streamline

Configuration Guide

Version 2.0

www.rossvideo.com

ROSS

Production Technology Experts

Thank You for Choosing Ross

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

Our mission is to:

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

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

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

David Ross
CEO, Ross Video
dross@rossvideo.com

Ross Video Code of Ethics

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

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

Streamline · Configuration Guide

- Ross Part Number: **7800DR-005-2.0**
- Release Date: July 16, 2015.
- Software Issue: **2.0**

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

Copyright

Patents

Patent numbers US 7,034,886; US 7,508,455; US 7,602,446; US 7,802,802 B2; US 7,834,886; US 7,914,332; US 8,307,284; US 8,407,374 B2; US 8,499,019 B2; US 8,519,949 B2; US 8,743,292 B2; GB 2,419,119 B; GB 2,447,380 B; and other patents pending.

Warranty and Repair Policy

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

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

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

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

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

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

Extended Warranty

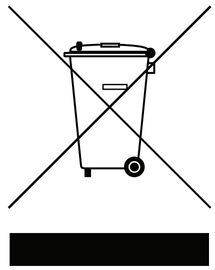
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Inception Server system, contact your regional sales manager.

Environmental Information

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

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

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



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

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

Company Address

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Contents

Introduction

This guide contains the following chapters that cover configuration of Streamline:

- Chapter 1, "**Introduction**" summarizes the guide and provides important terms, conventions, and features.
- Chapter 2, "**Configuring System Properties**" provides instructions on how to configure a Streamline system.
- Chapter 3, "**Managing Perspectives**" provides instructions on how to customize the layout of the Streamline user interface.
- Chapter 4, "**Configuring User Permissions**" provides instructions on how to set role-base user permissions for Streamline users.
- Chapter 5, "**Configuring LDAP Authentication**" provides instructions on how to use LDAP to create Streamline user accounts and roles.
- Chapter 6, "**Configuring MOS Connections**" provides instructions on how to configure the MOS protocol connection between Streamline and XPression).
- Chapter 7, "**Configuring Metadata Elements**" provides instructions on how to specify the choices available in the metadata lists displayed in the Streamline panels.
- Chapter 8, "**Configuring Work Order Notifications**" provides instructions on how to configure the e-mail addresses used to send and receive work order notifications.
- Chapter 9, "**Configuring Asset Properties**" provides instructions on how to configure the storage location, targets, and transcoders for the assets in your Streamline system.

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

Documentation Conventions

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

Interface Elements

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

In the **Asset Browser** panel, click **Saved Searches**.

User Entered Text

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

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

Referenced Guides

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

For more information, refer to the section "**Running a Report**" on page 3–6 in the ***Streamline User Guide***.

Menu Sequences

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

Important Instructions

Star icons identify important instructions or features. For example:

✶ You must obtain Streamline feature licenses from Ross Video Technical Support before users can access some Streamline features.

Getting Help

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

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

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

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

Contacting Technical Support

At Ross Video, we take pride in the quality of our products, but if problems occur, help is as close as the nearest telephone.

Our 24-hour Hot Line service ensures that users have access to technical expertise around the clock. Ross Video personnel directly provide after-sales service and technical support. During business hours (Eastern Time), technical support personnel are available by telephone. After hours and on weekends, a direct emergency technical support phone line is available. If an on-call technical support person does not immediately answer this line, please leave a voice message and a support person will return your call shortly. This team of highly trained staff is available to react to any problem and to do whatever is necessary to ensure customer satisfaction.

- **Technical Support:** (+1) 613-652-4886
- **After Hours Emergency:** (+1) 613-349-0006
- **E-mail:** techsupport@rossvideo.com
- **Website:** http://www.rossvideo.com

Configuring System Properties

This chapter provides instructions for configuring the general system properties of your Streamline system using the following tabs in the System panel of the Configuration window:

- **Database** — How Streamline accesses the database that stores application data.
- **Licensing** — How features in Streamline are activated using product license keys.
- **System** — How Streamline sets the time zone to record the local time of when it runs daily maintenance tasks.
- **Mail Server** — How Streamline communicates with an e-mail server to send approval notifications.

This chapter discusses the following topics:

- Configure Database Connectivity
- Activate a Product Key
- Manually Activate License Keys
- Reactivate a Product Key
- Deactivate a Product Key
- Set the Local Time Zone
- Configure the E-mail Server

Accessing Streamline System Properties

Before proceeding, contact your Streamline administrator who will provide you with the Streamline web page URL.

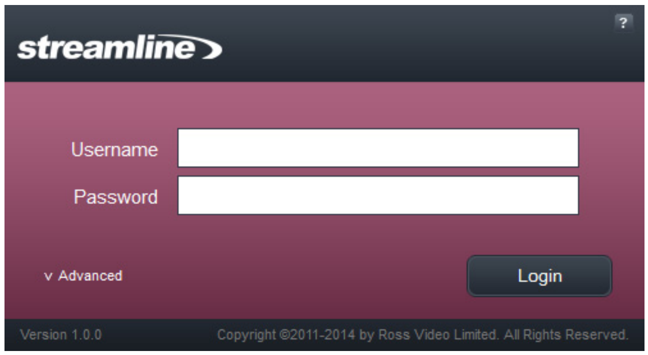
Streamline can be accessed using one of the following web browsers:

- Windows® Internet Explorer® version 9 or greater
- Mozilla® Firefox® version 3.6 or greater
- Google® Chrome™ version 17.x or greater

To access Streamline system properties

1. In a supported web browser, navigate to the Streamline web page.

   The **Login** panel opens.



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

   The default system administrator login credentials are as follows:

   - **Username** — `root`
   - **Password** — `password`

3. Click **Login**.

   Streamline opens.

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

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

   The **Configuration** window opens.

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

Configure Database Connectivity

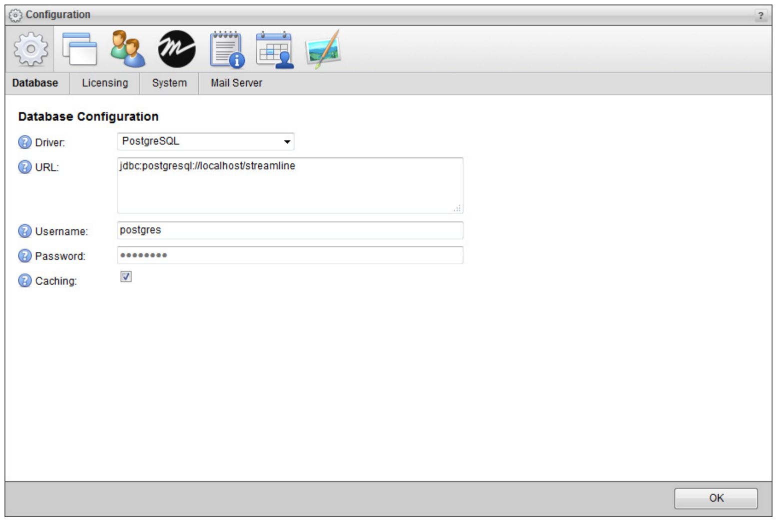
To configure database connectivity

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

   The **System** panel opens.

2. Click the **Database** tab.

   The **Database** tab opens.



3. Use the **Driver** list to select the database driver used to connect to the Streamline Database.
4. In the **URL** box, enter the JDBC URL that the Streamline uses to connect to the Streamline Database. For example, for a database named **`streamline`** on PostgreSQL, use the following URL:

   `jdbc:postgresql://localhost/streamline`

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

   The box looks empty, even after specifying a password.

7. Select the **Caching** check box to enable the database caching level for the best database performance.

✶ On multi-node systems, you MUST clear the **Enable Caching** check box to disable database caching.

Activate a Product Key

Ross Video uses a product key and feature license keys to control user access to Streamline features. You can obtain a Streamline product key from Ross Video Technical Support.

✶ When you activate a Streamline software product key, your Streamline computer must contact the Ross Video Activation Server. When your Streamline cannot contact the Activation Server, use the procedure in the section "**Manually Activate License Keys**" on page 2–5 to activate a Streamline software product key.

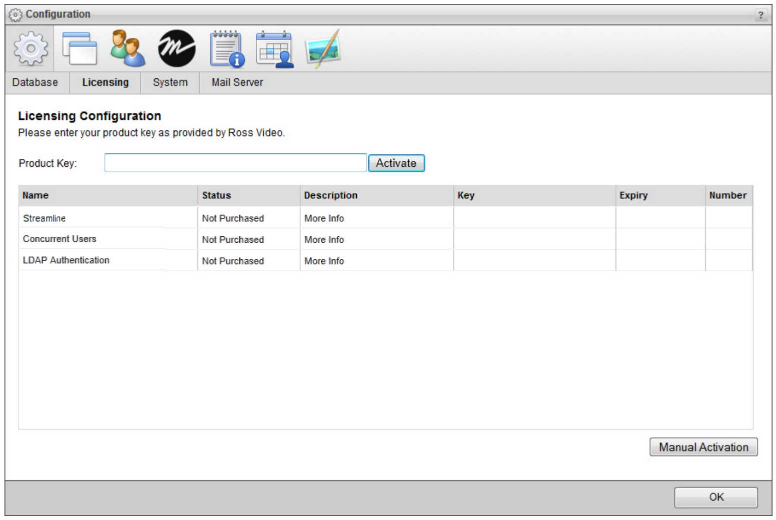
To activate a Streamline product key

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

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing** tab opens.



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

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

6. Click **OK**.

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

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

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

   The **Configuration** window closes.

8. Refresh your web browser window.

   Streamline adds icons to the toolbar for the newly activated features if applicable.

For More Information on...

- Ross Video Technical Support phone numbers, refer to the section “**Contacting Technical Support**”.

Manually Activate License Keys

When the Streamline computer cannot contact the Ross Video Activation Server, you can manually activate product keys by providing Ross Video Technical Support a valid Request Code for the Streamline feature to activate.

To manually activate a product key

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

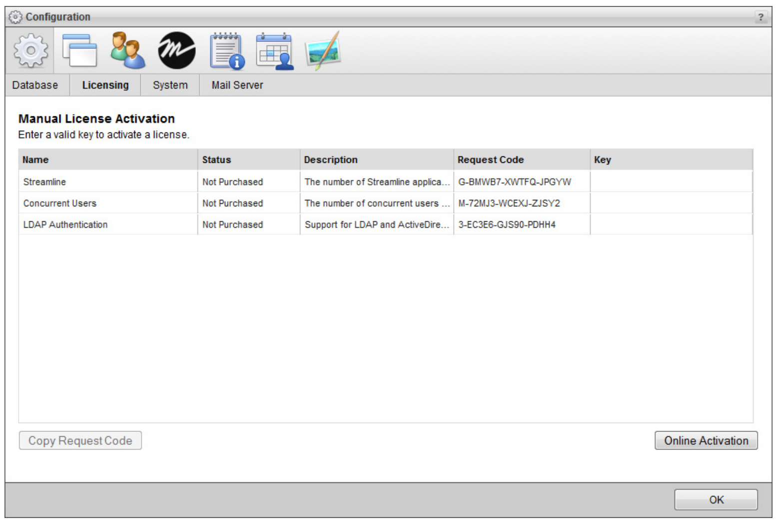
   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing** tab opens.

3. Click **Manual Activation**.

   The **Manual Licensing Activation** page opens.



4. To obtain a product key for a Streamline feature, call Ross Video Technical Support and provide the associated request code displayed in the **Request Code** column.

5. Double-click in the **Key** column for the Streamline feature.

6. Enter the product key obtained from Ross Video Technical Support.

   The **Status** column displays one of the following states:

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

7. To activate additional Streamline features, follow step **4** to step **6**.

For More Information on...

- Ross Video Technical Support phone numbers, refer to the section "**Contacting Technical Support**".

Reactivate a Product Key

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

To reactivate a Streamline product key

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

   The **System** panel opens.

2. Click the **Licensing** tab.

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

3. Click **Reactivate**.

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

4. Click **OK**.

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

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

   The **Configuration** window closes.

6. Refresh your web browser window.

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

Deactivate a Product Key

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

To deactivate a Streamline product key

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

   The **System** panel opens.

2. Click the **Licensing** tab.

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

3. Click **Deactivate**.

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

4. Click **OK**.

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

   Deactivating a product key removes Streamline user access to all of the Streamline features associated with the product key.

Set the Local Time Zone

The Streamline uses the set time zone to record the local time of when it runs daily maintenance tasks.

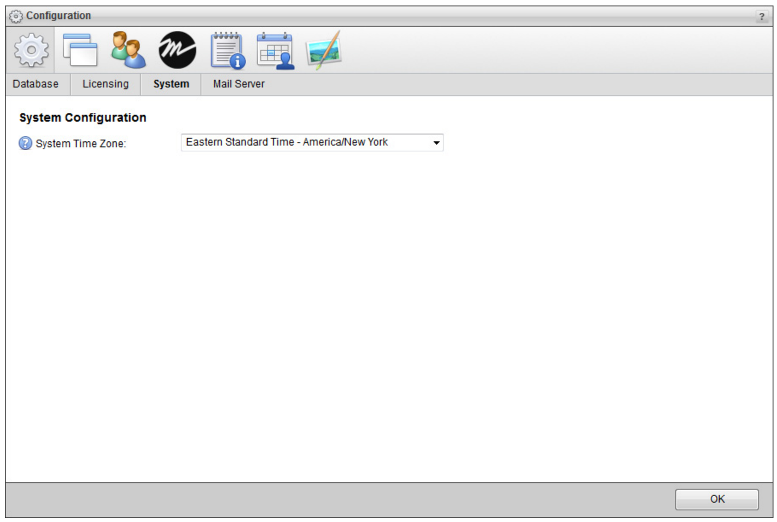
To set the time zone for your Streamline system

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

   The **System** panel opens.

2. Click the **System** tab.

   The **System** tab opens.



3. Use the **System Time Zone** list to select the time zone which matches the physical location of the Streamline computer.

Configure the E-mail Server

You will need to configure the e-mail server feature of the Streamline system if you wish to notify Streamline users that they are assigned to a work order when it is submitted.

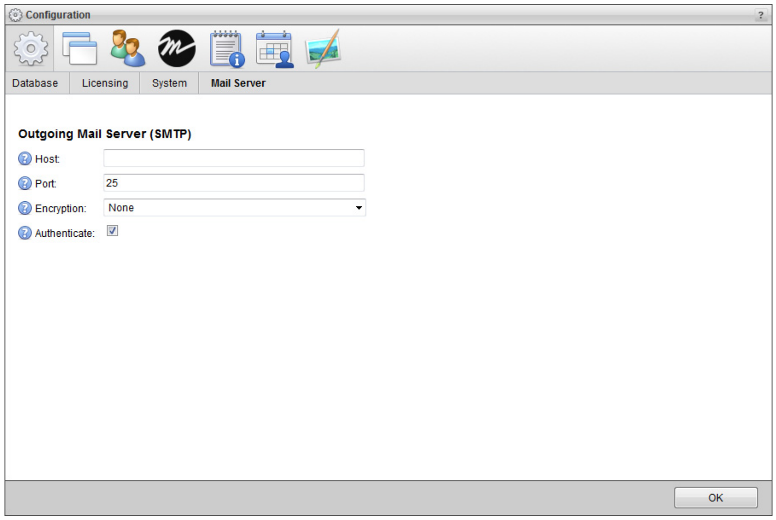
To configure the e-mail server

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

   The **System** panel opens.

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

The **Mail Server** tab opens.



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

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

Managing 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 Asset Browser, Reports Manager, and Work Order Manager panels.

For example, you can create a perspective that includes a work order in the left column, a report in the top middle, and an Asset Editor panel in the right column. When you later use this perspective, any work order you open display in the left column. Reports open in the middle. Asset Editor open in the right column.

Perspectives can include any or all panel types:

- Approval Manager
- Asset Browser (Including panel columns)
- Asset Editor
- Reports Manager
- Work Orders Manager (Including panel columns)
- Work Order Editor

This chapter discusses the following topics:

- Creating a New Perspective
- Opening a Saved Perspective
- Renaming a Perspective
- Changing the Layout of a Perspective
- Making a User Perspective Global
- Deleting a Perspective

Creating a New Perspective

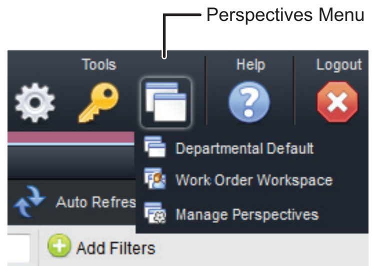
All Streamline users can create perspectives for their own use. Streamline administrators can also create global perspectives available to all users.

To create a new perspective for your own use

1. Log in to Streamline as a system administrator.
2. Open one of each type of panel you want to include in the new perspective.
3. Rearrange the panels to the positions you want them to occupy in the perspective.

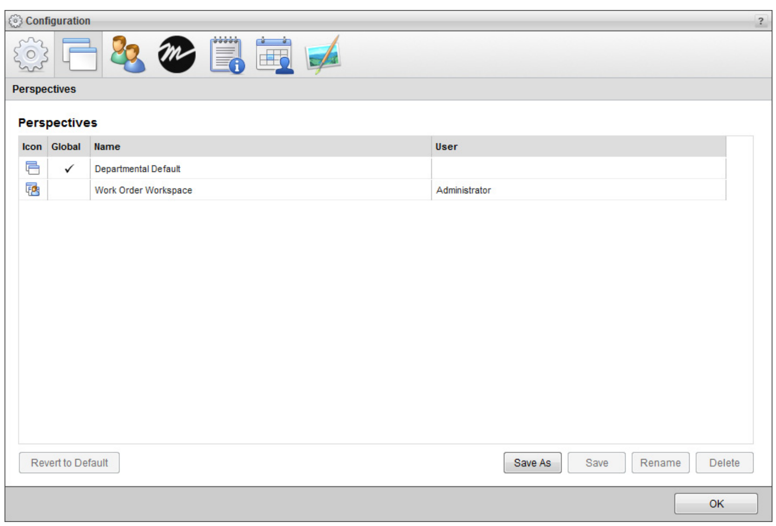
   For more information about repositioning panels, refer to the ***Streamline User Guide***.
4. In **Work Order**, **Reports**, and **Asset Browser** panels, display the panel columns to include in the perspective.

   For more information about displaying panel columns, refer to the ***Streamline User Guide***.
5. On the main toolbar, point to the **Perspectives** icon.



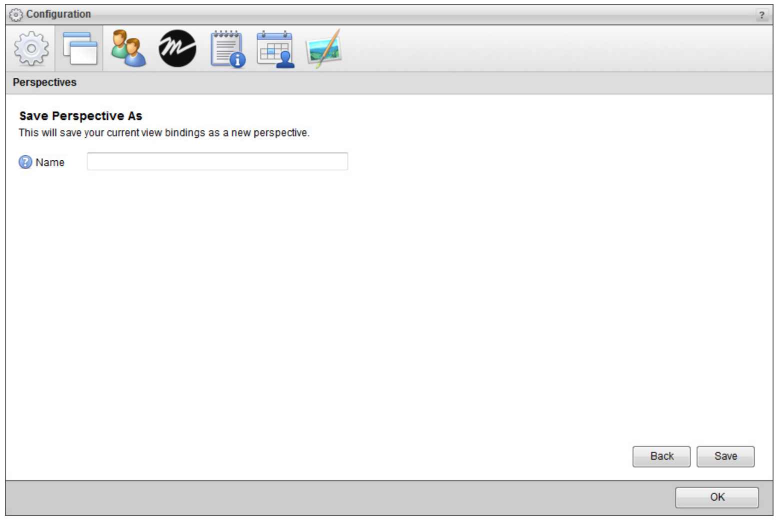
6. In the list, click **Manage Perspectives**.

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



7. Click **Save As**.

   The **Save Perspective As** page opens.



8. In the **Name** box, enter a name for the new perspective.
9. Click **Save**.

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

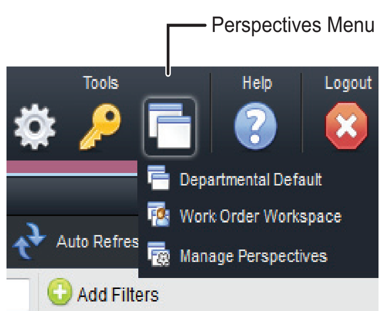
Opening a Saved Perspective

Panels may not always open 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 work order in the left column and you use it to open only a work order, the work order occupies all the available space. As you open more panel types, Streamline adjusts the layout to conform with the perspective.

To open a saved perspective

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

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



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

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

Renaming a Perspective

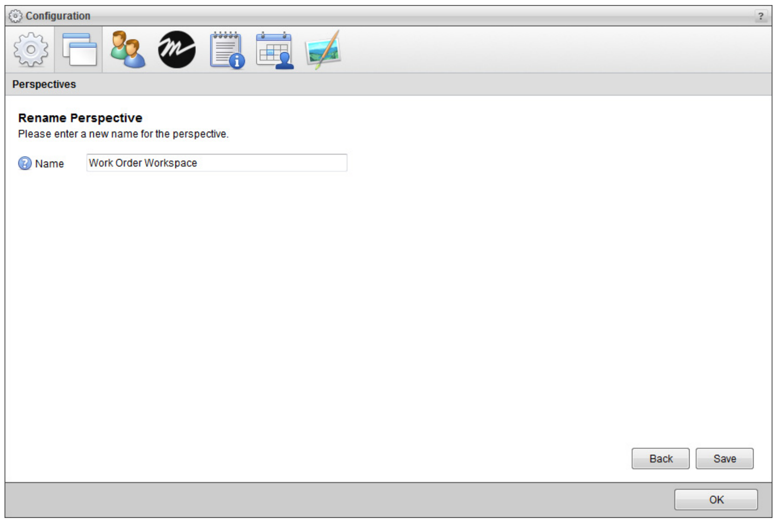
To rename a perspective

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

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

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

   The **Rename Perspective** page opens.



4. In the **Name** box, enter a new name for the selected perspective.
5. Click **Save**.

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

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

Changing 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 **Work Order Manager**, **Reports Manager**, and **Asset Browser** panels, display the panel columns to include in the perspective.
3. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

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

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

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

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

   The confirmation message closes and Streamline saves the set panel layout is with the selected perspective.

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

Reverting 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 Manager, Reports Manager, and Asset Browser panels to their default columns.

The following illustration describes the default layout.

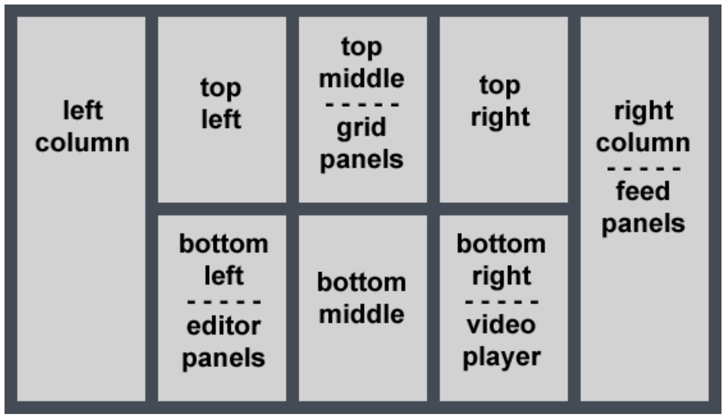


Figure 3.1 Default Panel Layout

Default layout positions are as follows:

- Grid-based panels open in the top middle box. These include the Work Order Manager, Reports Manager, the Asset Browser, and the Approval Manager panels.
- The Asset Editor and Work Order Editor interfaces 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. When you use the default layout and open instances of every type of panel, panels display as follows:

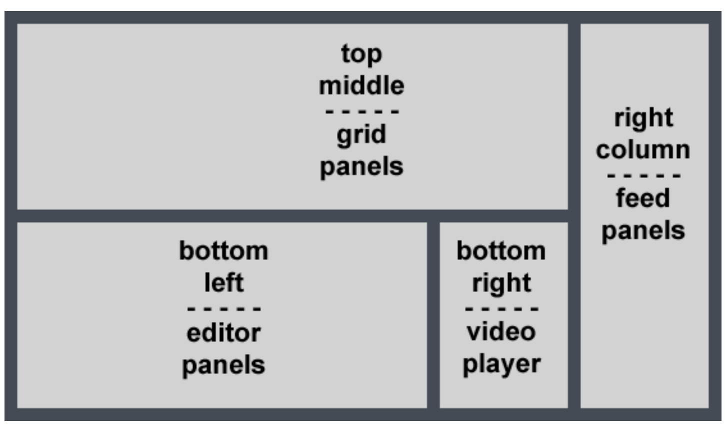


Figure 3.2 Actual Layout with all Panel Types Open

To revert a perspective to the default layout

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

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

2. In the **Perspective** list, select the perspective to apply the default layout.
3. Click or tap **Revert to Default**.

   A confirmation message opens, asking whether you want to revert the perspective to the default layout.

✶ There is no undo for this change. When you revert to the default layout Streamline also reverts the columns displayed in the panels to their default columns. Click or tap **Cancel** to keep the current perspective layout.

4. In the confirmation message, click or tap **OK**.

   The confirmation message closes and Streamline saves the default panel layout with the selected perspective.

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

Making a User Perspective Global

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

To make a perspective global

1. Log in to Streamline as an administrator.

   Only administrators can make a perspective available to all users.

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

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

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

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

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

   A check mark displays in the **Global** column of the selected perspective, which indicates that all users now have access the perspective from the **Perspectives** icon.

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

To make a global perspective user-specific

1. As an administrator, 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 global perspective to make user-specific.

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

3. Click **Set as User**. This option is only available to Streamline administrators.

   Streamline removes the check mark from the **Global** column of the selected perspective, which indicates that only the user who created the perspective can use it.

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

Deleting a Perspective

Streamline users can only delete perspectives that they created. You must log in to 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 or tap **Delete**.

   A confirmation message opens, asking whether you want to delete the perspective. Click or tap **Cancel** to keep the perspective.

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

   Streamline deletes the selected perspective from the **Perspectives** list.

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

Configuring User Permissions

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

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

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

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

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

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

This chapter discusses the following topics:

- Creating a User Role
- Modifying a User Role
- Typical User Role PermissionsStreamline
- Assigning Permissions
- Deleting a User Role
- Creating a User Account
- Modifying a User Account
- Deleting a User Account
- Configure Single Sign-On for Inception and Streamline

Creating a User Role

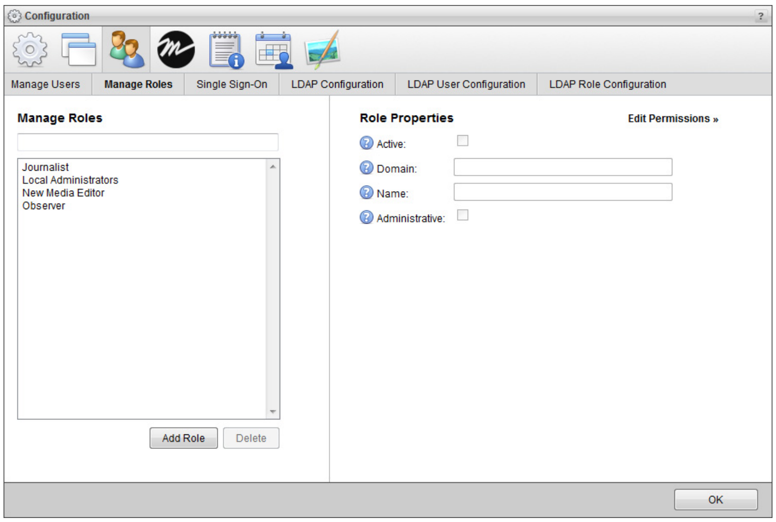
To create a user role

1. Log in to your Streamline system as a system administrator.
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Users** icon. If the **Users** icon is not visible, you are not an administrator and cannot configure user roles.

   The **Users** panel opens.
4. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.



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

   Streamline automatically saves property values set for a new user role.
6. In the **Role Properties** section, select the **Active** check box to make the role operational.

   Clear this check box to deactivate a user role. Inactive roles cannot convey permissions to user accounts.
7. In the **Name** box, enter a name for the user role.
8. Select the **Administrative** check box to grant the user role all user permissions and enable the user role to configure all administrative settings.

   Clear this check box to only include selected permissions with the user role.
9. Click **Edit Permissions**.

   The **Role Permissions** list opens.

10. In the **Role Permissions** list, select the permissions to assign to the user role.

    Keep in mind the following point as you assign permission to a user role:

    - Permission assignment changes save automatically.
    - Background shading delineates category headings from role permissions. To select or de-select all permissions in a category, select or clear the check box in the category heading.
    - Permissions displayed in **Bold Text** are assignable to all accounts or to selected accounts:
      - › If you want to assign the permission for all accounts, select the bolded permission. This setting also applies to any accounts created in the future.
      - › If you want to assign the permission for selected accounts, clear the bolded permission and then select individual accounts from the list below the bolded permission name.
      - › If you do not want to assign the permission for any accounts, clear all accounts in the list.
    - To select all permissions in the entire list, click **Select All**.

      Use this option to assign all permissions to the role, or to assign most of the permissions by selecting all of them and then clearing the ones you do not want to assign.
    - To clear all permissions, click **Deselect All**.

      Use this option to assign only a few permissions to the role, by clearing all of them and then selecting only the ones you want to assign.

    After finishing the configuration of a user role, you can assign it to a user.

For More Information on...

- user roles, refer to the sections "**Modifying a User Role**" on page 4–3, and "**Deleting a User Role**" on page 4–6.
- user accounts, refer to the sections "**Creating a User Account**" on page 4–7, "**Modifying a User Account**" on page 4–8, and "**Deleting a User Account**" on page 4–9.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 4–4.

Modifying a User Role

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

To modify a user role

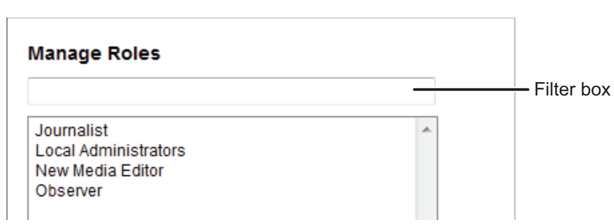
1. On the **Configuration** window toolbar, click the **Users** icon.

   The **Users** panel opens.
2. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.
3. In the **User Role** list, select the name of the user role to modify.

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

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



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

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

5. Click **Edit Permissions**.

   The **Role Permissions** list opens.

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

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

For More Information on...

- user roles, refer to the sections "**Creating a User Role**" on page 4–2, and "**Deleting a User Role**" on page 4–6.
- user accounts, refer to the sections "**Creating a User Account**" on page 4–7, "**Modifying a User Account**" on page 4–8, and "**Deleting a User Account**" on page 4–9.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 4–4.

Typical User Role Permissions

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

Table 4.1 Assets

Permission	Producer	Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Artist	News Anchor
Approve Assets	✓			✓			
Upload Assets			✓			✓	
Delete Assets	✓			✓			
Edit Assets						✓	

Table 4.2 Work Orders

Permission	Producer	Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Artist	News Anchor
Create/Edit/Delete Work Orders	✓			✓	✓		
View Work Orders	✓		✓			✓	
Comment on **Work Orders**	✓	✓	✓	✓	✓	✓	✓

Table 4.3 Reports

Permission	Producer	Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Artist	News Anchor
Create/Edit/Delete Local Reports	✓	✓		✓			
Create/Edit/Delete Global Reports	✓			✓			
View Reports	✓	✓		✓			

Table 4.4 Searches

Permission	Producer	Media Editor	Character Generator Operator	News Director	Broadcast Journalist	Artist	News Anchor
Create/Edit/Delete Global Searches	✓	✓	✓	✓		✓	

Permission Dependencies

Some user permissions depend on others. For example, you cannot upload a file to an asset if you do not have permission to edit assets. When you add user roles intended for creating and modifying assets, work orders, and reports, you should assign the permissions listed in the following table:

Table 4.5 Dependant Permissions

Permission Category	Permission	Description
Assets	View Assets	Enables users to view the details of an asset.
	Modify Assets	Enables users to create, modify, and delete assets.
Work Order	View Work Orders	Enables users to open work orders.
	Modify Work Order	Enables users to create, modify, and delete work orders.
Reports	Create Reports	Enables user to create reports.
	View Reports	Enables user to view reports.
	Modify Reports	Enables user to create, modify, and delete reports.

For More Information on...

- user role assignment, refer to the sections "**Creating a User Role**" on page 4–2, "**Modifying a User Role**" on page 4–3, and "**Deleting a User Role**" on page 4–6
- user account configuration, refer to the sections "**Creating a User Account**" on page 4–7, "**Modifying a User Account**" on page 4–8, and "**Deleting a User Account**" on page 4–9
- role-based user permissions, refer to the chapter "**Configuring User Permissions**" on page 4–1

Assigning Permissions

Only users with roles that include permission to manage ALL accounts of that type can assign stories to the new account. When you want other users to manage the account, you must add account management permissions to one or more of their user roles.

When you create several accounts at the same time, it is most efficient to create all accounts and then assign permissions to manage them.

To assign permissions to a user role

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

   The **Users** panel opens.

2. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.

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

   The **Role Permissions** list opens.

5. In the **Role Permissions** list, scroll down to the permission you want to assign.
6. Select the check boxes associated with the permission(s) for the user role to manage.

   Keep in mind the following as you select permissions for a user role:

   - To assign permission for individual accounts, select the associated check box. Clear the check box to unassign a permission.
   - Streamline automatically saves permission assignment changes.

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

7. Click **OK** to exit the panel.

Deleting a User Role

You can delete user roles created in Streamline.

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

To delete a user role

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

   The **Users** panel opens.

2. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.

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

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

5. Click **OK**.

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

For More Information on...

- user roles, refer to the sections “**Creating a User Role**” on page 4–2, and “**Modifying a User Role**” on page 4–3.
- user accounts, refer to the sections “**Creating a User Account**” on page 4–7, “**Modifying a User Account**” on page 4–8, and “**Deleting a User Account**” on page 4–9.

Creating a User Account

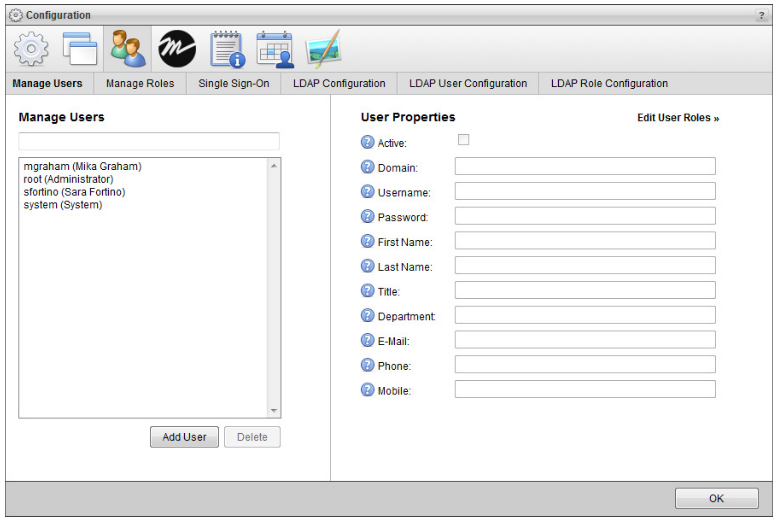
To create a user account

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

   The **Users** panel opens.

2. Click the **Manage Users** tab.

   The **Manage Users** tab opens.



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

   Streamline automatically saves property values set for a new user.

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

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

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

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

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

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

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

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

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

9. In the **Title** box, enter the job title of the user within the organization.

10. In the **Department** box, enter the department to which the user belongs within the organization.

11. In the **E-Mail** box, enter the corporate e-mail address of the user.

12. In the **Phone** box, enter the corporate telephone number of the user.

13. In the **Mobile** box, enter the mobile telephone number of the user.

14. Click **Edit User Roles**.

15. In the **User Roles** list, select the check boxes associated with the user roles to assign to the user. Clear the check box associated with a user role to unassign it from the user.

For More Information on...

- user accounts, refer to the sections "**Modifying a User Account**" on page 4–8, and "**Deleting a User Account**" on page 4–9.
- user roles, refer to the sections "**Creating a User Role**" on page 4–2, "**Modifying a User Role**" on page 4–3, and "**Deleting a User Role**" on page 4–6.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 4–4.

Modifying a User Account

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

To modify a user account

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

   The **Users** panel opens.

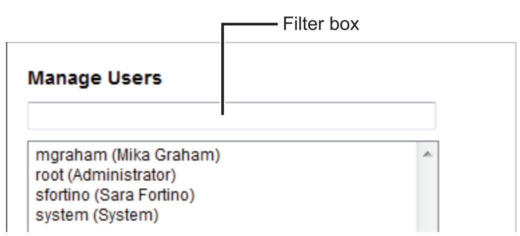
2. Click the **Manage Users** tab.

   The **Manage Users** tab opens.

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

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

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



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

   Streamline automatically saves property value changes made to a user.

5. Click **Edit User Roles**.

   The **User Roles** list opens.

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

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

For More Information on...

- user accounts, refer to the sections "**Creating a User Account**" on page 4–7, and "**Deleting a User Account**" on page 4–9.
- user roles, refer to the sections "**Creating a User Role**" on page 4–2, "**Modifying a User Role**" on page 4–3, and "**Deleting a User Role**" on page 4–6.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 4–4.

Deleting a User Account

You can delete user accounts created in Streamline.

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

To delete a user account

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

   The **Users** panel opens.

2. Click the **Manage Users** tab.

   The **Manage Users** tab opens.

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

4. Click **Delete**.

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

5. Click **OK**.

   Streamline deletes the selected user.

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

For More Information on...

- user accounts, refer to the sections "**Creating a User Account**" on page 4–7, and "**Modifying a User Account**" on page 4–8.
- user roles, refer to the sections "**Creating a User Role**" on page 4–2, "**Modifying a User Role**" on page 4–3, and "**Deleting a User Role**" on page 4–6.

Configure Single Sign-On for Inception and Streamline

Single sign-on enables Inception users to automatically log in to Streamline when they open Streamline as a MOS plugin to Inception. Configuring single sign-on between an Inception Server and a Streamline system involves the following:

- "**Verify Matching Inception and Streamline Users**" on page 4–9
- "**Add a Single Sign-On Trust Relationship to Both Servers**" on page 4–10
- "**Create a Streamline MOS device on the Inception Server**" on page 4–11

Verify Matching Inception and Streamline Users

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

For More Information on...

- manually creating user accounts in a Streamline system, refer to the section "**Creating a User Account**" on page 4–7.
- using LDAP to add user accounts to a Streamline system, refer to the chapter, "**Configuring LDAP Authentication**" on page 5–1.
- adding user accounts to Inception, refer to the ***Inception Configuration Guide*** or **Online Help** system.

Add a Single Sign-On Trust Relationship to Both Servers

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

Inception Server

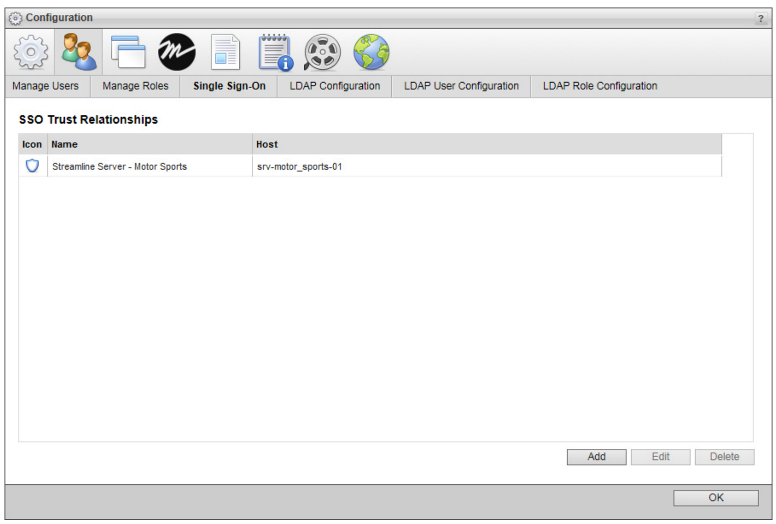
To add a single sign-on trust relationship with the Streamline system

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

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

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

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



5. Click **Add**.

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

   The **Save Perspective As** page closes and Inception adds the new perspective to the **Perspectives** list.
9. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Streamline System

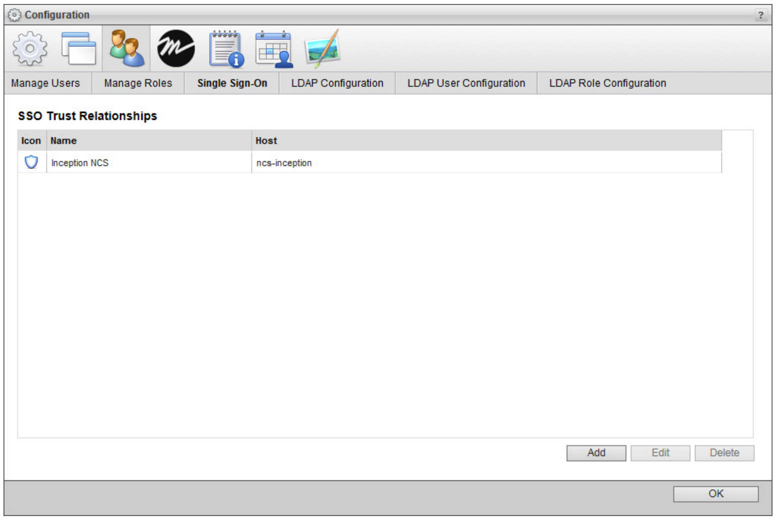
To add a single sign-on trust relationship with the Inception Server

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

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

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

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



5. Click **Add**.

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

   The **Save Perspective As** page closes and Inception adds the new perspective to the **Perspectives** list.
9. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Create a Streamline MOS device on the Inception Server

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

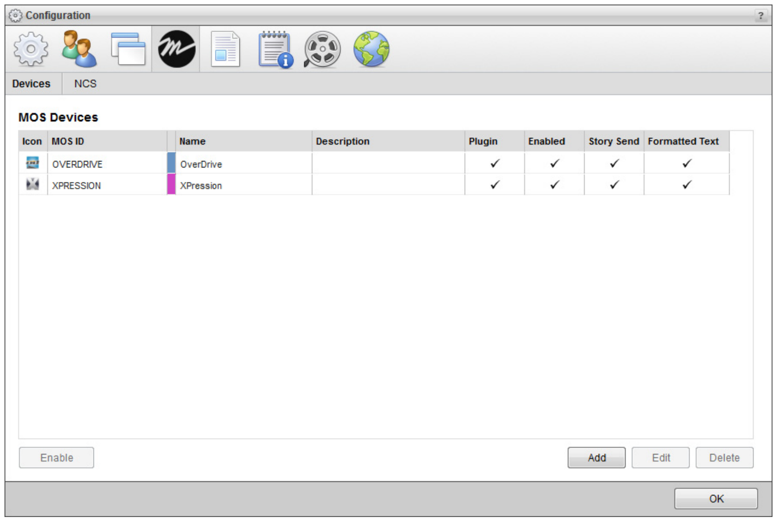
To add a Streamline MOS device to Inception

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

   The **MOS** panel opens.

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

   The **Devices** tab opens.



3. Click **Add**.

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

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

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

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

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

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

8. Click **Next**.

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

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

10. Click **Next**.

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

11. Click **Save**.

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

Manage Single Sign-On Trust Relationships

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

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

Edit Single Sign-On Trust Relationship Properties

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

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

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

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

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

Delete Single Sign-On Trust Relationships

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

To delete a single sign-on trust relationship

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

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

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

Configuring LDAP Authentication

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

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

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

This chapter discusses the following topics:

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

Connect to an LDAP Directory Server

To connect to an LDAP directory server

1. Log in to your Streamline as a system administrator.
2. On the main toolbar, click the **Configuration** icon.

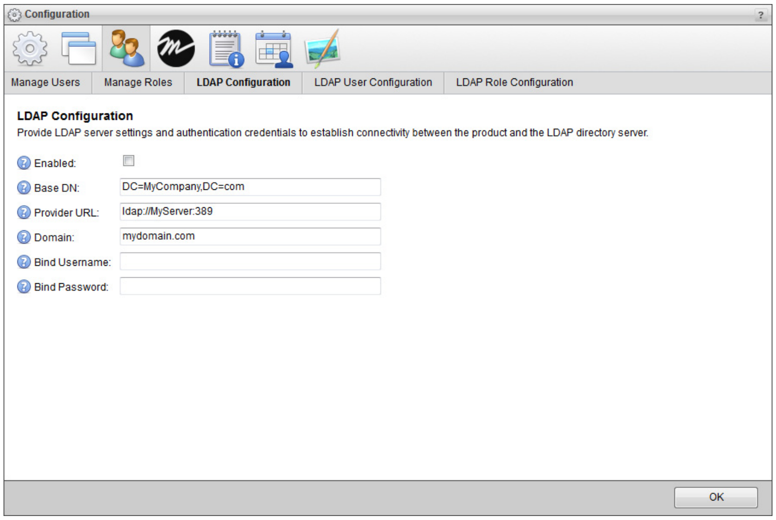
   The **Configuration** window opens.

3. On the **Configuration** window toolbar, click the **Users** icon. If the **Users** icon is not visible, you are not an administrator and cannot configure the server.

   The **Users** panel opens.

4. Click the **LDAP Configuration** tab.

   The **LDAP Configuration** tab opens.



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

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

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

   Example: `DC=MyCompany,DC=com`

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

   Example: `ldap://MyServer:389`

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

   Example: `rossvideo.com`

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

For More Information on...

- LDAP Authentication, refer to the chapter "**Configuring LDAP Authentication**" on page 5–1
- how to import LDAP user account data, refer to the section "**Map to LDAP User Data**" on page 5–3
- how to Import LDAP user role data, refer to the section "**Map to LDAP Group (Role) Data**" on page 5–4

Map to LDAP User Data

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

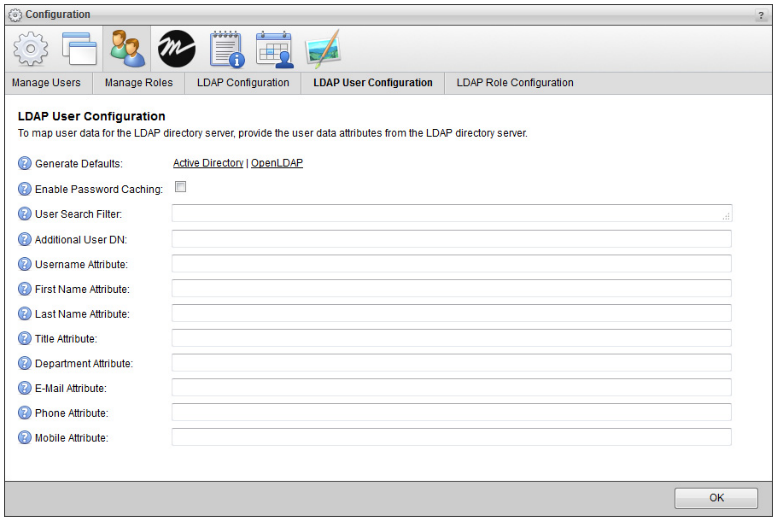
To map to LDAP user data

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

   The **Users** panel opens.

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

   The **LDAP User Configuration** tab opens.



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

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

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

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

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

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

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

   Example: `uid` or `sAMAccountName`

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

   Example: `givenName`

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

   Example: `sn`

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

    Example: `title`

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

    Example: `department`

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

    Example: `mail`

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

    Example: `telephoneNumber`

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

    Example: `mobile`

For More Information on...

- LDAP Authentication, refer to the chapter "**Configuring LDAP Authentication**" on page 5–1
- how to connect to an LDAP directory server, refer to the section "**Connect to an LDAP Directory Server**" on page 5–2
- how to import LDAP user role data, refer to the section "**Map to LDAP Group (Role) Data**" on page 5–4

Map to LDAP Group (Role) Data

You can synchronize roles between an LDAP directory server and the Roles table of the Streamline system.

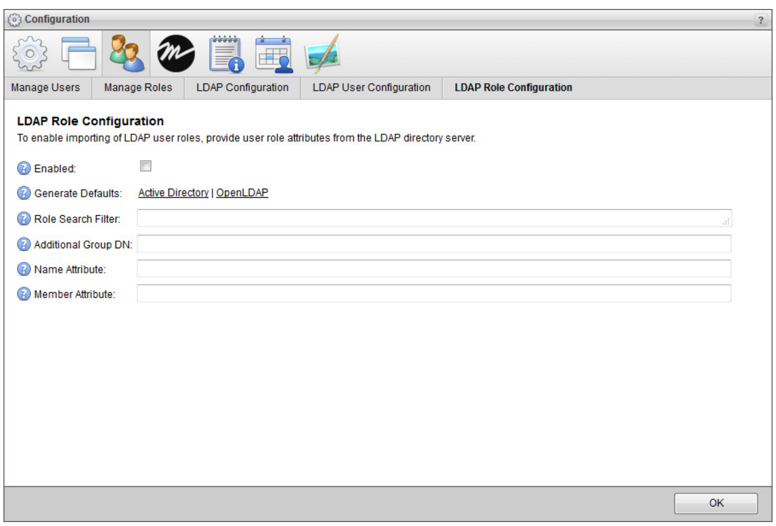
To map to LDAP group (role) data

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

   The **Users** panel opens.

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

   The **LDAP Role Configuration** tab opens.



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

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

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

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

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

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

   Example: `cn`

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

   Example: `memberOf`

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

For More Information on...

- LDAP Authentication, refer to the chapter “**Configuring LDAP Authentication**” on page 5–1
- how to connect to an LDAP directory server, refer to the section “**Connect to an LDAP Directory Server**” on page 5–2
- how to import LDAP user account data, refer to the section “**Map to LDAP User Data**” on page 5–3

Configuring MOS Connections

Streamline can be configured to communicate with various systems using the MOS protocol.

This chapter discusses the following topics:

- Connecting Streamline with XPression

Connecting Streamline with XPression

Streamline can be configured to communicate with Ross XPression and other systems using the MOS protocol.

✶ XPression must have a proper API key to enable communications with the Streamline system.

API Access

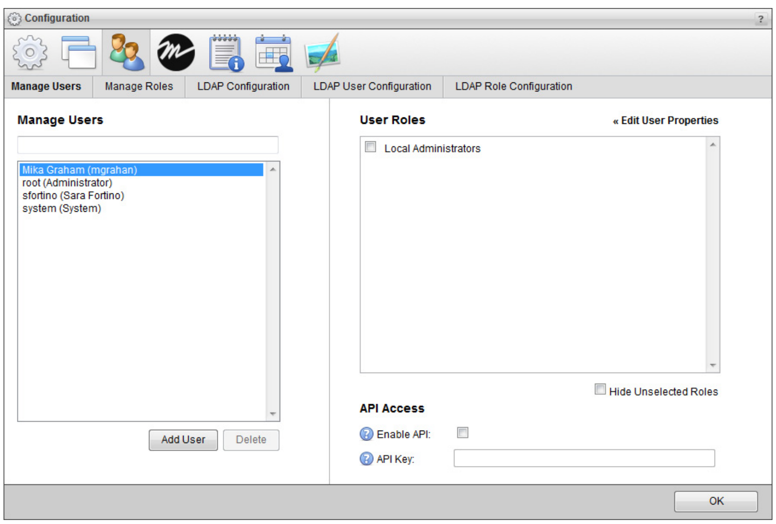
To setup a Streamline user account for API access with XPression

1. Log in to Streamline as a system administrator.
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Users** icon. If the **Users** icon is not visible, you are not an administrator and cannot configure a user account for API access.

   The **Manage Users** tab of the **Users** panel opens.
4. In the **Manage Users** list, select the user account you want to enable API access for.
5. Select **Edit User Roles and API Access**.

   The **Manage Users** tab updates to display the **API Access** fields.



6. In the **API Access** section, select the **Enable API** check box.

   Streamline automatically enters an XPression API key in the **API Key** box that identifies the Streamline system to your XPression system.
7. Copy the text displayed in the **API Key** field.
8. Click **OK** to apply your changes and close the **Configuration** window.

MOS Connection

To configure a MOS connection between Streamline and XPression

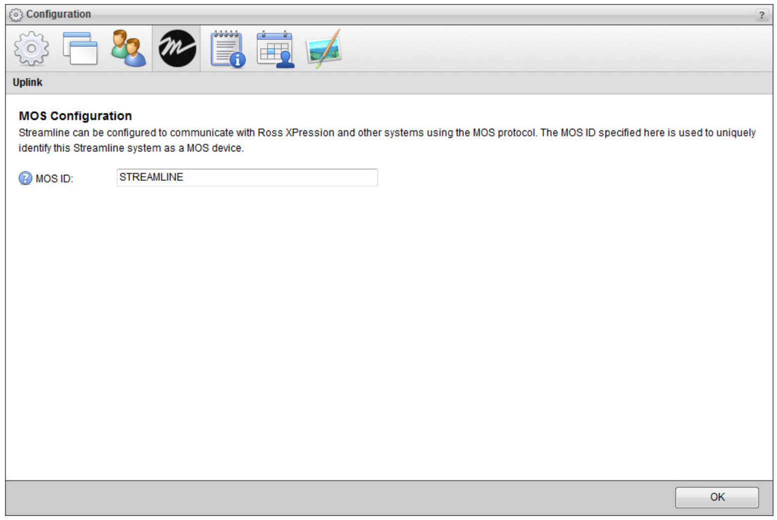
1. In your XPression system, create a MOS device to represent the Streamline system.
2. Record the MOS device identifier (MOS ID) for your Streamline system.
3. Log in to Streamline as a system administrator.

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

   The **Configuration** window opens.

5. On the **Configuration** window toolbar, click the **MOS** icon. If the **MOS** icon is not visible, you are not an administrator and cannot configure MOS connections.

   The **Uplink** tab of the **MOS** panel opens.



6. In the **MOS ID** box, enter the MOS ID of the MOS device you created on your XPression for this Streamline system.

   The MOS ID specified in the Configuration interface of Streamline is used to uniquely identify this Streamline system as a MOS device.

For More Information on...

- creating MOS devices for Inception, refer to the ***Inception Configuration Guide*** or **Online Help** system.

Configuring Metadata Elements

Streamline uses metadata elements to configure or set asset types, asset categories, file formats, priority levels, show slots, identify stations, and define keywords (tags). Use the Metadata panel in the Configuration window to configure or set metadata properties that are available for selecting in the Streamline interface.

This chapter discusses the following topics:

- Pre-defined Metadata Elements
- Managing the Choices for Metadata Elements

Pre-defined Metadata Elements

The metadata elements display in the Descriptive and Structural tabs of the Asset Editor panel, the Asset Browser panel, Work Order Editor panel, Attachment field in the Attachments view of a work order, the Create Work Order interface, the By and And Then By menus in the Report Manager panel.

Asset Source

The Asset Source defines where the asset originate from. This can be the application used to create the asset file (e.g. Adobe® Captivate®), or a group with your organization (e.g. Social Media Marketing).

Asset Type

The Asset Type defines the application of the asset, or the intended use of the file. By default, the asset type is configured to include the following elements:

- **Duratran** — used to create the backgrounds that appear behind news anchors.
- **Headshot** — a portrait or photograph of a person's head.
- **Logo** — a graphic mark, icon, or symbol used as an identifier for a company, organization, or other group.
- **Lower Third** — an image used in the title-safe area.
- **Marketing Handout** — a form of printed advertisement intended for wide distribution. For example, letterhead (A4), or postcard (A6).
- **Monitor Wall Animation** — a video clip used as the wallpaper for a monitor wall setup.
- **Monitor Wall Still** — a still image that is stored as a single frame of video.
- **OTS** — an over the shoulder shot; the image is taken from the perspective or camera angle from the shoulder of another person.

Categories

An asset category defines the object class of the asset. By default, the category metadata is configured to include the following elements: Audio, Document, Image, Other, and Video.

Content Region

This metadata defines the geographical or network affiliate level associated with the asset. By default, the content region metadata is configured to include the following elements: International, Local, Nation, and State.

Formats

This metadata defines the format of the file that is associated with the asset in the Streamline system. No elements are pre-defined for this metadata. Instead, the Streamline system automatically updates this list whenever assets are added.

Priorities

This metadata specifies the level of importance of the asset. For example, a Rush priority would be assigned to a work order that is due immediately versus a work order with a priority of Low that is due in a week. By default, the priority metadata is configured to include the following elements: High, Low, Medium, and Rush.

Shows

This metadata identifies the program or segment associated with the asset. No elements are pre-defined for this metadata.

Stations

This metadata identifies the call sign of the commercial television station identified with the asset. No elements are pre-defined for this metadata.

Tags

This metadata is a keyword or term that describes an asset and facilitates searches of the Streamline system. For example, adding the tags “**`child`**”, “**`American`**” and “**`flag`**” to an asset that includes a still image of a child posing with an American flag would list the asset in searches for “American” or “flag” or “child”. No elements are pre-defined for this metadata.

Managing the Choices for Metadata Elements

You can add new choices or delete existing choices from metadata elements, enabling you to customize the values that users can select for metadata fields when editing assets.

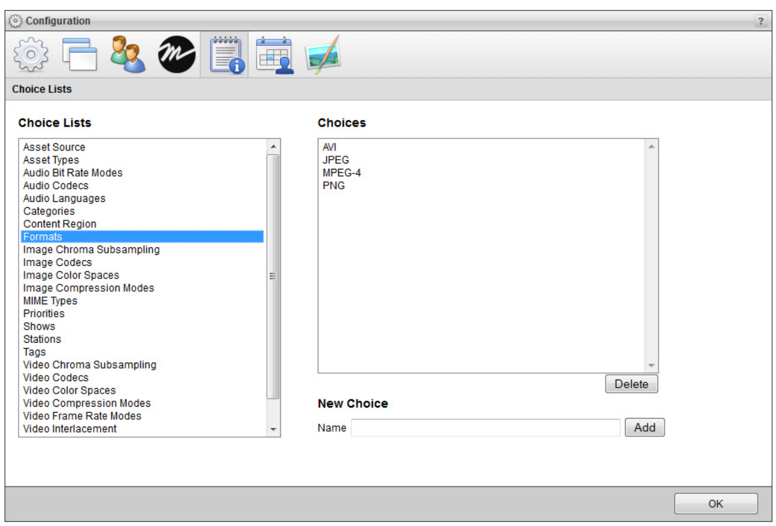
To add a new choice to a metadata element

1. Log in to Streamline as a system administrator.
2. On the main toolbar, click the **Configuration** icon.

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

   The **Metadata** panel opens.
4. Use the **Choice Lists** list to select the metadata element to add a new choice.

   The **Choices** list displays the choices contained in the selected metadata element.



5. In the **New Choice** section, enter the metadata value for the new choice in the **Name** box.
6. Click **Add**.

   The metadata value entered in the **Name** box is added to the **Choices** list associated with the selected metadata element.

To delete a choice

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

   The **Metadata** panel opens.

2. Use the **Choice Lists** list to select the metadata element to from which to delete a choice.

   The **Choices** list displays the choices contained in the selected metadata element.

3. Use the **Choices** list to select the choice to delete from the selected metadata element.

4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the choice. Click **Cancel** to keep the choice.

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

   Streamline deletes the selected choice from the choice list. Deleting a choice does not delete existing assets classified with the choice from the panel menus or tables.

Configuring Work Order Notifications

You can enable Streamline to notify users via e-mail when a work order is submitted to the system, and remind users when a deadline is near.

This chapter discusses the following topics:

- Enable Work Order Notifications via E-mail

Enable Work Order Notifications via E-mail

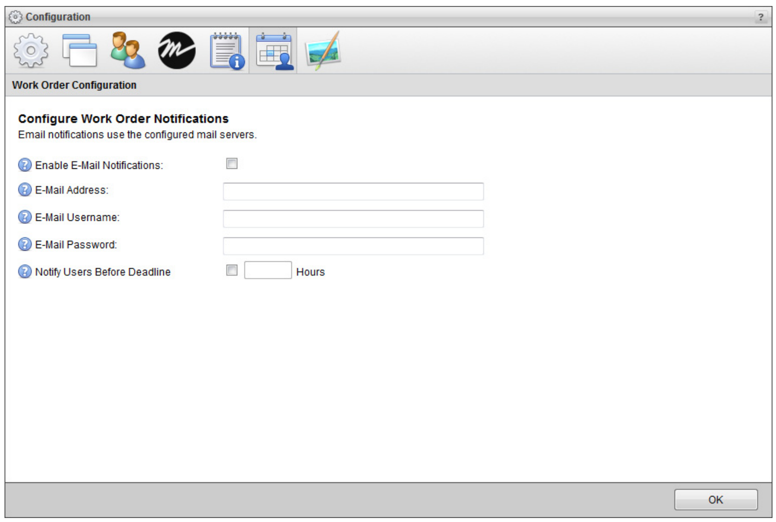
Streamline enables you to setup which users to automatically notify, via e-mail, when a work order is submitted.

To enable work order notifications

1. Log in to Streamline as a system administrator.
2. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Work Order** icon. If the **Word Order** icon is not visible, you are not an administrator and cannot enable notifications.

   The **Work Order Configuration** panel opens.



4. Select the **Enable E-Mail Notifications** check box to enable Streamline to send work order notification e-mails to Streamline users.
5. In the **E-Mail Address** box, enter the e-mail address that Streamline uses to send work order notification e-mails to Streamline users.
6. In the **E-Mail Username** box, enter the username of the e-mail account associated with the e-mail address that Streamline uses to send work order notification e-mails to Streamline users.
7. In the **E-Mail Password** box, enter the password for the e-mail account.
8. Select the **Notify Users Before Deadline** check box to send a work order notification e-mail to the assignee before the work order deadline.
9. In the **Hours** box, enter the number of hours before the work order deadline to send a work order notification to the assignee.
10. Click **OK** to close the **Configuration** window.

Configuring Asset Properties

This chapter provides instructions for configuring the storage location, targets, and transcoders for the assets in your Streamline system.

This chapter discusses the following topics:

- Specify the Asset Storage Location
- Targets
- Transcoders

Specify the Asset Storage Location

You must specify the location that assets will be stored into. Assets can be stored on local drives of the Streamline Server, or to a drive mapped through the file system of your facility.

✶ After modifying this path, any files currently residing in the original location will need to be copied over to the new location.

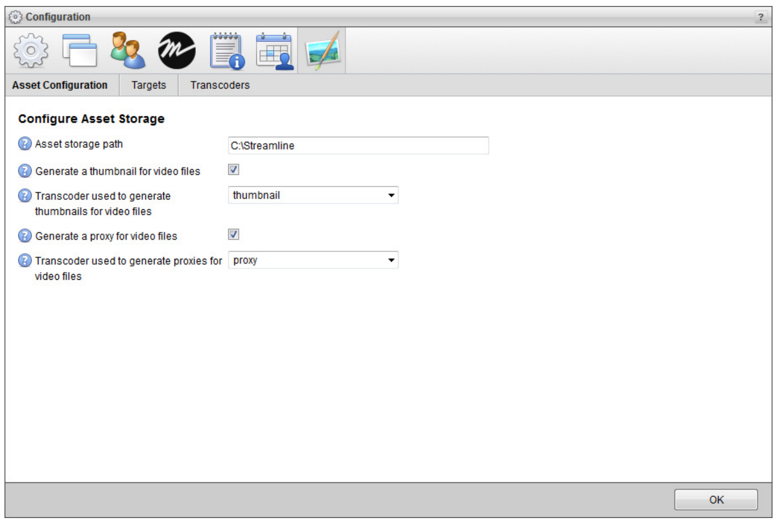
Mapping to a Folder on the Local Server Drive

This section outlines how to re-map the storage location for your assets to a folder on the Streamline Server.

To map the asset storage location to a folder

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

   The **Configure Asset Storage** panel opens.



2. In the **Asset Storage Path** box, enter the full path to the folder that Streamline uses to store asset files.
3. Click **OK** to close the **Configuration** panel.

Mapping to a Folder on the Network

This procedure applies when you wish to map the storage location to a folder on your facility network. Before proceeding, ensure that you have the following:

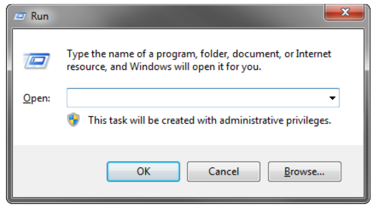
- A Microsoft® Windows® account that has full permissions to read, write, modify, and remove files and folders inside the directory you wish to map to.
- A Streamline user account with full administrator permissions.

✶ You must re-map the storage location to a folder on your facility network after every Streamline software upgrade.

To map the storage location to a folder on the network

1. Log in to Streamline as a system administrator.
2. From the Windows Desktop, press **Windows Key+R**.

   The **Run** dialog box opens.

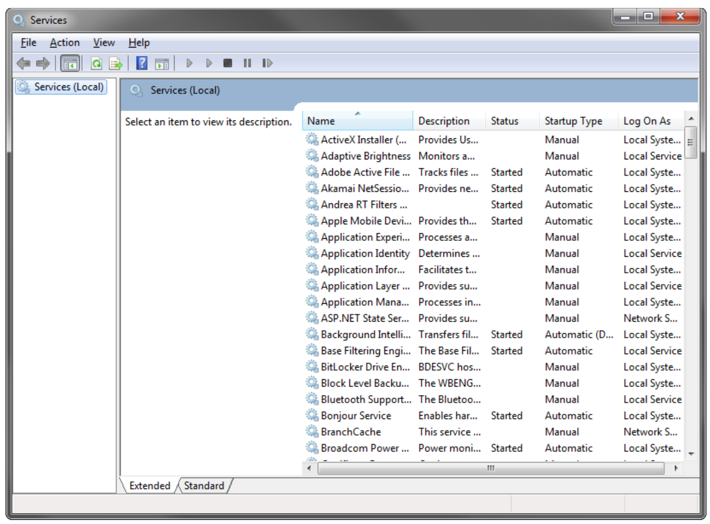


3. In the **Open** box, type the following application name:

   `services.msc`

4. Click **OK**.

   The **Services** dialog box opens.



5. In the **Services** list, locate and select the **Ross Streamline** service.
6. Click **Stop** for the **Ross Streamline** service.
7. Right-click the service and select **Properties**.
8. Select the **Log On** tab.
9. In the **Log on as:** area, select **This Account**.
10. Ensure that your Microsoft® Windows® account has all the necessary permissions on the folder you want to map to on the network.
11. Ensure that you specify the domain properly if it is a domain account as opposed to the local computer account.
12. In the **Services** dialog box, click **Start** for the **Ross Streamline** service.
13. Wait at least one minute to ensure your changes have taken effect.
14. Log in to Streamline.
15. Specify the full path to the folder using the procedure “**To map the asset storage location to a folder**” on page 9–2.

    For example, you would specify **`\\server01\multimedia_group\assets`** instead of **`Y:\multimedia_group\assets`**.

Enabling Public Sharing of a Media Folder

You must enable public sharing on the folder that you mapped in the procedure “**Mapping to a Folder on the Network**”. This requires a Microsoft® Windows® administrator account.

Ensure the following options are configured in the **Network and Sharing Center** the system that houses the folder that you want to share with users across the network:

- **Public Folder Sharing** — turn **ON** this option to enable users on your network to access the shared folder.
- **Password Protected Sharing** — turn **OFF** this option to allow users on your network to access shared folders on the network without having to log in with their username and password.

Targets

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

Add a Target

You can add the following types of targets to you Streamline system:

- **File System** — a shared folder accessible to Streamline and devices.
- **FTP** — an FTP server accessible to Streamline and devices.
- **Pull** — a device that directly pulls assets from Streamline.

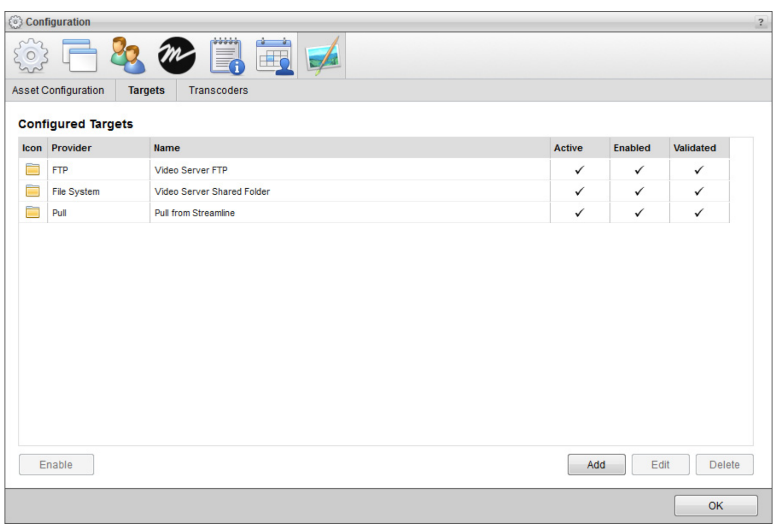
To add a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.



3. Click **Add**.

   The **Attach Target** page opens.

4. Use the **Target Type** list to select the type of target to add. The available target types are as follows:
   - **File System** — a shared folder accessible to Streamline and devices.
   - **FTP** — an FTP server accessible to Streamline and devices.
   - **Pull** — a device the directly pulls assets from Streamline.
5. Click **Next**.

   The page that opens depends on the selected **Target Type**.
6. In the page that opens, configure the selected **Target Type** as follows:

   File System Target Configuration

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

   b. In the **Key Name** box, enter a name to use as an identifier for the target.

   c. In the **Path** box, enter the full pathname of the shared folder in which to save assets pushed from Streamline to external devices. This folder must be accessible by both Streamline and external devices.

   d. Click **Next** to continue defining the new target on the **Target Configuration** page.

   FTP Target

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

   b. In the **Key Name** box, enter a name to use as an identifier for the target.

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

   d. In the **Port** box, enter the FTP port number to connect to on the host.

   e. In the **Username** box, enter the username for the FTP server.

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

   g. In the **Base Folder** box, enter the path to the folder on the FTP server to open upon initial connection.

   h. Click **Next** to continue defining the new target on the **Target Configuration** page.

   Pull Target

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

   b. In the **Key Name** box, enter a name to use as an identifier for the target.

   c. In the **Host** box, enter the hostname or IP address of the external device to pull assets from Streamline.

   d. Click **Next** to continue defining the new target on the **Target Configuration** page.
7. On the **Target Configuration** page, use the **Icon** list to select an icon to identify the target.

   If the icons in the list are not appropriate for your target, do the following:

   a. Use the **Icon** list to select **Upload an Icon**.

   Streamline displays a **Browse** button.

   b. Click **Browse**.

   The **File Upload** dialog box opens.

   c. Use the **File Upload** dialog box to select the image file to use as the icon for your target.

   d. Click **Open**.

   Streamline adds the image contained in the selected image file to the **Icon** list as the **Uploaded Icon** option, and automatically selects the uploaded image as the icon for your target. You can only upload one image to the **Icon** list at a time. Uploading another image to the **Icon** list replaces the current uploaded image with the new image.

8. Select the **Require Approval** check box to only allow users to send approved assets to the target. Clear this check box to allow users to send unapproved or approved assets to the target.
9. In the **Remove from Target After** box, enter the amount of time after which to delete unused assets from the target.
10. Use the **Clip Name Case** list to select the capitalization of clip names on the target. The available options are as follows:
    - **Default** — use the same capitalization as the asset filename (Sports Intro).
    - **All Uppercase** — change all letters to uppercase (SPORTS INTRO).
    - **All Lowercase** — change all letters to lowercase (sports intro).
11. Select the **Replace Spaces With Underscores** check box to replace all spaces in a clip name with underscore (_) characters.

    For example: the clip name `Sports Intro` would change to `Sports_Intro`.
12. In the **Max Clip Name Length** box, enter the maximum length in characters for clip names on the target.

    The maximum clip length does not include the file extension. Clip names for assets with filenames longer than the set maximum clip name length are truncated to the set length.
13. Us the **Time Unit** to the right of the **Remove from Target After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Remove from Target After** box.
14. Click **Edit Filter** to open the **Search Editor** window to define a filter that controls the assets that users can send to the target.

✶ Streamline only allows users to send assets to a target that match the filter defined for the target.

15. Click **Save**.

    Streamline adds the new target to the **Configured Targets** list.

For More Information on...

- using the Search Editor window to define asset searches, refer to the section "**Using the Search Editor**" in the ***Streamline User Guide***.

Manage Available Targets

You can create any number of targets for your Streamline system. You can enable or disable the targets on your Streamline system match the requires of your users.

To enable or disable a target

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

   The **Asset** panel opens.
2. Click the **Targets** tab.

   The **Targets** tab opens.
3. In the **Configured Targets** list, select the target to enable or disable.

   Depending on the state of the selected target, Streamline displays either the **Enable** or **Disable** button below the **Configured Targets** list.
4. Do one of the following to control the availability of the selected target on your Streamline system:
   - **Enabled Targets** — if the selected target is currently enabled, click **Disable**.

     The disables target is no longer available to receive files pushed to it by Streamline users.
   - **Disabled Targets** — if the selected target is currently disabled, click **Enable**.

     Inception enables the selected target and makes it available to receive files pushed to it by Streamline users.

Edit Targets

When editing a target, you cannot change the target type.

To edit a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.

3. In the **Configured Targets** list, select the target to edit.
4. Click **Edit**.

   The **Configuration** page for the selected target opens.

5. Edit the target type configuration settings as required.
6. Click **Next**.

   The **Target Configuration** page opens.

7. Edit the target configuration settings as required.
8. Click **Save**.

Delete Targets

To delete a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.

3. In the **Configured Targets** list, select the target to delete.
4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Streamline deletes the selected target from the **Configured Targets** list.

Transcoders

Transcoders enable Streamline to automatically generate thumbnail images or compressed preview videos for assets when users upload video files to Streamline to create assets.

Add a Transcoder

You can add the following types of transcoders to you Streamline system:

- **Telestream Vantage** — use a Telestream Vantage server to generate thumbnails and preview video for assets.
- **Watch Folder** — a transcoder takes input files from a specified folder, transcodes the files, and outputs the transcoded file in another specified folder.

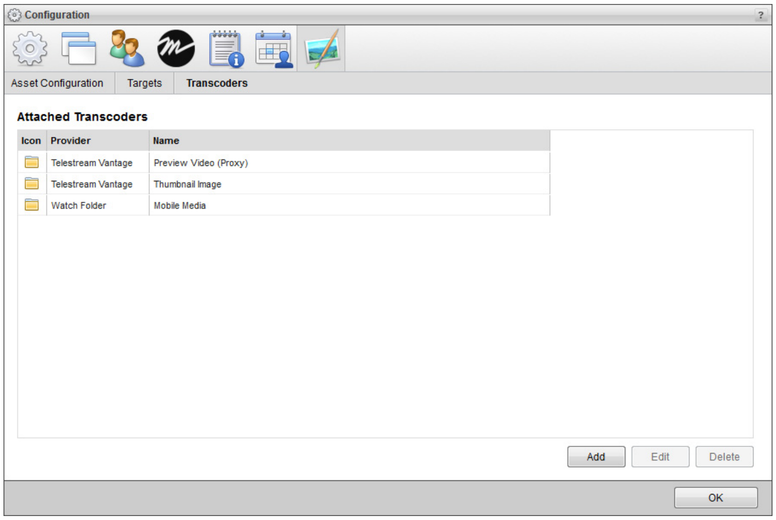
To add a transcoder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Transcoders** tab.

   The **Transcoders** tab opens.



3. Click **Add**.

   The **Attach Transcoder** page opens.

4. Use the **Transcoder Type** list to select the type of transcoder to add. The available transcoder types are as follows:

   - **Telestream Vantage** — use a Telestream Vantage server to generate thumbnails and preview video for assets.
   - **Watch Folder** — a transcoder takes input files from a specified folder, transcodes the files, and outputs the transcoded file in another specified folder.

5. Click **Next**.

   The page that opens depends on the selected **Transcoder Type**.

6. In the page that opens, configure the selected **Transcoder Type** as follows:

   Vantage Transcoder Configuration

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

   b. In the **URL** box, enter the URL of the Telestream Vantage server.

   c. In the **Shared Path** box, enter the full pathname of the folder in which to save transcoded output files. This folder must be accessible by both the Streamline system and the Telestream Vantage server.

   d. In the **Suffix** box, enter in this box the text to add to the end of the input file name to create the name for the output file.

   e. Click **Next**.

   f. On the **Target Configuration** page, click **Browse**.

   g. In the **File Upload** dialog box, select the **Vantage flip descriptor** file to create a thumbnail or preview video for assets.

   h. Click **Open** to save the new transcoder and add it to the **Attached Transcoders** list.

Watch Folder Transcoder Configuration

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

b. In the **Input Path** box, enter the full pathname of the input folder from which the transcoder takes input files for transcoding. This folder must be accessible by both the Streamline system and the transcoder.

c. In the **Output Path** box, enter the full pathname of the folder in which to save transcoded output files. This folder must be accessible by both the Streamline system and the transcoder.

d. In the **Suffix** box, enter in this box the text to add to the end of the input file name to create the name for the output file.

e. Click **Next** to save the new transcoder and add it to the **Attached Transcoders** list.

For More Information on...

- creating Vantage flip descriptor files, refer to the ***Telestream Vantage User Guide***.

Edit Transcoders

To edit a transcoder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Transcoder** tab.

   The **Transcoders** tab opens.

3. In the **Attached Transcoders** list, select the transcoder to edit.

4. Click **Edit**.

   The **Configuration** page for the selected transcoder opens.

5. Edit the transcoder type configuration settings as required.

6. Click **Next**.

   The **Target Configuration** page opens.

7. Edit the target configuration settings as required. You cannot change the transcoder type.

8. For **Telestream Vantage** transcoders, click **Next** to edit the **Vantage flip descriptor** file used to create thumbnails or preview videos for assets.

9. Click **Next** to save your changes.

Delete Transcoders

To delete a transcoder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Transcoder** tab.

   The **Transcoders** tab opens.

3. In the **Attached Transcoders** list, select the transcoder to delete.

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Streamline deletes the selected transcoder from the **Attached Transcoders** list.