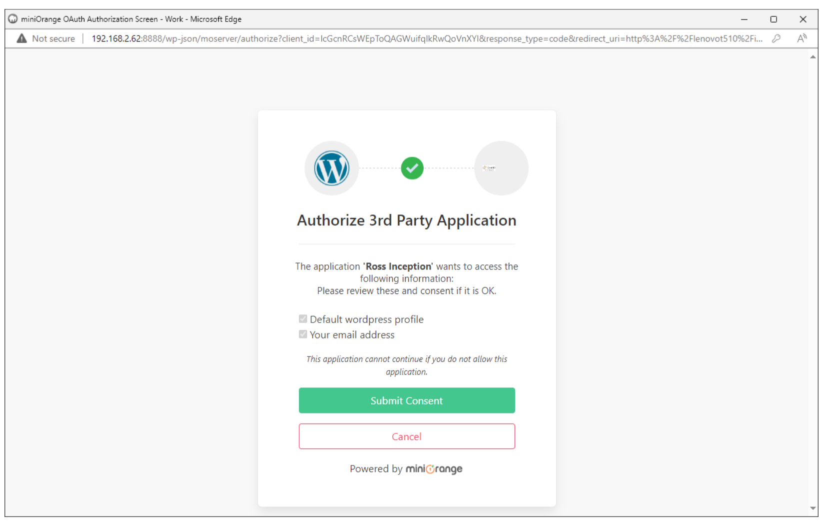
i. Click **Authorize Your Word Account**.

The **WordPress Authorize Ross Inception** web page opens. If you are currently signed in to your WordPress account, proceed to step **k**.



j. Log in to your **WordPress.org** account.

After you successfully log in to your **WordPress.org** account, the **Authorize 3rd Party Application** web page opens.



k. In the **Authorize 3rd Party Application** web page opens, click **Submit Consent**.

WordPress approves the Ross Inception application to connect to your WordPress.com site and displays a success message.

l. Close the **WordPress Authentication for Inception Successful** window.

12. Click **Next**.

The categories to exclude setting opens.

13. Use the **Exclude Categories** list to select one or more **WordPress categories** that contain posts that you do not want Inception to ingest. Select WordPress categories as follows:
    - **Single** — click the WordPress category to select.
    - **Range** — click the first WordPress category in the selection range, then **Shift-click** the last WordPress category in the range.
    - **Multiple** — click the first WordPress category to select, then **Ctrl-click** each additional WordPress category to add to the selection.
14. Click **Done**.

    Inception adds the new WordPress.org account to the list of accounts.

    By default, only users with roles that include permission to manage ALL WordPress accounts can publish content using the new account. You can assign account management permissions to other user roles.

Edit a WordPress Account

You can edit the name of a WordPress account and the credentials exchanged between WordPress and Inception. you must deauthorize a WordPress account before you can edit account credentials.

✶ After editing WordPress account credentials, you must re-authorize the account before you can use it to publish Inception content.

To edit a WordPress account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

    The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

    The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the **WordPress** account to edit.
4. Click **Edit**.

    The **Edit WordPress Publishing Account** settings open.
5. Edit account **Name** as required.

    When only editing the name of a WordPress account, click **Save** after entering the new account name in the **Name** box.
6. To edit authentication credentials exchanged between WordPress and Inception, you must click **Deauthorize** to deauthorize the WordPress account.

✶ You must re-authorize your WordPress account before you can use the account to publish Inception content.

7. Click **Next** and **Back** to access the available account settings.
8. After completing the required account setting edits, click **Done** on the last page of account settings.

For More Information on...

- account management permissions, refer to the section "**New Account Role Permissions**" on page 7–10.
- enabling or disabling accounts, refer to the section "**Enable or Disable an Account**" on page 18–44
- deleting accounts, refer to the section "**Delete an Account**" on page 18–44

YouTube Account Configuration

YouTube enables billions of people to discover, watch and share originally created videos. Follow the procedures in this section to create or edit an account to publish content to YouTube.

✶ Your YouTube account must contain one or more channels before you can publish Inception YouTube stories to the account.

✶ Do not use the same e-mail address to configure YouTube and Gmail accounts.

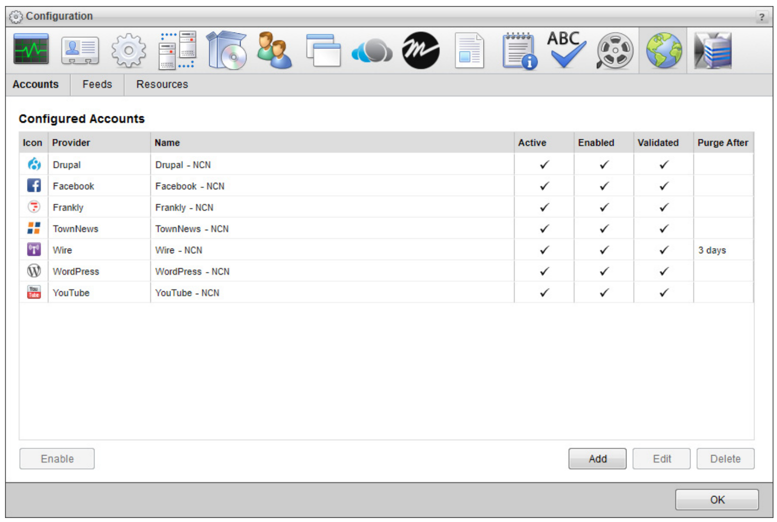
To create a YouTube account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list, to select **YouTube**.

5. Click **Next**.

   The **Create YouTube Account** settings open.

6. In the **Name** box, enter a unique name for the YouTube account.

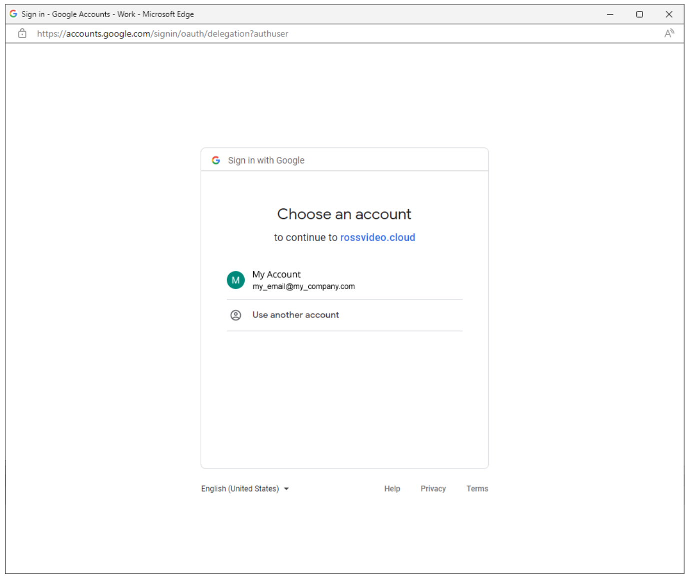
   YouTube account names must be unique on an Inception Server.

7. Click **Next**.

   The YouTube authorization settings open.

8. Click **Authorize Your YouTube** Account.

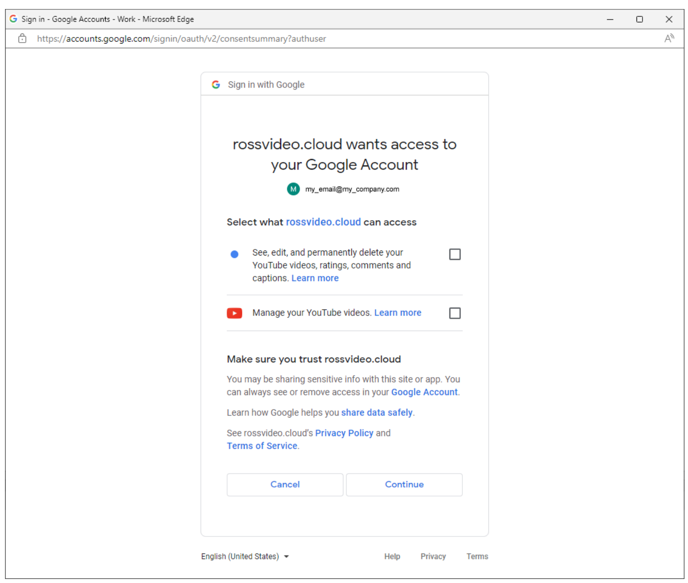
   The **Choose an account** web page opens.



✶ Do not configure a YouTube account with the same e-mail address used by a configured Gmail account.

9. In the **Account** list, click the **Google account name** that you use for **YouTube**.

   The **rossvideo.cloud wants access to your Google Account** web page opens.



10. In the **Select what rossvideo.cloud can access** list, enable the following privileges:

    - **See, edit, and permanently delete your YouTube videos, ratings, comments and captions**
    - **Manage your YouTube videos**

11. Click **Continue**.

    The **Success** web page opens.

    - Close the **Success** web page.

12. In **Inception**, click **Done**.

    Inception adds the new **YouTube** account to the list of accounts. By default, only users with roles that include permission to manage ALL YouTube accounts can publish content using the new account. You can assign account management permissions to other user roles.

To edit a YouTube account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the **YouTube** account to edit.

4. Click **Edit**.

   The **Edit YouTube Account** settings open.

5. In the **Name** box, edit the name of the YouTube account.

6. To edit authentication credentials exchanged between YouTube and Inception you must click **Deauthorize** to deauthorize the YouTube account.

✶ You must re-authorize your YouTube account before you can use the account to publish Inception content.

7. Click **Next** and **Back** to access the available account settings.

8. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- account management permissions, refer to the section "**New Account Role Permissions**" on page 7–10.
- enabling or disabling accounts, refer to the section "**Enable or Disable an Account**" on page 18–44
- deleting accounts, refer to the section "**Delete an Account**" on page 18–44

E-mail Account Configuration

E-mail accounts enable Inception to approve stories via e-mail, create stories via e-mail, and send assignment notifications via e-mail. You can configure an e-mail account for Gmail, Outlook, or any webmail service that supports basic username and password authorization.

For More Information on...

- enabling story approval via e-mail, refer to the section "**Enable Story Approval via E-mail**" on page 4–13
- enabling story creation via e-mail, refer to the section "**Enable Story Creation via E-mail**" on page 4–14.
- enabling assignment notification via e-mail, refer to the section "**Enable Assignment Notification via E-mail**" on page 13–11

Gmail

You can create a Gmail account for the free e-mail service provided by Google.

✶ Do not use the same e-mail address to configure Gmail and YouTube accounts.

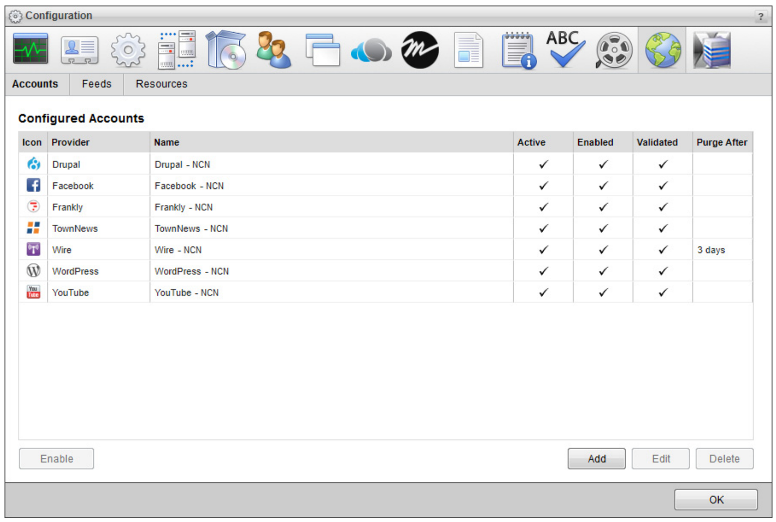
To create a Gmail account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list, to select **Gmail**.

5. Click **Next**.

   The **Create Gmail Account** settings open.

6. In the **Name** box, enter a unique name for the Gmail account.

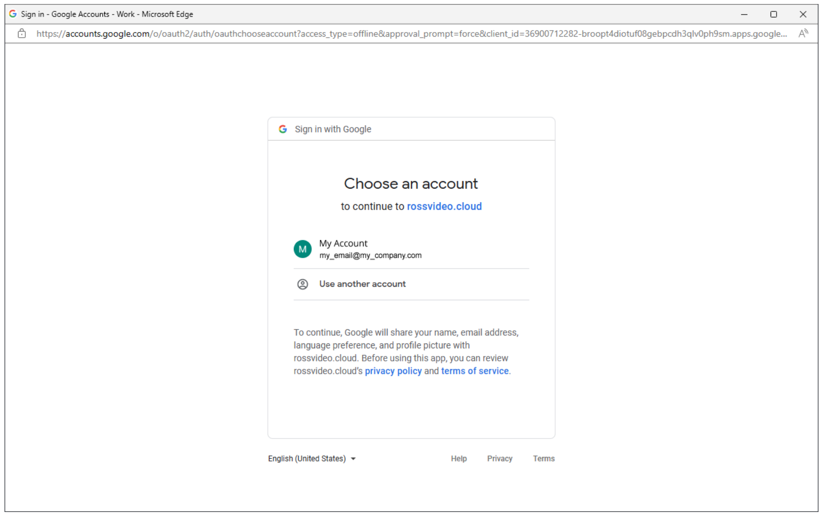
   Gmail account names must be unique on an Inception Server.

7. Click **Next**.

   The Gmail authorization settings open.

8. Click **Authorize Your Gmail Account**.

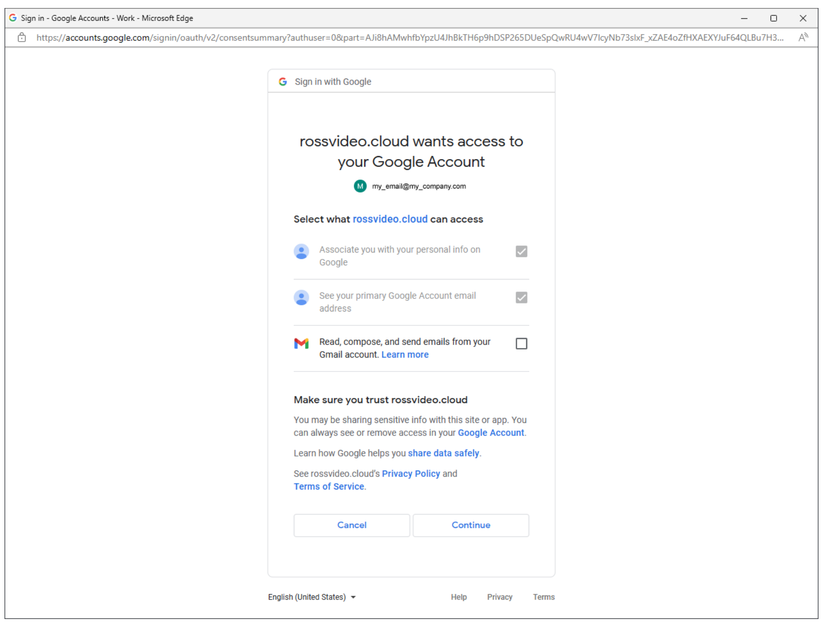
   The **Choose an account** web page opens.



✶ Do not configure a Gmail account with the same e-mail address used by a configured YouTube account.

9. In the **Account** list, click the **Google account name** that you use for **YouTube**.

   The **rossvideo.cloud wants access to your Google Account** web page opens.



10. Select the **Read, compose, and send emails from your Google account** check box.

11. Click **Continue**.

    The **Success** web page opens.

12. Close the **Success** web page.

13. In **Inception**, click **Done**.

    Inception adds the new **Gmail** account to the list of accounts. By default, Gmail e-mail accounts are **Active**, **Enabled**, and **Validated**.

To edit a Gmail account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the **Gmail** account to edit.
4. Click **Edit**.

   The **Edit Gmail Account** settings open.
5. In the **Name** box, edit the name of the Gmail account.
6. To edit authentication credentials exchanged between Google and Inception you must click **Deauthorize** to deauthorize the Gmail account.

✶ You must re-authorize your Gmail account before you can use the account to send or receive e-mails.

7. Click **Next** and **Back** to access the available account settings.
8. After completing the required account setting edits, click **Save** on the last page of account settings.

Outlook

You can create an Outlook account for the webmail service offered as part of the Microsoft 365 product family.

✶ A Ross Video commissioner or support representative must configure your Inception Server to enable Outlook account configuration.

To create an Outlook account

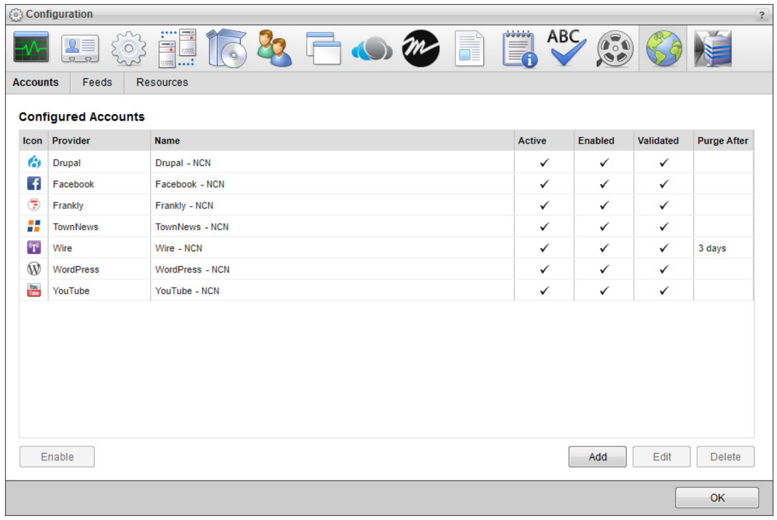
1. For Inceptions Servers that do not use HTTPS, you must use the following steps to log in to Inception:
   a. Log in to the **Inception Server computer** directly or through a remote connection.
   b. In a web browser, use the following URL to open the Inception web page:

      `http://localhost/`
   c. In the **Login** panel, enter your Inception administrator login credentials in the **Username** and **Password** boxes.
   d. On the main toolbar, click the **Configuration** icon.
2. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

3. Click the **Accounts** tab.

   The **Accounts** tab opens.



4. Click **Add**.

   The **Create New Account** settings open.

5. Use the **Account** list, to select **Outlook**.
6. Click **Next**.

   The **Create Outlook Account** settings open.

7. In the **Name** box, enter a unique name for the Outlook account.

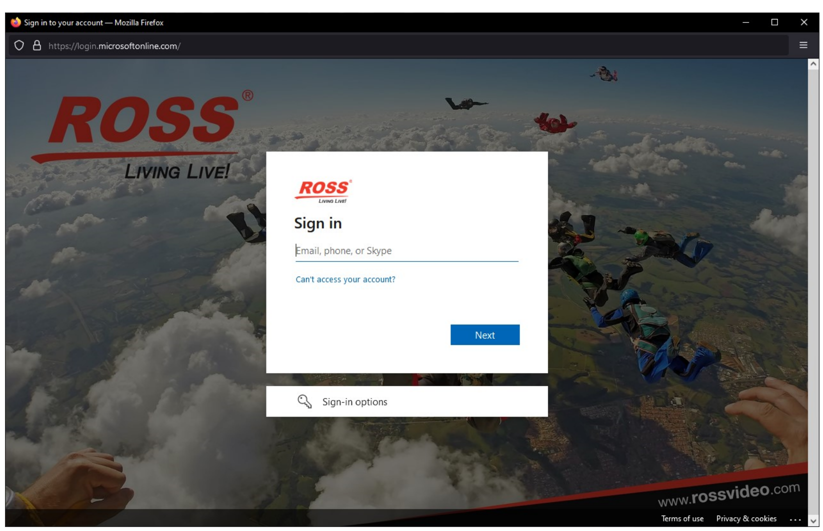
   Outlook account names must be unique on an Inception Server.

8. In the **Email Address** box, enter a the e-mail address of the Outlook account.
9. Click **Next**.

   The Outlook authorization settings open.

10. Click **Authorize Your Outlook Account**.

    The **Sign in** web page opens.



11. Enter the **e-mail address** of the Outlook account.
12. Click **Next**.

    The **Enter password** web page opens.
13. Enter the **password** for the Outlook account.
14. Click **Sign in**.

    The **Approve sign in request** screen opens.
15. Approve the sign in.

    The **Success** web page opens.
16. Close the **Success** web page.
17. In **Inception**, click **Done**.

    Inception adds the new **Outlook** account to the list of accounts. By default, Outlook e-mail accounts are **Active**, **Enabled**, and **Validated**.

To edit an Outlook account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the **Outlook** account to edit.
4. Click **Edit**.

   The **Edit Outlook Account** settings open.
5. In the **Name** box, edit the name of the Outlook account.
6. In the **Email Address** box, enter a the e-mail address of the Outlook account.
7. To edit authentication credentials exchanged between Microsoft and Inception you must click **Deauthorize** to deauthorize the Outlook account.

✶ You must re-authorize your Outlook account before you can use the account to send or receive e-mails.

8. Click **Next** and **Back** to access the available account settings.
9. After completing the required account setting edits, click **Save** on the last page of account settings.

Basic Mail

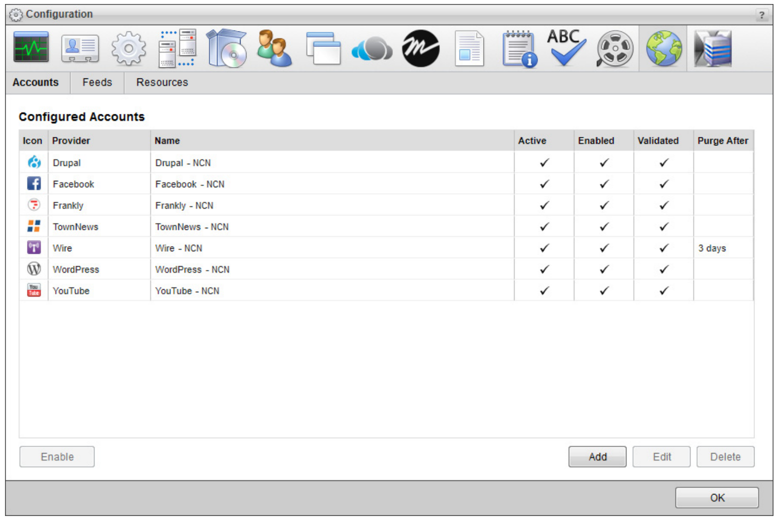
You can create a Basic Mail account for any webmail service that supports basic username and password authorization.

To create a Basic Mail account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

The **Accounts** tab opens.



3. Click **Add**.

   The **Create New Account** settings open.

4. Use the **Account** list, to select **Basic Mail**.

5. Click **Next**.

   The **Create Basic Mail** settings open.

6. In the **Name** box, enter a unique name for the Basic Mail account.

   Basic Mail account names must be unique on an Inception Server.

7. Click **Next**.

   The Basic Mail Credentials settings open.

8. In the **Email Address** box, enter the e-mail address for the Basic Mail account.

9. In the **Password** box, enter a the password for the e-mail address entered in the **Email Address** box.

10. Click **Done**.

    Inception adds the new **Basic Mail** account to the list of accounts. By default, Basic Mail accounts are **Active**, **Enabled**, and **Validated**.

To edit a Basic Mail account

1. On the **Configuration** window toolbar, click the  **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the **Basic Mail** account to edit.

4. Click **Edit**.

   The **Edit Basic Mail Account** settings open.

5. In the **Name** box, edit the name of the Outlook account.

6. To edit authentication credentials exchanged between Microsoft and Inception you must click **Deauthorize** to deauthorize the Basic Mail account.

✶ You must re-authorize your Basic Mail account before you can use the account to send or receive e-mails.

7. Click **Next** and **Back** to access the available account settings.
8. After completing the required account setting edits, click **Save** on the last page of account settings.

Enable or Disable an Account

Inception automatically enables all new accounts that you create. You can disable an account, making it unavailable to users. Temporarily disabling accounts enables you to create many accounts and manage which ones are available for publishing. You can create any number of accounts, but your Inception license limits the number of accounts that you can enable at one time.

Only active accounts are available for publishing. To activate an account, you must enable and validate the account. Inception validates accounts by connecting to the application associated with the account.

To disable an account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the enabled account to disable.
4. Click **Disable**.

   Inception removes the check marks from the **Active** and **Enabled** columns of selected account.

To enable an account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the disabled account to enable.
4. Click **Enable**.

   Inception adds check marks to the **Active** and **Enabled** columns of selected account.

Delete an Account

You cannot delete an account that contains links to an Inception story.

To delete an account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the account to delete.

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Inception deletes the selected account from the list of accounts.

Configuring Feeds

Feeds enable Inception to ingest content from RSS, Spredfast, and Wire services. You can select and add ingested content to a playlist, which Inception can make available to external systems such as character generators. You use the Accounts and Feeds panel to create, modify, and delete feeds.

This chapter discusses the following topics:

- RSS Feed Configuration
- Spredfast Feed Configuration
- Wire Search-Based Feed Configuration
- Enable or Disable a Feed
- Delete a Feed

RSS Feed Configuration

RSS feeds enable the ingestion of content from millions of web sites across the internet. Follow the procedures in this section to create or edit a feed to ingest content from an RSS feed that matches a search query.

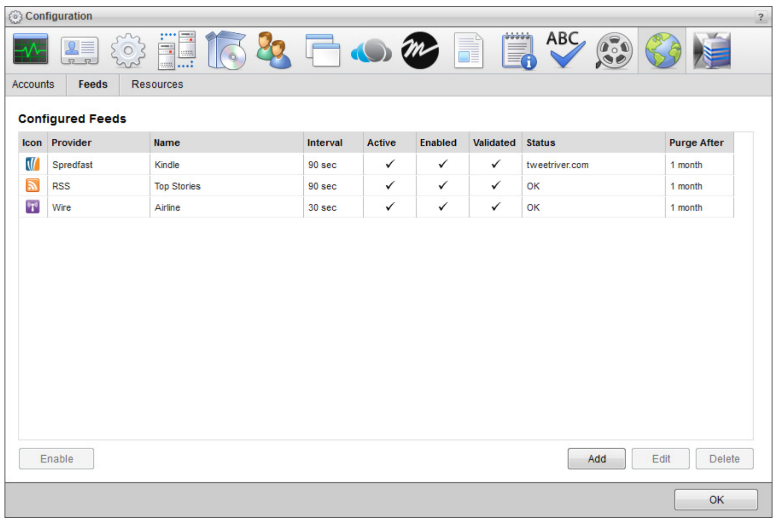
To create an RSS feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens.



3. Click **Add**.

   The **Create New Feed** settings open.

4. Use the **Feed** list to select **RSS**.
5. Click **Next**.

   The **Create RSS Feed** settings opens.

6. In the **Name** box, enter a name for the RSS feed.
7. Select the **Enabled** check box to active the feed and make it available to all users.
8. In the **URL** box, enter the URL address to access the RSS feed source.
9. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

   The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.

10. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
11. Click **Next**.

    Inception adds the new RSS feed to the list of configured feeds. To view RSS content ingested by the feed, open the feed in the **RSS Feed Viewer**.

To edit an RSS feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.

3. In the **Configured Feeds** list, select the **RSS** feed to edit.

4. Click **Edit**.

   The **Edit RSS Feed** settings open.

5. Edit feed settings as required.

   You cannot change the **URL** for an RSS feed.

6. After completing the required feed setting edits, click **Save**.

For More Information on...

- how to disable feeds, refer to the section "**Enable or Disable a Feed**" on page 19–6
- how to delete feeds, refer to the section "**Delete a Feed**" on page 19–7

Spredfast Feed Configuration

Spredfast is a social experience platform that helps brands, media and agencies involve and connect with audiences by integrating social media into their marketing and advertising efforts. Through a Spredfast feed you can ingest pre-moderated content from the Spredfast platform. Follow the procedures in this section to create or edit a feed to ingest content from the Spredfast platform.

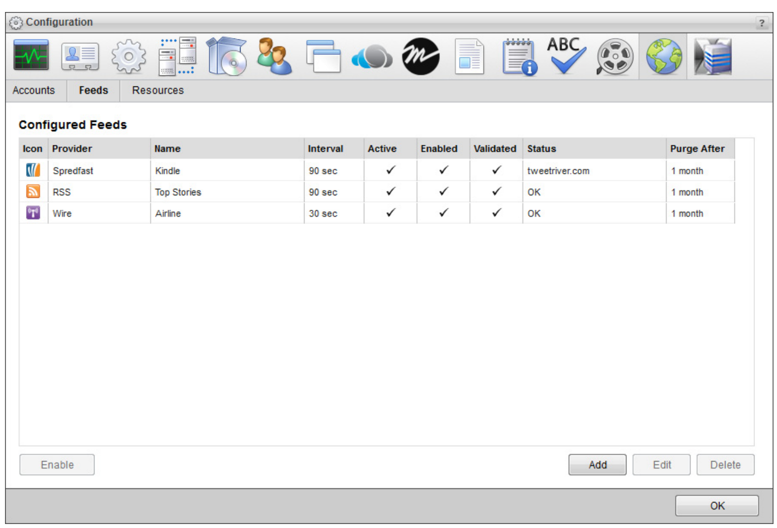
To create a Spredfast feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens.



3. Click **Add**.

   The **Create New Feed** settings open.

4. Use the **Feed** list to select **Spredfast**.
5. Click **Next**.

   The **Create Spredfast Feed** settings open.
6. In the **Name** box, enter a name for the Spredfast feed.
7. Select the **Enabled** check box to active the feed and make it available to all users.
8. In the **URL** box, enter the URL address to access the Spredfast source of the feed.
9. In the **Update Interval** box, enter the number of seconds to wait before rechecking the Spredfast **URL** for new content.
10. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

    The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.
11. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
12. Click **Next**.

    Inception adds the new Spredfast feed to the list of configured feeds. To view Spredfast content ingested by the feed, open the feed in the **Spredfast Feed Viewer**.

To edit a Spredfast feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.
3. In the **Configured Feeds** list, select the **Spredfast** feed to edit.
4. Click **Edit**.

   The **Edit Spredfast Feed** settings open.
5. Edit feed settings as required.

   You cannot change the **URL** for a Spredfast feed.
6. After completing the required feed setting edits, click **Save**.

For More Information on...

- how to disable feeds, refer to the section “**Enable or Disable a Feed**” on page 19–6
- how to delete feeds, refer to the section “**Delete a Feed**” on page 19–7

Wire Search-Based Feed Configuration

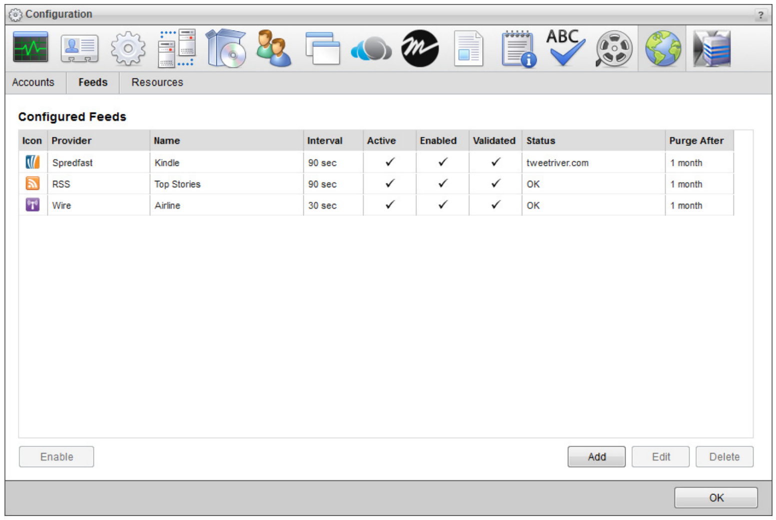
Wire feeds the ingestion of broadcast news information from various wire services. Follow the procedures in this section to create or edit a feed to ingest content from a wire services that matches a search query.

✶ To create a Wire Search-Based feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

The **Feeds** tab opens.



3. Click **Add**.

   The **Create New Feed** settings open.

4. Use the **Feed** list to select **Wire**.

5. Click **Next**.

   The **Create Wire Feed** settings opens.

6. In the **Name** box, enter a name for the Wire Search-Based feed.

7. Use the **Wire** list to select the Wire account to use as the content source for the feed.

8. Select the **Enabled** check box to active the feed and make it available to all users.

9. In the **Slug** box, enter the term or terms that slugs from the selected Wire account must contain for Inception to add the story to the Wire Search-Based feed.

10. In the **Content** box, enter the term or terms that content from the selected Wire account must contain for Inception to add the story to the Wire Search-Based feed.

11. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

    The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.

12. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.

13. In the **Categories** box, enter the category or categories that content from the selected Wire account must be part of for Inception to add the content to the feed. When you enter multiple categories, use a space or comma to separate each category.

    The **Category** column in the **Wire Feed Viewer** displays the various categories of Wire content.

14. In the **Providers** box, enter the content provider or providers that content from the selected Wire account must come from for Inception to add the content to the feed. When you enter multiple content providers, use a space or comma to separate each category.

    The **Provider** column in the **Wire Feed Viewer** displays the various providers of Wire content.

15. Use the **Minimum Urgency** list to select the minimum urgency level that content from the selected Wire account must meet for Inception to add the content to the feed.

    The most urgent content has an urgency level of **1**, while the least urgent content has an urgency level of **9**. The **Urgency** column in the **Wire Feed Viewer** displays the urgency level of Wire content.

16. Click in the **From** box to use the **Calendar** tool to select the earliest issue date for Inception to add content from the selected Wire account to the feed.

    The **Issue Date** column in the **Wire Feed Viewer** displays the issue date of Wire content.

17. Click in the **To** box to use the **Calendar** tool to select the latest issue date for Inception to add content from the selected Wire account to the feed.

    The **Issue Date** column in the **Wire Feed Viewer** displays the issue date of Wire content.

18. Select the **Send Notifications** check box to display a user notification in the message area each time Inception adds content to the Wire Search-Based feed.

19. For **AP Media** Wire accounts use the **Entitlement** list to select one or more content categories to include in the wire feed as follows:

    - **Single** — click the content category to select.
    - **Range** — click the first content category in the selection range, then **Shift-click** the last content category in the range.
    - **Multiple** — click the first content category to select, then **Ctrl-click** each additional content category to add to the selection.

20. Click **Next**.

    Inception adds the new Wire Search-Based feed to the list of configured feeds. To view Wire content ingested by the feed, open the feed in the **Wire Feed Viewer**.

To edit a Wire Search-Based feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.

3. In the **Configured Feeds** list, select the **Wire** feed to edit.

4. Click **Edit**.

   The **Edit Wire Feed** settings open.

5. Edit feed settings as required.

   You cannot change the **URL** for an RSS feed.

6. After completing the required feed setting edits, click **Save**.

For More Information on...

- how to disable feeds, refer to the section “**Enable or Disable a Feed**” on page 19–6
- how to delete feeds, refer to the section “**Delete a Feed**” on page 19–7

Enable or Disable a Feed

Inception automatically enables all new feeds that you create, and makes them available to users. When you do not want users to access information ingested by a feed, you can disable the feed to make it unavailable to users.

To disable a feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.

3. In the **Configured Feeds** list, select the feed to disable.
4. Click **Disable**.

   Inception removes the check marks from the **Active** and **Enabled** columns of selected feed.

To enable a feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.
3. In the **Configured Feeds** list, select the disabled feed to enable.
4. Click **Enable**.

   Inception adds check marks to the **Active** and **Enabled** columns of selected feed.

Delete a Feed

To delete a feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.
3. In the **Configured Feeds** list, select the feed to delete.
4. Click **Delete**.

   A confirmation dialog box opens.
5. Click **OK**.

   Inception deletes the selected searched-base feed from the list of feeds.

Configuring Web Content Resources

Web content resources enable Inception users to open web sites without leaving Inception. The web content resources that you define are added to the Resources list on the main toolbar for Inception users to access. Depending on the configuration of a web content resource, web sites open in a new browser tab or in a new Inception panel.

This chapter discusses the following topics:

- Create a Web Content Resource
- Delete a Web Content Resource

Create a Web Content Resource

Web content resources enable Inception users to open web sites without leaving Inception. The web content resources that you create are added to the Resources list on the main toolbar for Inception users to access.

To create a web content resource

1. Log in to your Inception Server as an Inception administrator.

   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

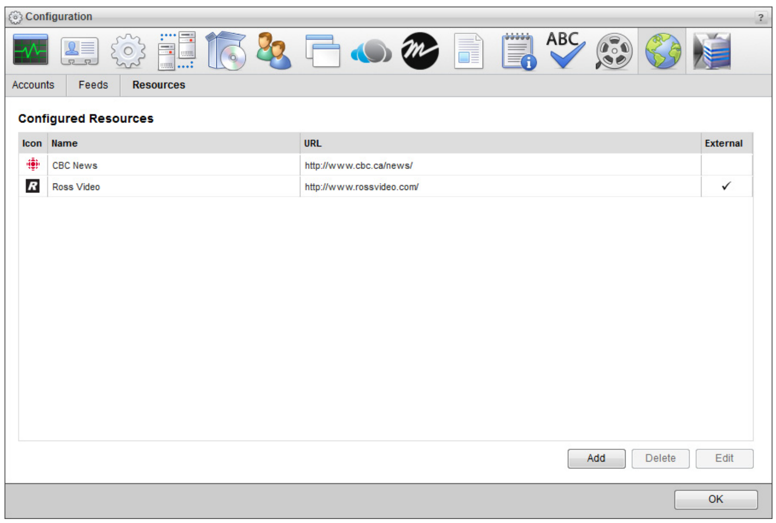
2. On the main toolbar, click the **Configuration** icon.

3. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

4. Click the **Resources** tab.

   The **Resources** tab opens.



5. Click **Add**.

   The **Create Resource** settings open.

6. In the **Name** box, enter the name to display for the web content resource in the Resources list on the main toolbar.

7. In the **URL** box, enter the web address (for example: http://www.rossvideo.com) of the web site that you want to the resource open.

8. Select the **Open in New Tab** check box to open the entered **URL** in a new web browser tab. Clear this check box to open the entered **URL** in a new Inception panel.

9. Click **Create**.

   Inception adds the new web content resource to the list of configured feeds.

To edit a web content resource

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Resources** tab.

   The **Resources** tab opens.

3. In the **Configured Resources** list, select the **web content resource** to edit.
4. Click **Edit**.

   The **Edit Resource** settings open.

5. Edit web content resource settings as required.
6. After completing the required web content resource setting edits, click **Save**.

Delete a Web Content Resource

Deleting a web content resource removes it the Resources list on the main toolbar.

To delete a web content resource

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Resources** tab.

   The **Resources** tab opens.

3. In the **Configured Resources** list, select the **web content resource** to delete.
4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Inception deletes the selected web content resource from the list of web content resources and the Resources list on the main toolbar.

Configuring DataLinq™ Server Connections

DataLinq Servers aggregate external data from XML files, RSS feeds, SMS servers, text files, or ODBC data sources and formats the output. Creating a connection to a DataLinq Server enables Inception users access DataLinq Server output.

This chapter discusses the following topics:

- Add a DataLinq Server to a Local Inception Server
- Connect an Inception Cloud Service to a DataLinq Server
- Manage DataLinq Server Fields
- Enable or Disable a DataLinq Server
- Manage DataLinq Servers

Add a DataLinq Server to a Local Inception Server

The DataLinq Server software runs on Ross XPression systems or on other computer systems to gather data from external sources. Before you add a DataLinq Server connection to your Inception Server, you will need the hostname or IP address of the DataLinq Server computer and the port number that it uses to output data.

✶ When using an Inception Cloud Service, DataLinq Servers are configured on your Ross Cloud Gateway.

To add a new DataLinq Server to a local Inception Server

1. Log in to your Inception Server as an Inception administrator.

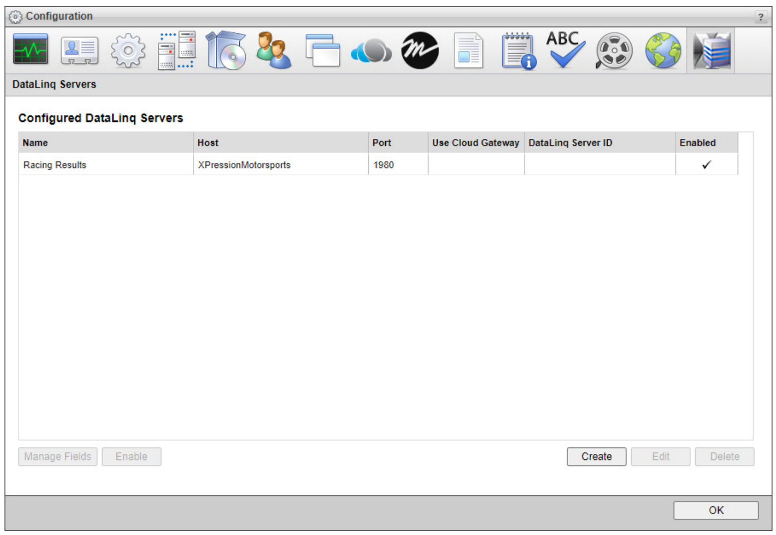
   For information about Inception Server log in, refer to the procedure “**To access the Inception Server Configuration window**” on page 2–2.

2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.

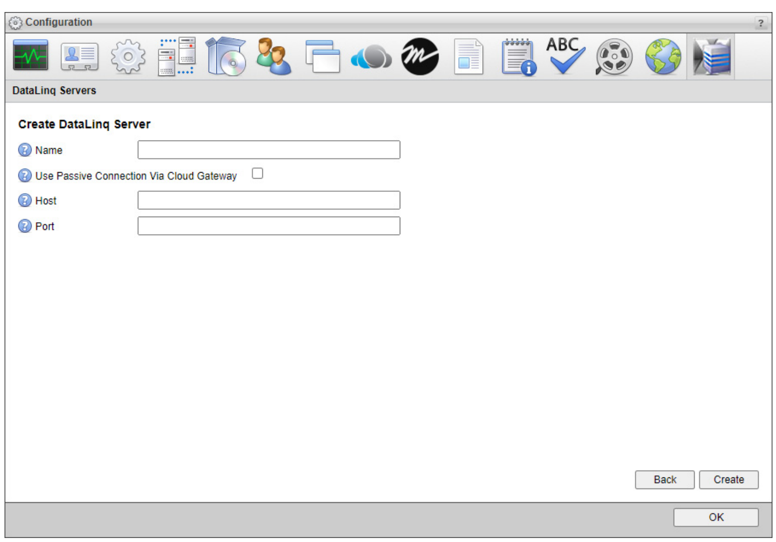
3. On the **Configuration** window toolbar, click the **DataLinq** icon.

   The **DataLinq Servers** tab opens.



4. Click **Create**.

   The **Create DataLinq Server** page opens.



5. In the **Name** box, enter a name for the DataLinq Server.
6. In the **Host** box, enter the hostname or IP address of the DataLinq Server.
7. In the **Port** box, enter the port number that the DataLinq Server uses to communicate with your Inception Server.
8. Click **Save**.

   Inception adds the new DataLinq Server to the **Configured DataLinq Servers** list.

Connect an Inception Cloud Service to a DataLinq Server

When using an Inception Cloud Service, DataLinq Servers are configured and managed on your Ross Cloud Gateway. Your Inception Cloud Service uses a unique DataLinq Server ID to connect it to a DataLinq Server configured on your Ross Cloud Gateway.

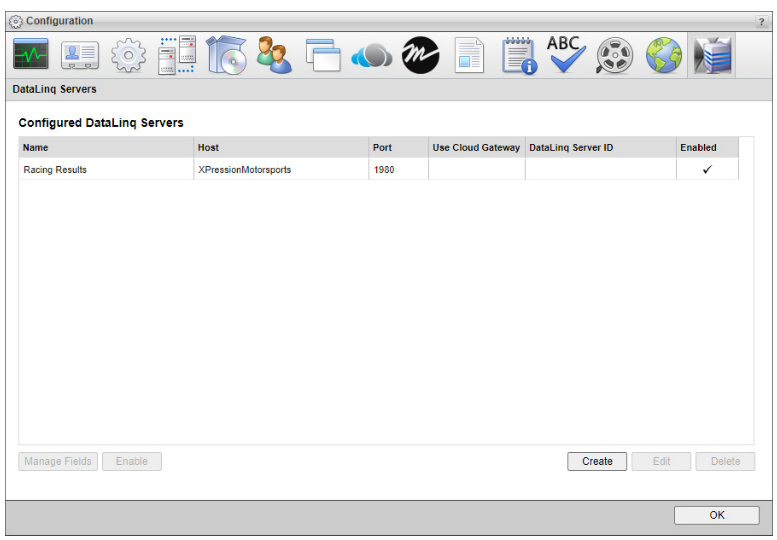
To connect your Inception Cloud Server to a DataLinq Server

1. On your **Ross Cloud Gateway**, add a DataLinq Server for your Inception Cloud Service. For more information on adding and managing DataLinq Servers to a Ross Cloud Gateway, refer the **Configuring DataLinq™ Server Connections** chapter in the ***Ross Cloud Gateway Configuration Guide***.

   Adding a DataLinq Server to your Ross Cloud Gateway closely follows the procedures used to add a DataLinq Server to a local Inception Server. a DataLinq Server on a Ross Cloud Gateway has an additional unique **DataLinq Server ID** that is used to connect it with an Inception Cloud Service.
2. Record the **DataLinq Server ID** that you set for the **DataLinq Server** you added to your Ross Cloud Gateway.
3. On your **Inception Cloud Service**, log in as an Inception administrator.
4. On the main toolbar, click the **Configuration** icon.

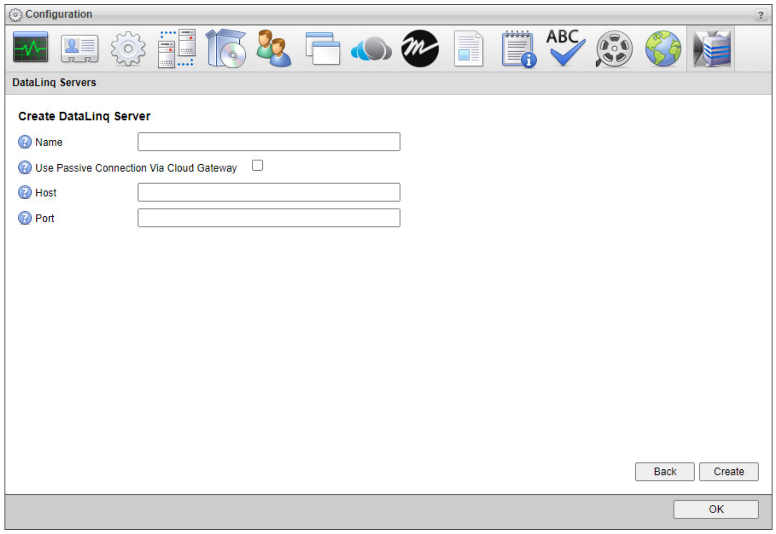
   The **Configuration** window opens.
5. On the **Configuration** window toolbar, click the **DataLinq** icon.

   The **DataLinq Servers** tab opens.



6. Click **Create**.

   The **Create DataLinq Server** page opens.



7. In the **Name** box, enter a name for the DataLinq Server.
8. Select the **Use Passive Connection Via Cloud Gateway** check box.

   Inception displays the **DataLinq Server ID** box and hides the **Host** and **Ports** boxes.
9. In the **DataLinq Server ID** box, enter the ID you recorded in step **2** on page 21-3.
10. Click **Save**.

    Inception adds the new DataLinq Server to the **Configured DataLinq Servers** list.

Manage DataLinq Server Fields

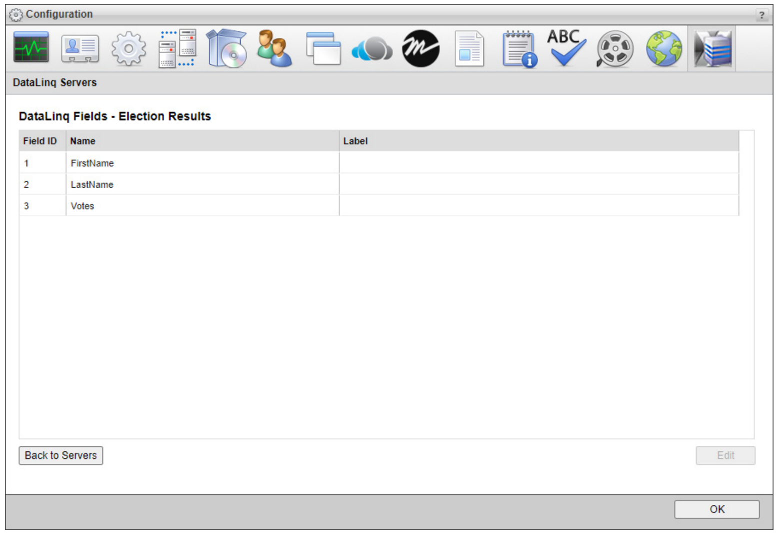
Inception enables you to customize the labels and order of the DataLinq Server fields for display in the DataLinq Viewer panel. When Inception users view DataLinq Server content in a DataLinq Viewer panel, they can choose to hide fields from the panel.

To manage DataLinq Server Fields

1. On the **Configuration** window toolbar, click the  **DataLinq** icon.

   The **DataLinq Servers** tab opens.
2. In the **Configured DataLinq Servers** list, select the DataLinq Server to manage.
3. Click **Manage Fields**.

   The **DataLinq Fields** page opens for the selected DataLinq Server.

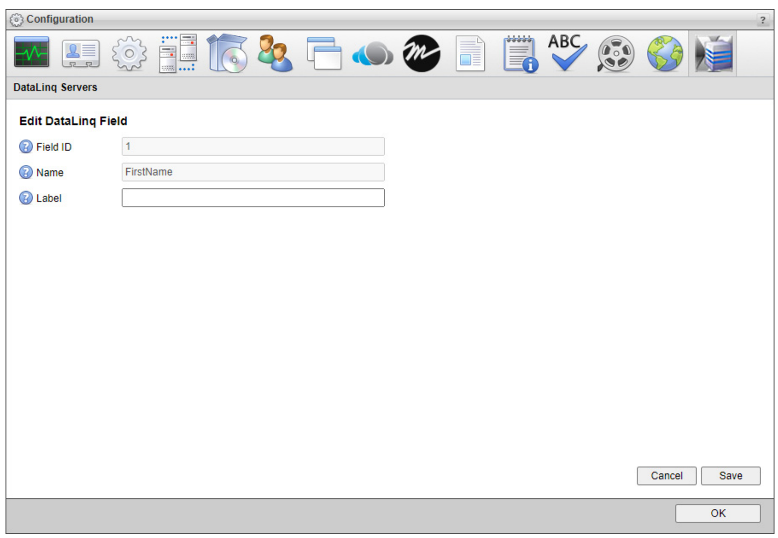


4. To edit the label displayed for a DataLinq Server field in the DataLinq Viewer panel, complete the following steps:

   a. In the **DataLinq Fields** table, select the **field** to edit.

   b. Click **Edit**.

   The **Edit DataLinq Field** page opens.



   c. In the **Label** box, enter the label to display for the selected field in the **DataLinq Viewer** panel.

   d. Click **Save**.

   The **Edit DataLinq Field** page closes, and the **DataLinq Fields** table displays the new label for the selected field.

5. To change the order that DataLinq Server fields are displayed in the DataLinq Viewer panel, complete the following steps:

   a. In the **DataLinq Fields** table, place the mouse pointer over the **field** to reposition.

   b. Click and hold on the **field** to reposition.

c. Drag the selected **field** to a new position in the **DataLinq Fields** table.

   As you drag the field in the **DataLinq Fields** table, a blue line previews the new position for the selected field.

d. When the blue line highlights the position in the **DataLinq Fields** table to place the field, release the mouse button.

   The **DataLinq Fields** table updates to show the selected field at the selected position. The **DataLinq Viewer** panel displays DataLinq Server data using the field order set in the **DataLinq Fields** table.

Enable or Disable a DataLinq Server

Inception automatically enables all new DataLinq Servers that you add, and makes them available to users. When you do not want users to access information from a DataLinq Server, you can disable the server to make it unavailable to users.

To disable a DataLinq Server

1. On the **Configuration** window toolbar, click the **DataLinq** icon.

   The **DataLinq Servers** tab opens.

2. In the **Configured DataLinq Servers** list, select the DataLinq Server to disable.
3. Click **Disable**.

   Inception removes the check mark from the **Enabled** column of selected DataLinq Server.

To enable a DataLinq Server

1. On the **Configuration** window toolbar, click the **DataLinq** icon.

   The **DataLinq Servers** tab opens.

2. In the **Configured DataLinq Servers** list, select the disabled DataLinq Server to enable.
3. Click **Enable**.

   Inception adds a check mark to the **Enabled** column of selected DataLinq Server.

Manage DataLinq Servers

You can manage configured DataLinq Servers by either editing server settings or deleting the server from your Inception Server.

Edit a DataLinq Server

You can edit the name, host, and port of configured DataLinq Servers.

To edit a DataLinq Server

1. On the **Configuration** window toolbar, click the **DataLinq** icon.

   The **DataLinq Servers** tab opens.

2. In the **Configured DataLinq Servers** list, select the **DataLinq Server** to edit.
3. Click **Edit**.

   The **Edit DataLinq Server** page opens.

4. Edit settings on the **Edit DataLinq Server** page as required.
5. After completing the required DataLinq Server setting edits, click **Save**.

Delete a DataLinq Server

When you no longer require to access to data from a DataLinq Server, you can delete the DataLinq Server.

To delete a DataLinq Server

1. On the **Configuration** window toolbar, click the **DataLinq** icon.

   The **DataLinq Servers** tab opens.

2. In the **Configured DataLinq Servers** list, select the **DataLinq Server** to delete.

3. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected DataLinq Server. To keep a DataLinq Server, click **Cancel**.

4. In the confirmation message, click **OK**.

   Inception deletes the selected DataLinq Server from the **Configured DataLinq Servers** list.

5. Click **OK** to close the **Configuration** window.

Importing Contacts

Inception contains a built-in contact manager that enables Inception user to keep track of the contacts that they consult while developing content for an assignment. Through the Contact Manager you can quickly import contacts from a Comma Separated Values (CSV) file into a global contact list shared by all Inception users.

✶ You require an NCS license for your Inception Server to use the Contact Manager. Please contact Ross Video to purchase an NCS license for your Inception Server.

This chapter discusses the following topics:

- Contact Import File Format
- Import Contacts

Contact Import File Format

The name of the contact import file must contain the extension .csv. The first line in a contact import file must contain one or more of the following column headings:

- First Name
- Last Name
- Title
- Department
- Company
- E-mail
- Phone
- Mobile
- Fax
- Office
- Address
- Address Two
- City
- State
- Postal Code
- Country
- Notes

Column heading names must not contain extra whitespace, for example:

“First Name” — works, no extra whitespace.

“First Name   ” — does not work, you must remove the trailing whitespace.

✶ When you import contacts from a file into the Contact Manager, Inception ignores any contact information contained in columns with headings other than the listed columns.

Import Contacts

✶ You cannot use mobile devices to import contacts into the Contact Manager.

To import contacts into the Contact Manager

1. Gather the contacts that you want to import into Inception in an **Comma Separated Values (CSV)** file.

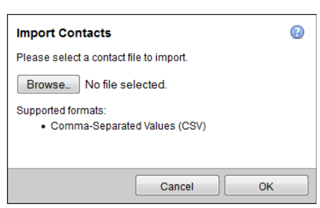
   The name of the contact import file must contain the extension `.csv`, and the first line in the file must contain one or more of the column headings listed in the **“Contact Import File Format”** section.

2. From the main toolbar, click the **Contact Manager** icon.

   The **Contact Manager** panel opens.

3. From the **Contact Manager** toolbar, click the **Import Contacts** icon.

   The **Import Contacts** dialog box opens.



4. Click **Browse**.

   The **File Upload** dialog box opens displaying the local file system of your computer.

5. Locate and select the **Comma Separated Values (CSV)** file that contains the contacts that you want to import into the **Contacts Manager**.

6. Click **Open**.

   The **File Upload** dialog box closes, and the **Import Contacts** dialog box displays the name of the selected file.

✶ Importing contacts from a file does not replace contacts in the Contact Manager that have the same information. Inception will create duplicate contacts with the information imported from a file.

7. In the **Import Contacts** dialog box, click **OK**.

   The **Import Contacts** dialog box closes, and Inception imports the contacts contained in the selected file into the **Contact Manager**. Inception displays the new contacts in the **Contact Manager** panel.

For More Information on...

- managing and working with contacts, refer to the chapter “**Managing Your Contacts**” on page 15–1. of the ***Inception User Guide***.

Appendix A. Regular Expressions

The sections in this appendix describe how to write regular expressions.

The following topics are discussed:

- What are Regular Expressions?
- Rules of Writing Regular Expressions
- Meta Characters with Pre-defined Meaning
- Quantifiers

What are Regular Expressions?

A regular expression defines a search pattern for strings. You can use regular expressions to search, edit, and manipulate text. Regex is the abbreviation for regular expression. A search pattern can be a simple character, a fixed string, or a complex expression containing special characters describing the pattern. A pattern defined by the regex may match once, several times, or not at all for a given string.

The pattern defined by the regex is applied on the text from left to right. Once a source character is used in a match, it cannot be reused. For example, the regex aba will match ababababa only two times (aba_aba__).

✶ By default, the comparison of text with any literal characters in a regex pattern is case sensitive, white space in a regular expression pattern is interpreted as literal white-space characters.

Regular Expression Examples

A simple example for a regular expression is a (literal) string. For example, the Hello World regex will match the "Hello World" string. A "." (dot) is another example for a regular expression. A dot matches any single character, for example: "a", "z", or "1".

The following table lists example regular expressions and describes the pattern they would match.

Table A.1 Regex Examples

Regular Expression	Matches
`this is text`	Matches exactly "this is text".
`this\s+is\s+text`	Matches the word "this" followed by one or more whitespace characters followed by the word "is" followed by one or more whitespace characters followed by the word "text".
`^\d+(\.\d+)?`	^ defines that the patter must start at beginning of a new line. \d+ matches one or several digits. The ? makes the statement in brackets optional. \. matches ".", parentheses are used for grouping. Matches for example "5", "1.5" and "2.21".

Rules of Writing Regular Expressions

The following table lists the meta characters that you can be use in regular expressions.

Table A.2 Regex Meta Characters

Regular Expression	Matches
.	Matches any character.
^regex	Finds regex that must match at the beginning of the line.
regex$	Finds regex that must match at the end of the line.
[abc]	Set definition, can match the letter a or b or c.
[abc][vz]	Set definition, can match a or b or c followed by either v or z.
[^abc]	When a caret appears as the first character inside square brackets, it negates the pattern. This pattern matches any character except a or b or c.
[a-d1-7]	Ranges: matches a letter between a and d and figures from 1 to 7, but not d1.
X|Z	Finds X or Z.
XZ	Finds X directly followed by Z.
$	Checks if a line end follows.

Meta Characters with Pre-defined Meaning

The following meta characters have a pre-defined meaning and make certain common patterns easier to use.

Table A.3 Meta Characters with Pre-defined Meaning

Regular Expression	Matches
\d	Any digit, short for [0-9].
\D	A non-digit, short for [^0-9].
\s	A whitespace character, short for [\t\n\x0b\r\f].
\S	A non-whitespace character, short for [^\s].
\w	A word character, short for [a-zA-Z_0-9].
\W	A non-word character [^\w].
\S+	Several non-whitespace characters.
\b	Matches a word boundary where a word character is [a-zA-Z0-9_].

Quantifiers

A quantifier defines how often an element can occur. The symbols ?, *, + and {} define the quantity of the regular expressions.

Table A.4 Regex Quantifiers

Regular Expression	Description	Example
`*`	Occurs zero or more times, short for {0,}.	X* finds no or several letter X. .* finds any character sequence.
`+`	Occurs one or more times, short for {1,}.	X+ finds one or several letter X.
`?`	Occurs no or one times, ? short for {0,1}.	X? finds no or exactly one letter X.
`{X}`	Occurs X number of times, {} describes the order of the preceding liberal.	\d{3} searches for three digits. .{10} searches for any character sequence of length 10.
`{X,Y}`	Occurs between X and Y times.	\d{1,4} means \d must occur at least once and at a maximum of four.
`*?`	? after a quantifier makes it a reluctant quantifier. It tries to find the smallest match. This makes the regular expression stop at the first match.	

Appendix B. Software Licenses

Your Ross Video product uses software covered by one or more of the licenses described in this document.

✶ As required by the GNU General Public License, and the Lesser GNU Public License (LGPL), source code can be obtained from Ross Video for at least 3 years. Contact Ross Video Technical Support for more information.

The following licenses are contained in this appendix:

- GNU LESSER GENERAL PUBLIC LICENSE 2.1
  - Germany (Deutseland) dictionary
- GNU LESSER GENERAL PUBLIC LICENSE 3
  - English (British) dictionary
  - Dutch dictionary
  - Swedish dictionary
- GNU GENERAL PUBLIC LICENSE 2.0
  - Portuguese (Portugal) dictionary
  - Portuguese (Brazilian) dictionary
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Version 2.1, February 1999

[This is the first released version of the Lesser GPL. It also counts
 as the successor of the GNU Library Public License, version 2, hence
 the version number 2.1.]

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A "library" means a collection of software functions and/or data prepared so as to be conveniently linked with application programs (which use some of those functions and data) to form executables.

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Thus, it is not the intent of this section to claim rights or contest your rights to work written entirely by you; rather, the intent is to exercise the right to control the distribution of derivative or collective works based on the Library.

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This option is useful when you wish to copy part of the code of the Library into a program that is not a library.

4. You may copy and distribute the Library (or a portion or derivative of it, under Section 2) in object code or executable form under the terms of Sections 1 and 2 above provided that you accompany it with the complete corresponding machine-readable source code, which must be distributed under the terms of Sections 1 and 2 above on a medium customarily used for software interchange.

If distribution of object code is made by offering access to copy from a designated place, then offering equivalent access to copy the source code from the same place satisfies the requirement to distribute the source code, even though third parties are not compelled to copy the source along with the object code.

5. A program that contains no derivative of any portion of the Library, but is designed to work with the Library by being compiled or linked with it, is called a "work that uses the Library". Such a work, in isolation, is not a derivative work of the Library, and therefore falls outside the scope of this License.

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If such an object file uses only numerical parameters, data structure layouts and accessors, and small macros and small inline functions (ten lines or less in length), then the use of the object file is unrestricted, regardless of whether it is legally a derivative work. (Executables containing this object code plus portions of the Library will still fall under Section 6.)

Otherwise, if the work is a derivative of the Library, you may distribute the object code for the work under the terms of Section 6. Any executables containing that work also fall under Section 6, whether or not they are linked directly with the Library itself.

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Version 3, 29 June 2007

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Version 2, June 1991

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2. You may modify your copy or copies of the Program or any portion of it, thus forming a work based on the Program, and copy and distribute such modifications or work under the terms of Section 1 above, provided that you also meet all of these conditions:

a) You must cause the modified files to carry prominent notices stating that you changed the files and the date of any change.

b) You must cause any work that you distribute or publish, that in whole or in part contains or is derived from the Program or any part thereof, to be licensed as a whole at no charge to all third parties under the terms of this License.

c) If the modified program normally reads commands interactively when run, you must cause it, when started running for such interactive use in the most ordinary way, to print or display an announcement including an appropriate copyright notice and a notice that there is no warranty (or else, saying that you provide a warranty) and that users may redistribute the program under these conditions, and telling the user how to view a copy of this License. (Exception: if the Program itself is interactive but does not normally print such an announcement, your work based on the Program is not required to print an announcement.)

These requirements apply to the modified work as a whole. If identifiable sections of that work are not derived from the Program, and can be reasonably considered independent and separate works in themselves, then this License, and its terms, do not apply to those sections when you distribute them as separate works. But when you distribute the same sections as part of a whole which is a work based on the Program, the distribution of the whole must be on the terms of this License, whose permissions for other licensees extend to the entire whole, and thus to each and every part regardless of who wrote it.

Thus, it is not the intent of this section to claim rights or contest your rights to work written entirely by you; rather, the intent is to exercise the right to control the distribution of derivative or collective works based on the Program.

In addition, mere aggregation of another work not based on the Program with the Program (or with a work based on the Program) on a volume of a storage or distribution medium does not bring the other work under the scope of this License.

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a) Accompany it with the complete corresponding machine-readable source code, which must be distributed under the terms of Sections 1 and 2 above on a medium customarily used for software interchange; or,

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