

***streamline*** 

---

**User Guide**

**Version 5.1**

**ROSS**

# 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](mailto:solutions@rossvideo.com).



David Ross  
CEO, Ross Video  
[dross@rossvideo.com](mailto: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.)*

# Streamline · User Guide

- Ross Part Number: **7800DR-004-5.1**
- Release Date: January 12, 2021. Printed in Canada.
- Software Issue: **5.1**

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

## Copyright

© 2014 - 2020 Ross Video Limited. Ross® and any related marks are trademarks or registered trademarks of Ross Video Limited. All other trademarks are the property of their respective companies. PATENTS ISSUED and PENDING. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, mechanical, photocopying, recording or otherwise, without the prior written permission of Ross Video. While every precaution has been taken in the preparation of this document, Ross Video assumes no responsibility for errors or omissions. Neither is any liability assumed for damages resulting from the use of the information contained herein.

## 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 Streamline 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

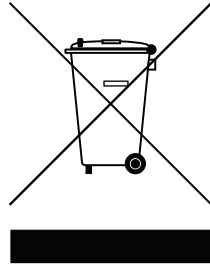
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Streamline Server system, contact your regional sales manager.

## 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

**Ross Video Limited**

8 John Street  
Iroquois, Ontario  
Canada, K0E 1K0

**Ross Video Incorporated**

P.O. Box 880  
Ogdensburg, New York  
USA 13669-0880

---

General Business Office: (+1) 613 • 652 • 4886

Fax: (+1) 613 • 652 • 4425

Technical Support: (+1) 613 • 652 • 4886

After Hours Emergency: (+1) 613 • 349 • 0006

E-mail (Technical Support): [techsupport@rossvideo.com](mailto:techsupport@rossvideo.com)

E-mail (General Information): [solutions@rossvideo.com](mailto:solutions@rossvideo.com)

Website: <http://www.rossvideo.com>



# Contents

<b>Introduction</b>	<b>1</b>
A Word of Thanks .....	1-1
About This Guide .....	1-2
Documentation Conventions .....	1-2
Interface Elements .....	1-2
User Entered Text .....	1-2
Referenced Guides .....	1-2
Menu Sequences .....	1-2
Important Instructions .....	1-3
Getting Help .....	1-3
Contacting Technical Support .....	1-3
<b>Getting Started</b>	<b>2</b>
Supported Formats .....	2-2
Thumbnail Viewing .....	2-2
Video Playout .....	2-2
Metadata Collection .....	2-2
Start Streamline .....	2-2
Streamline Workflow .....	2-3
Manage Assets .....	2-3
Search for Assets .....	2-3
Use Work Orders .....	2-4
Run Reports .....	2-4
Exploring the Streamline User Interface .....	2-5
Main Toolbar .....	2-5
Assets Panel .....	2-6
Upload Panel Overview .....	2-8
Asset Editor Panel Overview .....	2-8
Asset Approvals Panel .....	2-9
Work Orders Panel .....	2-10
Work Order Editor Panel Overview .....	2-11
Tasks Panel .....	2-12
Message Manager User Panel .....	2-12
Message Manager Conversations Panel .....	2-12
Chat Panel .....	2-13
Conversation Panel .....	2-13
Report Manger Panel .....	2-14
Panel Positions and Perspectives .....	2-14
Default Panel Positions .....	2-15
Move a Panel from One Layout Position to Another .....	2-15
Rearrange Panel Tabs Within a Layout Position .....	2-16
Navigating within Panels .....	2-16

## Managing Assets 3

Metadata Overview .....	3-2
Uploading Media Files to Create Assets .....	3-2
Uploading Media Through the Upload Panel .....	3-2
Uploading Assets to a Selected Folder .....	3-4
Approving Assets on Ingest .....	3-6
Uploading Media Files Through a Watch Folder .....	3-6
Creating Placeholder Assets .....	3-7
Fulfilling Placeholder Assets Through the EVO ShareBrowser .....	3-7
Editing Asset Metadata .....	3-8
Asset Editor Panel .....	3-8
Assets Panel .....	3-9
Take the Asset Lock from the User Editing an Asset .....	3-10
Previewing the Essence of an Asset .....	3-12
Updating the Essence of an Asset .....	3-12
Downloading the Essence of an Asset .....	3-13
Deleting Assets .....	3-14
Organizing Assets in Folders .....	3-14
Adding Folders to the Folders Tree View .....	3-14
Moving Assets into Folders .....	3-15
Managing Folders in the Folders Tree View .....	3-15
Using the Folders Tree View to List Assets .....	3-16
Linking Assets .....	3-17
Requesting Approval for an Asset .....	3-18
Requesting Asset Approval on Ingest .....	3-18
Approving or Rejecting Assets .....	3-19
Approving or Rejecting Assets Through the Asset Editor Panel .....	3-19
Approving or Rejecting Multiple Assets Through the Asset Approvals Panel .....	3-20
Sending Assets to File Storages .....	3-21
Viewing the Assets that are Suitable for a Storage .....	3-21
Sending an Asset to a File Storage .....	3-21
Setting the Master Essence Media File for an Asset .....	3-22
Add Thumbnails, Proxies, and Video Formats to Assets .....	3-23

## Managing Work Orders 4

Work Order Editor Panel Overview .....	4-2
Details Tab .....	4-2
Attachments Tab .....	4-2
Comments Tab .....	4-2
Creating a Work Order .....	4-2
Adding Assets to a Work Order .....	4-4
Editing a Work Order .....	4-6
Delete Assets from a Work Order .....	4-6
Attaching Files to a Work Order .....	4-6
Deleting Attachments .....	4-8
Adding Comments to a Work Order .....	4-8
Completing a Work Order .....	4-8
Deleting a Work Order .....	4-9

<b>AP Media Feeds</b>	<b>5</b>
View the Content in an AP Media Feed .....	5-2
Edit a Search-Based Feed .....	5-3
AP Media One-Time Searches .....	5-5
Create an AP Media One-Time Search .....	5-5
Edit an AP Media One-Time Search .....	5-7
Save an AP Media One-Time Search .....	5-8
Download AP Media Content .....	5-8
Approve a Requested Download .....	5-10
<b>MGN Online Feeds</b>	<b>6</b>
View the Content in an MGN Online Feed .....	6-2
Edit a Search-Based Feed .....	6-3
MGN Online One-Time Searches .....	6-4
Create an MGN Online One-Time Search .....	6-5
Edit an MGN Online One-Time Search .....	6-6
Save an MGN Online One-Time Search .....	6-7
Download MGN Online Content .....	6-7
<b>Searching Streamline</b>	<b>7</b>
Using the Search Toolbar .....	7-2
Filtering the Quick Search Results .....	7-2
Using the Search Editor .....	7-3
Search by Metadata Elements .....	7-4
Search by Date .....	7-5
Saving Searches .....	7-6
Running a Saved Search .....	7-6
Editing a Search .....	7-6
<b>Reporting</b>	<b>8</b>
Create a Report .....	8-2
Standard Report .....	8-3
Row Count Report .....	8-4
Create a Template from a Report .....	8-5
Run a Report .....	8-6
Edit a Report .....	8-8
Export Report Results to a CSV File .....	8-8
Delete a Report .....	8-9
<b>Messaging</b>	<b>9</b>
Set Your Messaging Status .....	9-2
Chat with Another User .....	9-3
Invite Users to a Conversation .....	9-4
Manage a Conversation .....	9-5
Manage Message Notifications .....	9-6
Filter Messages .....	9-7
Send Files as Message Attachments .....	9-7
Download Session Transcripts .....	9-8

<b>Configuring Streamline</b>	<b>10</b>
Changing Your Streamline Password .....	10-2
Working with Perspectives .....	10-2
Open a Saved Perspective .....	10-3
Create a New Perspective .....	10-3
Rename a Perspective .....	10-4
Change the Layout of a Perspective .....	10-5
Revert a Perspective to the Default Layout .....	10-5
Delete a Perspective .....	10-7

<b>Appendix A: Hotkeys</b>	<b>A</b>
General User Interface .....	A-2
Asset Approvals Panel .....	A-2
Assets Panel .....	A-2
Asset Editor Panel .....	A-3
Work Orders Panel .....	A-3
Work Order Editor Panel .....	A-3
AP Media Feed View Panel .....	A-3
AP Media Item Viewer Panel .....	A-3
MGN Online Feed View Panel .....	A-4
MGN Online Item Viewer Panel .....	A-4

<b>Appendix B: Mapping Profiles</b>	<b>B</b>
Default File Mappings .....	B-2
Dublin Core .....	B-3

<b>Glossary of Terms</b>	<b>C</b>
--------------------------	----------

# Introduction

## A Word of Thanks

Thank you for choosing Ross Video Streamline as your media asset 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](mailto:techsupport@rossvideo.com).

We hope that you visit our website [www.rossvideo.com](http://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 is more than happy to provide further information on the plans available. Members of our sales team will promptly response to e-mails sent to: [solutions@rossvideo.com](mailto:solutions@rossvideo.com).

Again, thank you for your purchase of a Streamline media asset management solution from Ross Video. We are confident of your future pleasure with your choice.

Yours Sincerely,

A handwritten signature in black ink that reads "Chris Kelly". The signature is written in a cursive, slightly slanted style.

Christopher Kelly  
Marketing Product Manager – Asset Management & Storage  
[ckelly@rossvideo.com](mailto:ckelly@rossvideo.com)

## About This Guide

This guide contains the following chapters that cover the use of the Streamline media asset management system:

1. **Introduction** — summarizes the guide and provides important terms, and conventions.
2. **Getting Started** — provides instructions on how to log into the Streamline interface, summarizes the interface, and how to personalize the layout of the Streamline panel layouts.
3. **Managing Assets** — describes the Assets panel and its components, how to update metadata associated with an asset, sharing files via Streamline, and deleting assets.
4. **Managing Work Orders** — describes how to create, edit, and approve requests for assets.
5. **AP Media Feeds** — describes how to gather and purchase content from the Associated Press Media media service.
6. **MGN Online Feeds** — describes how to gather and purchase content from the MGN Online media service.
7. **Searching Streamline** — provides instructions on the ways to search assets, work orders, and report results in the Streamline system.
8. **Reporting** — describes how to specify criteria to create and run reports to analyze the Streamline system.
9. **Messaging** — describes how to communicate with one or multiple users on the same Streamline system.
10. **Configuring Streamline** — provides instructions on how to configure Streamline for your organization.
11. **Appendix A: Hotkeys** — lists the hotkeys that you can use to quickly execute Streamline commands.
12. **Appendix B: Mapping Profiles** — describes media file metadata properties to Streamline properties mappings contained the mapping profiles included with a Streamline system.

If you have questions pertaining to the operation of Streamline, please contact us at the numbers listed in the section “**Contacting Technical Support**”. Our technical staff is always available for consultation, training, or service.

## Documentation Conventions

Special text formats are used in this guide to identify parts of the user interface, text that a user must enter, or a sequence of menus and sub-menus that must be followed to reach a particular command.

### Interface Elements

Bold text is used to identify a user interface element such as a dialog box, menu item, or button. For example:

In the **Assets panel**, click **Delete**.

### User Entered Text

Courier text is used to identify text that a user must enter. For example:

In the **Language** box, enter **English**.

### Referenced Guides

Italic text is used to identify the titles of referenced guides, manuals, or documents. For example:

For more information, refer to the section “**User Role Configuration**” in the *Streamline Configuration Guide*.

### Menu Sequences

Menu arrows are used in procedures to identify a sequence of menu items that you must follow. For example, if a step reads “**File > Save As**,” you would click the **File** menu and then click **Save As**.

## Important Instructions

Star icons are used to identify important instructions or features. For example:

- ★ After upgrading Streamline software, you must obtain feature licenses from Ross Video Technical Support before users can access Streamline features.

## Getting Help

The Ross Video product Online Help system is accessed by selecting **Help Topics** from the **Help** menu in the product. Alternatively, press the **F1** key while working in a client or dialog box.

The Online Help system contains the following navigation tabs to locate information contained in the Online Help topics and *User Guide*:

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

Ross Video product guides are also supplied as print-ready PDF files on the Ross Video product 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: +1-613-652-4886

Toll free within North America: +1 844-652-0645

### EMEA

Our EMEA center is located in Buckinghamshire, England, United Kingdom and 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.

Our telephone number is: +44 (0)1189502446

International toll free: +800 1005 0100

### Emergency After-hours Support

Our telephone number is: +1-613-349-0006

Toll free within North America: +1 844-652-0645

International toll free: +800 1005 0100

## Online

E-mail: [techsupport@rossvideo.com](mailto:techsupport@rossvideo.com)

Website: use the link <http://www.rossvideo.com/support/tech-support.html> to open a support request.

# Getting Started

Streamline by Ross Video is a comprehensive asset management platform that allows you to organize, search, approve, collaborate, distribute and archive your digital media content. Streamline enables you to quickly review, approve, and manage assets through a single user interface over the Internet - anywhere, anytime.

The following topics are discussed in this chapter:

- Supported Formats
- Start Streamline
- Streamline Workflow
- Exploring the Streamline User Interface
- Panel Positions and Perspectives

## Supported Formats

The following sections describe the media formats supported by the Streamline system.

### Thumbnail Viewing

Streamline supports the following image formats for thumbnail viewing:

- BMP
- GIF
- JPG
- PNG
- TGA
- TIF
- WBMP

A PNG thumbnail is generated when Streamline encounters one of the support formats. This thumbnail is scaled down to fit within a 256x144 image.

### Video Playback

Streamline supports video playback within your web browser using Flowplayer for the following formats:

**Table 2.1 Supported Video Formats for Playback**

Format	Video Codec	Audio Codec
F4V	H.264	AAC
FLV	Sorenson H.263	MP3
MP4	H.264	AAC

### Metadata Collection

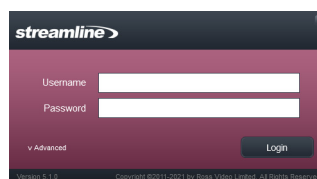
Streamline supports the gathering of structural metadata using the MediaInfo tool. Refer to the MediaInfo website for a list of analytics and supported file formats.

## Start Streamline

### To start Streamline

1. Use one of the following supported web browsers to open the Streamline web page provided by your Streamline administrator:
  - Microsoft Internet Explorer® version 11 or greater
  - Google Chrome™ 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, type your Streamline login credentials in the **Username** and **Password** boxes.
3. Click **Login**.

Streamline opens.

- ★ If a message indicates that the system is in maintenance mode, a system administrator must establish a database connection before you can log in as a Streamline user.

#### To close Streamline

- On the main toolbar, click the  **Logout** icon.

## Streamline Workflow

You can use Streamline to manage marketing or sales related materials, digital media used for production, and as an archive of media in a central location that can be accessed only by specified users with required permissions.

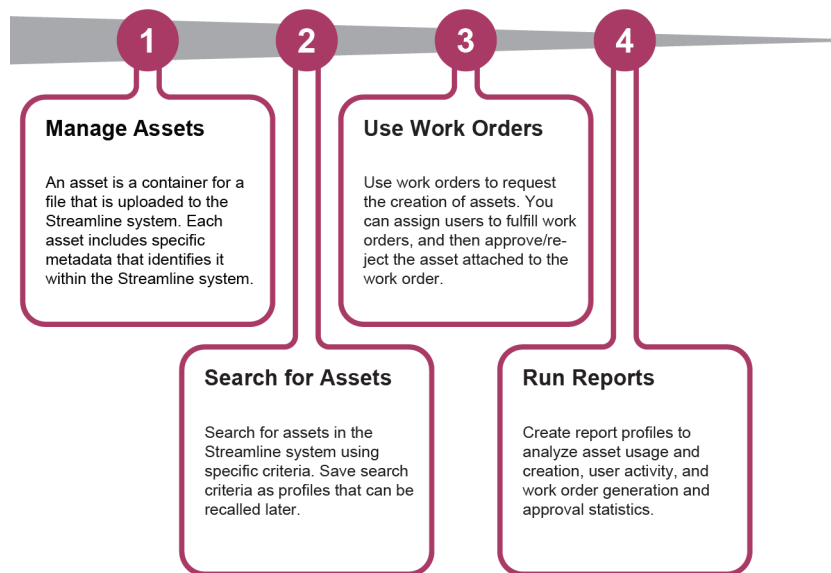


Figure 2.1 Streamline Workflow

### Manage Assets

Users with permissions can upload, modify, and delete assets in the Streamline system. Assets can be stored to local drives on the Streamline system, or to drives mapped through the file system.

### Search for Assets

Each asset includes metadata that helps identify it in the Streamline system. This metadata can be ported from the media file attached to the asset or supplied by users. Search the Streamline system for metadata elements and save the criteria as search profiles that can be recalled by all users or specific users with permissions. Search profiles also help identify assets that you may need but are currently unavailable in the Streamline system.

## Use Work Orders

If an asset doesn't exist, just create a work order with the necessary information.

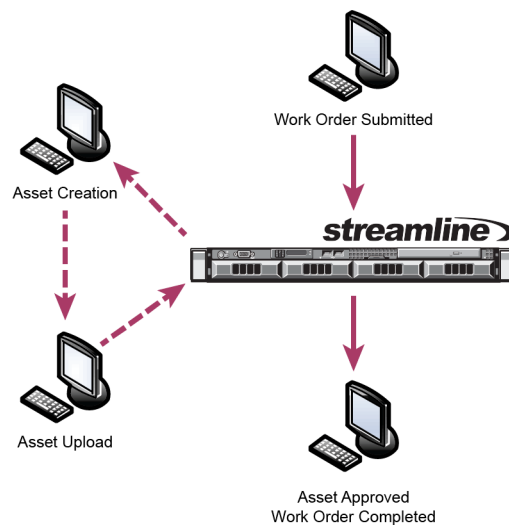


Figure 2.2 Work Order Workflow

### Work Order Submitted

A user submits a work order that provides the requirements of the new asset including type, (e.g. a still, rendered animation clip, or 3D model) due date, assignees, priority, desired file format, and air date. An e-mail is sent to the selected assignees, notifying them that a work order is submitted. A placeholder for the asset is created in the Streamline system using the details provided in the work order.

### Asset Creation

Assignees (artists) will be able to view their assigned work orders in Streamline and have access to notes and criteria from the journalist or editor who submitted the work order. The assignee creates the media file in an external application and saves it to central storage.

### Asset Upload

The assignee uploads the media file(s) into the Streamline system manually. Metadata is automatically ingested from the uploaded file, or the assignee can add metadata via the Streamline interface.

### Asset Approved

Users with the required permissions view and approve the asset. The work order is automatically marked as completed in the Streamline system once the asset is approved.

## Run Reports

Reports enable you to track and manage how the Streamline system is used such as:

- Number of work orders grouped by users who created them
- Number of assets ingested, by user, over a specified time period
- Total number of assets in the Streamline system with a breakdown by file format and file size
- Artist time-tracking that analyzes average work order processing time

The report results are display in a graphical layout which is user defined (e.g. bar graph, pie chart, or line graph) and can be automatically updated as often as required (e.g. every hour or every 10 minutes). Save your report criteria as a report profile that can be quickly recalled by Streamline user with permissions.

## Exploring the Streamline User Interface

The Streamline user interface consists of a main toolbar and several types of workspace panels that open as required.

### Main Toolbar

The main toolbar is located at the top of the Streamline interface. The icons in the main toolbar enable you to open workspace panels to access almost all features of Streamline. The icons that you access from the main toolbar depend on the features your organization purchased and the user permissions that your Streamline administrator assigned to your user account.

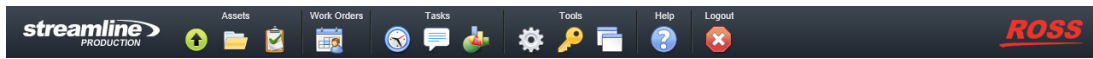


Figure 2.3 Streamline Main Toolbar

The main toolbar contains the following icons:

Table 2.2 Main Toolbar Icons

Icon	Name	Description
	Upload	Opens the Upload panel which enables you to select file(s) to copy from a specific location (e.g. your computer) to the Streamline system.
	Browse	Opens the Assets panel. The assets displayed in the panel are determined by the last search criteria used in the panel.
	Approvals	Opens the Asset Approvals panel and displays the assets and work orders currently pending your approval.
	Work Orders	Opens the Work Orders panel that enables you to submit requests for asset creation.
	Tasks	Opens the Tasks panel to monitor the status of running and completed tasks on the Streamline Server.
	Messaging	Opens the Messaging Manager panel to monitor the online status of users on a Streamline Server, create new conversations, and manage the conversations in which you are involved.
	Report Manager	Opens the Reports panel that enables you to create, recall, and run reports using specific criteria.
	Configuration	Opens the Configuration interface which provides options such as setting up network connections, user permissions, installing license keys, work order parameters, and database setup.
	Change Password	Enables you to change the password you use to log into Streamline.
	Perspectives	Enables you to switch to a different layout (perspective), or to manage saved perspectives available in the Streamline system.
	Help	Opens the Help system.
	Logout	End your current session and log out of the Streamline system.

## Assets Panel






The Assets panel lists assets in a table or tile layout, allowing you to quickly access individual assets or search the Streamline system for specific assets. From the Assets panel you can select assets to upload, delete, modify, and share files. A thumbnail represents the asset in the panel. If the asset is a still, a thumbnail of the image is displayed. If an image is not available for the asset thumbnail, an icon containing the name of the file extension is displayed. If an asset is currently associated with a work order and does not yet have an associated file, a placeholder icon is displayed in the Assets panel until a file is associated with it.

### For More Information on...

- adding an asset to the Streamline system, refer to the section “**Uploading Media Files to Create Assets**” on page 3–2.





The Assets panel toolbar contains following icons:

**Table 2.3 Assets Panel Toolbar Icons**

Icon	Name	Description
	Download	Downloads the selected asset to your computer.
	Delete	Deletes the selected asset from the Streamline system. You must have permission to delete assets.
	Edit Mode Enabled	Indicates that the ability to edit asset metadata in the Assets table is currently enabled. Click the icon to disable edit mode.
	Edit Mode Disabled	Indicates that the ability to edit asset metadata in the Assets table is currently disabled. This is the default state. Click the icon to enable edit mode.
	Auto Refresh Enabled	Indicates that the Assets panel is automatically updated as assets are added, removed, and/or modified. This is the default state. Click the icon to disable the auto refresh feature.
	Auto Refresh Disabled	Indicates that the Assets panel is not automatically updated. Click the icon to enable the auto refresh feature.
	Reports	Opens the Reports panel with the same search filters applied.
	Targets	Use this menu to preview the assets that are suitable to send to a selected file storage.
	Transcode	Use this menu to select a transcoder with which to generate a thumbnail image, proxy video, or additional video format for selected assets.
	List View	Toggles the main view to display information in a spread sheet layout with asset records displayed under a specified set of columns.
	Tile View	Toggles the main view to display information where metadata is displayed in vertical lines under a thumbnail of the asset.

The Search toolbar below the Assets panel toolbar contains the following icons:

**Table 2.4 Search Toolbar Icons**

Icon	Name	Description
	Saved Searches	Provides a list of search criteria that are saved as individual profiles that you can recall.
	Search Editor	Opens the Search Editor window that enables you to change the search criteria.
	Keyword	Searches for any occurrence of the provided text across all text-based metadata fields.
	Provider	Use this list to select the content providers from which to search for assets.
	Add Filters	Enables you to provide a set of criteria against one or more metadata items to perform a search.
	Delete Filter	Deletes the selected filter from the search.

The status bar at the bottom of the Assets panel displays the following information:

**Table 2.5 Assets Panel Status Bar Information**






Field	Description
# Total Assets	Indicates the total number of assets in the system regardless of the current search criteria
# MB Used	Indicates the combined size of all assets in the Streamline system regardless of the current search criteria.
# MB Free	Indicates the amount of total asset storage space available
# Assets Match Search	Indicates the number of assets that include the search criteria

## Upload Panel Overview

The Upload panel enables you to add files to the Streamline system without associating them with a Work Order. You must have permission to upload files.

The Upload panel toolbar contains the following icons:

**Table 2.6 Upload Panel Toolbar Icons**

Icon	Name	Description
	Add Files	Enables you to select a file to upload to the Streamline system. An entry displays in the Upload panel with a thumbnail for the file, the filename, the file size, and a progress bar. A single Remove button and Upload button are displayed for each entry, allowing you to remove or upload individual files as required. The file is not uploaded until the Upload or Upload All buttons are selected.
	Upload All	Uploads all the files currently listed in the Upload panel.
	Remove All	Removes all the files currently listed in the Upload panel.
	Approve All	Approves all the files currently listed in the Upload panel. You must have permission to approve files.
	Request Approval for All	Sends a request for approval of the uploaded assets.

## Asset Editor Panel Overview





When you double-click an asset in the Assets panel, the Asset Editor panel for the asset displays in Streamline. The Asset Editor panel provides specific information (metadata) for the selected asset which can be edited by users with the required permissions. This metadata is organized into four categories with each represented as a tab: Descriptive, Structural, Comments, and Linked Assets. Each of these tabs provide options for editing metadata, viewing metadata ported from the associated media file, and general comments added by Streamline users.

### For More Information on...

- the available types of metadata, refer to the section “**Metadata Overview**” on page 3–2.
- editing assets, refer to the section “**Editing Asset Metadata**” on page 3–8.

The top toolbar of an Asset Editor panel contains the following icons:

**Table 2.7 Asset Editor Panel Top Toolbar Icons**

Icon	Name	Description
	Save	Saves the changes to the asset metadata.
	Update File	Enables you to replace the current attached file with a newer version of the file. You must have permission to update the file.
	Download	Saves a copy of the file, associated with the selected asset, to your computer.
	Delete	Removes the asset from the Streamline system.

The bottom toolbar of an Asset Editor panel contains the following icons and information:

**Table 2.8 Asset Editor Panel Bottom Toolbar Icons**

Icon	Name	Description
	Approve	Clicking this icon approves the asset in the Streamline system. The Approved status updates in the toolbar and in the Assets table.  If a work order is associated with the asset, its status changes to “Approved”.  You must have permission to approve an asset.
	View Work Order	If a work order is associated with the asset, clicking this icon opens the work order in its Work Order Editor panel.
	Request Approval	Displays if you do not have approval permissions.
	Unapprove	You must have permission to approve an asset.  Clicking this icon marks the asset as “Not Approved” in the Streamline system. The Approved status updates in the toolbar and in the Assets table.
	Downloaded	Indicates the number of times the asset was downloaded from the Streamline system.
	Approved	Indicates that the asset received approval from a Streamline user with approval permission.
	Not Approved	Indicates that the asset is not yet approved.

## Asset Approvals Panel

The Asset Approvals lists the assets for which Streamline users have requested your approval. Only those users with the appropriate permissions can approve or reject assets. After a user approves or rejects an asset, Streamline removes the asset from the Asset Approvals panel.

### For More Information on...

- approving assets, refer to the section “**Approving or Rejecting Assets**” on page 3–19.

The Asset Approvals panel toolbar contains the following icons:

**Table 2.9 Asset Approvals Panel Toolbar Icons**

Icon	Name	Description
	Approve	Approves the selected asset.
	Reject	The asset is not approved, the creator, and any associated work order is updated.
	Refresh	Update the Asset Approvals panel to display the most recent approval requests.

The status bar at the bottom of the Assets Approval panel displays the following information:

**Table 2.10 Asset Approvals Panel Status Bar Information**

Field	Description
# Tasks	Indicates the number of assets that are awaiting your approval.

## Work Orders Panel










The Work Orders panel lists your work orders in a table or calendar layout, allowing you to quickly access work orders or search the Streamline system for specific requests. Use the Work Orders panel to create, delete, modify, and view work orders you have submitted or are assigned to complete.

### For More Information on...

- the features of the Work Orders panel, refer to the section “**Work Order Editor Panel Overview**” on page 4–2.
- creating work orders, refer to the section “**Creating a Work Order**” on page 4–2.






The Work Orders panel toolbar contains the following icons:

**Table 2.11 Work Orders Panel Toolbar Icons**

Icon	Name	Description
	Create Work Order	Opens the Create Work Order interface which enables you to summarize the criteria for the creation of a new asset.
	Delete	Deletes the selected work order from the Work Orders panel.
	Edit Mode Enabled	Toggles the ability to update work orders listed in the panel. Currently select fields can be edited within the Work Orders panel.
	Edit Mode Disabled	Toggles the ability to update work orders listed in the panel. Currently all the fields in the Work Orders panel are set to read-only. This is the default state.
	Auto Refresh Enabled	The entries in the Work Orders panel are automatically updated. This is the default state. Click to disable the auto refresh feature.
	Auto Refresh Disabled	The table in the Work Orders panel will not automatically update as work orders are added, removed, and/or modified. Click the icon to enable the auto refresh feature.
	Report	Click the icon to open the Reports panel with the selected search filters applied.
	List	Toggles the Work Orders panel view to display information in a spread sheet layout with work orders displayed under a specified set of columns.
	Calendar	Toggles the display of the Work Orders panel into a calendar. The current date is pre-selected on the calendar grid. Work orders are organized according to their due date.

The Search toolbar below the Work Orders panel toolbar contains the following icons:

**Table 2.12 Search Toolbar Icons**

Icon	Name	Description
	Saved Searches	Provides a list of search criteria that are saved as individual profiles that you can recall.
	Search Editor	Opens the Search Editor window that enables you to change the search criteria.
	Keyword	Searches for any occurrence of the provided text across all text-based metadata fields.
	Add Filters	Enables you to provide a set of criteria against one or more metadata items to perform a search.
	Delete Filter	Deletes the selected filter from the search.

## Work Order Editor Panel Overview








Double-click a work order in the Work Orders panel to display its Editor panel. From the Work Order Editor panel, you can assign users to fulfill the work order, change the parameters of the work order, and upload files for approval.

### For More Information on...

- submitting a work order, refer to the section “**Creating a Work Order**” on page 4–2.
- approving an asset, refer to the section “**Approving or Rejecting Assets**” on page 3–19.

A Work Order Editor panel contains the following icons:

**Table 2.13 Work Order Editor Toolbar Icons**


Icon	Name	Description
	Details	Enables you to view and modify information such as the due date, who is assigned to complete the work order, priority level, asset type, and a brief description of the asset you require.
	Save	Saves the work order form and any changes you made to its fields.
	Attachments	Displays a list of files currently attached to the work order.
	Attach	Uploads a file to the work order as an attachment.
	Delete	Deletes the selected attachment from the work order.
	Comments	Displays additional textual information that is associated with the work order.
	Add Comment	Add a comment to the work order.

## Tasks Panel

The Tasks panel lists the running and completed asset tasks on the Streamline Server.

The Tasks panel toolbar contains the following icon:

**Table 2.14 Tasks Toolbar Icon**

Icon	Name	Description
	Refresh	Refreshes the view of the running and completed asset tasks on the Streamline Server.

## Message Manager User Panel




Use the Messaging Manager panel to monitor the online status of users on an Streamline Server, create new conversations, and manage the conversations in which you are involved.

### For More Information on...

- messaging with Streamline users, refer to the chapter “**Messaging**” on page 9–1.

The Message Manager User panel contains the following icons:

**Table 2.15 Message Manager User Panel Toolbar Icons**

Icon	Name	Description
	Filter	Show and hide the Filter section.
	Compose	Opens the New Conversation dialog box to create a new message to send to an online Streamline user.
	Status	Change your current messaging status to Online, Busy, or Away.

## Message Manager Conversations Panel





Use the Messaging Manager Conversations panel to create new conversations and manage the conversations in which you are involved.

### For More Information on...

- messaging with Streamline users, refer to the chapter “**Messaging**” on page 9–1.

The Message Manager User panel contains the following icons:

**Table 2.16 Message Manager Conversations Panel Toolbar Icons**

Icon	Name	Description
	Filter	Show and hide the Filter section.
	Compose	Opens the New Conversation dialog box to create a new message to send to an online Streamline user.
	Leave	Remove yourself from the selected conversation and remove the conversation from the Conversations table.
	Status	Change your current messaging status to Online, Busy, or Away.

## Chat Panel




Use the Chat panel to send and receive messages as part of a one-on-one chat session with another Streamline user.

### For More Information on...

- messaging with Streamline users, refer to the chapter “**Messaging**” on page 9–1.

The Chat panel contains the following icons:

**Table 2.17 Chat Panel Toolbar Icons**

Icon	Name	Description
	Filter	Show and hide the Filter section.
	Download	Save the content of the Messages section in text file.
	Attach File	Send a file as an attachment to a message.

## Conversation Panel







Use the Conversation panel to send and receive messages as part of a conversation with one or more Streamline users.

### For More Information on...

- messaging with Streamline users, refer to the chapter “**Messaging**” on page 9–1.

The Conversation panel contains the following icons:

**Table 2.18 Conversation Panel Toolbar Icons**

Icon	Name	Description
	Settings	Opens the Edit Conversation dialog box to change the subject of the conversation.
	Filter	Show and hide the Filter section.
	Add	Add one or more Streamline users to the conversation. In the list, select the check box to the left of each user to add to the conversation.
	Leave	Remove yourself from the selected conversation and remove the conversation from the Conversations table.
	Download	Save the content of the Messages section in text file.
	Attach File	Send a file as an attachment to a message.

## Report Manger Panel







Use the Report Manager panel to create, run, open, and manage asset and work order reports. The reports contained in the Report Manager panel are available to all Streamline users assigned Report Manager permissions.

### For More Information on...

- creating a report, refer to the section “**Create a Report**” on page 8–2.
- running a report, refer to the section “**Run a Report**” on page 8–6.

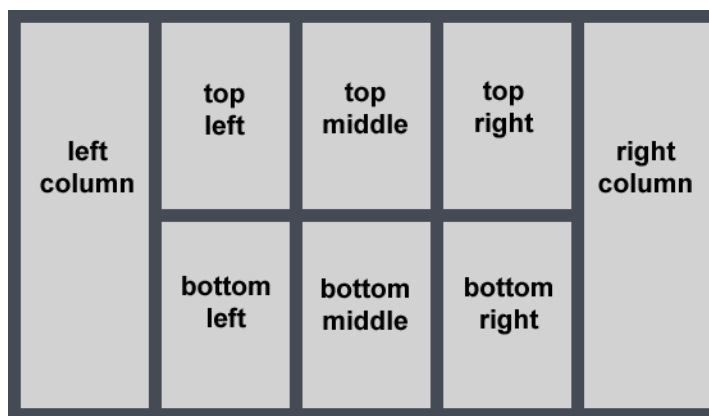
The Reports panel toolbar contains the following icons:

**Table 2.19 Report Manager Toolbar Icons**

Icon	Name	Description
	Create Report	Opens the New Report dialog box to create a new report.
	Delete	Deletes the report selected in the Report table.
	Run Report	Generate results for the report selected in the Report table.
	Refresh	Updates the list of reports displayed in the Report table.
	Show Templates	Shows template reports in the Running Orders table. Template reports are identified by a check mark in the Template column of the Reports table. This icon is only available when template reports are hidden from the Reports table.
	Hide Templates	Hides template reports from the Reports table. This icon is only available when template reports are shown in the Reports table.

## Panel Positions and Perspectives

When accessed from a desktop computer, the Streamline user interface layout consists of the main toolbar plus eight panel positions. Each panel position can contain zero or more types of Streamline panels. If some positions are unoccupied, Streamline optimizes the layout by expanding open panels to fill all available space. By default, Streamline does not occupy all eight panel positions.



*Figure 2.4 Arrangement of the Eight Panel Positions*

A user perspective is a customized view of the Streamline user interface. It is a mapping of Streamline panel types to positions in the user interface layout. Perspectives also save the columns displayed in the Assets, Work Orders, and Asset Approvals panels.

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

- ★ Panels may not always appear exactly where you expect. As you open and close panels, Streamline adjusts the layout to optimize use of the available space. For example, if the current perspective includes an Asset Editor panel in the right column and you use it to open only an Asset Editor panel, the Asset Editor panel occupies all the available space. As you open more panel types, Streamline adjusts the layout to conform with the perspective.

## Default Panel Positions

When you first use Streamline, it opens certain types of panels in certain panel positions by default. Streamline continues to use the default layout until you move a panel or open a saved perspective. If you revert your panel layout to the default panel layout, Streamline also reverts the columns displayed in the Work Orders, Reports, and Assets panels to default columns. **Figure 2.5** describes the default Streamline layout. Streamline optimizes the layout by expanding open panels to fill all available space.

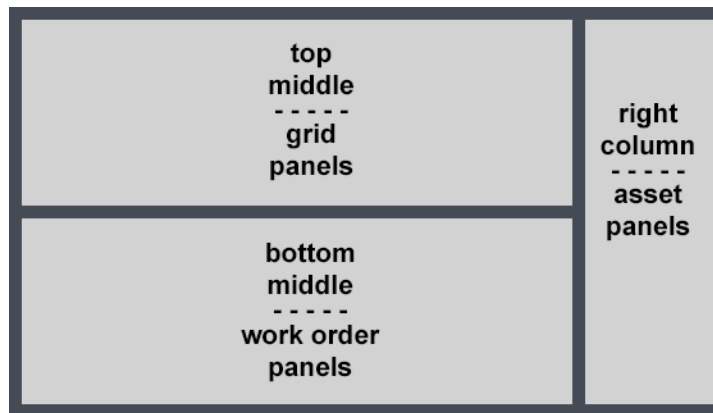


Figure 2.5 Default Panel Layout

Default layout positions are as follows:

- Grid-based panels open in the middle position. The Work Orders, Reports, Asset Approvals, and Assets panels are all grid-based panels.
- The Work Order Editor and Asset Editor panels open in the right column.

### For More Information on...

- creating and managing perspectives, refer to the section “**Working with Perspectives**” on page 10–2.

## Move a Panel from One Layout Position to Another

You can move panels between layout positions to customize the layout to suit your typical workflow.

### To move a panel from one layout position to another

1. At the top of the panel you want to move, click and drag the panel’s name tab.
2. Drag the pointer over the layout guide to specify the position to which you want to move the panel.  
As you drag the pointer over the layout guide, the current drop position for the panel turns yellow. Light gray indicates unoccupied positions. Dark gray indicates occupied positions that can accept additional panels.
3. When the position to which you want to move the panel turns yellow, release the mouse button.  
After you have arranged panels to your liking, you can save the layout as a perspective.

### For More Information on...

- saving a layout as a perspective, refer to the section “**Working with Perspectives**” on page 10–2.

## Rearrange Panel Tabs Within a Layout Position

You can rearrange the order of panel tabs within a layout position to customize the layout to suit your typical workflow.

### To rearrange the order of panel tabs within a layout position

1. Click and drag the panel's name tab within the tab row at the top of the layout position.  
As you drag the pointer over the tab row, a dotted rectangle indicates the current drop position for the selected panel tab. If the rectangle surrounds a tab name, the drop position is to the left of that tab.
2. When the dotted rectangle indicates the desired position, release the mouse button to drop the panel tab.  
You can also move a panel to a different layout position by dragging and dropping the panel name tab into the tab row of the destination panel. After you have arranged panel tabs to your liking, you can save the layout as a perspective.


## Navigating within Panels

This section describes how resize and close panels, and how to navigate within column-based panels.

### To resize a panel

- Hover the mouse pointer over an edge or corner of the panel until the resizing icon displays, and then click and drag the edge or corner.
- ★ Streamline does not save custom panel sizing as part of a perspective.

### To close a panel

- Click the  **Close** icon in the top right corner of the panel.  
If the layout position contains more than one open panel, only the current panel closes.

## Navigating within Column-Based Panels

Column-based panels consist of horizontal rows, each of which represents an asset, or a work order. Each vertical column contains one type of information about the rows.

The following panel types are column-based:

- Asset Approvals
- Assets
- Work Orders
- Reports

The following table describes how to navigate within a column-based panel.

**Table 2.20 Column-based Panel Navigation**

Desired Effect	Action to Perform
To move between cells	Press the <b>Arrow</b> keys ( <b>Up</b> , <b>Down</b> , <b>Left</b> , or <b>Right</b> ). Alternatively, to move horizontally, press <b>Tab</b> or <b>Shift+Tab</b> .
To select a row	Click the row or press the <b>Up</b> and <b>Down Arrow</b> keys to navigate to the row. Yellow shading highlights the selected row.
To select a range of rows	Click the first row in the selection range, and then <b>Shift-click</b> the last row in the selection range. The row selection includes the first selected row, the last selected row, and all the rows between the two selected rows.
To select multiple rows	Click the first row to select, and then <b>CTRL-click</b> additional rows to add to the selected row.
To select all rows	Click a row, and then press <b>CTRL+A</b> . Streamline selects all the rows in a panel.
To select a cell	Click the cell, or navigate to it by pressing the <b>Arrow</b> keys ( <b>Up</b> , <b>Down</b> , <b>Left</b> , or <b>Right</b> ) or <b>Tab</b> keys ( <b>Tab</b> , <b>Shift+Tab</b> )
To replace all the text in a cell	Select the cell, press the <b>Space Bar</b> , and then enter new contents using the keyboard.
To edit the text in a cell	Select the cell, press the <b>Insert</b> key, press the <b>Left</b> and <b>Right Arrow</b> keys to position the cursor, and then insert new content using the keyboard. Press the <b>Delete</b> key to delete individual characters.
To change the status of a check box in the selected cell	Select the cell, and then press the <b>Space Bar</b> to reverse the cell status.
To scroll horizontally	Click and drag the horizontal scroll bar at the bottom of the panel.
To scroll vertically	Roll the mouse wheel or click and drag the vertical scroll bar on the right side of the panel.
To move a column	Click and drag the column header to a new location in the panel.



# Managing Assets

Streamline enables you to archive, manage, distribute, and analyze your digital media (assets). You can tag assets with keywords, comments, and metadata to help organize your assets into meaningful categories. This information is used in searches of the Streamline system, and when creating report criteria.

The following topics are discussed in this chapter:

- Metadata Overview
- Uploading Media Files to Create Assets
- Creating Placeholder Assets
- Editing Asset Metadata
- Take the Asset Lock from the User Editing an Asset
- Previewing the Essence of an Asset
- Updating the Essence of an Asset
- Downloading the Essence of an Asset
- Deleting Assets
- Organizing Assets in Folders
- Linking Assets
- Requesting Approval for an Asset
- Approving or Rejecting Assets
- Sending Assets to File Storages
- Add Thumbnails, Proxies, and Video Formats to Assets

## Metadata Overview

Metadata helps identify the asset within the Streamline system using a collection of information that can be added and modified by Streamline users or ported from the file(s) associated with the asset. Metadata is used in search criteria, and report profiles to help identify, catalog, and manage assets and work orders in the Streamline system.

If you have permission to approve, upload, or modify asset metadata, you can access the Asset Editor panel via the Assets panel. The Asset Editor panel is organized into four tabs: Descriptive, Structural, Comments, and Linked Assets. Each tab includes metadata fields that Streamline classifies into one of the following data types:

- **Date** — calendar date that may include a timestamp.
- **Floating point number** — a number that includes a fractional component. For example, 3.07.
- **Integer** — a whole number without a fractional component.
- **Menu choice** — data that results from a user selecting an item from a menu (single or multiple selection).
- **Text** — a sequence of characters.
- **User** — identity of a Streamline user as defined in the Configuration tool or your LDAP system.

The data type is used when building searches and reports to help classify the value of the metadata, the operations that can be done using the metadata, and how the metadata is stored.


## Uploading Media Files to Create Assets

Uploading a media file to a Streamline Server creates an asset on the Streamline Server with metadata automatically ported from the file. You must have permission to upload files to your Streamline Server.

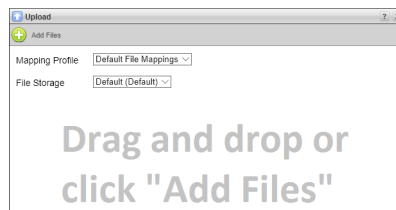
### Uploading Media Through the Upload Panel

Use the Upload panel to upload one or multiple media files from a local file system to your Streamline Server. Some web browsers enable you to upload all the media files contained in a folder. When you upload media files through the Upload panel the assets that Streamline creates from the media files are stored in the Local folder of the Folders tree view.

#### To upload an asset through the Upload panel

1. In the main toolbar, click the  **Upload** icon.

The **Upload** panel opens.



2. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the Streamline asset created by uploading a media file:
  - **Default File Mappings** — refer to the section “**Default File Mappings**” on page B-2 to view mappings.
  - **Dublin Core** — refer to the section “**Dublin Core**” on page B-3 to view mappings.

Your Streamline Server may contain additional mapping profiles.

3. Use the **File Storage** list to select the file storage to ingest the media file into your Streamline System.

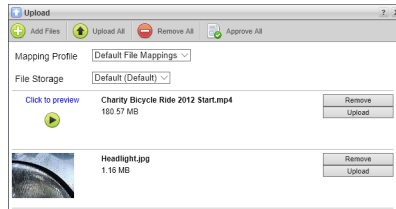
A file storage sets the physical location to store the ingested media file along with setting the lifecycle, naming, folder path, validation, and triggers for the media file. Streamline contains a default file storage that you can use to ingest media files and store them in the default file system on your Streamline Server. Your Streamline System may also have custom file storages to ingest media files into the various file systems on your Streamline Server.

- ★ You cannot directly upload assets to an offline file storage, a file storage associated with Amazon S3 Glacier file system, but you send an asset to an offline file storage after uploading it to a regular Streamline file storage.

4. To select the media files to upload, perform one of the following actions:

- Drag and drop one or multiple media file from a local file system to the **Upload** panel. Some web browsers enable you to drag and drop folders from a local file system to the **Upload** panel to upload all the media files contained in the selected folder.
- Click the **Add Files** icon in the **Upload** panel toolbar to open the **Open** dialog box. In the **Open** dialog box, select the media files to upload, and then click **Open**.

The **Upload** panel displays a preview for each media file selected for upload.

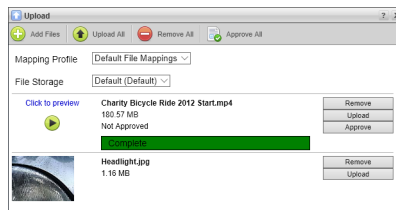


5. To remove a specific media file from the **Upload** panel that you do not want to upload, click the **Remove** button associated with the media file preview. Click the **Remove All** icon in the **Upload** panel toolbar to remove all the media files from the **Upload** panel.

You can choose to remove a file from the Upload panel to avoid uploading it to the Streamline system. Removing a file from your selection is useful when you realize that some files are not required in the selection or you notice that you have selected the wrong file for upload.

6. To upload a specific media file, click the **Upload** button associated with the media file preview. Click the **Upload All** icon in the **Upload** panel toolbar to upload all the media files listed in the **Upload** panel

After successfully uploading a media file, Streamline updates the media file preview to show the upload as **Complete** but **Not Approved**. Streamline also adds a **Approve** button to the media file preview to enable you to approve the asset associated with the uploaded media file.



Streamline creates an asset for each successfully uploaded media file. You can open the Assets panel to view the assets contained in your Streamline Server. The assets that Streamline creates from media files uploaded through the Upload panel are stored in the **Local** folder of the Folders tree view.


#### For More Information on...

- the Folders tree view, refer the section “**Organizing Assets in Folders**” on page 3–14.
- approving assets, refer to the section “**Approving Assets on Ingest**” on page 3–6.

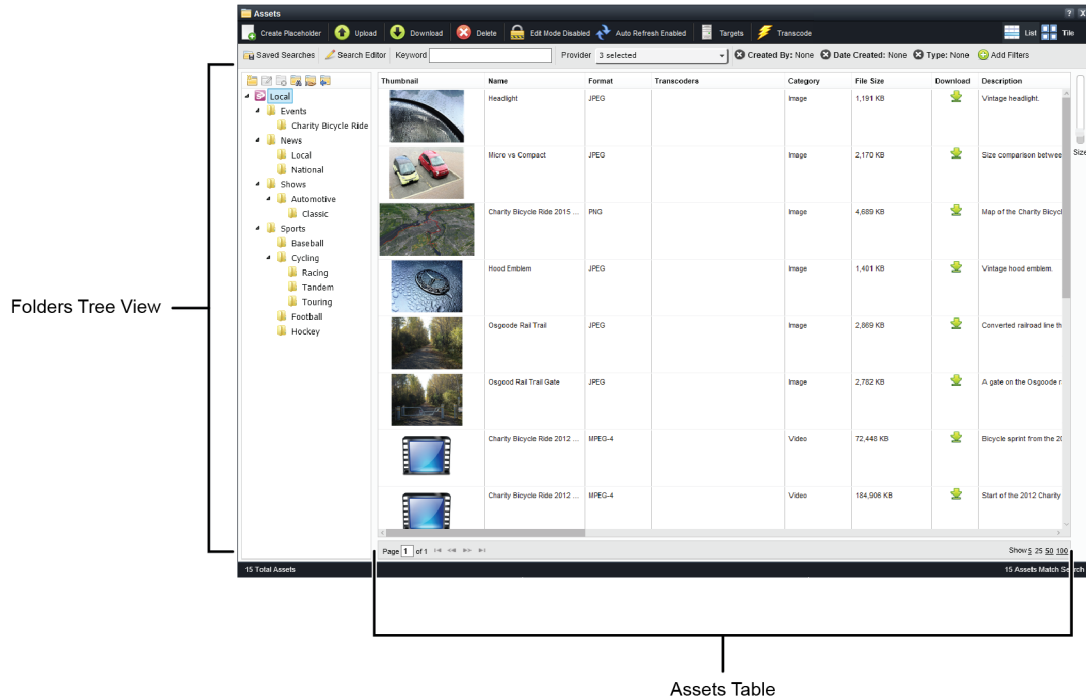
## Uploading Assets to a Selected Folder


When you want to store the asset created from an uploaded media file in a specific folder of the Folders tree view, select the folder before you upload the media file.

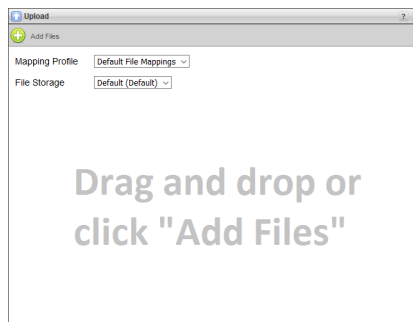
### To upload an asset to a selected folder

1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search. On a new Streamline Server the **Folders** tree view only contains a **Local** folder.



2. In the **Folders** tree view, select the folder to store the assets that Streamline creates from the media files that you upload.
3. Click the  **Upload** icon.  
The **Upload** panel opens.



4. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the Streamline asset created by uploading a media file:
  - **Default File Mappings** — refer to the section “**Default File Mappings**” on page B–2 to view mappings.
  - **Dublin Core** — refer to the section “**Dublin Core**” on page B–3 to view mappings.Your Streamline Server may contain additional mapping profiles.

5. Use the **File Storage** list to select the file storage to ingest the media file into your Streamline System.

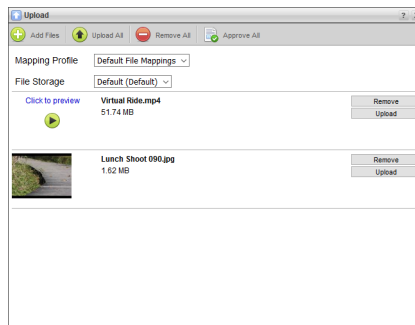
A file storage sets the physical location to store the ingested media file along with setting the lifecycle, naming, folder path, validation, and triggers for the media file. Streamline contains a default file storage that you can use to ingest media files and store them in the default file system on your Streamline Server. Your Streamline System may also have custom file storages to ingest media files into the various file systems on your Streamline Server.

- ★ You cannot directly upload assets to an offline file storage, a file storage associated with Amazon S3 Glacier file system, but you send an asset to an offline file storage after uploading it to a regular Streamline file storage.

6. To select the media files to upload, perform one of the following actions:

- Drag and drop one or multiple media file from a local file system to the **Upload** panel. Some web browsers enable you to drag and drop folders from a local file system to the **Upload** panel to upload all the media files contained in the selected folder.
- Click the **Add Files** icon in the **Upload** panel toolbar to open the **Open** dialog box. In the **Open** dialog box, select the media files to upload, and then click **Open**.

The **Upload** panel displays a preview for each media file selected for upload.

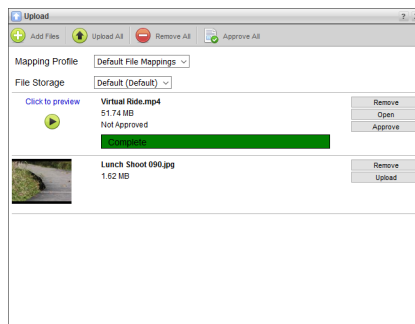


7. To remove a specific media file from the **Upload** panel that you do not want to upload, click the **Remove** button associated with the media file preview. Click the **Remove All** icon in the **Upload** panel toolbar to remove all the media files from the **Upload** panel.

You can choose to remove a file from the Upload panel to avoid uploading it to the Streamline system. Removing a file from your selection is useful when you realize that some files are not required in the selection or you notice that you have selected the wrong file for upload.

8. To upload a specific media file, click the **Upload** button associated with the media file preview. Click the **Upload All** icon in the **Upload** panel toolbar to upload all the media files listed in the **Upload** panel

After successfully uploading a media file, Streamline updates the media file preview to show the upload as **Complete** but **Not Approved**. Streamline also adds a **Approve** button to the media file preview to enable you to approve the asset associated with the uploaded media file.



Streamline creates an asset for each successfully uploaded media file in the selected folder of the Folder tree view.

9. To close the **Upload** panel, click the  **Close** icon in the top right corner of the panel.

#### For More Information on...

- the Folders tree view, refer the section “**Organizing Assets in Folders**” on page 3–14.
- approving assets, refer to the section “**Approving Assets on Ingest**” on page 3–6.
- sending assets to other file storages, refer to the section “**Sending Assets to File Storages**” on page 3–21.


## Approving Assets on Ingest

When you have the permission to approve assets, you can choose to approve assets while Streamline creates new assets by ingesting media files.

★ To approve assets upon ingest, media files must contain all required attributes.

You can use the Asset Editor panel or the Asset Approval panel to approve existing assets.

#### To approve assets on ingest


1. In the main or **Assets** panel toolbar, click the  **Upload** icon.

The **Upload** panel opens.

2. Add the media files to ingest to the **Upload** panel.

3. Click the  **Approve All** icon.

Streamline adds the text “To be approved upon ingest” to the preview of each media file selected for upload.

4. To upload a specific media file, click the **Upload** button associated with the media file preview. Click the  **Upload All** icon in the **Upload** panel toolbar to upload all the media files listed in the **Upload** panel

Streamline ingests the selected media files and approves the assets associated with ingested media files. For approved assets, Streamline displays the text **Approved** in the media file preview.

Streamline does not approve the assets associated with media files that do not contain the required attributes, and displays the text **Not Approved** in the media file preview. You can use the **Asset Editor** panel to set the required attributes for an asset and then approve the asset.

#### For More Information on...

- setting asset attributes, refer to the section “**Editing Asset Metadata**” on page 3–8.
- approving assets, refer to the section “**Approving or Rejecting Assets**” on page 3–19.

## Uploading Media Files Through a Watch Folder

You can also upload asset files to Streamline by placing a media file in a designated watch folder. Streamline uses the mapping profile associated with the watch folder to set the attributes for the asset created uploading the asset files in the watch folder. Watch folder also set the Asset panel folder in which to store the asset create from an uploaded media file. It is the responsibility of your Streamline administrator to create the watch folders used to upload asset files to Streamline.

#### To upload an asset through a watch folder


1. Ask your Streamline administrator for the watch folder location on your Streamline Server.
2. Locate the watch folder associated with the appropriate mapping profile and **Assets** panel folder for the media file to upload.
3. Move or copy the media file to the appropriate watch folder.

Streamline uploads the media file to Streamline, uses the mapping profile to set asset attributes, and places the new asset in the specified **Assets** panel folder.


## Creating Placeholder Assets

A placeholder is an asset that does not contain an essence. Placeholders are typically used to hold metadata for a future file that will become the asset essence. Ingesting a file into a placeholder fulfills the asset. You can create placeholder assets from the Assets panel or as part of a work order.

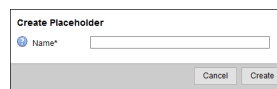
### To create a placeholder asset from the Assets panel

1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search. On a new Streamline Server the **Folders** tree view only contains a **Local** folder.

2. In the **Folders** tree view, select the folder in which to create the placeholder asset.
3. Click the  **Create Placeholder** icon.

The **Create Placeholder** dialog box opens.



4. In the **Name** box, enter a unique identifier for the asset. Only use the following valid characters to enter the name of an asset: letters, numbers, spaces, -, and \_.
5. Click **Create**.

Streamline creates a new placeholder asset in the selected folder of the Folder tree view. When a media file is available for the essence of the placeholder asset you can edit the asset and upload the media file to the asset to complete it. After an asset is complete, it can be approved for broadcast.

### For More Information on...

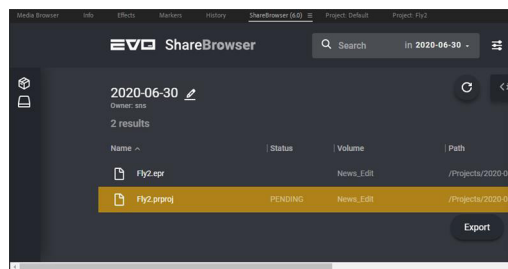
- editing an asset, refer to the section “**Editing Asset Metadata**” on page 3–8.
- approving assets, refer to the section “**Approving or Rejecting Assets**” on page 3–19.
- work orders, refer to the chapter “**Managing Work Orders**” on page 4–1.

## Fulfilling Placeholder Assets Through the EVO ShareBrowser

When your Streamline Server is configured to work with a Studio Network Solutions EVO MAM, you can use the EVO ShareBrowser to fulfill placeholder assets from within Adobe® Premiere® Pro.

### To use the EVO ShareBrowser to fulfill placeholder asset from within Adobe Premiere Pro

1. Create a placeholder asset in Streamline for fulfillment in **Adobe Premiere Pro**.
2. In **Adobe Premiere Pro**, open the **EVO ShareBrowser** panel.
3. In the **EVO ShareBrowser** panel, open the **Premiere Pro project** created for your Streamline placeholder asset. The Premiere Pro project name has the same as your Streamline placeholder asset with the addition of the file extension **.prproj**.



4. Use **Adobe Premiere Pro** to create a video to fulfill the Streamline placeholder asset.
5. After you complete the video for your Streamline placeholder asset, click **Export** in the **EVO ShareBrowser** panel.

The EVO ShareBrowser fulfills the Streamline placeholder asset with the video created in Adobe Premiere Pro. In Streamline you can open the new asset that contains the video created in Adobe Premiere Pro.


## Editing Asset Metadata

You can use either the Asset Editor panel or the Assets panel to edit the metadata associated with an asset.

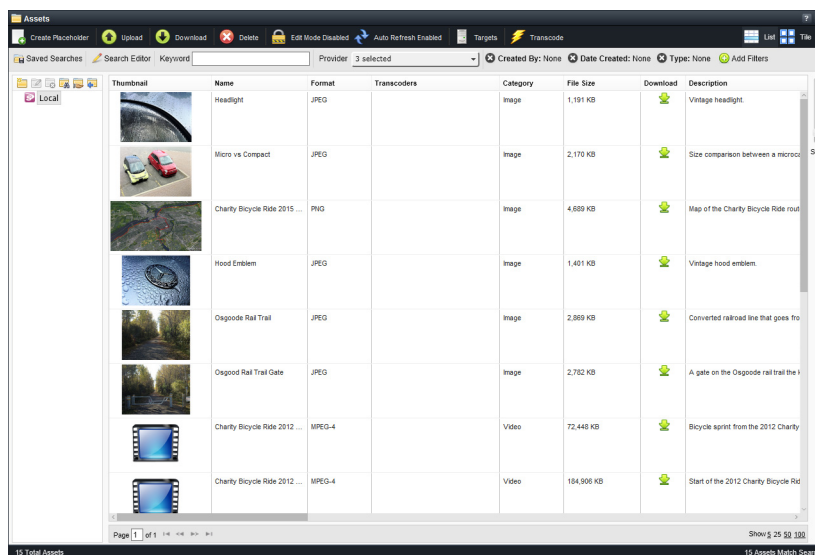
### Asset Editor Panel

When you use the Asset Editor panel to edit the metadata of an asset, Streamline displays a red asterisk (\*) next to the asset name in the panel header to indicate the asset has unsaved changes. If you exit the Asset Editor panel without saving, Streamline prompts you to save or discard your changes before proceeding. You must have permission to edit the metadata of an asset.

#### To edit asset metadata using the Asset Editor panel

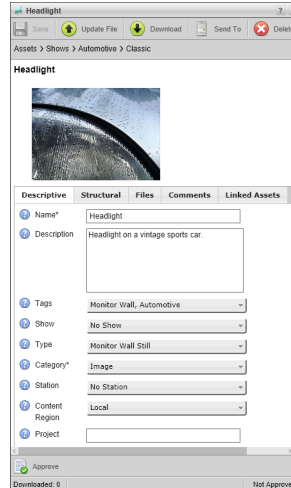
1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.



2. Double-click the asset to edit.

The **Asset Editor** panel opens for the selected asset.




3. To edit the descriptive metadata for the asset:


- a. Click the **Descriptive** tab.
- b. Edit the provided fields as required.

Only use the following valid characters to change the name of an asset: letters, numbers, spaces, -, and \_.

On Streamline Servers with the **Rename Essence to Asset Name** option selected, changing the name of an asset automatically changes the name of the media file associated with the asset to match the new asset name.

- c. Click the  **Save** icon to apply your changes.

4. To add a comment to the asset:


- a. Click the **Comments** tab.
- b. Click the  **Add Comment** icon.
- c. Type a comment of up to 500 characters in the provided field.

5. Click **Save**.

## Assets Panel

When you only want to edit one or two metadata attributes of an asset, the Assets panel enables you to quickly access and edit the required attributes.

### To edit asset metadata using the Assets panel

1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.

2. Click the  **Edit Mode Disabled** icon.

The  **Edit Mode Disabled** icon changes to the  **Edit Mode Enabled** icon, indicating that you are now able to use the **Assets** panel to edit asset attributes.

3. Locate the asset to edit in the **Assets** panel.
4. Click in the cell associated with the attribute to edit.
5. Depending on the type of attribute you select, edit the attribute as follows

#### **Text**

- a. Click in the cell of the attribute to edit.
- b. Press the **Space Bar** to start editing the attribute text.

Only use the following valid characters to change the name of an asset: letters, numbers, spaces, -, and \_.

On Streamline Servers with the **Rename Essence to Asset Name** option selected, changing the name of an asset automatically changes the name of the media file associated with the asset to match the new asset name.

- c. Click in another cell of the **Assets** panel to save your changes.



#### **Check Box**

- a. Click in the cell of the attribute to edit.
- b. Select or clear the check box.
- c. Click in another cell of the **Assets** panel to save your changes.

#### **Menu**

- a. Click in the cell of the attribute to edit.
- b. Use the menu to select the attribute value or values for the asset.
- c. Click in another cell of the **Assets** panel to save your changes.

6. Click the  **Edit Mode Enabled** icon.

The  **Edit Mode Enabled** icon changes to the  **Edit Mode Disabled** icon, indicating that you cannot use the **Assets** panel to edit asset attributes. Disabling edit mode for the **Assets** panel protects against users making unintended changes to asset attributes.

## Take the Asset Lock from the User Editing an Asset

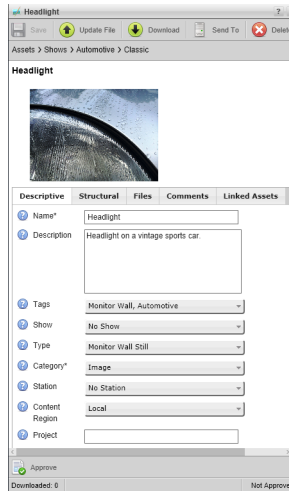
When you edit an asset, Streamline locks the asset from other users. A user with Allow User to Take Asset Lock permission can take the asset lock from the current user and start editing the asset. Streamline automatically saves the asset before passing the asset lock and asset to the taking user for editing.

- ★ Only users assigned the **Allow User to Take Asset Lock** permission can take the asset lock and asset from the user currently editing an asset.

**To take the asset lock from the user currently editing an asset**

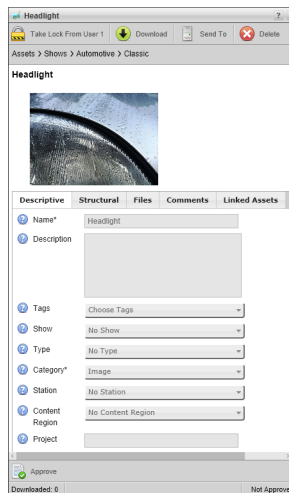
1. For example, **User 1** opens the **Headlight** asset for editing.


The **Headlight** asset opens for **User 1** in the **Asset Editor**.



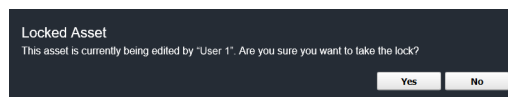
2. **User 2** also opens the **Headlight** asset for editing.

The **Headlight** asset opens for **User 2** in the **Asset Editor**. The grayed-out attributes in the **Descriptive** tab show **User 2** that they cannot edit the **Headlight** asset.





3. In the **Asset Editor**, **User 2** clicks or taps the  **Take Lock from User 1** icon.

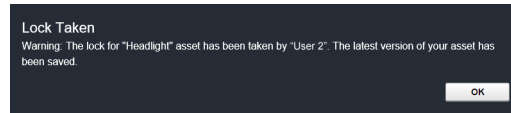
Streamline displays the following **Alert** to **User 2** on their computer:



4. Choose one of the following options:

- To take the asset lock from **User 1** and start editing the asset, click **Yes**.

Streamline saves the asset and then passes the asset lock and asset to **User 2** for editing. In the **Asset Editor**, the  **Take Lock from User 1** icon changes to the  **Save** icon. The following **Alert** displays on the computer of **User 1**:




After **User 1** clicks or taps **OK**, Streamline adds the  **Take Lock from User 2** icon to their **Story Editor**.

- To let **User 1** finish editing, click **No**.

## Previewing the Essence of an Asset

You can preview the essence of an asset to verify the media file contents and ensure the media file matches the asset description or the work order criteria.

### To preview a essence of an asset

1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.

2. Double-click the asset for which you want to preview the essence.

The **Asset Editor** panel opens for the selected asset.


3. Click the asset thumbnail.

Streamline displays the asset essence media file in a new web browser window.

## Updating the Essence of an Asset

You can update the essence of an asset by uploading a new media file to the asset. The media file that you upload to an asset replaces the current media file associated with the asset and becomes the new essence of the asset.

### To update the essence of an asset

1. In the main toolbar, click the  **Browse** icon.

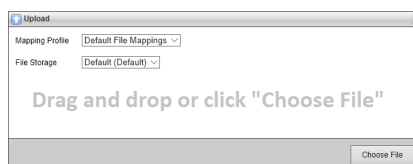
The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.

2. Double-click the asset for which you want to update the essence.

The **Asset Editor** panel opens for the selected asset.

3. Click the  **Update File** icon.

The **Upload** dialog opens.



4. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the selected Streamline asset:
  - **Default File Mappings** — refer to the section “**Default File Mappings**” on page B–2 to view mappings.
  - **Dublin Core** — refer to the section “**Dublin Core**” on page B–3 to view mappings.

Your Streamline Server may contain additional mapping profiles.

5. Use the **File Storage** list to select the file storage method with which to ingest the update media file into your Streamline Server.
6. To select the media file to upload, perform one of the following actions:
  - Drag and drop a media file from a local file system to the **Upload** panel.
  - Click **Choose File** to open the **Open** dialog box. In the **Open** dialog box, select the media file to upload, and then click **Open**.

The **Upload** panel displays a preview for the media file selected for upload.

7. Click **Upload**.


Streamline uploads the selected media file to the asset. The uploaded file replaces the previous media file associated with the asset and becomes the new essence of the asset.


On Streamline Servers with the **Rename Essence to Asset Name** option selected, Streamline automatically changes the filename of the uploaded media file to match the asset name.

## Downloading the Essence of an Asset


You can use either the Assets panel or the Asset Editor panel to download a copy of the asset essence media file to your computer.

### To download a copy of the asset essence media file to your local drive

1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.
2. Locate the asset from which you want to download the essence media file.
3. In the **Download** column of the asset, click the  **Download** icon.

Streamline downloads the asset essence media file to your computer.
4. To download the asset essence media file from the **Asset Editor**:
  - a. Double-click the asset from which you want to download the asset essence media file.



The **Asset Editor** panel opens for the selected asset.
  - b. Click the  **Download** icon.

Streamline downloads the asset essence media file to your computer.

## Deleting Assets

Users with Delete Assets permission can delete assets from the Streamline Server. Deleting an asset also removes any links between the deleted asset and existing assets or work orders.

### To delete an asset from Streamline

1. In the main toolbar, click the  **Browse** icon.  
The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.
2. Select the asset to delete.  
Streamline highlights the selected asset in the **Assets** panel.
3. Click the  **Delete** icon.
4. Click **OK** to confirm.  
Streamline deletes the selected asset from the Streamline Server.


## Organizing Assets in Folders

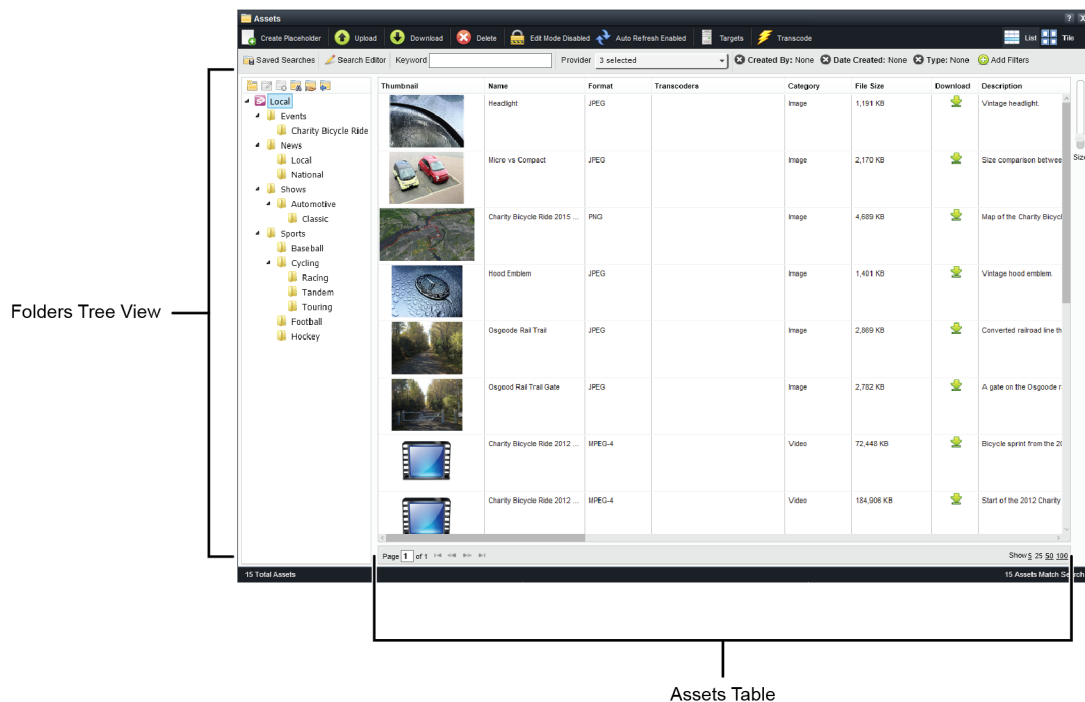
Streamline Servers routinely contain a very large number of assets. You can use the Folders tree view in the Asset panel to organize assets in the manner that you prefer. The Work Orders Panel uses the same Folders tree view to organize work orders.


### Adding Folders to the Folders Tree View

The folder structure in the Folders tree view is fully user customizable. On a new Streamline Server, the Folders tree view only contains an Assets folder.

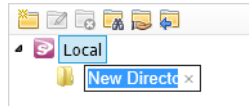
### To add a folder to the Folders tree view

1. In the main toolbar, click the  **Browse** icon.  
The **Assets** panel opens displaying the assets on your Streamline Server that match the current search. On a new Streamline Server the **Folders** tree view only contains an **Local** folder.

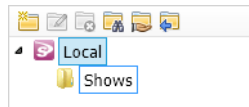


2. In the **Folders** tree view, select the folder to which you want to add a folder.
3. In the **Folders** tree view toolbar, click the  **Add Folder** icon.

Streamline adds a new folder to the folder selected in the **Folders** tree view.



4. Enter a name for the new folder.
5. Click in a blank area of the **Folders** tree view.



## Moving Assets into Folders

After adding folders to the Folders tree view, you can move assets into the folders. You can also move folders into other folders in the tree view.

### To move an asset into a folder

1. In the **Assets** panel, locate the asset the you want to move into a folder.
2. Expand the folders in the **Folders** tree view so that you can see the folder for the asset.
3. From the **Assets** panel, drag the thumbnail of the asset to the folder in the Folders tree view.
4. Release mouse button to move the selected asset into the selected folder.
5. You can also drag a folder in the Folders tree view to another folder.


The selected folder and contained assets move into the selected folder.

## Managing Folders in the Folders Tree View

Folder management includes the following tasks:

- Renaming existing folders
- Deleting empty folders from Folders tree view

### To rename a folder

1. In the **Folders** tree view, expand folders so that you can see the folder to rename.
2. Select the folder to rename.
3. In the **Folders** tree view toolbar, click the  **Rename Folder** icon.
4. Enter a new name for the selected folder.
5. Click in a blank area of the **Folders** tree view.

### To delete a folder

1. In the **Folders** tree view, expand folders so that you can see the folder to delete.
2. Select the folder to delete.

You can only delete empty folders from the **Folders** tree view.

3. In the **Folders** tree view toolbar, click the  **Delete Folder** icon.


Streamline deletes the selected folder from the **Folders** tree view.


## Using the Folders Tree View to List Assets

After creating a folder structure in the Folders tree view and moving assets into the folders, click a tree view folder to list the assets that it contains in the Assets panel. You can also set the level of assets to list for the selected folder. The available listing levels are as follows:

- Only list the assets contained in the selected folder.
- List the assets contained in the selected folder and the assets contained in all the sub-folders within the selected folder.

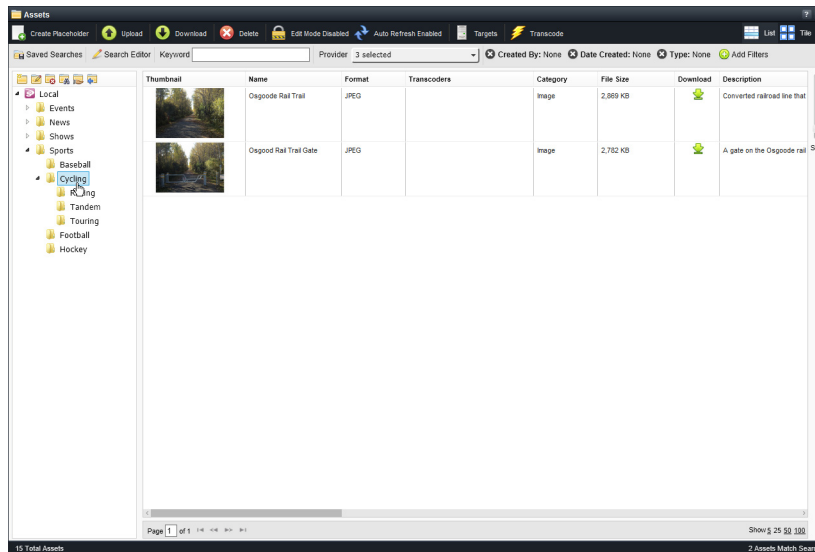
### To list assets using the Folders tree view

1. In the **Folders** tree view toolbar, toggle the  **Include Subfolder** icon to remove the gray background from the icon.


When the  **Include Subfolders** icon does not have a gray background, Streamline only lists the assets contained in the folder selected in the Folders tree view.

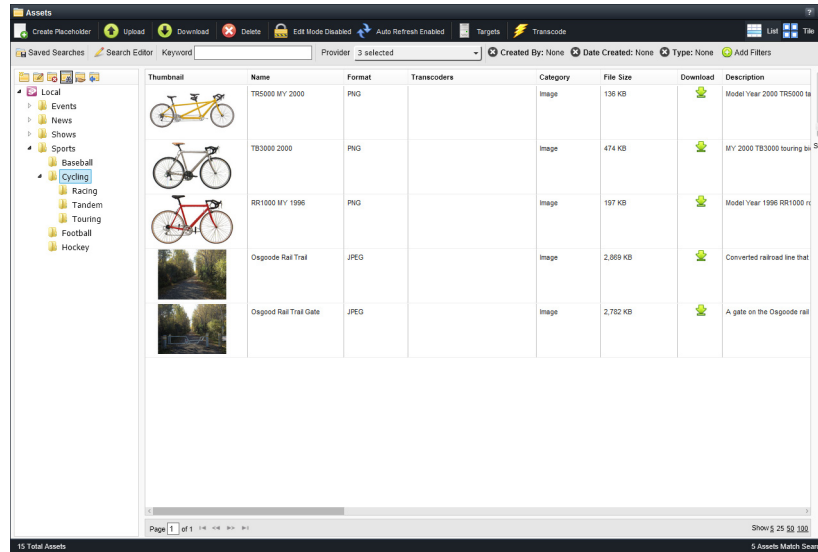
2. In the **Folders** tree view, expand folders so that you can see the folder that you want to list.
3. Select the folder to list.

The **Asset** panel lists the assets contained in the selected folder.



4. In the **Folders** tree view toolbar, toggle the  **Include Subfolders** icon to display a gray background for the icon.

When the  **Include Subfolder** icon has a gray background, Streamline lists the assets contained in the selected folder and the assets contained in all the sub-folders within the selected folder. The Assets panel updates to list the assets in the selected folder and sub-folders.



You can use a search to further filter the assets listed in the Asset panel.\


#### For More Information on...

- searching assets, refer to the chapter “**Searching Streamline**” on page 7–1.

## Linking Assets

You can drag and drop assets from the Assets panel to the Linked Assets tab of another asset to link them together. For example, you can link raw camera footage to a finished package. Linked assets are listed in the Linked Assets tab, with each linked asset represented by its icon. You can click the linked asset to automatically display the Asset Editor panel for that asset.

#### To link an asset

1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.

2. Double-click the asset to which to link other assets.

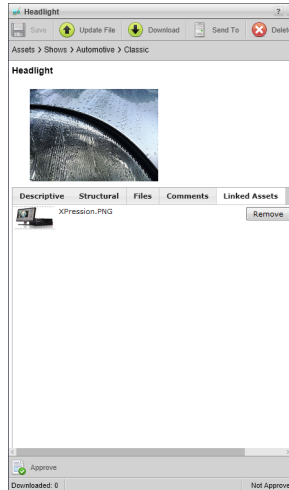
The **Asset Editor** panel opens for the selected asset.

3. Click the **Linked Assets** tab.

The **Linked Assets** tab opens.

4. Use the following procedure to select an asset to link to the asset open in the **Asset Editor** panel:
  - a. In the **Asset** panel, select the thumbnail of the asset that you want to link to the asset open in the **Asset Editor** panel.
  - b. Drag and drop the selected asset in the **Linked Assets** tab of the **Asset Editor** panel.

The **Linked Assets** tab updates to display a thumbnail asset you added to the tab.



5. To view information about a linked asset, click the thumbnail of a linked asset.  
The **Asset Editor** panel opens for the selected linked asset.
6. To unlink an asset from the current asset, click **Remove** to the right of the asset to unlink.  
Streamline removes the selected asset from the **Linked Assets** tab and breaks the link between the assets. The unlinked asset is not deleted from your Streamline Server.



## Requesting Approval for an Asset

When a Streamline user without Approve Assets permission uploads media files to a Streamline Server, Streamline marks the assets created from the media files as Unapproved. To get the new assets approved, the user must request asset approval from a Streamline user with Approve Assets permission. All the users with Approve Assets permission on a Streamline Server receive an asset approval request in the Asset Approvals panel.


## Requesting Asset Approval on Ingest

When you do not have Approve Assets permission, you can choose to request asset approval while Streamline creates new assets by ingesting media files. You can use the Asset Editor panel to request approval of existing assets.

### To request asset approval on ingest

1. As a user without Approve Assets permission, click the  **Upload** icon in the main toolbar.  
The **Upload** panel opens.
2. Add the media files to ingest to the **Upload** panel.
3. Click the  **Request Approval for All** icon.


Streamline adds the text “Approval to be requested upon ingest” to the preview of each media file selected for upload.

4. To upload a specific media file, click the **Upload** button associated with the media file preview. Click the  **Upload All** icon in the **Upload** panel toolbar to upload all the media files listed in the **Upload** panel  
Streamline ingests the selected media files and requests approval for the assets associated with ingested media files. Streamline displays the text **Approval Requested** in the media file preview.  
All the users with Approve Assets permission on a Streamline Server receive an asset approval request in the Asset Approvals panel.

## Requesting Asset Approval of Existing Assets

You can use the Asset Editor panel to request approval of existing assets.

### To request approval of an exist asset

1. As a user without Approve Assets permission, upload media files to your Streamline Server.  
Streamline ingests the selected media files and displays the text **Not Approved** in the media file preview.
2. In the **Assets** panel, double-click the asset to submit for approval.  
The **Asset Editor** panel opens for the selected asset.
3. Click the  **Request Approval** icon in the bottom toolbar.  
The **Asset Editor** panel status bar displays a new status of “Pending Approval”. The **Asset** panel displays a check mark in the **Submitted** column of the asset.

### For More Information on...

- uploading media files, refer to the section “**Uploading Media Files to Create Assets**” on page 3–2.





## Approving or Rejecting Assets

As a Streamline user with Approve Assets permission, you can use the Asset Editor panel or the Asset Approval panel to approve or reject assets.


### Approving or Rejecting Assets Through the Asset Editor Panel

Users with the Approve Assets permission can approve or reject the asset directly from its Asset Editor panel. The status of the asset is reported in the bottom toolbar of the Asset Editor panel and in the Approval column of the Assets panel.

#### To approve an asset using the Asset Editor panel

1. In the main toolbar, click the  **Browse** icon.  
The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.
2. Double-click the asset to approve.  
The **Asset Editor** panel opens for the selected asset.
3. Click the  **Approve** icon in the bottom toolbar.  
The  **Approve** icon changes to the  **Unapprove** icon. The **Asset Editor** panel status bar displays a new status of “Approved”. The **Asset** panel displays a check mark in the **Approved** column of the asset.


### To reject an asset using the Asset Editor panel


1. In the main toolbar, click the  **Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.



2. Double-click the asset to approve.

The **Asset Editor** panel opens for the selected asset.

3. Click the  **Reject** icon in the bottom toolbar.

The  **Reject** icon closes. The **Asset Editor** panel status bar displays a new status of “Not Approved”. The **Asset** panel clears the check mark from the **Submitted** column of the asset.

### Approving or Rejecting Multiple Assets Through the Asset Approvals Panel

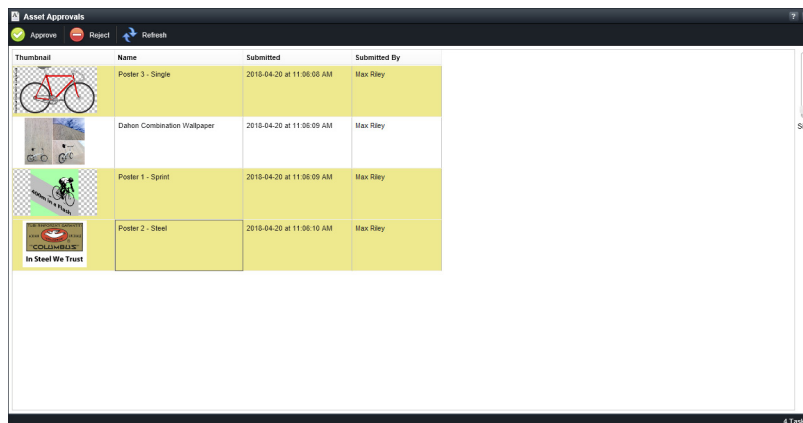
When at least one asset is pending your approval, the main toolbar in the Streamline displays the  icon. Clicking the  icon opens the Asset Approvals panel which lists all the assets pending your approval. From this panel you can approve or reject one or multiple assets at a time.

#### To approve assets using the Asset Approvals panel

1. In the main toolbar, click the  **Assets Pending Approval** icon.

The **Asset Approvals** panel opens.

2. Select the asset or assets to approve.



3. Click the  **Approve** icon in the toolbar.


Streamline approves the selected assets and clears them from the **Asset Approval** panel. In the **Asset** panel, Streamline displays a check mark in the **Approved** column of the assets.

#### To reject assets using the Asset Approvals panel

1. In the main toolbar, click the  **Assets Pending Approval** icon.

The **Asset Approvals** panel opens.

2. Select the asset or assets to reject.

3. Click the  **Reject** icon in the toolbar.

Streamline rejects approval of the selected assets and clears them from the **Asset Approval** panel. The **Asset** panel clears the check mark from the **Submitted** column of the assets.

## Sending Assets to File Storages




File Storages enable Streamline to use shared folders or FTP servers to push assets to external devices; such as, video servers for playout. Using file storages, Streamline can integrate external devices that do not support MOS into an OverDrive automation system.

- ★ Streamline only allows you to send assets to a file storage that match the ingest validation defined for the file storage.

### Viewing the Assets that are Suitable for a Storage

When ingest validations are assigned to a file storage, Streamline only allows you to send assets to the file storage that match the set ingest validations. In the Assets panel you can view the assets that are suitable for a file storage before you select assets to send a file storage.


#### To view the assets that are suitable for a file storage

1. In the main toolbar, click the  **Browse** icon.  
The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.
2. In the **Assets** toolbar, use the  **Targets** menu to select the file storage to which you want to send assets.  
The **Assets** panel refreshes to display only the assets that are suitable for you to send to the selected file storage.
3. To view all the assets in your Streamline Server, use the  **Targets** menu to select **None**.

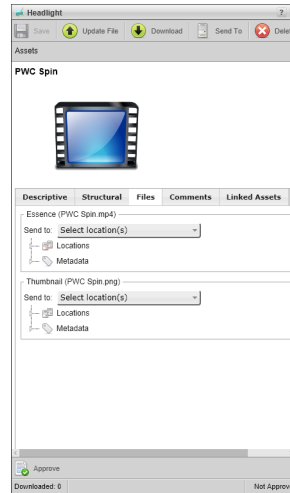
### Sending an Asset to a File Storage

After you view the suitable assets for a file storage, you can use the Asset Editor to send an asset to the file storage.

#### To send an asset to a file storage

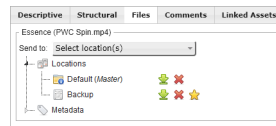
1. In the **Assets** panel, double-click the asset to send to a file storage.  
The **Asset Editor** panel opens for the selected asset.
  2. Use the  **Send To** list to select the file storage to which to send the selected asset.  
Streamline sends a copy of the essence media file associated with the selected asset to the selected file storage.  
An Alert opens when the selected asset is not suitable for the selected target.
- ★ Transfers to offline file storages, a file storage associated with Amazon S3 Glacier file system, may take longer than to a regular Streamline file storage.

3. To view the files associated with an asset:
  - a. In the **Assets Editor** panel, click the **Files** tab.  
The **Files** tab opens.



- b. In the **Essence** section, expand the **Locations** node.

The **Locations** node lists all the file storages that contain the essence media file. Streamline displays the name of the essence media file in the brackets to the right of the section title.



The *(Master)* label to the right of a file storage indicates that the file storage contains the media file from which Streamline created the asset. The **i** displayed on the location icon indicates that the file storage containing the asset essence media file writes XMP Metadata to supported media files on ingest.

- c. Click the **Download** icon to the right of a file storage to download the essence media file from the selected file storage.

Streamline downloads the asset essence media file from the selected file storage to your computer.

- d. Click the **Delete** icon to the right of a file storage to delete the essence media file from the selected file storage.

An alert opens.

- e. Click **Yes** to delete the essence media file from the selected file storage.

Streamline deletes the essence media file from the selected file storage.

- f. Use the **Thumbnail** section to view and manage the file storages that contain the thumbnail image for the asset.

- g. Use the **Format** section to view and manage the file storages that contain different formats of the essence media file image for the asset.

## Setting the Master Essence Media File for an Asset

After you send the essence media file of an Asset to multiple file storages, you can select a file storage as the Master for the asset. The essence media file contained in the selected file storage becomes the Master essence media file for the asset.

- ★ You cannot delete the Master essence media file unless it is the only essence media file associated with an asset.

### To set the Master essence media file for an asset

1. In the **Assets** panel, double-click the asset to for which to set the Master essence media file.

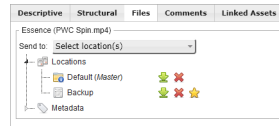
The **Asset Editor** panel opens for the selected asset.

2. In the **Assets Editor** panel, click the **Files** tab.

The **Files** tab opens.

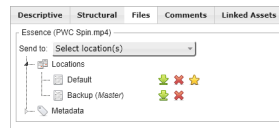
3. In the **Essence** section, expand the **Locations** node.

The **Locations** node lists all the file storages that contain the essence media file. The *(Master)* label to the right of a file storage indicates that the file storage that contains the Master essence media file for the asset.



4. Click the **★ Set as Master** icon to the right of a file storage to set as the container of the Master essence media file for the asset.

The essence media file contained in the selected file storage becomes the Master essence media file for the asset. Streamline labels the selected file storage with **(Master)** and adds the **★ Set as Master** icon to the previous Master file storage.



## Add Thumbnails, Proxies, and Video Formats to Assets

Depending on the file storage that you choose to ingest a media file, Streamline may create a thumbnail, a proxy, and an additional video format during ingest. You can also use a transcoder to add thumbnails, proxies, or additional video formats to existing assets on your Streamline Server.

### To add thumbnails, proxies, and video formats to existing assets

1. In the main toolbar, click the **📁 Browse** icon.

The **Assets** panel opens displaying the assets on your Streamline Server that match the current search.

2. Select the assets for which to generate a thumbnail, proxy, or additional video format.

3. In the **Assets** toolbar, use the **⚡ Transcode** menu to select the transcoder with which to generate a thumbnail, proxy, or additional video format for the selected assets.

- **Thumbnail** — select a transcoder with the label **(Thumbnail)** to generate a thumbnail for the selected assets.
- **Proxy** — select a transcoder with the label **(Proxy)** to generate a video proxy for the selected assets.
- **Video Format** — select a transcoder without a label in brackets to generate an additional video format for the selected assets.

Streamline reports the transcode status for each asset in the **Transcoders** column.



# Managing Work Orders

Work orders are requests to create an asset by providing a set of criteria for the asset. You must have the required user permissions to create, modify, view or comment on work orders.

The following topics are discussed in this chapter:

- Work Order Editor Panel Overview
- Creating a Work Order
- Adding Assets to a Work Order
- Editing a Work Order
- Attaching Files to a Work Order
- Completing a Work Order
- Deleting a Work Order

## Work Order Editor Panel Overview

The Work Order Editor panel enables you to view the details, added comments, attached files, and approval status for a work order. The Work Order Editor panel contains three tabs: Details, Attachments, and Comments.

### Details Tab

The Details tab of a Work Order Editor panel enables you to provide media requirements, details on how the asset will be used, and set deadlines. The thumbnails displayed in the Associated Assets section represent the assets that need to be created to complete the work order. Each asset requested in the work order is also displayed in the Assets panel until the work order is completed.

### Attachments Tab

This tab enables you to upload and attach media files to the work order. This tab is used to attach raw asset files that can be used by the work order assignee to fulfill the work order. The placeholder asset can be reached by clicking its icon in the Details tab. Attachments do not fulfill a work order.



### Comments Tab

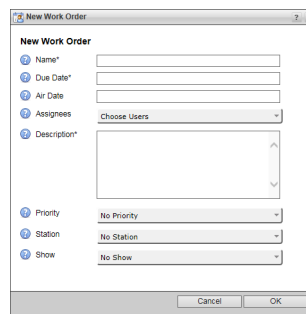
The Comments tab enables you to enter additional text related to the work order that may not be already covered in other fields of the Work Order Editor panel. For example, you may wish to add a note about a future application of the asset or feedback from another user.

## Creating a Work Order

You must have permission to create work orders. When you submit a work order, Streamline automatically creates a placeholder in the Assets panel for each asset requested in the work order.

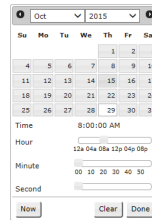
### To create a new work order

1. In the main toolbar, click the  **Work Orders** icon.  
The **Work Orders** panel opens.
2. In the **Folders** tree view, select the folder to store the work order.
3. In the **Work Orders** main toolbar, click the  **Create Work Order** icon.  
The **New Work Order** dialog box opens.



4. In the **Name** box, enter a unique identifier for the work order.

5. Select the **Due Date** when the work order must be completed and submitted by. You must set a due date for all work orders.
  - a. Click the **Due Date** box to open the **Calendar** tool.



- b. In the **Date** selector, click the due date.

The **Date** selector shows the current month. To view the calendar for a different month, click the **Arrows** on either side of the month name.

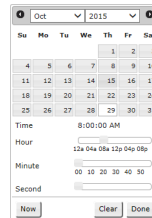
- c. Drag the **Hour**, **Minute**, and **Second** sliders to specify the start time.

Alternatively, you can click or tap **Now** to select the current date and time.

- d. Click **Done**.

6. Select the **Air Date** when the work order assets will be used in a broadcast. For work orders that do not require an air date, leave this box empty.

- a. Click the **Air Date** box to open the **Calendar** tool.



- b. In the **Date** selector, click the air date.

The **Date** selector shows the current month. To view the calendar for a different month, click the **Arrows** on either side of the month name.

- c. Drag the **Hour**, **Minute**, and **Second** sliders to specify a time on the selected date.

Alternatively, you can click or tap **Now** to select the current date and time.

- d. Click **Done**.

7. Use the **Assignee** list to select the Streamline user to complete the work order. In the list, select the check box to the left of each Streamline user to assign to the assignment. You can add one or more Streamline users to work order.

8. In the **Description** box, enter a summary of the asset you are requesting.

9. Use the **Priority** list to select the level of importance for the work order.

For example, assign a higher priority to a work order that is due immediately versus a work order that is due in a week's time.

10. Use the **Station** list to select the organization associated with the asset.

11. Use the **Show** list to select the program or segment associated with the asset.


12. Click **OK** to submit the work order.

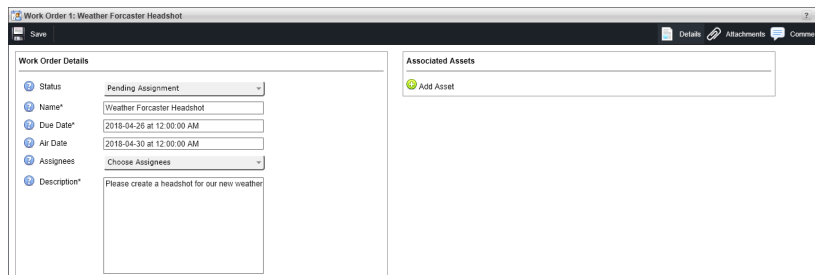
Streamline adds the new work order to the **Work Order** panel, and the **Assets** panel displays a placeholder.


## Adding Assets to a Work Order

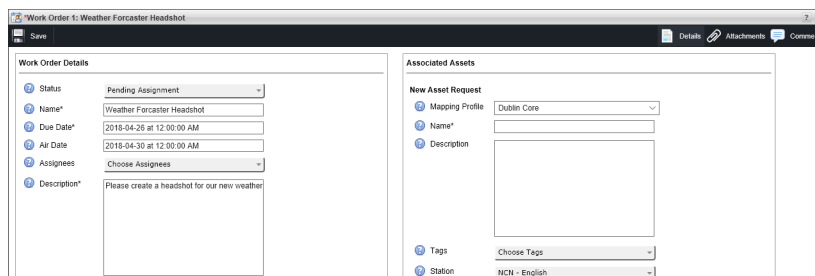
After creating a work order, you can add one or more assets to the work order. When you add an asset to a work order, Streamline adds an placeholder for the requested asset to the Assets panel. After the work order assignee creates a file for the asset, they can edit the asset placeholder and upload the new file to the asset to complete the asset. After an asset is complete, it can be approved for broadcast.

### To add an asset to a work order

1. In the main toolbar, click the  **Work Orders** icon.  
The **Work Orders** panel opens.
2. In the **Work Orders** panel, double-click the work order to which to add one or more assets.  
The selected work order opens in the **Work Order Editor** panel.



3. In the **Associated Assets** section, click the  **Add Asset** icon.  
The **New Asset Request** section opens.



4. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the Streamline asset created from the media file:
  - **Default File Mappings** — refer to the section “**Default File Mappings**” on page B–2 to view mappings.
  - **Dublin Core** — refer to the section “**Dublin Core**” on page B–3 to view mappings.

Your Streamline Server may contain additional mapping profiles.

5. In the **Name** box, enter a unique identifier for the asset. Only use the following valid characters to enter the name of an asset: letters, numbers, spaces, -, and \_. You must enter a name for each asset that you add to a work order.

On Streamline Servers with the **Enable Placeholder Watch Folders** option selected, Streamline uses the asset name to create a watch folder that users outside of Streamline can use to fulfill the asset.

6. In the **Description** box, enter additional information about the asset.
7. Use the **Tags** list to select the keywords to associate with the asset. In the list, select the check box to the left of each keyword to associate with the asset.
8. Use the **Station** list to select the call sign of the commercial television station identified with the asset.
9. Use the **Show** list to select the program or segment with which to associate the asset.

10. Use the **Type** list to select the application or the intended use for the asset. You must select a type for each asset that you add to a work order.
11. Use the **Category** list to select the type of media type contained in the asset; for example, an image or a video clip. You must select a category for each asset that you add to a work order.

When you select **Placeholder** from the **Category** list and the **Enable Placeholder Watch Folders** option is selected on your Streamline Server, Streamline creates a watch folder with the asset name for the placeholder. Users outside of Streamline can fulfill the asset by saving or placing media files into the watch folder created for the placeholder. When an existing folder has the same name as the placeholder, Streamline uses one of the following naming methods to create a watch folder for the placeholder:

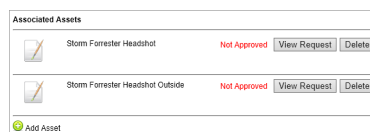
- **Reject** — do not create a watch folder for the placeholder. To create a watch folder for the placeholder, you must rename the placeholder with a name that does not match existing folders in the selected File System.
  - **Append to Name** — automatically add an underscore ( \_ ) followed by an incremental number to the end of the placeholder name and the name of the watch folder created for the placeholder.
  - **Prepend to Name** — automatically add an underscore ( \_ ) followed by an incremental number to the start of the placeholder name and the name of the watch folder created for the placeholder.
  - **Fulfill Multiple Placeholders** — use the existing folder as the watch folder for the placeholder. Saving or placing a media file in a watch folder shared by multiple placeholders fulfills all the placeholders with the same media file.
12. Use the **Content Region** list to select the geographical or network affiliate level to associate with the asset.
  13. In the **Project** box, enter the project or assignment with which to associate the asset.
  14. In the **Event** box, enter a historical incident, holiday, or other occurrence of significance to associate with the asset. For example, Christmas or the Olympics.
  15. In the **Language** box, enter the language used in the asset.
  16. In the **Rights** box, enter information about the intellectual property rights held in and over the asset.
  17. In the **Creator** box, enter the name of the person responsible for creating the content for the asset.
  18. In the **Talent** box, enter the news anchor, performer, or announcer that the asset features.
  19. In the **Camera Operator(s)** box, enter the videographer that provided video footage for the asset.
  20. Click **Save**.

The **New Asset Request** section closes, and Streamline adds the defined asset to the **Associated Assets** section of the work order.



Depending on the configuration of your Streamline Server, placeholders for the defined assets are saved in the folder set by the work order mapping profile or in the work order folder. Asset placeholders do not move with a work order if you move the work order to another folder.

21. To add another asset to the work order, click the **+** **Add Asset** icon and then follow steps 4 to 20.





The **Assets** panel also displays work order asset placeholders.

## Editing a Work Order

When Edit Mode is enabled, you can edit work orders directly in the Work Order table, or by double-clicking the work order in the table to display the required Work Order Editor panel. You must have permission to edit work orders.


### To edit work order requirements

1. In the main toolbar, click the  **Work Orders** icon.  
The **Work Orders** panel opens.
2. In the **Work Orders** panel, double-click the work order to edit.  
The work order opens in the **Work Order Editor** panel.
3. In the **Work Order Editor** toolbar, select the **Details** tab.
4. Edit the provided settings as required.  
Whenever you change the value of a work order setting, Streamline displays a red asterisk (\*) to the left of the work order name to indicate that the work order has unsaved changes.
5. In the **Work Order Editor** toolbar, click the  **Save** icon to save the changes made to the work order.

## Delete Assets from a Work Order

When you delete an asset from a work order, you also delete the associated asset placeholder from the **Assets** panel.

### To delete an asset from a work order and the associated asset placeholder


1. In the main toolbar, click the  **Work Orders** icon.  
The **Work Orders** panel opens.
2. In the **Work Orders** panel, double-click the work order from which you want to delete an asset.  
The work order opens in the **Work Order Editor** panel.
3. In the **Associated Assets** section of the **Work Order Editor** panel, locate the asset to delete.
4. Click the **Delete** button to the right of the asset to delete.
5. In the **Alert** dialog that opens, click **OK**.  
Streamline deletes the selected asset from the **Associated Assets** section of the work order and the associated asset placeholder from the **Assets** panel.



## Attaching Files to a Work Order

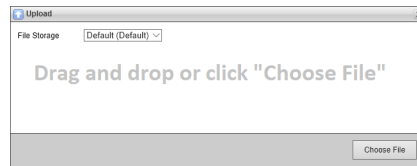
The purpose of attaching files to a work order is to provide raw materials to the artist to fulfill the work order criteria. For example, you might want a still image that includes the American flag, the text “Election Night Results”, and a picture of the candidates. The raw asset files you would attach would be the image of the American flag and photographs of the candidates.

Streamline creates an asset for each file that you upload to a work order as an attachment. Only users with Upload Asset permission can add attachments a work order.

### To attach a file to a work order

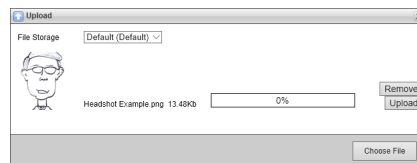
1. In the main toolbar, click the  **Work Orders** icon.  
The **Work Orders** panel opens.
2. In the **Work Orders** panel, double-click the work order to which to attach a file.  
The work order opens in the **Work Order Editor** panel.

3. In the **Work Order Editor** panel toolbar, click the  **Attachments** tab.  
The **Attachments** tab opens.
4. In the **Attachments** tab toolbar, click the  **Attach** icon.  
The **Upload** dialog opens.



5. Use the **File Storage** list to select the file storage to save the attachment for the work order.  
A file storage sets the physical location to store attached files along with setting the lifecycle, naming, folder path, validation, and triggers for the media file. Streamline contains a default file storage that you can use to store attached files in the default file system on your Streamline Server. Your Streamline System may also have custom file storages to store attachments in various file systems on your Streamline Server.
6. To select the file to attach, perform one of the following actions:
  - Drag and drop a file from a local file system to the **Upload** panel.
  - Click **Choose File** to open the **Open** dialog box. In the **Open** dialog box, select the file to upload, and then click **Open**.

The **Upload** panel displays a preview of the file selected for upload.



7. In the **Upload** dialog, click **Upload**.  
Streamline uploads the selected file to the **Attachments** tab of the **Work Order Editor** panel.
8. To enter a description for an attachment:
  - a. In the **Attachments** tab, click the **Description** cell associated with the attachment to describe.
  - b. Press the **Space Bar**.
  - c. In the text box that opens, enter a description for the attachment.
  - d. After entering a description, click **Save**.



Streamline displays the entered description in the **Description** column of the selected attachment.

9. To view an attachment in the **Asset Editor** panel, double-click the attachment to view.  
The **Asset Editor** panel opens for the selected attachment.

## Deleting Attachments

Users with Delete Assets permission can delete attached files from a work order. Deleting an asset also removes any links between the deleted asset and existing assets or work orders.



### To delete an attachment from a work order

1. In the **Work Order Editor** panel toolbar, click the  **Attachments** tab.
2. In the **Attachments** tab, select the attachment to delete.
3. In the **Attachments** tab toolbar, click the  **Delete** icon.  
An **Alert** dialog opens.
4. In the **Alert** dialog, click **OK**.  
Streamline deletes the selected attachment from the work order.

## Adding Comments to a Work Order

Additional information about a work order or the progress of a work order can be added to the work order as a comment.

### To add comments to a work order

1. In the **Work Order Editor** toolbar, click the  **Comments** tab.  
The **Comments** tab opens.
2. In the **Comments** tab toolbar, click the  **Add Comment** tab.  
A text box opens in the **Comments** tab.
3. In the provided text box, enter a comment for the work order.
4. Click the **Save** below the text box.  
Streamline adds the entered comment to the **Comments** tab along with the creation date and time of the comment.

## Completing a Work Order

To complete a work order, the associated assets must be created and approved. The work order assignee creates and uploads a media files to the assets associated with the work order. A Streamline user with Approve Assets permission approves the assets associated with the work order.

### Assignee

- “**To upload an asset through the Upload panel**” on page 3–2



### Approver

- “**To approve an asset using the Asset Editor panel**” on page 3–19 or
- “**To approve assets using the Asset Approvals panel**” on page 3–20

## Deleting a Work Order

When you remove a work order from the Streamline system, any attachments included with it are also discarded. You must also delete the asset placeholder in the Assets panel once the work order is removed from the Streamline system. This helps to avoid users accessing an incomplete asset. You must have full work order and asset permissions to delete work orders.

### To delete a work order

1. In the main toolbar, click the  **Work Orders** icon.  
The **Work Orders** panel opens.
2. Select the work order to delete.
3. In the **Work Order Editor** panel toolbar, click the  **Delete** icon.  
An **Alert** dialog opens.
4. In the **Alert** dialog, click **OK**.

Streamline deletes the selected work order along with all the attachments associated with the work order. Streamline does not delete the assets created to fulfill the deleted work order.



# AP Media Feeds

AP Media feeds are lists of content gathered from the Associated Press Media library of over 500,000 ready-to-use graphics and graphic elements for on-air and digital use. You can view and download AP Media content through a Feed View panel.


This chapter discusses the following topics:

- View the Content in an AP Media Feed
- AP Media One-Time Searches
- Download AP Media Content

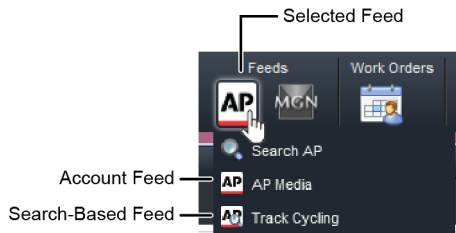
## View the Content in an AP Media Feed

Streamline uses Feed View panels to display content gathered by an AP Media feed. You can download AP Graphics content and store the content as an asset in Streamline.

### To view the content in an AP Media feed

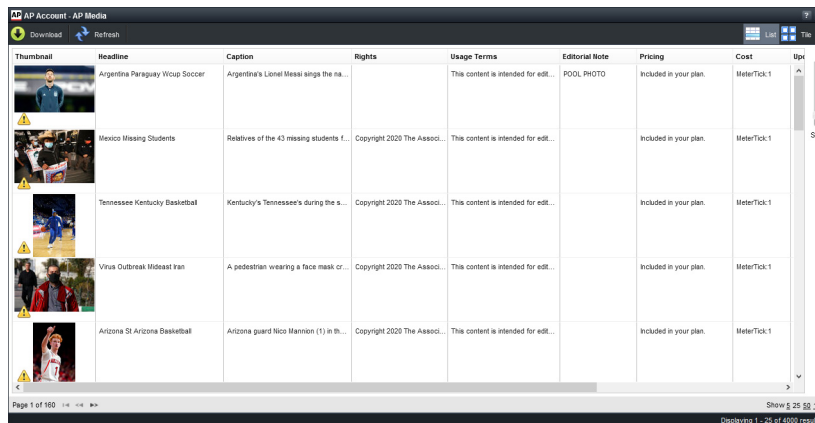
1. In the main toolbar, point to the  **AP Media** icon.




A list opens displaying the available AP Media feeds of the selected type opens. The first feed in the list displays the all the AP Media content available to an AP Media account. The addition of a magnifying glass to a feed icon identifies a Search-Based feed that only displays AP Media content that matches the search parameters set for the feed.




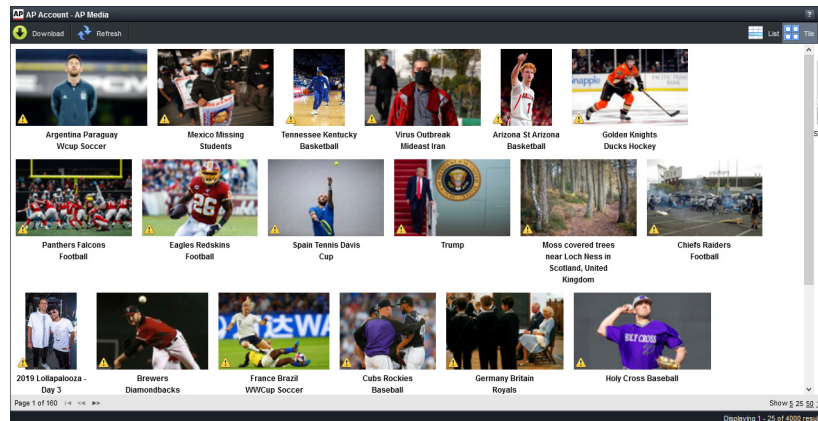
2. Click the name of the feed to open.


The feed opens in the **Feed View** panel.

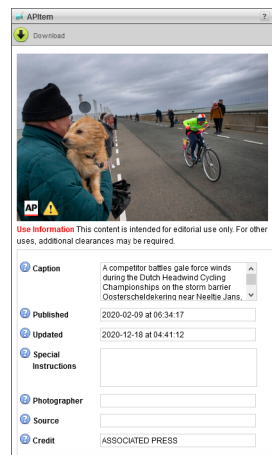



3. Drag the **Size** slider to enlarge or reduce the size of the thumbnail images displayed for the feed content items.
4. When the **Feed View** panel cannot display all the content contained in a feed on a single page, use the following controls in the bottom toolbar of the **Feed View** panel to view all the content:
  -  — click button to view the first page of content.
  -  — click button to view the previous page of content.
  -  — click this button to view the next page of content.
  - **Show** — click the following links to set the number of content items to display on a page:
    - › **5** — display 5 content items on a page.
    - › **25** — display 25 content items on a page.
    - › **50** — display 50 content items on a page.
    - › **100** — display 100 content items on a page.

- To display feed content thumbnail images, click the  **Tile** icon in the toolbar.  
The **Feed View** panel displays content as thumbnail images.



- To once again display feed content in table format, click the  **List** icon in the toolbar.
- To view more information about a content item, double-click the item.  
The **AP Media Item Viewer** panel opens for the selected content item.



- Click the  **Refresh** icon to refresh the feed with updated content.


## Edit a Search-Based Feed

When a Search-Based feed does not gather the content that you thought it would, you can edit the search parameters to refine the search.

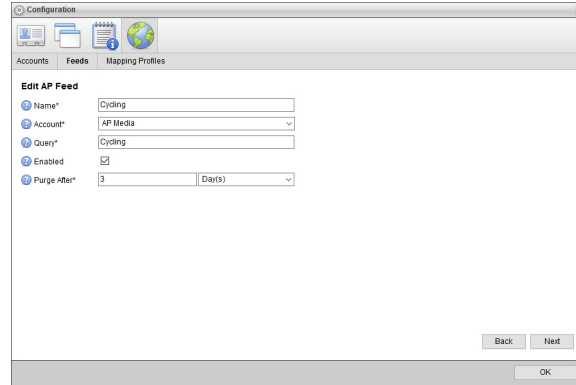
### To edit a Search-Based feed search

- View the results of a Search-Based feed.

A magnifying glass in a feed icon identifies a feed as a Search-Based feed that only displays AP Media content that matches the search parameters set for the feed.

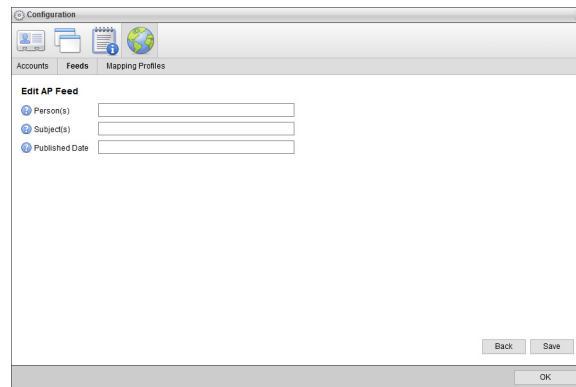
- In the toolbar, click the  **Configure** icon.

The **Edit AP Feed** settings page opens.



3. In the **Name** box, enter a name for the Search-Based feed.
4. Use the **Account** list to select the configured AP Media account to search for and purchase AP Media content.
5. In the **Query** box, enter the term or terms with which to search for content in the AP Media.  
Use the \* (asterisk) character as a wild card to match one or more characters.
6. Select the **Enabled** check box to active the feed and make it available to all users.
7. 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.
8. 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.
9. Click **Next**.

The next **Edit AP Feed** settings page opens.

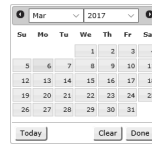


10. In the **Person(s)** box, enter the name or names of people that content must feature. Use a comma to separate multiple names.
11. In the **Subject(s)** box, enter the AP Media category or categories of which content must be a part. Use a comma to separate multiple categories.

The AP Media Subject Vocabulary defines the available categories.

12. Select the date on which the AP Media must have published content.

a. Click in the **Published Date** box to open the **Calendar** tool.



b. Use the **Month** menu to select the month for the publish date.

c. Use the **Year** menu to select the year for the publish date.

d. In the **Calendar** area, select the day for the publish date.

Alternatively, you can click **Today** to select the current date.

e. Click **Done**.

13. After completing the required feed parameter edits, click **Save**.

The **Configured Feeds** page opens.

14. Click **OK**.

The **Configured Feeds** page closes and the **Feed View** panel updates to display the results of your updated Search-Based feed.


## AP Media One-Time Searches

AP Media One-Time searches are a quick method of gathering content from the AP Media that match specific search terms. After a user creates an AP Media One-Time search, Streamline automatically makes the search available to all users on the Streamline Server, which makes AP Media One-Time searches a good research tool for group projects. To not burden the system, Streamline deletes AP Media One-Time searches after 36 hours of inactivity. To keep an AP Media One-Time search, you can save the search as an AP Media feed before Streamline deletes the search.

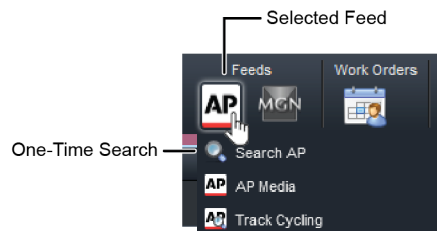
### Create an AP Media One-Time Search

Users must have permission to manage feeds in order to create AP Media One-Time searches.

#### To create an AP Media One-Time search

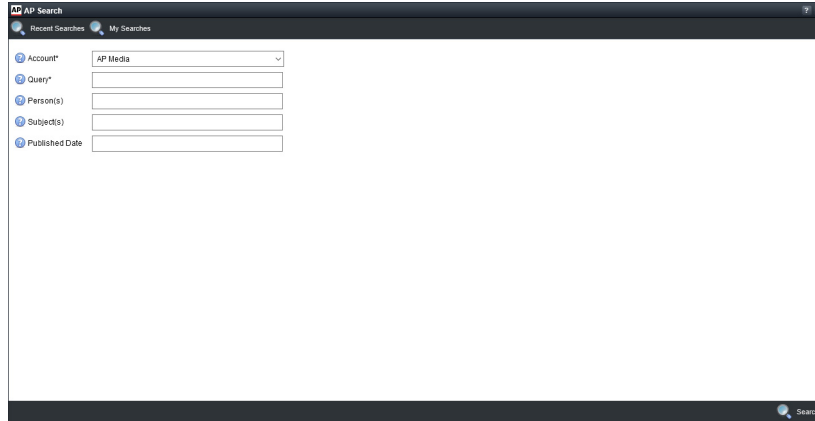
1. In the main toolbar, point to the  **AP Media** icon.

A list opens displaying the available AP Media feeds of the selected type opens.



2. Click **Search AP**.


The **AP Search** dialog box opens in the **Feed View** panel.



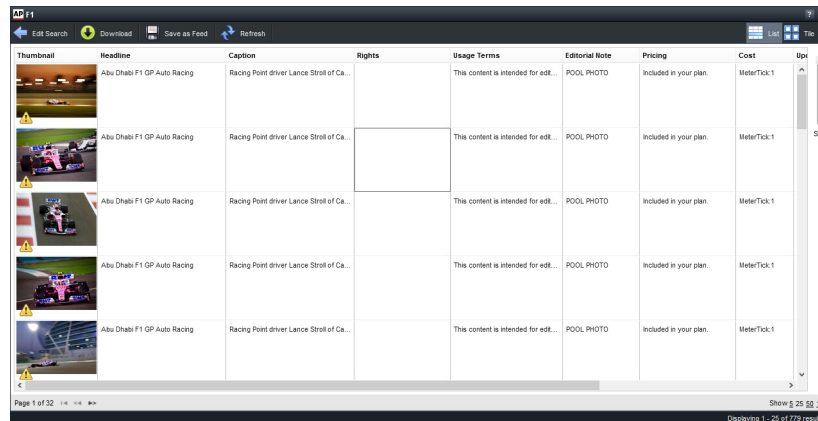
3. Use the **Account** list to select the configured AP Media account to search for and purchase AP Media content.
4. In the **Query** box, enter the term or terms with which to search for content in the AP Media.  
Use the \* (asterisk) character as a wild card to match one or more characters.
5. Use the **Content Set** list to select the type of AP Media content to search, graphics or photos.
6. In the **Person(s)** box, enter the name or names of people that content must feature. Use a comma to separate multiple names.
7. In the **Subject(s)** box, enter the AP Media category or categories of which content must be a part. Use a comma to separate multiple categories.  
The AP Media Subject Vocabulary defines the available categories.
8. Select the date on which the AP Media must have published content.
  - a. Click in the **Published Date** box to open the **Calendar** tool.






- b. Use the **Month** menu to select the month for the publish date.
    - c. Use the **Year** menu to select the year for the publish date.
    - d. In the **Calendar** area, select the day for the publish date.  
Alternatively, you can click **Today** to select the current date.
    - e. Click **Done**.

9. In the bottom toolbar, click the  **Search** icon.

The **Feed View** panel opens displaying the content items that match the set parameters: **Query**, **Content Set**, **Person(s)**, **Subject(s)**, and **Published Date**.





Streamline automatically adds the AP Media One-Time searches that you create to the  **Recent Searches** and the  **My Searches** menu in the **AP Search** dialog box.

10. Click the  **Refresh** icon to refresh the feed with updated content.


## Edit an AP Media One-Time Search


When an AP Media One-Time search does not gather the content that you thought it would, you can edit any parameter of the search to refine the search.

### To edit an AP Media One-Time search

1. View the results of an AP Media One-Time search by doing one of the following:
  - Create a new AP Media One-Time search.
  - In the **AP Search** dialog box, use the  **Recent Searches** menu to select a recent AP Media One-Time search created by any of the users on the Streamline Server.
  - In the **AP Search** dialog box, use the  **My Searches** menu to select a previous AP Media One-Time search that you created.

The **Feed View** panel displays the results of the selected AP Media One-Time search.

2. To edit the AP Media One-Time search open in the **Feed View** panel, do the following:
  - a. In the toolbar, click the  **Edit Search** icon.



The **AP Search** dialog box opens in the **Feed View** panel.
  - b. Edit the search parameters as required to refine your search.
  - c. In the bottom toolbar, click the  **Search** icon.

The **Feed View** panel updates to display the results for your new search.


## Save an AP Media One-Time Search


You can save an AP Media One-Time search as an AP Media feed for future reference. Users must have permission to manage feeds in order to save AP Media One-Time searches as feeds.

### To save an AP Media One-Time search as an AP Media feed

1. View the results of an AP Media One-Time search by doing one of the following:
  - Create a new AP Media One-Time search.
  - In the **AP Search** dialog box, use the  **Recent Searches** menu to select a recent AP Media One-Time search created by any of the users on the Streamline Server.
  - In the **AP Search** dialog box, use the  **My Searches** menu to select a previous AP Media One-Time search that you created.

The **Feed View** panel displays the results of the selected AP Media One-Time search.

2. In the toolbar, click the  **Save as Feed** icon.

Streamline saves the open AP Media One-Time search as an AP Media feed. The **Feed View** panel toolbar updates to display AP Media feed tools. You can use the  **Configure** tool to edit the name of the new AP Media feed.

3. The next time you want to open your new  **AP Media** feed, use the  **AP Media** list in the main toolbar to select the feed.

The selected AP Media feed opens in the **Feed View** panel.




## Download AP Media Content

After you find the AP Media content that you want to use, you can download and purchase the content. For Streamline users that do not have permission to manage AP Media transactions, they can request the download of content. Streamline does not download the requested content until a Streamline user with the permission to manage AP Media transactions approves the content download request.

You can download AP Media content into an existing asset associated with a work order, or you can create a new asset for the content.



- ★ When you download an AP Media content item into an existing asset, the AP Media metadata overwrites all the metadata associated with the existing asset.

### To download content from the AP Media

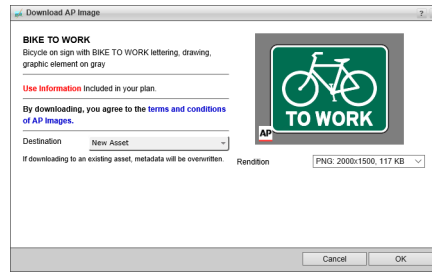
1. Use one of the following methods to view the AP Media content item to download in the **Feed View** panel:
  - Use the  **AP Media** list in the main toolbar to open an AP Media feed.
  - Create a new AP Media One-Time search.
  - In the **AP Search** dialog box, use the  **Recent Searches** menu to select a recent AP Media One-Time search created by any of the users on the Streamline Server.
  - In the **AP Search** dialog box, use the  **My Searches** menu to select a previous AP Media One-Time search that you created.

The **Feed View** panel displays the results of the selected AP Media feed ore One-Time search.

2. In the **Feed View** panel, select the content item to download.

- In the toolbar, click the  **Download** icon. For users that do not have permission to manage AP Media transactions, click the  **Request Download** icon

The **Download AP Image** dialog box opens for the selected content item.



The **Use Information** section displays purchase information about the selected content item.

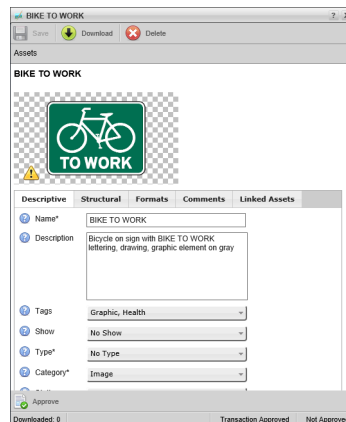
- Use the **Destination** list to select the asset with which to associate the downloaded content item.

To filter the **Destination** list, enter in the **Filter** box a portion of the asset name you want to select. You do not need to enter the start of an asset name, just any portion of the name filters the **Destination** list. The **Destination** list automatically updates to display only the assets with names that contain the text entered in the **Filter** box. Clear the **Filter** box to display all the available assets in the **Destination** list.

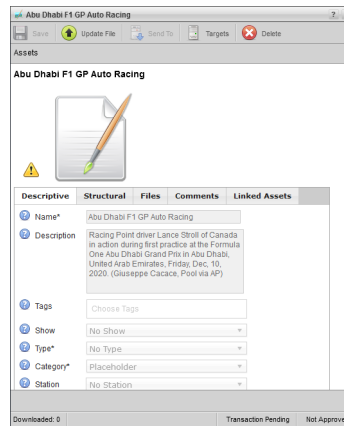
- Use the **Rendition** list to select the image format and size to download from the selected content item.
- Click **OK**.

Streamline downloads the image from the selected AP Media content item and associates the image with a new or selected asset and opens the asset in the **Asset Editor** panel.

To complete the asset, edit the asset metadata as required and then approve the asset.



For users that do not have permission to manage AP Media transactions, the **Asset Editor** panel displays an asset with a placeholder for the image from the selected AP Media content item. After a user with the permission to manage AP Media transactions approves the download request, Streamline downloads the content item image into the asset.





### For More Information on...

- editing asset metadata, refer to the procedure “**To edit asset metadata using the Asset Editor panel**” on page 3–8.
- approving assets, refer to the section “**Approving or Rejecting Assets**” on page 3–19.

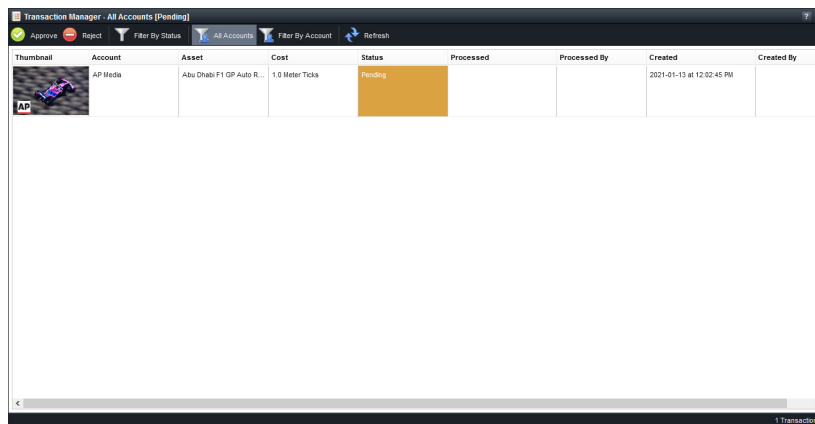
## Approve a Requested Download

When a Streamline user without the permission to manage AP Media transactions requests the download of a content item, Streamline does not immediately download the content item. A Streamline user with the permission to manage AP Media transactions must approve the download request to download the image for the AP Media content item into a Streamline asset.

### To approve a requested download

1. Log in to Streamline as a user with the permission to manage AP Media transactions.
2. In the main toolbar, point to the  **Transactions Pending Approval** icon. When there are not transactions pending approval, the toolbar displays the  **No Transactions Pending Approval** icon.

The **Transaction Manager** panel opens.




3. Use the **Filter By Status** list to select **Pending**.

The **Transaction Manager** panel updates to display only the pending transactions.

4. Use the **Filter By Account** list to select the **AP Media** account used on your Streamline Server to download content items.


The **Transaction Manager** panel updates to display only the pending transactions for the selected account.

5. In the **Transaction Manager** panel, select the transaction to approve.

6. In the toolbar, click the  **Approve** icon.

The **Approve Transaction** dialog box opens.



To reject the selected transaction, click the  **Reject** icon and click **OK** in the alert that opens. Streamline does not download AP Media content for a rejected transaction.

7. To automatically approve the asset associated with the downloaded AP Media content item, select the **Automatically approve asset(s)** check box. Clear the check box to manually approve the associated asset after downloading the content item.

8. Click **OK** to complete the transaction and download the AP Media content item.

Click **Cancel** to cancel the approval of the transaction. Streamline does not download AP Media content for a canceled transaction. The **Transaction Manager** retains canceled transactions as pending transactions.

9. To view approved transactions, use the **Filter By Status** list to select **Approved**.

The **Transaction Manager** panel updates to display the approved transactions.

10. To view rejected transactions, use the **Filter By Status** list to select **Rejected**.

The **Transaction Manager** panel updates to display the rejected transactions.



# MGN Online Feeds

MGN Online feeds enable you to search America's premier resource for still and animated news graphics. You can view and download MGN Online content through a Feed View panel.


This chapter discusses the following topics:

- View the Content in an MGN Online Feed
- MGN Online One-Time Searches
- Download MGN Online Content

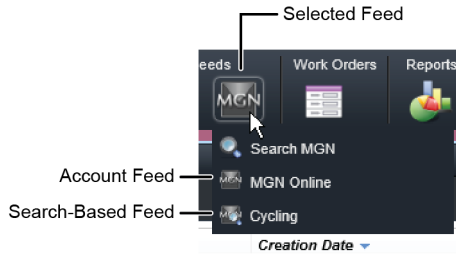
## View the Content in an MGN Online Feed

Streamline uses Feed View panels to display content gathered by an MGN Online feed. You can download AP Graphics content and store the content as an asset in Streamline.

### To view the content in an MGN Online feed

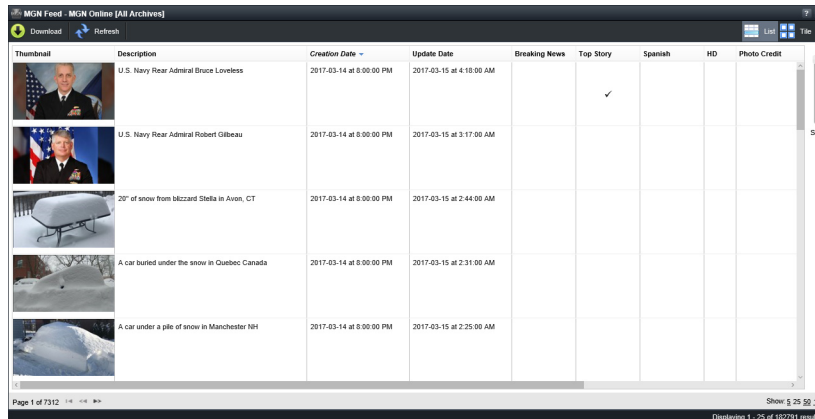
1. In the main toolbar, point to the  MGN icon.




A list opens displaying the available MGN Online feeds of the selected type opens. The first feed in the list displays the all the MGN Online content available to an MGN Online account. The addition of a magnifying glass to a feed icon identifies a Search-Based feed that only displays MGN Online content that matches the search parameters set for the feed.




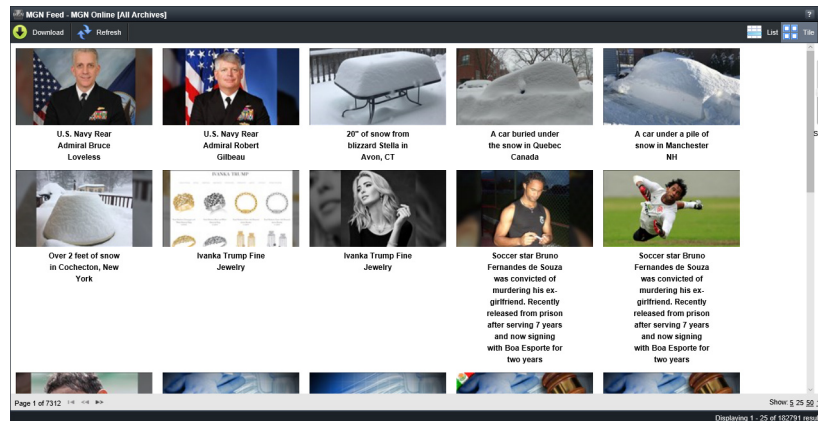
2. Click the name of the feed to open.


The feed opens in the **Feed View** panel.

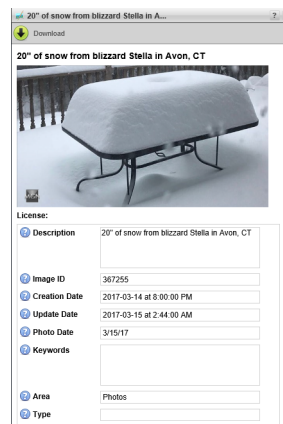



3. Drag the **Size** slider to enlarge or reduce the size of the thumbnail images displayed for the feed content items.
4. When the **Feed View** panel cannot display all the content contained in a feed on a single page, use the following controls in the bottom toolbar of the **Feed View** panel to view all the content:
  -  — click button to view the first page of content.
  -  — click button to view the previous page of content.
  -  — click this button to view the next page of content.
  - **Show** — click the following links to set the number of content items to display on a page:
    - › **5** — display 5 content items on a page.
    - › **25** — display 25 content items on a page.
    - › **50** — display 50 content items on a page.
    - › **100** — display 100 content items on a page.

- To display feed content thumbnail images, click the  **Tile** icon in the toolbar. The **Feed View** panel displays content as thumbnail images.



- To once again display feed content in table format, click the  **List** icon in the toolbar.
- To view more information about a content item, double-click the item. The **MGN Online Item Viewer** panel opens for the selected content item.



- Click the  **Refresh** icon to refresh the feed with updated content.


## Edit a Search-Based Feed

When a Search-Based feed does not gather the content that you thought it would, you can edit the search parameters to refine the search.

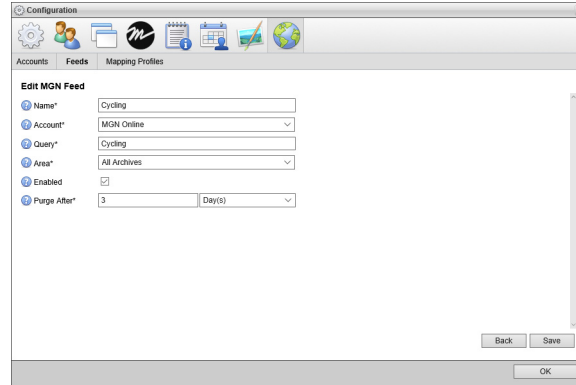
### To edit a Search-Based feed search

- View the results of a Search-Based feed.

A magnifying glass in a feed icon identifies a feed as a Search-Based feed that only displays MGN Online content that matches the search parameters set for the feed.

- In the toolbar, click the  **Configure** icon.

The **Edit MGN Feed** settings page opens.



3. In the **Name** box, enter a name for the Search-Based feed.
4. Use the **Account** list to select the configured MGN Online account to search for and purchase MGN Online content.
5. In the **Query** box, enter the term or terms with which to search for content in MGN Online.  
Use the \* (asterisk) character as a wild card to match one or more characters.
6. Use the **Area** list to select the MGN Online gallery or archive in which to search for content: **Top Stories**, **Graphics**, **Elements**, **Photos**, **My Archive**, or **NewsToons**.
7. Select the **Enabled** check box to active the feed and make it available to all users.
8. 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.
9. 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.
10. After completing the required feed parameter edits, click **Save**.  
The **Configured Feeds** page opens.
11. Click **OK**.  
The **Configured Feeds** page closes and the **Feed View** panel updates to display the results of your updated Search-Based feed.

## MGN Online One-Time Searches

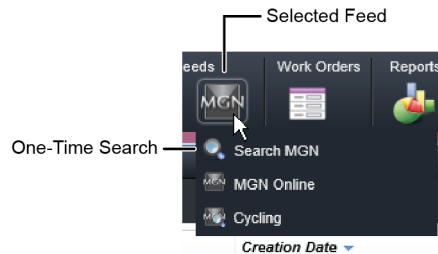
MGN Online One-Time searches are a quick method of gathering content from the MGN Online that match specific search terms. After a user creates an MGN Online One-Time search, Streamline automatically makes the search available to all users on the Streamline Server, which makes MGN Online One-Time searches a good research tool for group projects. To not burden the system, Streamline deletes MGN Online One-Time searches after 36 hours of inactivity. To keep an MGN Online One-Time search you can save the search as an MGN Online feed before Streamline deletes the search.

## Create an MGN Online One-Time Search

Users must have permission to manage feeds in order to create MGN Online One-Time searches.

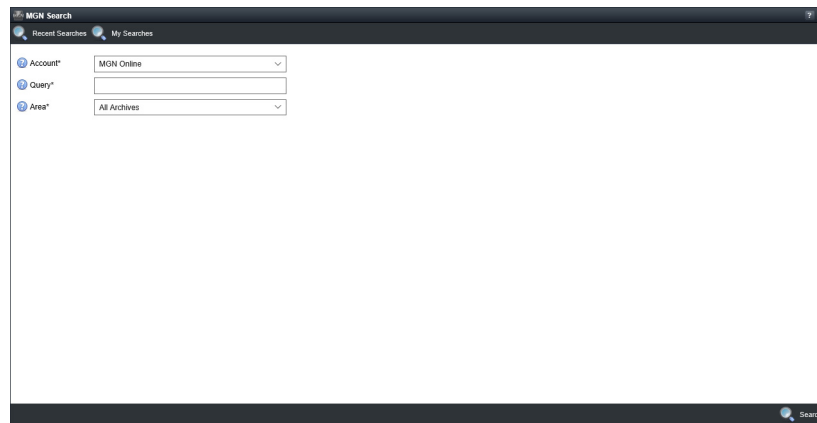
### To create an MGN Online One-Time search

1. In the main toolbar, point to the  **MGN** icon.  
A list opens displaying the available MGN Online feeds of the selected type opens.




2. Click **Search MGN**.

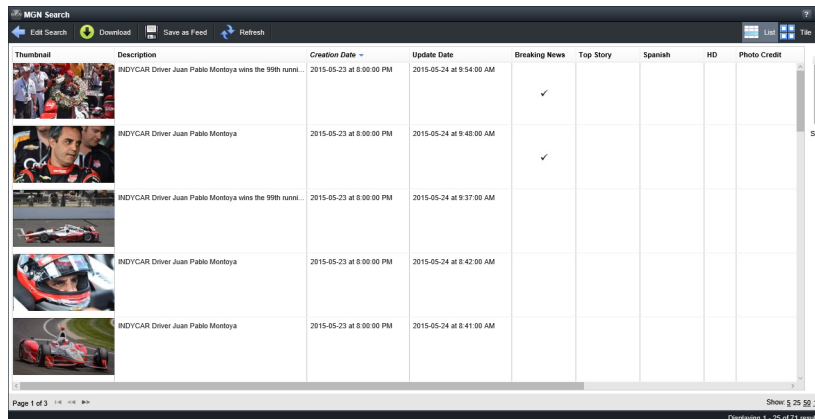
The **MGN Search** dialog box opens in the **Feed View** panel.






3. Use the **Account** list to select the configured MGN Online account to search for and purchase MGN Online content.
4. In the **Query** box, enter the term or terms with which to search for content in the MGN Online.  
Use the \* (asterisk) character as a wild card to match one or more characters.
5. Use the **Area** list to select the MGN Online gallery or archive in which to search for content: **Top Stories**, **Graphics**, **Elements**, **Photos**, **My Archive**, or **NewsToons**.

- In the bottom toolbar, click the  **Search** icon.

The **Feed View** panel opens displaying the content items that match the set parameters: **Query** and **Area**.





Streamline automatically adds the MGN Online One-Time searches that you create to the  **Recent Searches** and the  **My Searches** menu in the **MGN Search** dialog box.

- Click the  **Refresh** icon to refresh the feed with updated content.


## Edit an MGN Online One-Time Search


When an MGN Online One-Time search does not gather the content that you thought it would, you can edit any parameter of the search to refine the search.

### To edit an MGN Online One-Time search

- View the results of an MGN Online One-Time search by doing one of the following:
  - Create a new MGN Online One-Time search.
  - In the **MGN Search** dialog box, use the  **Recent Searches** menu to select a recent MGN Online One-Time search created by any of the users on the Streamline Server.
  - In the **MGN Search** dialog box, use the  **My Searches** menu to select a previous MGN Online One-Time search that you created.

The **Feed View** panel displays the results of the selected MGN Online One-Time search.

- To edit the MGN Online One-Time search open in the **Feed View** panel, do the following:
  - In the toolbar, click the  **Edit Search** icon.



The **MGN Search** dialog box opens in the **Feed View** panel.
  - Edit the search parameters as required to refine your search.
  - In the bottom toolbar, click the  **Search** icon.

The **Feed View** panel updates to display the results for your new search.


## Save an MGN Online One-Time Search


You can save an MGN Online One-Time search as an MGN Online feed for future reference. Users must have permission to manage feeds in order to save MGN Online One-Time searches as feeds.



### To save an MGN Online One-Time search as an MGN Online feed

1. View the results of an MGN Online One-Time search by doing one of the following:
  - Create a new MGN Online One-Time search.
  - In the **MGN Search** dialog box, use the  **Recent Searches** menu to select a recent MGN Online One-Time search created by any of the users on the Streamline Server.
  - In the **MGN Search** dialog box, use the  **My Searches** menu to select a previous MGN Online One-Time search that you created.

The **Feed View** panel displays the results of the selected MGN Online One-Time search.

2. In the toolbar, click the  **Save as Feed** icon.

Streamline saves the open MGN Online One-Time search as an MGN Online feed. The **Feed View** panel toolbar updates to display MGN Online feed tools. You can use the  **Configure** tool to edit the name of the new MGN Online feed.

3. The next time you want to open your new  **MGN** feed, use the  **MGN** list in the main toolbar to select the feed.




The selected MGN Online feed opens in the **Feed View** panel.

## Download MGN Online Content

After you find the MGN Online content that you want to use, you can download the content to your Streamline Server. You can download MGN Online content into an existing asset associated with a work order, or you can create a new asset for the content.



- ★ When you download an MGN Online content item into an existing asset, the MGN Online metadata overwrites all the metadata associated with the existing asset.

### To download content from the MGN Online

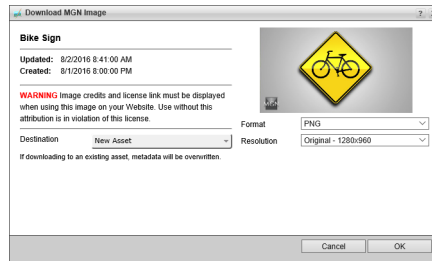
1. Use one of the following methods to view the MGN Online content item to download in the **Feed View** panel:
  - Use the  **MGN** list in the main toolbar to open an MGN Online feed.
  - Create a new MGN Online One-Time search.
  - In the **MGN Search** dialog box, use the  **Recent Searches** menu to select a recent MGN Online One-Time search created by any of the users on the Streamline Server.
  - In the **MGN Search** dialog box, use the  **My Searches** menu to select a previous MGN Online One-Time search that you created.

The **Feed View** panel displays the results of the selected MGN Online feed ore One-Time search.

2. In the **Feed View** panel, select the content item to download.

- In the toolbar, click the  **Download** icon. For users that do not have permission to manage MGN Online transactions, click the  **Request Download** icon

The **Download MGN Image** dialog box opens for the selected content item.



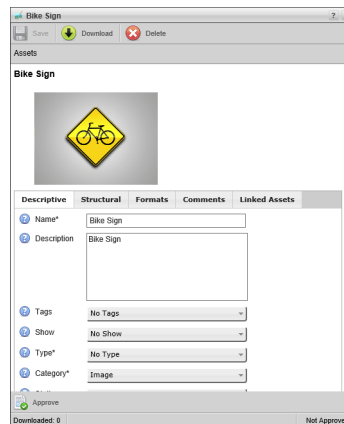
The **Use Information** section displays purchase information about the selected content item.

- Use the **Destination** list to select the asset with which to associate the downloaded content item.

To filter the **Destination** list, enter in the **Filter** box a portion of the asset name you want to select. You do not need to enter the start of an asset name, just any portion of the name filters the **Destination** list. The **Destination** list automatically updates to display only the assets with names that contain the text entered in the **Filter** box. Clear the **Filter** box to display all the available assets in the **Destination** list.

- Use the **Format** list to select the image format to download from the selected content item.
- Use the **Resolution** list to select image size to download from the selected content item.
- Click **OK**.

Streamline downloads the image from the selected MGN Online content item and associates the image with a new or selected asset and opens the asset in the **Asset Editor** panel.



- To complete the asset, edit the asset metadata as required and then approve the asset.

#### For More Information on...

- editing asset metadata, refer to the procedure “**To edit asset metadata using the Asset Editor panel**” on page 3–8.
- approving assets, refer to the section “**Approving or Rejecting Assets**” on page 3–19.

# Searching Streamline

The Assets, Work Orders, and Reports panels enable you to search assets, work orders, and report results respectively, available in your Streamline system. You can enter search criteria and select search filters to search for specific content. Streamline automatically updates the panel to display the results for a search. When a panel opens, it displays the results of the last search performed in that panel.

In this chapter, the term “panel” is used to refer to the Assets, Work Orders, and Reports panels unless otherwise noted.

The following topics are discussed in this chapter:

- Using the Search Toolbar
- Using the Search Editor
- Saving Searches
- Editing a Search

## Using the Search Toolbar

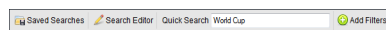
Each panel provides a Search toolbar that enables you to search Streamline content using entered key words and defined filters. Streamline searches all text-based metadata elements and displays the content that matches the text you entered and the filters you defined. The Search toolbar Keyword box is not case sensitive. The following table lists the valid search terms and operators for constructing a search query.

**Table 7.1 Quick Search Queries**

Search Query	Finds Items Containing
El	elections, elves, ELECT
Elections Night	the exact phrase “Elections Night”

### To create a keyword search

1. From the main toolbar of the panel, enter the search query in the **Keyword** box. For example, enter the text “**World Cup**”.



As you enter text in the Keyword box, Streamline updates the panel to only display the content that matches the entered text. For example, the panel updates to only display the content that includes “**World Cup**” or “**WORLD CUP**” as part of a text-based metadata element.

2. When you subscribe to external content providers, use the **Provider** list to select the content providers to include in your search. The **Internal** provider is your Streamline Server.


The panel updates to display content from the selected providers and that matches the text entered in the **Keyword** box.

3. To once again display all available the content in a panel, clear the text from the **Keyword** box.

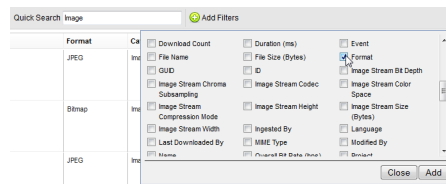
## Filtering the Quick Search Results

You can apply additional filters to the search results displayed in a panel. For each metadata element that you select for a search, you can select a filter value. After you select filter values for the metadata elements, Streamline updates the panel to only display the content that matches the text entered in the Keyword box and the defined filters.

### To filter the results of a search

1. In the **Search** toolbar, click the  **Add Filters** icon.

The **Metadata** list opens.



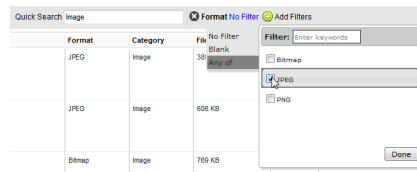
2. Select the check box to the left of each metadata element to use as a filter.
3. After selecting the required metadata elements for your search, click **Add**.

The toolbar updates to include the selected metadata (set in blue text).



- Select a metadata element for which to set a filter value.

The **Filter Value** list opens for the selected metadata element.




- Select one of the following values for the selected metadata element:

- **None** — include content with no value set for the selected metadata element.
- **Blank** — include content with a blank value set for the selected metadata element.
- **Any Of** — include content with the selected values for the selected metadata element. In the list that opens when you select **Any Of**, select the check boxes to the left of the values to include in your search results.

- Click **Done** to save your defined filter.

The panel updates to display the contents that match the text entered in the **Keyword** box and all the defined filters. The example search shown in step 4 finds content with a field that includes the text “**Image**”, when the **Format** of the content **JPG**.






- To delete a filter from your search, click the  icon to the left of the filter to delete.

The panel updates to display the contents that match the text entered in the **Keyword** box and all the defined filters.

## Using the Search Editor

When you define a search in the Search toolbar you have limited options to specify a search criterion. Use the Search Editor to build advanced search criteria to define searches. The Search Editor also enables you to save searches so that you can reuse them in the current or other panels.

**Table 7.2 Search Editor Options**

Icon	Name	Description
	Saved Searches	List your saved searches and enables you to recall a selected search to run or edit.
	New	Defines a new search.
	Save	Saves the current search.
	Save As	Saves the current search criteria as a new search with a new name.
	Delete	Deletes the current search from your saved searches.
	Keyword	Searches all text-based metadata fields for the entered text.
	Not	When this box is selected, any content that matches the specified criteria are not included in the search results.
	Field	Lists the available metadata elements to search.



**Table 7.2 Search Editor Options**

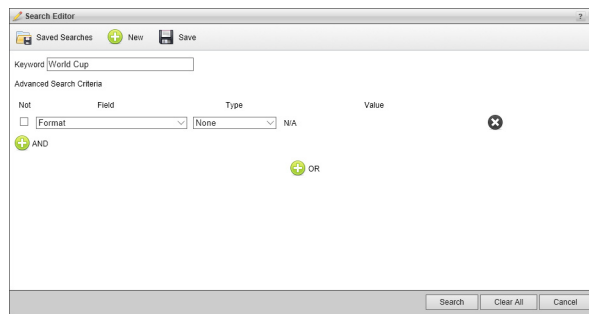
Icon	Name	Description
	Type	Selects the type of information in which to search for the selected field. The available options in this list depend on the selected Field.
	Value	Specifies the value to match in the selected Field and Type. Values vary depending on the selected Field and Type.
✕	Remove	Removes the associated filter from the search criteria.
+	AND	Adds another set of criteria to the search. Note that AND filters are grouped together.
+	OR	Adds an alternative to the criteria specified above it.

### Search by Metadata Elements

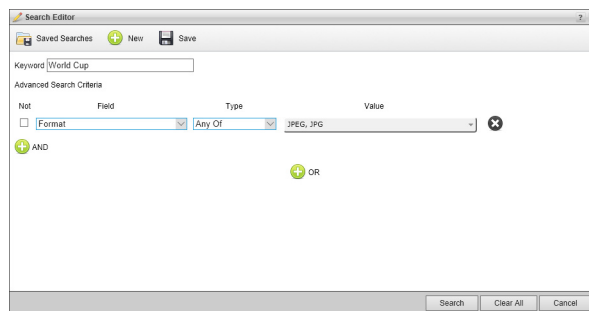
When you define a search, you can limit your search to a selected type of Streamline asset or work order. When you select an element type along with your search query, the panel table only displays the items that match both the entered search query and the selected type. Searches are not case sensitive.

#### To create a search based on metadata fields

- From the **Search** toolbar of a panel, click the  **Search Editor** icon.  
The **Search Editor** window opens.
- In the **Search Editor** toolbar, click the  **New** icon.
- In the **Keyword** box, enter the text with which to search all text-based metadata in your Streamline system. When you leave the **Keyword** box blank, Streamline does not apply a general query to your search. In the following example, the search looks for items that contain the text **“World Cup”**:



- Use the **Field**, **Type**, and **Value** options in conjunction to specify a filter for your search.  
Our example search now looks for items that contain the text **“World Cup”** and have a format of JPEG or JPG.



5. Select the **Not** check box for a filter when you want to select items that do not match the set **Field**, **Type**, and **Value** options.
6. Click the **+ AND** icon to add another filter to the search.
7. Click the **+ OR** icon to add an alternative filter to the search.
8. To run your new search, click **Search**.

The **Search Editor** window closes and the current panel updates to display the items that match your new search.

## Search by Date

In a search you can use the approved, created, encoded, ingested, last downloaded, modified, or submitted date of a Streamline content to filter search results.

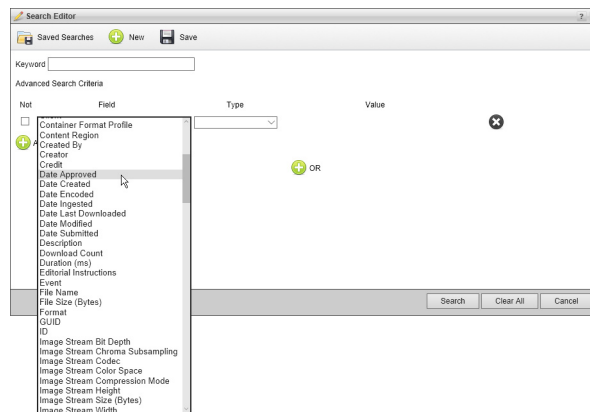
### To search by date

1. From the **Search** toolbar of a panel, click the **Search Editor** icon.

The **Search Editor** window opens.

2. In the **Search Editor** toolbar, click the **+ New** icon.
3. Use the **Field** list to select a date dependent metadata element.

For example, select **Date Approved** from the **Field** list.




4. Use the **Type** list to select the date or date range with which to search for Streamline content. The available options are as follows:
  - **Today** — today's date.
  - **This Week** — dates within the current week.
  - **This month** — dates within the current month.
  - **This Year** — dates within the current year.
  - **Exact Date** — the date set in the **Value** box using the **Calendar** tool.
  - **Range** — dates within the **Start** and **End** dates set in the **Value** box using the **Calendar** tool.
  - **After** — dates after the date set in the **Value** box using the **Calendar** tool.
  - **Before** — dates before the date set in the **Value** box using the **Calendar** tool.
  - **Relative Days** — dates between the current date and the number of days entered in the **Value** box.
  - **Relative Hours** — times between the current time and the number of hours entered in the **Value** box.
5. To run your new search, click **Search**.

The **Search Editor** window closes and the current panel updates to display the items that match your new search.

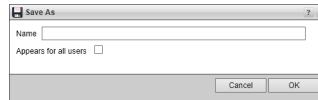
## Saving Searches

When you save a search, Streamline adds the search to the Saved Searches list of the Search toolbar in the panel from which you created the search. Depending on your user permissions, you can keep your searches to yourself or make them available to all the user on your Streamline Server. You can quickly run a search by selecting the search from the Saved Searches list. The current panel updates to display the results of the selected search.

### To save a search for a panel

6. Use the **Search Editor** window to create a search.
7. In the **Search Editor** window toolbar, click the  **Save** icon.

The **Save As** dialog box opens.




8. In the **Name** box, enter a unique name for your search.  
Streamline displays search names in the **Saved Searches** list.
9. Select the **Appears for all users** check box when you want to allow all the users on your Streamline Server to use your saved search.
10. Click **OK**.

The **Save As** dialog box closes and Streamline adds your search to the **Saved Searches** list in the **Search** toolbar of the current panel.

## Running a Saved Search

The Saved Searches list in the Search toolbar of a panel enables you to select a saved search to run. The Saved Searches list only contains the searches saved for the current panel. Along with the searches you created, the Saved Searches list may contain searches created by other users on your Streamline Server.



### To run a saved search

1. In the **Search** toolbar of a panel, click the  **Saved Searches** icon.  
A list of searches saved for the current panel opens.
2. Use the **Saved Searches** list to select the saved search to run for the current panel.  
The current panel updates to display the items that match the selected saved search.

## Editing a Search

The Saved Searches list in the Search Editor window enables you to select a saved search to edit.

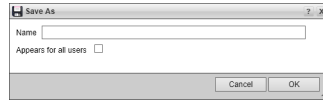
### To edit a search

1. From the **Search** toolbar of a panel, click the  **Search Editor** icon.  
The **Search Editor** window opens.
2. Use the **Saved Searches** list to select the saved search to edit.  
The **Search Editor** window displays the search criteria of the selected save search.
3. Edit the search criteria as required to refine your search.
4. Click the  **Save** icon

5. To save the refined search as a new search with a new name, complete the following steps:

- a. Click the  **Save As** icon.

The **Save As** dialog box opens.



- b. In the **Name** box, enter a unique name for your search.

Streamline displays search names in the **Saved Searches** list.

- c. Select the **Appears for all users** check box when you want to allow all the users on your Streamline Server to use your saved search.
- d. Click **OK**.

The **Save As** dialog box closes and Streamline adds your search to the **Saved Searches** list in the **Search** toolbar of the current panel.



# Reporting

Streamline enables you to create reports to provide metrics about the assets and work orders saved on a your Streamline Sever. Reports can include user-defined filters to focus report results. You can display report results in a tabular or graphical format. After you view a report, you can export the report results to a Comma Separated Values (CSV) formatted file.


The following topics are discussed in this chapter:

- Create a Report
- Run a Report
- Edit a Report
- Export Report Results to a CSV File
- Delete a Report

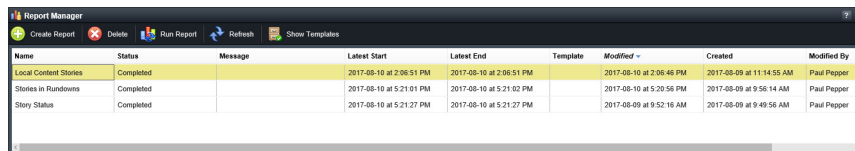
## Create a Report

When working with reports, all procedures start from the Reports Manager panel. The first steps in creating a report are common between the various report types. After you select a report type there are specific steps to define the selected report type. The first procedure in this section outlines the common steps used to start creating a report. Subsequent procedures are specific to the type of report you select to create.


### To start creating a new report

1. From the main toolbar, click or tap the  **Running Orders** icon.

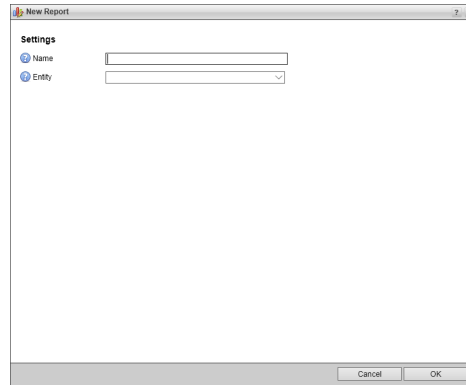
The **Report Manager** panel opens.



Name	Status	Message	Latest Start	Latest End	Template	Modified	Created	Modified By
Local Content Stories	Completed		2017-08-10 at 2:06:51 PM	2017-08-10 at 2:06:51 PM		2017-08-10 at 2:06:46 PM	2017-08-09 at 11:14:55 AM	Paul Pepper
Stories in Randoms	Completed		2017-08-10 at 5:21:01 PM	2017-08-10 at 5:21:02 PM		2017-08-10 at 5:20:58 PM	2017-08-09 at 9:56:14 AM	Paul Pepper
Story Status	Completed		2017-08-10 at 5:21:27 PM	2017-08-10 at 5:21:27 PM		2017-08-09 at 9:52:16 AM	2017-08-09 at 9:49:56 AM	Paul Pepper

2. From the **Report Manager** toolbar, click or tap the  **Create Report** icon.

The **New Report** dialog box opens.



**New Report**

Settings

Name

Entity

Cancel OK

3. In the **Name** box, enter a name for the report.
4. Use the **Entity** list to select entities from which Streamline generates the report. The available entities are as follows:
  - **Asset** — only the assets contained in a Streamline Server.
  - **Work Orders** — only the work orders saved on a Streamline Server.
5. Use the **From Template** list to select the report to use as a template to create your new report. Select **None** to not use a report template.

This list only displays the templates based on the entity you selected from the **Entity** list.
6. Use the **Type** list to select the type of report to create. The available report types are as follows:
  - **Standard** — a tabular report that lists the stories that match the filters set for the report. To define this type of report, continue with the procedure “**To define a standard report**” on page 8–3.
  - **Row Count** — a summary report that displays the number of stories within a group that match the filters set for the report. You can display this type of report as a table, bar chart, column chart, or pie chart. To define this type of report, continue with the procedure “**To define a row count report**” on page 8–4.

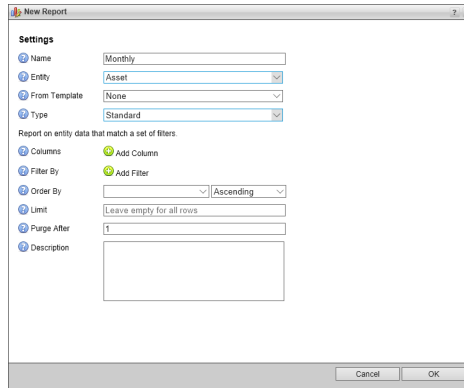
## Standard Report

Standard reports display information about each found story as a single row in a table. You can define filters as part of a standard report to focus report results.

### To define a standard report

1. In the **New Report** dialog box, use the **Report Type** menu to select **Standard**.

The **New Running Order** dialog box displays the **Standard** report options.



2. In the **Columns** section, click or tap **+ Add Column** to add a column to the report.

A column selection list opens in the **Columns** section.



Reports must contain one or more columns.

3. Use the **Column** list to select a column that contains information to display in the report.
4. To add additional columns to a report, repeat steps 2 and 3.

The **Columns** section displays the selected columns in the order that they will display in the report.

5. Use the following icons to manage the columns selected for a report:

- — click or tap this icon to delete the associated column from the report.
- — click and drag this icon to move the associated column to a new position in the report.

6. In the **Filter By** section, click or tap **+ Add Filter** to add a filter the report. Report results will only include the stories that match all the defined filters in the order they are displayed in the **Filter By** section.

A filter definition opens in the **Filter By** section.



7. Use the **Field** list to select the field that contains the information to filter.
8. Use **Type** to select the type of value that you want to filter for the selected field.

The **Value** field updates to match the selected **Type**.

9. Use the **Value** field to set a value for the selected **Type**.

Some **Types** do not require that you enter or select a **Value**.

10. When you want a report to contain results that do not match a defined filter, select the **Not** check box associated with the filter.

11. To add additional filters to a report, repeat steps **6** and **10**.  
Report results will only include the stories that match all the defined filters in the order they are displayed in the **Filter By** section.
12. Use the **Order By** list to select the field that contains the information with which to order report results.
13. Use the list to the right of the **Order By** list to select the order in which to sort report results based on the information contained in the field selected from the **Order By** list.
14. Enter in the **Limit** box the maximum number of records to include in a report.
15. Enter in the **Purge After** box the number of days that Streamline saves report results.  
Streamline deletes report results that are older than the set **Purge After** time.
16. Enter in the **Description** box a description of the report.
17. Click or tap **OK**.  
Streamline adds the new report to the **Report Manger** panel.

## Row Count Report

Row count reports report the number of stories that match the filters defined for the report. When you add groups to the report, the report displays a story total for each group. You can display the results of a row count report as a table, bar chart, column chart, or pie chart.




### To define a row count report

1. In the **New Report** dialog box, use the **Report Type** menu to select **Row Count**.  
The **New Running Order** dialog box displays the **Row Count** report options.

2. In the **Group By** section, click or tap **+ Add Group** to add a group to the report.  
A column selection list opens in the **Group By** section.

3. Use the **Column** list to select a column that contains the information that you want to use to group the report results.

The report results will display a count for each distinct value in the selected **Group By** column. When creating the report, Streamline takes all the assets or work order that fit the report criteria and groups them. For example, selecting the **Station** field will group assets by Station. Additional sub-diving of the groups can be done by adding more fields. For example, select **Station** as the first field to group by, and then select **Ingested By** as the second field to group by. If there are 3 stations and 4 users, this gives 12 different bars to display on a graph.

- To add additional **Group By** columns to a report repeat steps 2 and 3.  
The **Group By** section displays the selected columns in the order that they will group results in the report.
- Use the following icons to manage the **Group By** columns selected for a report:
  -  — click or tap this icon to delete the associated **Group By** column from the report.
  -  — click and drag this icon to move the associated **Group By** column to a new position in the grouping order.
- In the **Filter By** section, click or tap  **Add Filter** to add a filter the report. Report results will only include the stories that match all the defined filters in the order they are displayed in the **Filter By** section.  
A filter definition opens in the **Filter By** section.



- Use the **Field** list to select the field that contains the information to filter.
- Use **Type** to select the type of value that you want to filter for the selected field.  
The **Value** field updates to match the selected **Type**.
- Use the **Value** field to set a value for the selected **Type**.  
Some **Types** do not require that you enter or select a **Value**.
- When you want a report to contain results that do not match a defined filter, select the **Not** check box associated with the filter.
- To add additional filters to a report, repeat steps 6 and 10.  
Report results will only include the stories that match all the defined filters in the order they are displayed in the **Filter By** section.
- Use the **Order Count** list to select the order in which to sort report results based on the reported row counts.
- Enter in the **Purge After** box the number of days that Streamline saves report results.  
Streamline deletes report results that are older than the set **Purge After** time.
- Enter in the **Description** box a description of the report.
- Click or tap **OK**.  
Streamline adds the new report to the **Report Manger** panel.

## Create a Template from a Report

You can create report templates from existing reports. When you use a template to create a new report, Streamline copies all the settings and filter definitions in the selected template into the new report.


### To create a template from an existing report

- In the **Report Manager** panel, locate the report that you want to use as a template.
- Click in the **Template** cell associated with the report that you want to use as a template.  
Streamline displays a check box in the selected **Template** cell.


Name	Status	Message	Latest Start	Latest End	Template	Modified -	Created	Modified By
My Story Types	Never run					2017-08-10 at 5:23:24 PM	2017-08-10 at 5:23:24 PM	Paul Pepper
Local Content Stories	Completed		2017-08-10 at 2:06:51 PM	2017-08-10 at 2:06:51 PM	<input checked="" type="checkbox"/>	2017-08-10 at 2:06:46 PM	2017-08-09 at 11:14:55 AM	Paul Pepper
Stories in Randoms	Completed		2017-08-10 at 5:21:01 PM	2017-08-10 at 5:21:02 PM		2017-08-10 at 5:20:56 PM	2017-08-09 at 9:56:14 AM	Paul Pepper
Story Status	Completed		2017-08-10 at 5:21:27 PM	2017-08-10 at 5:21:27 PM		2017-08-09 at 9:52:16 AM	2017-08-09 at 9:49:56 AM	Paul Pepper

3. Select the **Template** check box.
4. Click any other cell in the **Report Manager** panel.

Streamline creates a template from the selected report and adds the template to the **From Template** list in the **New Report** dialog box.

5. To show template reports in the **Reports** table, click or tap the  **Show Templates** icon in the **Reports Manager** toolbar.

The **Reports** table updates to show all the template reports. Template reports are identified by a check mark in the **Template** column of the **Reports** table.

6. To hide template reports from the **Reports** table, click or tap the  **Hide Templates** icon in the **Report Manager** toolbar.

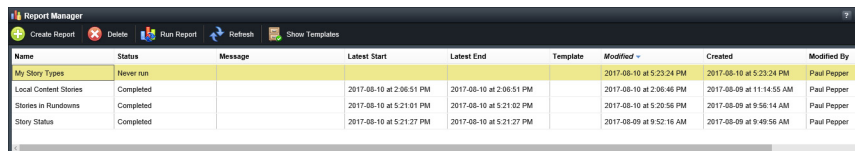
The **Reports** table updates and hides all the template reports.

## Run a Report


After you create a report you need to run the report to view the report results. New reports are added to the Report Manager panel with the status “Never Run”. After you run a report the report status changes to “Completed”. Streamline saves the results of each report run. When a report result is older than the set Purge After time for the Report, Streamline deletes the result.

### To run a report

1. In the **Report Manager** panel, select the report to run.




Name	Status	Message	Latest Start	Latest End	Template	Modified	Created	Modified By
My Story Types	Never run					2017-08-10 at 5:23:24 PM	2017-08-10 at 5:23:24 PM	Paul Pepper
Local Content Stories	Completed		2017-08-10 at 2:06:51 PM	2017-08-10 at 2:06:51 PM		2017-08-10 at 2:06:46 PM	2017-08-09 at 11:14:55 AM	Paul Pepper
Stories in Rundowns	Completed		2017-08-10 at 5:21:01 PM	2017-08-10 at 5:21:02 PM		2017-08-10 at 5:20:56 PM	2017-08-09 at 9:56:14 AM	Paul Pepper
Story Status	Completed		2017-08-10 at 5:21:27 PM	2017-08-10 at 5:21:27 PM		2017-08-09 at 9:52:16 AM	2017-08-09 at 9:49:56 AM	Paul Pepper

2. From the **Report Manager** toolbar, click or tap the  **Run Report** icon.

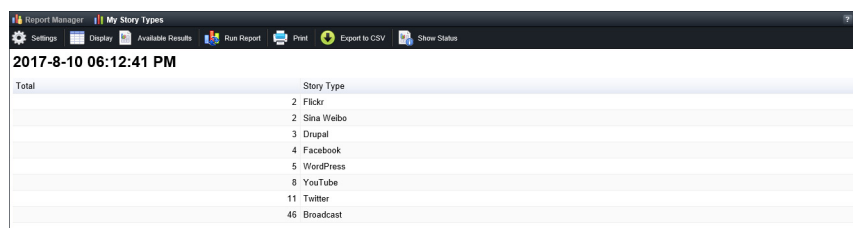
While Streamline runs the report the **Status** column displays “Running” as the current status. When the report is ready for viewing, **Status** column displays “Complete” as the status. A status of “Failed” displays when a report run does not properly complete. The **Message** column displays additional information about “Failed” report runs.

3. To view a completed report, double-click the report in the **Report Manager** panel.


The report results open in a **Report** panel. The **Report** panel title bar displays the report name.

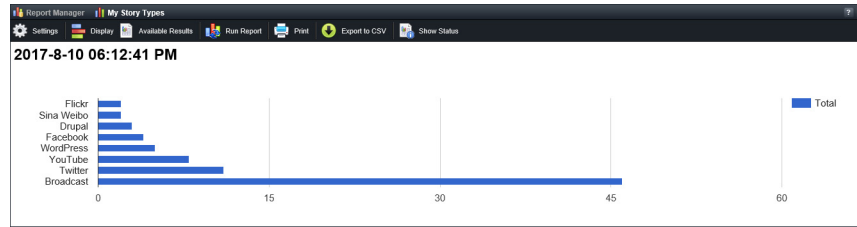
4. In the **Report** panel toolbar, point to the  **Display** icon and then select the format in which to view the report results. The available report display formats are as follows:


-  **Table**

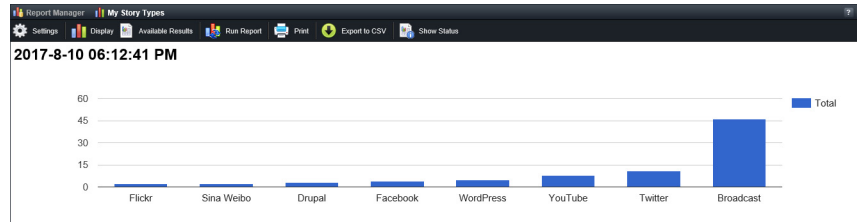



Total	Story Type
2	Flickr
2	Sina Weibo
3	Drupal
4	Facebook
5	WordPress
8	YouTube
11	Twitter
46	Broadcast

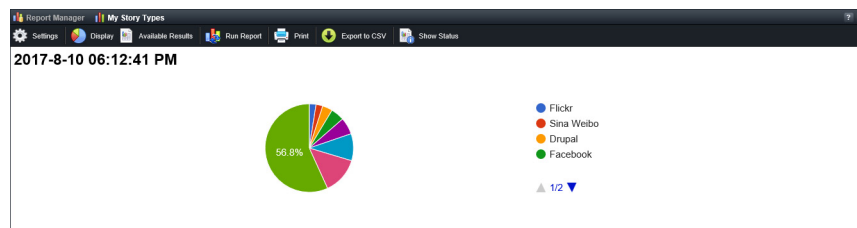
-  **Bar** (Row Count reports only) — hover the mouse pointer over a bar to display more information.



-  **Column** (Row Count reports only) — hover the mouse pointer over a column to display more information.




-  **Pie** (Row Count reports only) — hover the mouse pointer over a section to display more information.





5. To view previous report results, point to the  **Available Results** icon in the **Report** panel toolbar and then select the date of the report to view.


Streamline saves the results of each report run. When a report result is older than the set **Purge After** time for the Report, Streamline deletes the result from the **Available Results** list.

6. To view the status of the current report, click the  **Show Status** icon in the **Report** panel toolbar.

Streamline displays the current report status in the **Report Display** area. To hide the report status, click the  **Hide Status** icon.

7. To create another run of the current report, click the  **Run Report** icon in the **Report** panel toolbar.


8. After the report run completes, select the first report from the  **Available Results** list to view the results of the report run.

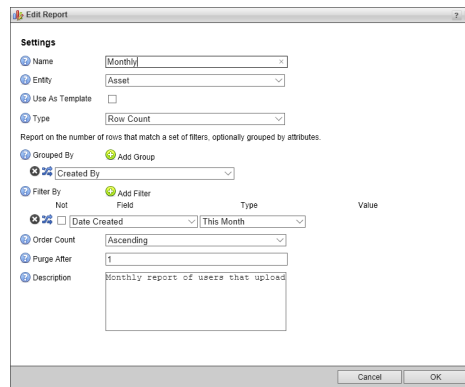
9. To print the current report, click the  **Print** icon to use the **Print** dialog box to format and print your report.



## Edit a Report

If a report does not quite give you the results you were looking for, you can edit the settings of the report.

### To edit an existing report

1. In the **Report Manager** panel, double-click the report to edit.  
The selected report opens in a **Report** panel.
2. In the **Report** panel toolbar, click or tap the  **Settings** icon.  
The **Edit Report** dialog opens for the selected report.




3. Edit the report settings as required.
  - ★ Saving changes to the report settings other than the **Name**, **Use Template**, **Purge Limit**, or **Description** will delete previously saved report results.
4. Click or tap **OK**.  
Streamline updates the selected report with the changed settings.  
When you change the report settings other than the **Name**, **Use Template**, **Purge Limit**, or **Description**; a confirmation message opens. Click **Yes** to continue and delete previous report results. Click **No** to keep previous report results.
5. Click the  **Run Report** icon in the **Report** panel toolbar to run the report using the new settings you set for the report.
6. After the report run completes, select the first report from the  **Available Results** list to view the results of the report run.

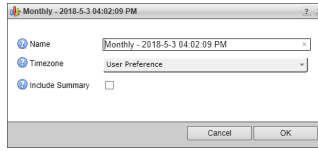
## Export Report Results to a CSV File

For further processing, you can export the results of a report to a Comma Separated Values (CSV) on your local computer. You can use Microsoft® Excel® to process the CSV file exported from a report.

### To export a report to a CSV file

1. In the **Report Manager** panel, double-click the report to export.  
The selected report opens in a **Report** panel.
2. In the **Report** panel toolbar, click or tap the  **Export to CSV** icon.

The **Export to CSV** dialog box opens for the selected report. The **Export to CSV** dialog box title bar displays the report name.




3. Enter in the **Name** box the filename for the report CSV file.  
Streamline appends the extension **.csv** to your entered filename.
4. Use the **Timezone** list to select the time zone with which to export time columns from the report. Select **User Preference** to use the time zone set in your Streamline preferences.
5. Select the **Include Summary** check box to include a summary total for all row count columns.
6. Click **OK**.  
Streamline generates a CSV file for the selected report and downloads the file to your web browser download folder.

## Delete a Report

When you no longer require a report, you can delete the report. Deleting a report also deletes the results associated with the report.

### To delete a report

1. In the **Report Manager** panel, select the report to delete.
2. From the **Report Manager** toolbar, click or tap the  **Delete** icon.  
A confirmation message opens.
3. Click or tap **OK**.  
Streamline deletes the selected report from the **Report Manager** panel.



# Messaging

Streamline contains a built-in messaging system that enables Streamline users to communicate with one or multiple users on the same Streamline Server. You can use the messaging system to communicate in the following manners:

- **Chat** — exchange messages between yourself and one other user.
- **Conversation** — exchange messages about a specific topic between yourself and one or more users.
- **Discussion** — exchange messages about an Streamline object between yourself and one or more users. Discussions are linked to Streamline objects.

You do not have to wait for other users to log in to Streamline, you can send them messages and they will receive the messages the next time they log in to Streamline.


This chapter discusses the following topics:

- Set Your Messaging Status
- Chat with Another User
- Invite Users to a Conversation
- Manage Message Notifications
- Filter Messages
- Send Files as Message Attachments
- Download Session Transcripts

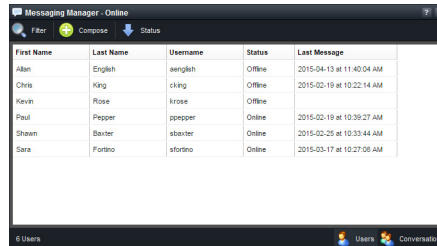
## Set Your Messaging Status

You can set your messaging status so that others who send you messages can see whether you are available to receive messages.

### To set your messaging status

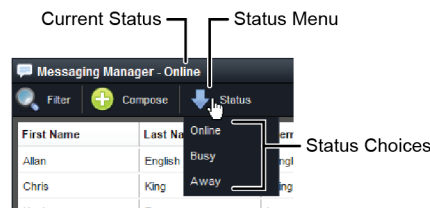
1. From the main toolbar, click or tap the  **Messaging** icon.

The **Messaging Manager** opens.



2. Depending on whether you work with Streamline through a desktop computer or mobile device, use one of the following methods to select your messaging status:

- **Desktop Computer** — in the toolbar, point to **Status**, and then click your new messaging status.
- **Mobile Device** — in the toolbar, tap **Status** to expand the list, and then tap your new messaging status.



You can set your messaging status to one of the following:


- **Online** — you are available to respond to messages.
- **Busy** — you are online, but unavailable or do not want to receive messages. Users can still send you messages, but your status lets them know that you may not answer.
- **Away** — you are online, but currently away from your computer and unable to respond to messages. Users can still send you messages, but your status lets them know that you will not immediately answer.

The status you select displays with your name in the other user's **Messaging Manager**, **Chat**, **Conversation**, and **Discussion** panels.

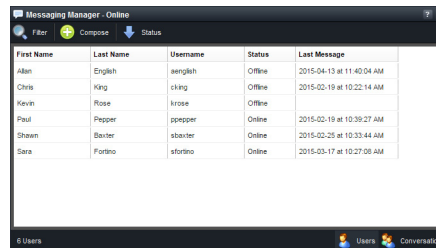
## Chat with Another User

Use the Chat panel when you want to exchange messages to a single user. After you start a one-on-one chat with a single user, you cannot add other users to the chat.

### To chat with another user

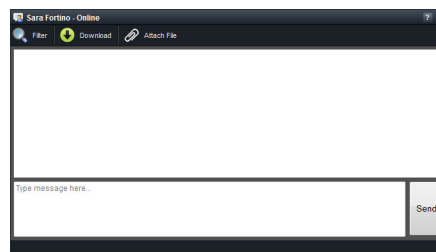
1. From the main toolbar, click or tap the  **Messaging** icon.

The **Messaging Manager** opens.



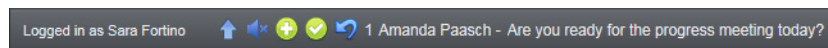
2. In the **Name** column, double-click the name of the user with which to start a one-on-one chat.


A **Chat** panel opens for the selected user displaying the user's name and current messaging status in the title bar.



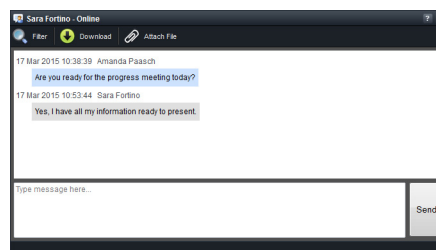
3. In the **Type message here** box, enter a message to send to the other user in the one-on-one chat.
4. Click or tap **Send** to send the message entered in the **Type message here** box to the other user in the one-on-one chat. You can also send a message by pressing **Return** after entering a message in the **Type message here** box.

Streamline notifies the user of your message by displaying the message in the status bar at the bottom of their Streamline window. An online user receives instant notification of your message, while an offline user does not receive notification until they log in to Streamline.



The receiving user can click or tap the  **Reply** icon in the status bar to open the **Reply** dialog box to quickly reply to your message, or they can click or tap the message to open a **Chat** panel to start chatting with you.



5. Since you have a **Chat** panel open, you receive the user's reply in the **Messages** section of the **Chat** panel.

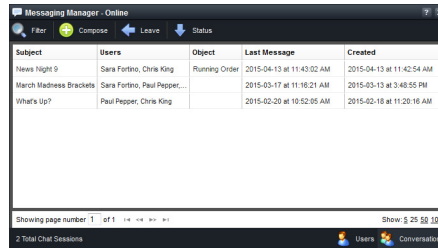



## Invite Users to a Conversation

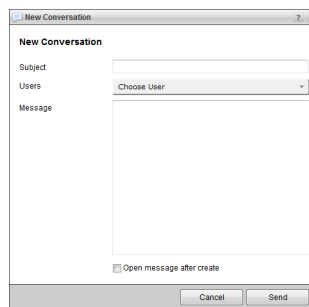
Use the Conversation panel when you want to exchange messages with multiple users about a specific subject. While in a conversation, you can add users to the conversation or users can choose to leave the conversation.

### To start a conversation with multiple users


1. From the main toolbar, click or tap the  **Messaging** icon.  
The **Messaging Manager** opens.
2. In the bottom toolbar of the **Messaging Manager**, click or tap the  **Conversations** icon.  
The **Conversations** tab opens.



3. From the **Messaging Manager** toolbar, click or tap the  **Compose** icon.  
The **New Conversation** dialog box opens.

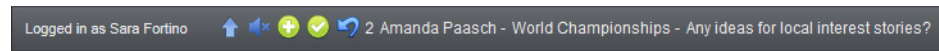



To rejoin a conversation that you are part of, double-click the conversation subject in the **Subject** column. The selected conversation opens in a **Conversation** panel.

4. In the **Subject** box, enter the subject of your new conversation.  
When users receive notification of a new conversation, Streamline displays the conversation subject and first message in the status bar at the bottom of the Streamline window.
5. Use the **Users** list to select the users that you want to include in your conversation.
  - a. In the **User** list, select the check box to the left of each user that you want to include in your conversation.  
To include all Streamline users in your conversation, select **System** from the **User** list.
  - b. Clear the check box to the left of each user that you want to exclude from your conversation.
  - c. Click or tap the  **Close** icon.
6. In the **Message** box, enter the first message for your conversation with the users you selected from the **Users** list.
7. Select the **Open Message After Create** check box to open a **Conversation** panel for the new conversation after Streamline creates the new conversation.

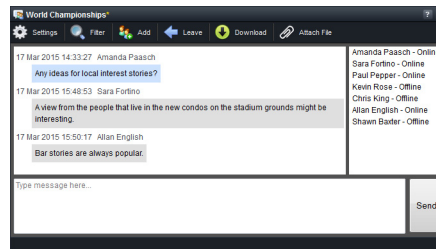
- Click or tap **Send** to use the message entered in the **Message** box to start the new conversation with the users selected from the Users list.

Streamline notifies the users of your conversation by displaying the conversation subject and first message of the conversation in the status bar at the bottom of their Streamline windows. Online users receive instant notification of your conversation, while offline users do not receive notification until they log in to Streamline.



The receiving users can click or tap the  **Reply** icon in the status bar to open the **Reply** dialog box to quickly reply to your message, or they can click or tap the message to open a **Conversation** panel to start chatting with you.

- When you have a **Conversation** panel open, you receive the user replies in the **Messages** section of the **Conversation** panel.



If you do not have a **Conversation** panel open, you receive notification of user replies in the status bar at the bottom of the Streamline window.



## Manage a Conversation

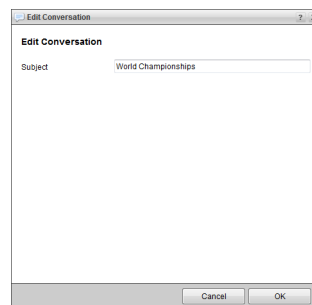
While participating in a conversation you can do the following to manage the conversation:

- Change the subject of the conversation.
- Add users to the conversation.
- End your participation in the conversation.

### To change the subject of a conversation

- From the **Conversation** panel toolbar, click or tap the  **Settings** icon.



The **Edit Conversation** dialog opens.



- In the **Subject** box, enter a new subject for the conversation.
- Click **OK**.

Streamline updates all **Messaging Managers** and **Conversation** panels with the new subject.

### To add a user or users to a conversation

1. From the **Conversation** panel toolbar, click or tap the  **Add** icon to display the **User** list.
2. In the **User** list, select the check box to the left of each user that you want to add to your conversation.
3. Click or tap the  **Close** icon.

Streamline adds the selected users to the conversation and sends each added user a notification that they have been added to the conversation.

### To end your participation in a conversation


1. From the **Conversation** panel toolbar, click or tap the  **Leave** icon.

An **Alert** opens.

2. Click **OK**.

After leaving a conversation you no longer receive notifications about the conversation. To rejoin a conversation, you need to ask a user in the conversation to add you to the conversation.

### To leave a conversation from the Messaging Manager


1. From the main toolbar, click or tap the  **Messaging** icon.

The **Messaging Manager** opens.

2. In the bottom toolbar of the **Messaging Manager**, click or tap the  **Conversations** icon.

The **Conversations** tab opens.

3. Select the conversation to leave.

4. From the **Messaging Manager** toolbar, click or tap the  **Leave** icon.

An **Alert** opens.

5. Click **OK**.

After leaving a conversation you no longer receive notifications about the conversation. To rejoin a conversation, you need to ask a user in the conversation to add you to the conversation.

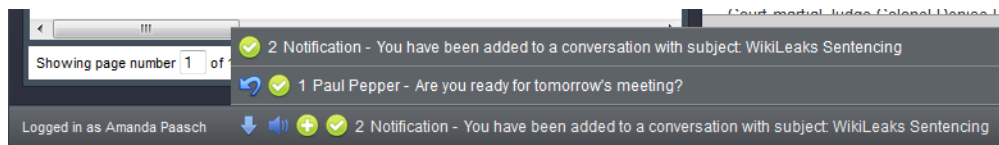
## Manage Message Notifications


The status bar at the bottom of the Streamline window displays notifications about received messages when you do not have a Chat, Conversation, or Discussion panel open. The tools in the status bar enable you to manage the notification messages that you receive.

### To manage notification messages




1. In the status bar, click or tap the  **Show Messages** icon.

A list of received notification messages opens above the status bar. The **Message** list displays the 50 most recent notification messages.



2. To mark a notification message as read in the **Message** list or status bar, click or tap the  **Mark as Read** icon to the left of the notification message.


Streamline removes the selected notification message from the **Message** list or status bar.

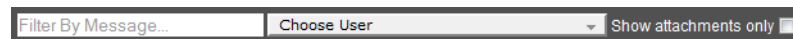
3. To close the **Message** list, click or tap the  **Hide Messages** icon in the status bar.
4. To play an alert sound for each notification message that you receive, click or tap the  **Turn Notification On** icon in the status bar.
5. To turn notification alert sounds off, click or tap the  **Turn Notification Off** icon in the status bar.


## Filter Messages


Use the Filter section in a Chat, Conversation, or Discussion panel to filter the messages displayed in the Messages section of the panel. The filters you set in the Filter section work together to filter the messages displayed in the Messages section.

### To filter displayed messages

1. From the **Chat**, **Conversation**, or **Discussion** panel toolbar, click or tap the  **Filter** icon.  
The **Filter** section opens for the panel.



When the **Filter** section is open, click or tap the  **Filter** icon to close the **Filter** section.

2. In the **Filter By Message** box, enter a portion of the subject of the messages you are looking for.  
The **Messages** section of the panel updates to display only the messages with subjects that contain the entered text.
3. Use the **Users** list to select the users who wrote the messages you are looking for.
  - a. In the **User** list, select the check box to the left of each user that you want to include in your search.
  - b. Clear the check box to the left of each user that you want to exclude from your search.
  - c. Click or tap the  **Close** icon.

The **Messages** section of the panel updates to display only the messages that the selected users wrote.

4. Select the **Show attachments only** check box to only display messages in the **Messages** section that have an attached file.


The **Messages** section of the panel updates to display only the messages with attached files.

When you set multiple filters, the **Messages** section only displays the messages the match all set filters.

## Send Files as Message Attachments


Along with sending text to the other users, you can send a file as an attachment. On a desktop computer you can select any type of file to send as any attachment. On a mobile device you can only attach photos or videos.

### To use a desktop computer to attach a file to a message

1. From the **Chat**, **Conversation**, or **Discussion** panel toolbar, click the  **Attach File** icon.  
The **File Upload** alert opens.
2. Click **Browse**.  
The **File Upload** dialog box opens showing the file system of the local computer.
3. Locate the file to attach to the message.
4. Click **Open**.

Streamline sends the selected file as a message attachment. The receiving users can click the **Download** link to view the attached file.

### To use a mobile device to attach a file to a message


1. From the **Chat, Conversation, or Discussion** panel toolbar, click the  **Attach File** icon.  
The **File Upload** alert opens.
2. Click **Browse**.
3. To choose a file to attach, tap one of the following options:
  - **Take Photo** — use the mobile device camera to take a photo and attach the saved image file to the playlist item.
  - **Choose Existing** — select a photo from a photo library on the mobile device and attached the selected image file to the playlist item.

Streamline sends the selected file as a message attachment. The receiving users can click the **Download** link to view the attached file.

## Download Session Transcripts

Any time you can save the transcript of a chat, conversation, or discussion to a text file.

### To download a transcript of a chat, conversation, or discussion



1. From the **Chat, Conversation, or Discussion** panel toolbar, click or tap click or tap the  **Download** icon.
2. Follow your web browser prompts to save the transcript to a text file.

Streamline appends `.txt` to the title of the chat, conversation, or discussion to create the name for the saved transcript file. The following is an example of a transcript file:

```
17 Mar 2015 14:33:27 Amanda Paasch: Any ideas for local interest stories?  
17 Mar 2015 15:48:53 Sara Fortino: A view from the people that live near by?  
17 Mar 2015 15:50:17 Allan English: Bar stories are always popular.
```

# Configuring Streamline

As a non-administrative Streamline user, you can use the following tools to configure your Streamline working environment:

-  **Change Password** — change the password you use to log in to Streamline.
-  **Perspectives** — apply a saved perspective to change the layout of panels in the Streamline user interface. You can also create and manage your own perspectives.


The following topics are discussed in this chapter:

- Changing Your Streamline Password
- Working with Perspectives

## Changing Your Streamline Password

You must have permission to change your password within Streamline.

### To change your Streamline password

1. On the main toolbar, click the  **Change Password** icon.

If the **Change Password** icon is not visible, you do not have permission to change your password within Streamline. If you need to change your password, contact your administrator.

The **Change Password** dialog box opens.

2. In the **Old Password** box, type your current password.
3. In the **New Password** box, type a new password.
4. In the **Verify Password** box, re-type the new password.
5. Click **Change Password**.

A message informs you of the successful change of your password.

6. Click **OK**.

The next time you log in to Streamline, use your new password.

## Working with Perspectives

A user perspective is a customized view of the Streamline user interface. It is a mapping of Streamline panel types to positions in the user interface layout. Perspectives also save the columns displayed in the Assets, Asset Approvals, and Work Order panels.

For example, you can create a perspective that includes the Asset Editor panel in the left column, a report in the middle, and a Work Order in the right column. When you later use this perspective, any Asset Editor panel you open appear in the left column. Reports appear in the middle. Work Orders appear in the right column.

Perspectives are especially useful for people who perform many different tasks in Streamline. For example, a producer may create one perspective for approving work orders and the Asset Editor panel, and another perspective for working with reports and work orders.

Perspectives can include any or all panel types:


- Work Orders Manager
- Assets
- Reports
- Asset Approvals
- Asset Editor
- Report Details
- My Work Orders

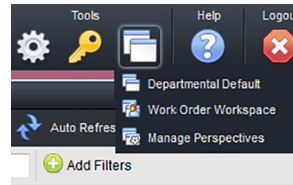
All Streamline users can create perspectives for their own use. Streamline administrators can also create global perspectives available to all users.

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

## Open a Saved Perspective

### To open a saved perspective

1. To open the **Perspectives** list, in the main toolbar, point to the  **Perspectives** icon.  
A list of saved perspectives displays. The last item on the list, **Manage Perspectives**, is not a perspective.




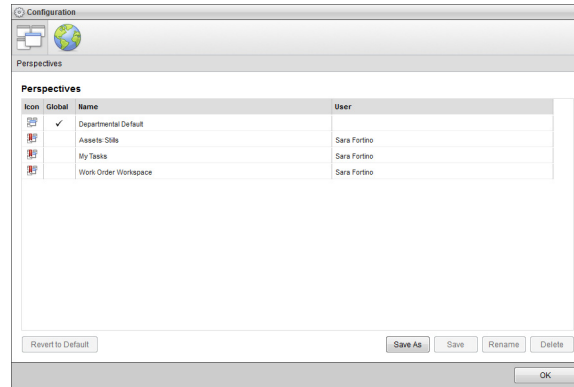
2. In the list, click the perspective to open.  
Streamline repositions the open panels to conform to the layout in the selected perspective.

## Create a New Perspective

### To create a new perspective for your own use

1. Open one of each type of panel you want to include in the new perspective.
2. Rearrange the panels to the positions you want them to occupy in the perspective.  
For more information about repositioning panels, refer to the section “**To move a panel from one layout position to another**” on page 2–15.
3. In **Assets**, **Work Orders**, and **Reports** panels, display the panel columns to include in the perspective as follows.
  - a. In the panel, right-click the title of any table column.  
The **Columns** list opens.
  - b. Select columns as follows:
    - To include a column, select the check box to the left of the column name.
    - To remove a column, clear the check box to the left of the column name.
  - c. Select the **Force fit columns** check box to automatically resize column widths to the table content.
  - d. Click **Close**.
  - e. Click and drag columns to reposition columns in the table.
  - f. Click and drag column dividers to manually resize the width of individual columns.


- On the main toolbar, use the  **Perspectives** icon to select **Manage Perspectives** from the list. The **Configuration** window opens, displaying the **Perspectives** tab.

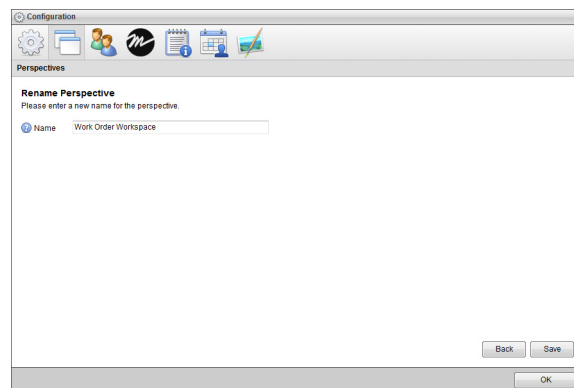


- Click **Save As**. The **Save Perspective As** page opens.
- In the **Name** box, type a name for the new perspective.
- Click **Save**. The **Save Perspective As** page closes and Streamline displays the new perspective to the **Perspectives** list.
- In the bottom toolbar, click **OK**. The **Configuration** window closes.

## Rename a Perspective

### To rename a perspective

- On the main toolbar, use the  **Perspectives** icon to select **Manage Perspectives** from the list. The **Configuration** window opens, showing the **Perspectives** tab.
- In the **Perspectives** list, select the perspective to rename.
- Click **Rename**. The **Rename Perspective** page opens.




- In the **Name** box, type a new name for the selected perspective.
- Click **Save**. The **Perspectives** list displays the new name of the selected perspective.

6. In the bottom toolbar, click **OK**.  
The **Configuration** window closes.

## 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 **the** panels, display the table 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 Streamline saves the set panel layout with the selected perspective.
7. In the bottom toolbar, click **OK**.  
The **Configuration** window closes.

## Revert a Perspective to the Default Layout

When you first use Streamline, it opens certain types of panels in certain panel positions by default. Streamline continues to use the default layout until you move a panel or open a saved perspective.

You can revert a saved perspective to Streamline'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 Streamline also reverts the columns displayed in the Work Order, Reports, and Assets panels to their default columns.

The following illustration describes the default layout.

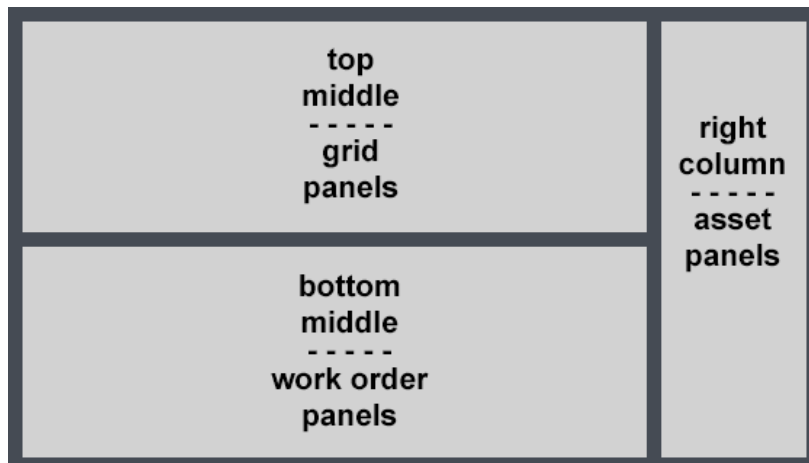


Figure 10.1 Default Panel Layout

Default layout positions are as follows:


- Grid-based panels open in the top middle position. The Work Orders, Reports, and Assets panels are all grid-based panels.
- Work Orders open in the bottom middle position.
- Asset Editor panels open in the right column.

By default, Streamline does not occupy all eight positions with a panel. Streamline does optimize a layout by expanding open panels to fill all available space.



Figure 10.2 Arrangement of the Eight Panel Positions


#### 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 **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 Streamline also reverts the columns displayed in the Work Order, Reports, and Assets panels to their default columns. Click **Cancel** to keep the current perspective layout.
4. In the confirmation message, click **OK**.  
The confirmation message closes and Streamline saves the default panel layout with the selected perspective.
5. In the bottom toolbar, click **OK**.  
The **Configuration** window closes.

## Delete a Perspective

Streamline users can only delete perspectives that they created. You must login into Streamline as an 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 **Delete**.  
A confirmation message opens, asking whether you want to delete the perspective. Click **Cancel** to keep the perspective.
4. In the confirmation message, click **OK**.  
Streamline deletes the selected perspective from the **Perspectives** list.
5. In the bottom toolbar, click **OK**.  
The **Configuration** window closes.



# Appendix A: Hotkeys

The sections in this appendix list the hotkeys that you can use to quickly execute Streamline commands.

This appendix lists the hotkeys for the following sections of the Streamline user interface:

- General User Interface
- Asset Approvals Panel
- Assets Panel
- Asset Editor Panel
- Work Orders Panel
- Work Order Editor Panel
- AP Media Feed View Panel
- AP Media Item Viewer Panel
- MGN Online Feed View Panel
- MGN Online Item Viewer Panel

## General User Interface

**Table A.1 General User Interface Hotkeys**

Hotkey	Function
<b>Ctrl+F11</b>	Hide or show the Streamline main toolbar.
<b>Ctrl+Alt+Shift+Q</b>	Close all Streamline panels.
<b>Ctrl+Right arrow</b>	Select the panel to the right of the currently active panel.
<b>Ctrl+Left arrow</b>	Select the panel to the left of the currently active panel.
<b>Ctrl+Up arrow</b>	Select the panel above of the currently active panel.
<b>Ctrl+Down arrow</b>	Select the panel below the currently active panel.
<b>Ctrl+Shift Right arrow</b>	Select the tab to the right of the currently active tab in a panel.
<b>Ctrl+Shift Left arrow</b>	Select the tab to the left of the currently active tab in a panel.
<b>Right arrow</b>	Move to the cell to the right of the currently selected cell in a panel.
<b>Left arrow</b>	Move to the cell to the left of the currently selected cell in a panel.
<b>Up arrow</b>	Move to the cell above the currently selected cell in a panel.
<b>Down arrow</b>	Move to the cell below the currently selected cell in a panel.
<b>Shift+Up arrow</b>	Add the cell above the currently selected cell in a panel to the current selection.
<b>Shift+Down arrow</b>	Add the cell below the currently selected cell in a panel to the current selection.

## Asset Approvals Panel

**Table A.2 Asset Approvals Panel Hotkeys**

Hotkey	Function
<b>Ctrl+Enter</b>	Open the assets selected in the Asset Approvals panel.

## Assets Panel

**Table A.3 Assets Panel Hotkeys**

Hotkey	Function
<b>Ctrl+Enter</b>	Open the assets selected in the Assets panel.
<b>Ctrl+Delete</b>	Delete the assets selected in the Assets panel.
<b>Ctrl+E</b>	Toggle between Edit Mode Enabled and Edit Mode Disabled.

## Asset Editor Panel

**Table A.4 Asset Editor Panel Hotkeys**

Hotkey	Function
<b>Ctrl+Delete</b>	Delete the asset.
<b>Ctrl+D</b>	Download a copy of the file associate with the asset to your computer.
<b>Ctrl+S</b>	Save the asset.
<b>Ctrl+U</b>	Upload a new file to replace the current file associated with the asset.

## Work Orders Panel

**Table A.5 Work Orders Panel Hotkeys**

Hotkey	Function
<b>Ctrl+Enter</b>	Open the work orders selected in the Work Orders panel.
<b>Ctrl+Delete</b>	Delete the work orders selected in the Work Orders panel.
<b>Ctrl+D</b>	View work orders in a calendar format.
<b>Ctrl+E</b>	Toggle between Edit Mode Enabled and Edit Mode Disabled.
<b>Ctrl+G</b>	View work orders in a table format.
<b>Ctrl+I</b>	Open the New Work Order dialog box to create a new work order.

## Work Order Editor Panel

**Table A.6 Work Order Editor Panel Hotkeys**

Hotkey	Function
<b>Ctrl+I</b>	Delete the selected work order attachments.
<b>Ctrl+S</b>	Save the work order.

## AP Media Feed View Panel

**Table A.7 AP Media Feed View Panel Hotkeys**

Hotkey	Function
<b>Ctrl+Enter</b>	Open the items selected in the AP Media Feed View panel.

## AP Media Item Viewer Panel

**Table A.8 AP Media Item Viewer Panel Hotkeys**

Hotkey	Function
<b>Ctrl+D</b>	Use the Download AP Image dialog box to download the selected item.

## MGN Online Feed View Panel

**Table A.9 MGN Online Feed View Panel Hotkeys**

Hotkey	Function
Ctrl+Enter	Open the items selected in the MGN Online Feed View panel.

## MGN Online Item Viewer Panel

**Table A.10 MGN Online Item Viewer Panel Hotkeys**

Hotkey	Function
Ctrl+D	Use the Download MGN Image dialog box to download the selected item.

# Appendix B: Mapping Profiles

The sections in this appendix show the mapping of media file metadata properties to Streamline properties for the mapping profiles included with a Streamline Server.

This appendix lists the mappings contained in the following mapping profiles:

- Default File Mappings
- Dublin Core

## Default File Mappings

This profile maps standard media file properties to Streamline asset attribute properties.

**Table B.1 Mappings Contained in the Default File Mapping Profile**

Asset Attribute	Media File Property	XMP Category
encodedDate	Encoded_Date	General
format	Format	General
duration	Duration	General
overallBitRate	OverallBitRate	General
fileSize	FileSize	General
videoStreams_duration	Duration	Video
videoStreams_bitRate	BitRate	Video
videoStreams_codec	Codec	Video
videoStreams_width	Width	Video
videoStreams_height	Height	Video
videoStreams_pixelAspectRatio	PixelAspectRatio	Video
videoStreams_displayAspectRatio	DisplayAspectRatio	Video
videoStreams_rotation	Rotation	Video
videoStreams_frameRateMode	FrameRate_Mode/String	Video
videoStreams_frameRate	FrameRate	Video
videoStreams_frameCount	FrameCount	Video
videoStreams_interlacement	Interlacement	Video
videoStreams_standard	Standard	Video
videoStreams_colorSpace	ColorSpace	Video
videoStreams_chromaSubsampling	ChromaSubsampling	Video
videoStreams_bitDepth	BitDepth	Video
videoStreams_compressionMode	Compression_Mode	Video
videoStreams_streamSize	StreamSize	Video
videoStreams_language	Language	Video
audioStreams_duration	Duration	Audio
audioStreams_bitRate	BitRate	Audio
audioStreams_samplingRate	SamplingRate	Audio
audioStreams_samplingCount	SamplingCount	Audio
audioStreams_channels	Channels	Audio
audioStreams_bitDepth	BitDepth	Audio
audioStreams_language	”Language	Audio
audioStreams_streamSize	StreamSize	Audio
audioStreams_codec	Codec	Audio

**Table B.1 Mappings Contained in the Default File Mapping Profile**

Asset Attribute	Media File Property	XMP Category
imageStreams_codec	Codec	Image
imageStreams_width	Width	Image
imageStreams_height	Height	Image
imageStreams_colorSpace	ColorSpace	Image
imageStreams_chromaSubsampling	ChromaSubsampling	Image
imageStreams_bitDepth	BitDepth	Image
imageStreams_compressionMode	Compression_Mode	Image
imageStreams_streamSize	StreamSize	Image

## Dublin Core

This profile contains the all the mappings from the Default mapping profile and adds mappings for the standard Dublin Core metadata properties. For more information about Dublin Core metadata properties, refer to the web page [http://wiki.dublincore.org/index.php/User\\_Guide](http://wiki.dublincore.org/index.php/User_Guide).

**Table B.2 Additional Mappings Contained in the Dublin Core Mapping Profile**

Asset Attribute	Media File Property	XMP Category
encodedDate	Encoded_Date	General
format	Format	General
description	Description	XMP
rights	Rights	XMP
language	Language	XMP
tags	Subject	XMP>
contentRegion	Coverage	XMP
creator	Creator	XMP
name	Title	XMP
type	Type	XMP



# Glossary of Terms

## A

**Asset** — a metadata container for content. An asset can have a single file associated which is called the essence. An asset without an essence is called a placeholder.

## D

**Default File Storage** — the file storage used to store asset essences when a user does not select a file storage when they upload a media file to Streamline.

**Derived File** — a file created from another file, for example: scaled images, thumbnails, low res video proxy files, or formats created by a transcoder.

## E

**Essence** — the primary file associated with an asset. An essence can have a thumbnail and proxy as previews for the associated Asset.

## F

**Format** — a file derived from the original file that is considered interchangeable with the original. A format derived from the asset essence can be used in place of the Essence when pushing to file storages with incompatible ingest validation.

**File** — a single file stored on a Streamline Server. A file can have one or more file locations, but only one file location can be the master file location. The first file location in which the file is stored becomes the initial master file location for the file. A file with no file locations is invalid and will be deleted from the Streamline Server.

**File Location** — an instance of a single file in a file storage. Properties of the file, like path and name, must match the rules defined for the file storage.

**File Storage** — an extension of a file system that contains file locations for files. A file storage can be configured with rules to control the behavior of file locations in the file storage, for example: naming rules, pathing rules, and ingest validation.

**File System** — a defined location used to store files, for example: a local hard drive, cloud storage, FTP servers, or any other device that can be used to store data.

**Fulfill** — the process of storing a file in a placeholder asset. The file used to fulfill a placeholder becomes the essence of the asset.

## I

**Indexed File Storage** — a file storage that the Streamline Server monitors to discover files which the server has not yet ingested. Indexed files are ingested into the Streamline Server to create new assets.

**Ingest** — the process of uploading a file into a Streamline Server, usually to create an asset. Ingest can also refer to storing an existing file into another file storage.

**Ingest Trigger** — a defined event configured for a file storage to trigger a push to the file storage. Mirror is an example of an ingest trigger that will push to a file storage when a file location is stored on another file storage.

**Ingest Validation** — a condition that must be met for a file to be stored on a file storage. For example, the Require Asset Approval condition only allows files on the file storage where the associated Asset is approved.

## M

**Mapping Profile** — a combination of metadata pairs from two different objects that are used to set data from one side of the pair to the other. For example: with an asset and file object pair, Streamline uses metadata from the file to set the metadata for the asset associated with the file.

**Master File Location** — a special file location that cannot be deleted until all other locations of a file have been deleted, or the entire file or associated asset has been deleted. The master file location can be changed to another file location of the same file at any time.

**Metadata** — a set of data that provides information for another piece of data.

## N

**Naming Rule** — a rule applied to the file name of file locations when a file is stored in a file storage. One or more naming rules can be configured for a file storage and are applied in sequential order. Example naming rules would set name casing or maximum length.

## P

**Pathing Rule** — a rule applied to the folder path of a file location when a file is stored in a file storage. One or more pathing rules can be configured for a file storage and are applied in sequential order. The resulting combination of all pathing rules are appended to the root of the file system set and will be the physical placement of the File Location.

**Placeholder** — an asset that does not contain an essence. Placeholders are typically used to hold metadata for a future file that will become the asset essence. Ingesting a file into a placeholder fulfills the asset.

**Proxy** — a preview for a video file. A typical proxy for a video file is a low-resolution version of the original file that can be played in a web browser.

**Push** — the process of sending a file to another file storage to create a new file location.

## T

**Task** — an operation running in the background on the Streamline Server.

**Thumbnail** — an image that represents a file. A typical thumbnail for an image is scaled down version of the original file.

## W

**Watch Folder** — a configured location in a file system to watch for new files to ingest into the Streamline Server. In contrast to a file storage, files are not kept in a watch folder for storage but are only used to discover new files to ingest into permanent storage.