streamline

User 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 · User Guide

- Ross Part Number: **7800DR-004-2.0**
- 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

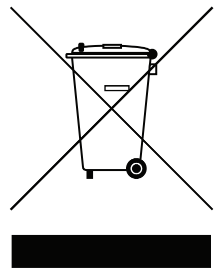
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Inception Server system, contact your regional sales manager.

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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Introduction

This guide covers the use of Streamline media asset management. The following chapters are included:

- Chapter 1, “**Introduction**” summarizes the guide and provides important terms, and conventions.
- Chapter 2, “**Getting Started**” provides instructions on how to log into the Streamline interface, summarizes the interface, and how to personalize the layout of the Streamline panel layouts.
- Chapter 3, “**Managing Assets**” describes the Assets panel and its components, how to update metadata associated with an asset, sharing files via Streamline, and deleting assets.
- Chapter 4, “**Managing Work Orders**” describes how to create, edit, and approve requests for assets.
- Chapter 5, “**Searching Streamline**” provides instructions on the ways to search assets, work orders, and report results in the Streamline system.
- Chapter 6, “**Managing Reports**” describes how to specify criteria to create and run reports to analyze the Streamline system.
- Chapter 7, “**Configuring Streamline**” provides instructions on how to configure Streamline for your organization.

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

Documentation Conventions

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

Interface Elements

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

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

User Entered Text

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

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

Referenced Guides

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

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

Menu Sequences

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

Important Instructions

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

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

Getting Help

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

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

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

Ross Video product guides are also supplied as print-ready PDF files on the Ross Video product Software Installation DVD.

Contacting Technical Support

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 you have access to technical expertise around the clock. After-sales service and technical support is provided directly by Ross Video personnel. 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 the technical support person who is on call does not answer this line immediately, a voice message can be left and the call will be returned 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

Getting Started

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

The following topics are discussed in this chapter:

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

Supported Formats

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

Thumbnail Viewing

Streamline supports the following image formats for thumbnail viewing:

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

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

Video Playout

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

Table 2.1 Supported Video Formats for Playout

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

Metadata Collection

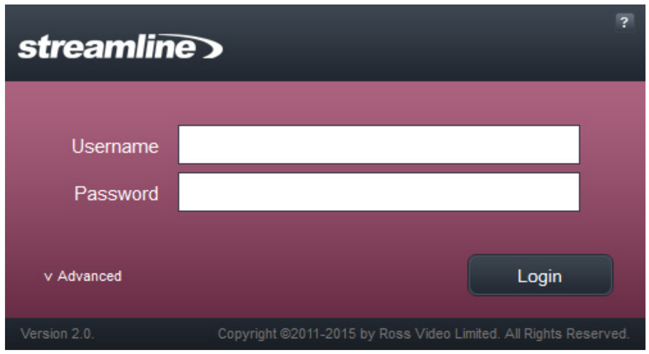
Streamline supports the gathering of structural metadata using the MediaInfo tool. Refer to the MediaInfo website for a list of analytics and supported file formats.

Start Streamline

To start Streamline

1. Use one of the following supported web browsers to open the Inception web page provided by your Inception administrator:
   - Microsoft Internet Explorer® version 9 or greater
   - Mozilla Firefox® version 3.6 or greater
   - Google Chrome™ browser version 17.x or higher
   - Apple Safari® version 5.1.x or greater

   The **Login** panel opens.



2. In the **Login** panel, type your Streamline login credentials in the **Username** and **Password** boxes.
3. Click **Login**.

   Streamline opens.

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

To close Streamline

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

Streamline Workflow

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

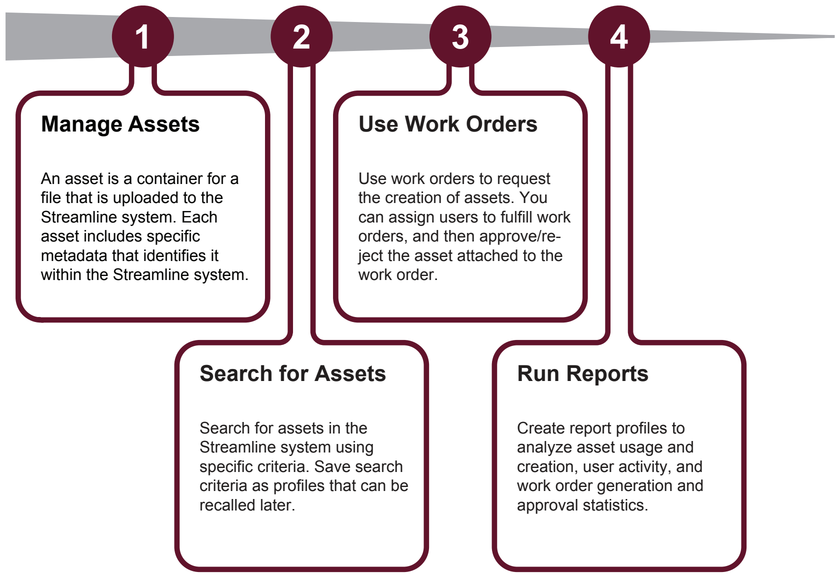


Figure 2.1 Streamline Workflow

Manage Assets

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

Search for Assets

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

Use Work Orders

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

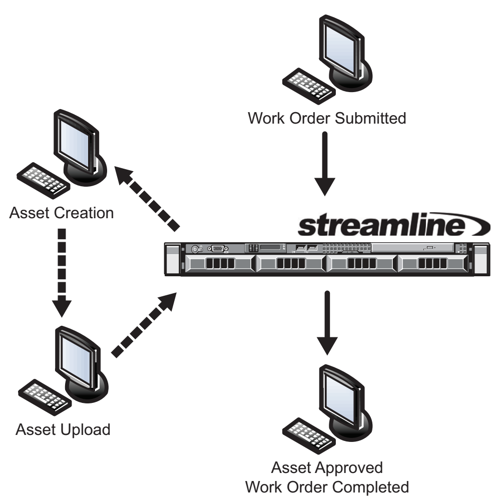


Figure 2.2 Work Order Workflow

Work Order Submitted

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

Asset Creation

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

Asset Upload

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

Asset Approved

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

Run Reports

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

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

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

Exploring the Streamline User Interface

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

Main Toolbar

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

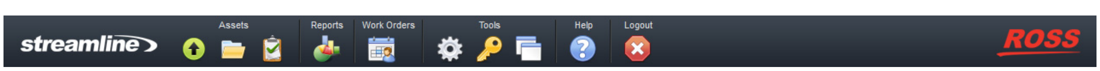
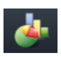
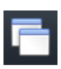
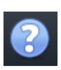


Figure 2.3 Streamline Main Toolbar

The main toolbar contains the following icons:

Table 2.2 Main Toolbar Icons

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

Assets Panel

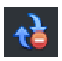
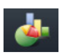
The Assets panel lists assets in a table or tile layout, allowing you to quickly access individual assets or search the Streamline system for specific assets. From the Assets panel you can select assets to upload, delete, modify, and share files. A thumbnail represents the asset in the panel. If the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

For More Information on...

- adding an asset to the Streamline system, refer to the section "**Uploading Assets**" on page 3–7.

The top toolbar in the Assets panel displays the following icons:

Table 2.3 Assets Panel Toolbar (Top)

Icon	Name	Description
	Download	Downloads the selected asset to your computer.
	Delete	Deletes the selected asset from the Streamline system. You must have permission to delete assets.
	Edit Mode Enabled	The ability to edit asset metadata in the Assets table is currently enabled. Click the icon to disable edit mode.
	Edit Mode Disabled	The ability to edit asset metadata in the Assets table is currently disabled. This is the default state. Click the icon to enable edit mode.
	Auto Refresh Enabled	The table in the Assets panel is automatically updated as assets are added, removed, and/or modified. This is the default state. Click the icon to disable the auto refresh feature.
	Auto Refresh Disabled	The table in the Assets panel is not updated. Click the icon to enable the auto refresh feature.
	Report	Click the icon to open the Reports panel with the same search filters applied.
	List View	Toggles the main view to display information in a spread sheet layout with asset records displayed under a specified set of columns.
	Tile View	Toggles the main view to display information where metadata is displayed in vertical lines under a thumbnail of the asset.
	Saved Searches	Provides a list of search criteria that are saved as individual profiles that you can recall.
	Edit Search	Opens the Search Editor window that enables you to change the search criteria.
	Quick Search	Searches for any occurrence of the provided text across all text-based metadata fields.
	Add Filters	Enables you to provide a set of criteria against one or more metadata items to perform a search.

The bottom toolbar of the Assets panel displays the following read-only information:

Table 2.4 Assets Panel Toolbar (Bottom)

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

Upload Assets Panel Overview

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

The toolbar of the Upload Assets panel displays the following icons:

Table 2.5 Upload Assets Toolbar

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

Asset Editor Panel Overview

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

For More Information on...

- the available types of metadata, refer to the section "**Metadata Overview**" on page 3–2.
- editing assets, refer to the section "**Editing the Metadata for an Asset**" on page 3–10.

The top toolbar of each Asset Editor panel includes the following icons:

Table 2.6 Asset Editor (Top) Toolbar Icons

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

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

Table 2.7 Asset Editor (Bottom) Toolbar Icons

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

Asset Approvals Panel

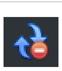
The Asset Approvals lists the assets for which Streamline users have requested your approval. Only those users with the appropriate permissions can approve or reject assets. After a user approves or rejects an asset, Streamline removes the asset from the Asset Approvals panel.

For More Information on...

- approving assets, refer to the section "**Approving and Rejecting an Asset**" on page 3–14.

The toolbar in the Asset Approvals panel includes the following icons:

Table 2.8 Asset Approvals Toolbar Icons

Icon	Name	Description
	Approve	Approves the selected asset.
	Reject	The asset is not approved, the creator, and any associated work order is updated.
	Auto Refresh Enabled	The table in the Asset Approvals panel is automatically updated as new approval requests are submitted. This is the default state.
	Auto Refresh Disabled	The table in the Asset Approvals panel is not routinely updated. Click the icon to enable the auto refresh feature.
	# Tasks	Indicates the number of assets that are awaiting your approval.

Work Orders Panel

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

For More Information on...

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

The top toolbar includes the following icons:

Table 2.9 Work Orders Toolbar (Top) Icons

Icon	Name	Description
	Create Work Order	Opens the Create Work Order interface which enables you to summarize the criteria for the creation of a new asset.
	Delete	Deletes the selected work order from the Work Orders panel.
	Edit Mode Enabled	Toggles the ability to update work orders listed in the panel. Currently select fields can be edited within the Work Orders panel.
	Edit Mode Disabled	Toggles the ability to update work orders listed in the panel. Currently all the fields in the Work Orders panel are set to read-only. This is the default state.
	Auto Refresh Enabled	The entries in the Work Orders panel are automatically updated. This is the default state. Click to disable the auto refresh feature.
	Auto Refresh Disabled	The table in the Work Orders panel will not automatically update as work orders are added, removed, and/or modified. Click the icon to enable the auto refresh feature.
	Report	Click the icon to open the Reports panel with the selected search filters applied.
	List	Toggles the Work Orders panel view to display information in a spread sheet layout with work orders displayed under a specified set of columns.
	Calendar	Toggles the display of the Work Orders panel into a calendar. The current date is pre-selected on the calendar grid. Work orders are organized according to their due date.
	Saved Searches	Provides a list of search criteria that are saved as individual profiles that you can recall.
	Edit Search	Opens the Search Editor window that enables you to change the search criteria.
	Quick Search	Searches for any occurrence of the provided text across all text-based metadata fields
	Add Filters	Enables you to provide a set of criteria against one or more metadata items to perform a search

The bottom toolbar of the Work Orders panel displays the following read-only information:

Table 2.10 Work Orders Toolbar (Bottom) Icons

Icon	Name	Description
	# Total Work Orders	Indicates the total number of work orders in the system regardless of the current search criteria
	# Work Orders Match Search	Indicates the number of work orders that include the search criteria

Work Order Editor Panel Overview

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

For More Information on...

- submitting a work order, refer to the section "**Creating a Work Order**" on page 4–4.
- approving an asset, refer to the section "**Approving and Rejecting an Asset**" on page 3–14.

A Work Order Editor panel includes the following icons:

Table 2.11 Work Order Editor Toolbar Icons

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

Reports Panel

From the Reports panel you can create, edit, and run reports that analyze asset requisitions (work orders), usage of asset files, provide a breakdown of assets based on metadata types or artist time-tracking. The complexity of the report criteria, and how results are displayed, are user configurable and can be saved to profiles that users can run automatically or recall when required.

For More Information on...

- creating a report, refer to the section "**Creating a New Report**" on page 6–5.
- running a report, refer to the section "**Running a Report**" on page 6–9.

The toolbar in the Reports panel includes the following icons:

Table 2.12 Reports Toolbar Icons

Icon	Name	Description
	Saved Reports	Provides a list of report criteria that are saved as individual profiles that you can recall. This icon only displays in the toolbar when at least one report profile is saved and available.
	Run Report	Forces a refresh based on the current report criteria.
	New	Opens the Reports Editor panel that enables you to create a new report and specify criteria.
	Save	Saves the current report criteria as a new report profile.
	Save As	Saves the current report criteria under a different report profile name. This icon is unavailable if the current report is not yet saved.
	Delete	Removes the report profile from Streamline. The profile is no longer displayed in the Saved Reports list.
	Print	Opens the Print dialog and enables you to send the report results to a printer.
	Export to CSV	Saves the report results to a Comma Separated Value (CSV) text file on your local computer. You can open the file in Microsoft® Excel®.
	Detailed Export to CSV	Saves the report results to a CSV text file on your local computer. This report includes the details from the assets or work orders which satisfy the report criteria. You can open the file in Microsoft® Excel®.
	Show/Hide Details	Toggles the display of the Settings, Grouped By, Analytics, and Filter toolbars in the Reports panel.
	View Items	Opens the Assets or Work Orders panel using the current filter criteria.

Panel Positions and Perspectives

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

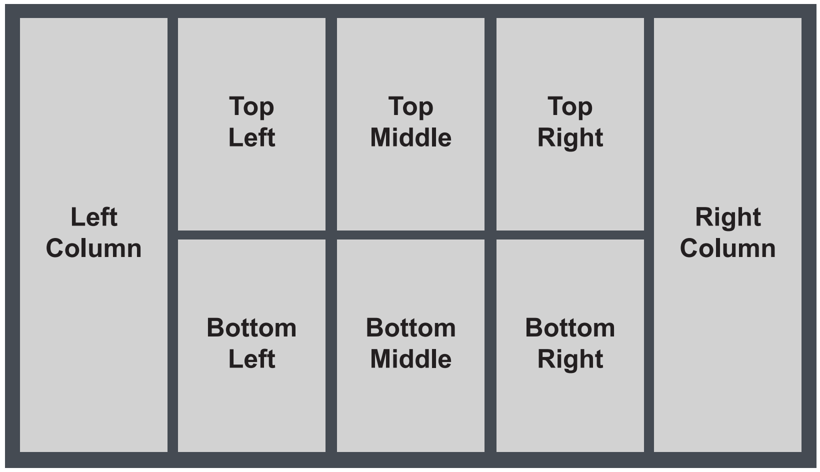


Figure 2.4 Arrangement of the Eight Panel Positions

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

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

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

Default Panel Positions

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

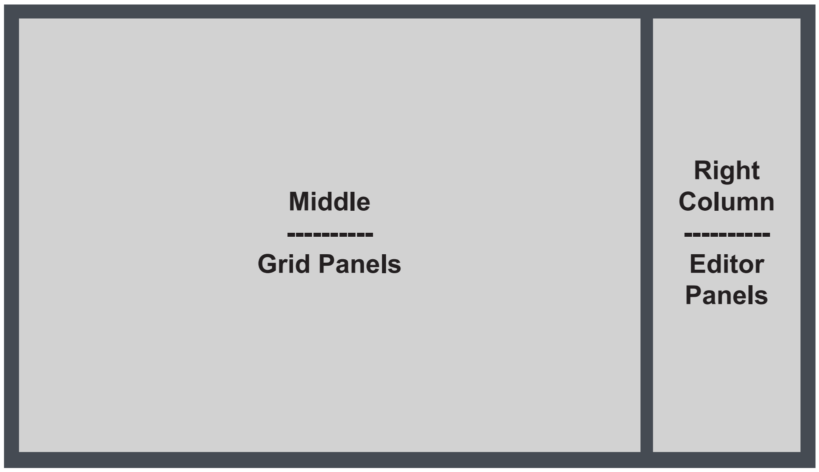


Figure 2.5 Default of Panel Layout

Default layout positions are as follows:

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

For More Information on...

- creating and managing perspectives, refer to the section "**Working With Perspectives**" on page 7–2.

Move a Panel from One Layout Position to Another

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

To move a panel from one layout position to another

1. At the top of the panel you want to move, click and drag the panel's name tab.
2. Drag the pointer over the layout guide to specify the position to which you want to move the panel.

   As you drag the pointer over the layout guide, the current drop position for the panel turns yellow. Light gray indicates unoccupied positions. Dark gray indicates occupied positions that can accept additional panels.
3. When the position to which you want to move the panel turns yellow, release the mouse button.

   After you have arranged panels to your liking, you can save the layout as a perspective.

For More Information on...

- saving a layout as a perspective, refer to the section "**Working With Perspectives**" on page 7–2.

Rearrange Panel Tabs Within a Layout Position

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

To rearrange the order of panel tabs within a layout position

1. Click and drag the panel's name tab within the tab row at the top of the layout position.

   As you drag the pointer over the tab row, a dotted rectangle indicates the current drop position for the selected panel tab. If the rectangle surrounds a tab name, the drop position is to the left of that tab.

2. When the dotted rectangle indicates the desired position, release the mouse button to drop the panel tab.

   You can also move a panel to a different layout position by dragging and dropping the panel name tab into the tab row of the destination panel. After you have arranged panel tabs to your liking, you can save the layout as a perspective.

Navigating within Panels

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

To resize a panel

- Hover the mouse pointer over an edge or corner of the panel until the resizing icon displays, and then click and drag the edge or corner.

✶ Streamline does not save custom panel sizing as part of a perspective.

To close a panel

- Click the close icon in the top right corner of the panel.

  If the layout position contains more than one open panel, only the current panel closes.

Navigating within Column-Based Panels

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

The following panel types are column-based:

- Asset Approvals
- Assets
- Work Orders
- Reports

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

Table 2.13 Column-based Panel Navigation

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

Managing Assets

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

The following topics are discussed in this chapter:

- Metadata Overview
- Uploading Assets
- Editing the Metadata for an Asset
- Linking Assets
- Sharing Files in Streamline
- Requesting Approval for an Asset
- Previewing an Asset File
- Approving and Rejecting an Asset
- Deleting an Asset

Metadata Overview

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

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

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

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

For More Information on...

- reports, refer to the section "**Report Criteria Overview**" on page 6–3.
- creating search profiles, refer to the section "**Saving Criteria as a Profile**" on page 5–6.

Descriptive Metadata

The Descriptive tab in the Asset Editor panel displays metadata that describes the individual instances of application data, the data content of the specific asset. The following table summarizes the fields available on the Descriptive tab, how Streamline classifies the data in the field, and whether the data can be modified by a user.

Table 3.1 Descriptive Metadata

Field	Description	Data Type	Editable
Asset Source	The source from which the asset originated from such as the application used to create the file (e.g. Adobe® Captivate®) or a group within an organization (e.g. Social Media Marketing).	Text	✓
Camera Operator(s)	The videographer that provided the footage for the asset.	Text	✓
Category	Defines the asset as a type of media. For example, a still image, or a video clip. Although the field is editable, the system attempts to populate it with an appropriate value at time of ingest.	Menu choice	✓
Content Region	The geographical or network affiliate level associated with the asset.	Menu choice	✓
Creator	The user responsible for creating the content. This differs from the Created By field in the Structural tab which represents the original Streamline user who first created the asset record in the Streamline system.	Text	✓
Description	Additional information about the asset	Text	✓

Table 3.1 Descriptive Metadata

Field	Description	Data Type	Editable
Event	Specifies a historical incident, holiday, or other occurrence of significance associated with the asset. For example, Christmas or the Olympics are each examples of an event.	Text	✓
Language	Specifies the language used. For example en (English), or fr (French).	Text	✓
Name	A unique identifier for the asset in the Streamline system. The asset name is derived from the file ingested. In the case of a placeholder associated with a work order, this field is the name of the work order. This information is automatically updated with the name of the file at time of ingest.	Text	✓
Project	Identifies the assignment the asset is required for.	Text	✓
Rights	Information about intellectual property rights held in and over the asset.	Text	✓
Rights Until	Specifies the latest date that this asset may be used. (informational purposes only)	Date	✓
Show	The program or segment associated with the asset.	Menu choice	✓
Station	The call sign of the commercial television station identified with the asset.	Menu choice	✓
Subtitles	Indicates whether subtitles, or closed captioning, are included in the asset.	Menu choice	✓
Tags	List of keywords associated with the asset.	Multiple menu choice	✓
Talent	The news anchor, performer, or announcer that the asset features.	Text	✓
Type	Defines the application of the asset, or the intended use of the asset.	Menu choice	✓

Structural Metadata

Structural metadata provides the technical specifications of the file associated with the asset. The information displayed in the Structural tab is automatically derived from the asset file, and is read-only. Metadata displayed in this tab is organized depending on the type of media of the asset file: system metadata, general file metadata, audio stream, image stream, and video stream.

System Metadata

All assets may display the following system metadata:

Table 3.2 System Metadata

Field	Description	Data Type	Editable
GUID	A pseudo-random number that uniquely identifies the asset.	Text	
Approval	Status of the asset (approved or none).	Text	
Approved By	User that last approved the asset.	User	
Created By	User who initially created the asset within the Streamline system.	User	
Date Created	The date the asset was first created within the Streamline system. In the case of an asset used to fulfill a work order, this is the date the work order was initially created.	Date	
Date Ingested	The date the file was ingested and associated with this asset.	Date	
Date Last Downloaded	The date the file was last downloaded.	Date	
Date Modified	The date the asset was last modified and includes when the metadata fields were last edited.	Date	
Date Submitted	The date the asset was submitted for approval in Streamline.	Date	
Download Count	The number of times the asset has been downloaded.	Integer	
Ingested By	The user who ingested the last revision of the file associated with this asset.	User	
Last Downloaded By	The last user who downloaded the file.	User	
Modified By	The user that last modified the asset.	User	
Submitted By	The user who uploaded/submitted the asset to the Streamline system.	User	

General File Metadata

General file metadata is derived from the file itself.

Table 3.3 General File Metadata

Field	Description	Data Type	Editable
Date Encoded	The date the file was encoded. This information is contained within certain file formats and the system attempts to deduce it automatically.	Date	
Duration	The duration of the video or audio file in milliseconds.	Integer	
File Revision	The revision number of the file.	Integer	
File Size	The total of bytes of the asset file.	Integer	
Format	The format of the file associated with the asset. The system attempts to read this information from the file at time of ingest.	Text	
Overall Bitrate	The overall bit rate of the file in bits per second.	Integer	

Audio Metadata

When the asset contains audio media, the following additional metadata fields can be displayed:

Table 3.4 Audio File Metadata

Field	Description	Data Type	Editable
Bit Depth	Bit depth of the audio file.	Integer	
Bit Rate	Bit rate of the audio stream in bits per second.	Integer	
Bit Rate Mode	Bit rate mode for this audio stream. For example CBR (constant bit rate), or VBR (variable bit rate).	Text	
Channels	The number of audio channels included in the audio stream.	Integer	
Codec	The specific Codec used to encode the stream.	Text	
Codec Description	Provides details on the Codec used to encode the stream.	Text	
Duration	Duration of the audio stream in milliseconds.	Integer	
Language	The language spoken in the audio stream.	Text	
Sampling Count	The number of audio samples.	Integer	
Sampling Rate	The sampling rate in hertz (Hz).	Integer	
Stream Size	The size of the audio stream in bytes.	Integer	

Image File Metadata

When the asset is classified as a still image, the following additional metadata fields can be displayed:

Table 3.5 Image File Metadata

Field	Description	Data Type	Editable
Bit Depth	The bit depth of the image.	Integer	
Chroma Subsampling	The method of encoding chroma and luma information in the image. For example, 4:4:4 and 4:2:2.	Text	
Codec	The Codec used to encode this image.	Text	
Color Space	The color space of the image. For example, YUV and RGB.	Text	
Compression Mode	The data encoding method used. For example, Lossy or Lossless.	Text	
Height	Overall height of the image in pixels.	Integer	
Width	Overall width of the image in pixels.	Integer	

Video Metadata

When the asset is classified as video media, the following additional metadata fields can be displayed:

Table 3.6 Video File Metadata

Field	Description	Data Type	Editable
Bit Depth	Bit depth of the video stream	Integer	
Bit Rate	Bit rate of the video stream in bits per second.	Integer	
Chroma Subsampling	The method of encoding the chroma and luma information in the video stream. For example, 4:4:4 or 4:2:2.	Text	
Codec	The Codec used to encode the video stream.	Text	
Codec Description	Details the Codec used to encode the stream.	Text	
Color Space	The color space of the image. For example, YUV or RGB.	Text	
Compression Mode	The data encoding method used. For example, Lossy or Lossless.	Text	
Display Aspect Ratio	The display aspect ratio of the video stream. For example, 16:9 or 4:3.	Floating point number	
Display Aspect Ratio Description	Provides details on the display aspect ratio.	Text	
Duration	Duration of the video stream in milliseconds.	Integer	
Frame Count	The number of frames in the video stream.	Integer	
Frame Rate Mode	The frame rate mode of the video stream. For example, Constant or Variable.	Text	
Height	The height of the video stream in pixels.	Integer	
Interlacement	Interlacing technique of the video stream. For example, PPF (picture per field).	Text	

Table 3.6 Video File Metadata

Field	Description	Data Type	Editable
Language	The language used in the video stream. For example en (English), fr (French), en-us (English-U.S.A.)	Text	
Pixel Aspect Ratio	Pixel aspect ratio of the video stream.	Floating point number	
Rotation	The amount of rotation applied to the video stream. For example, 3.14.	Floating point number	
Standard	The format of the video stream. For example, NTSC, or PAL.	Integer	
Stream Size	The size of the video stream in bytes.	Integer	
Width	The width of the video stream in pixels.	Integer	

Comments

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

Linked Assets

The Linked Assets view lists the assets in the Streamline system that are actively associated. You can link assets by dragging and dropping them from the Assets panel to the Linked Assets view.

Uploading Assets

Uploading a file creates an asset in the Streamline system with metadata automatically ported from the file. You must have permission to upload files to the Streamline system.

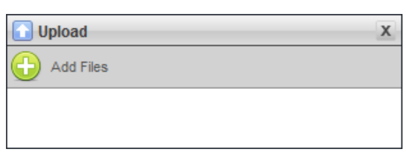
Uploading a Single Asset

You can select an asset file from a local file system and upload it to the Streamline system.

To upload an asset

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

   The **Upload** panel opens.



2. Perform one of the following:
   - Drag and drop the asset file from its location to the **Upload** panel; or
   - In the **Upload** panel, click the **Add Files** icon, navigate to the file location, and click **Open** to close the dialog.
3. In the **Upload** panel, click the **Upload** button next to the file thumbnail to upload the file to the Streamline system.

Uploading Multiple Assets

When using the Google® Chrome® browser, a folder can also be selected from a local file system and all files contained in that folder will be uploaded to the Streamline system. Each file in the folder will have an entry in the Upload panel, and will create an asset in the Streamline system once uploaded.

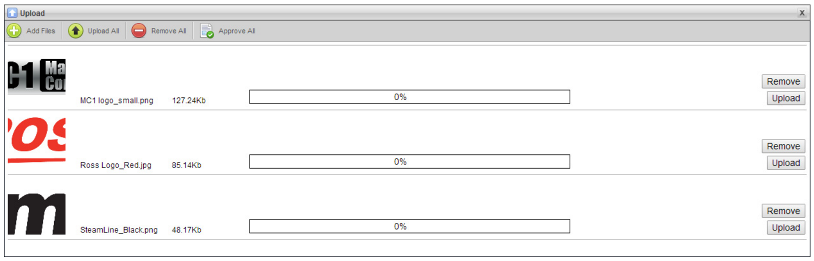
To upload multiple assets

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

   The **Upload** panel opens.

2. Drag and drop the asset folder from its location to the **Upload** panel.

   The Upload panel updates to display an entry for each file in the folder. The main toolbar now displays the **Upload All**, **Remove All**, and **Approve All** icons.



3. To upload all the files, click the **Upload All** icon in the main toolbar.

4. To upload specific files, click the **Upload** button next to its entry in the **Upload** panel.

Uploading Video Clips and Proxies

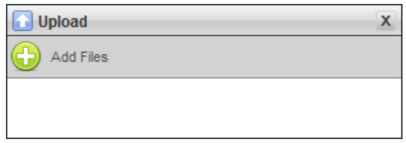
You can upload proxies and thumbnails and have them automatically associated as one asset. Keep the following in mind when uploading video clips, proxies, and thumbnails:

- You will need to upload three files: the essence, the proxy, and the thumbnail.
- The essence file is the raw video clip (e.g. senator1.avi for the asset named `senator1`).
- Any upload of a proxy file will be considered as a proxy for an existing asset with the same filename (e.g. senator1.avi.proxy.mp4 will be the proxy for the asset named `senator1`). If that asset is not in the system, a placeholder is created, but with the proxy being the file that was just uploaded. This proxy is displayed in the media player when you select the asset thumbnail in the Asset Editor panel to preview the file.
- Any upload of a thumbnail file will be considered the thumbnail for an existing asset with the same filename (e.g. senator1.avi.thumbnail.png will be the thumbnail for the asset named `senator1`). If that asset is not in the system, a placeholder is created, but with the thumbnail being the file that was just uploaded. Note that the thumbnail is scaled automatically to 256x144.
- Any new uploads (not replacing a file within an existing asset) will check to see if there is an asset with the same name that happens to have a proxy and/or thumbnail, but not associated essence. If so, it will apply the file to the essence of that asset as opposed to creating a new asset.

To upload a video clip

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

   The **Upload** panel opens.



2. In the **Upload** panel, click the **Add Files** icon.

   The **File Upload** dialog opens.

3. Navigate to the file location and select the files for the video clip. Ensure that all files use the same filename nomenclature. For example, to create an asset named senator1, you would upload the following files:

   - Essence file (e.g. senator1.avi)
   - Proxy file (e.g. senator1.avi.proxy.mp4)
   - Thumbnail file (e.g. senator1.avi.thumbnail.png)

4. Click **Open**.

   The **File Upload** dialog closes and the **Upload** panel now lists the selected files.

5. In the **Upload** panel, click the **Upload All** icon in the main toolbar.

Removing Files from the Upload Panel

You can choose to remove a file from the Upload panel to avoid uploading it to the Streamline system. This is useful when you have selected the contents of an entire folder for upload but realize that some files are not required, or noticing that you have selected the wrong file for upload.

Once an asset file is removed from the panel, it will not be uploaded to the Streamline system. You must repeat the procedure "**To upload an asset**" on page 3–7 to add it to the Streamline system.

To remove a file from the Upload panel

- In the **Upload** panel, click the **Remove** button next to the file entry to delete it from the list.

  The list in the **Upload** panel no longer displays an entry for the deleted file.

To remove all files from the Upload panel

- In the **Upload** panel, click the **Remove All** icon in the main toolbar of the **Upload** panel.

  The **Upload** panel no longer displays files ready for upload.

Approving Assets in the Upload Panel

You can approve a collection of assets before they are uploaded to the Streamline system. You must have permission to approve assets. To approve a single asset, you must first upload it to the Streamline system and then use the procedure "**To approve an asset using the Asset Editor panel**" on page 3–14 to approve it.

To approve multiple assets using the Upload panel

1. In the **Upload** panel, click the **Approve All** icon in the main toolbar of the **Upload** panel.

2. Click the **Upload All** icon in the main toolbar of the **Upload** panel.

   The assets are uploaded to the Streamline system.

Editing the Metadata for an Asset

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

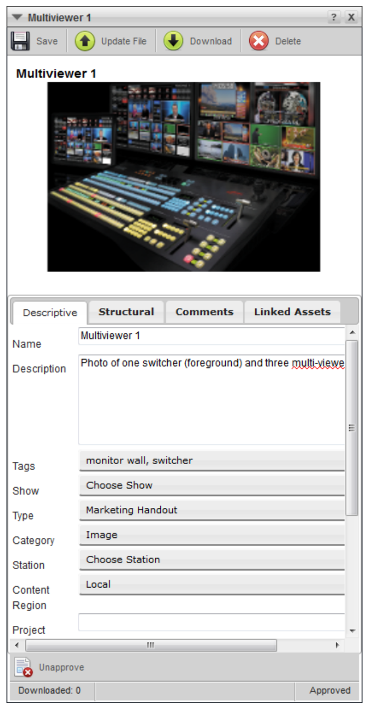
To edit the metadata for an asset

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets** panel opens.

2. In the **Assets** table, double-click the asset you want to edit.

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



3. To edit the descriptive metadata for the asset:

   a. Click the **Descriptive** tab.

   b. Edit the provided fields.

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

4. To add a comment to the asset:

   a. Click the **Comments** tab.

   b. Click the **Add Comment** icon.

   c. Type your text in the provided field.

5. Click **Save**.

Linking Assets

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

To verify whether an asset is linked to another

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

2. In the **Assets** table, double-click the asset you want to verify the links to.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

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

   The **Linked Assets** tab lists the assets that are linked to the current asset.

To link an asset

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

2. In the **Assets** table, double-click the asset you want to create a link to.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

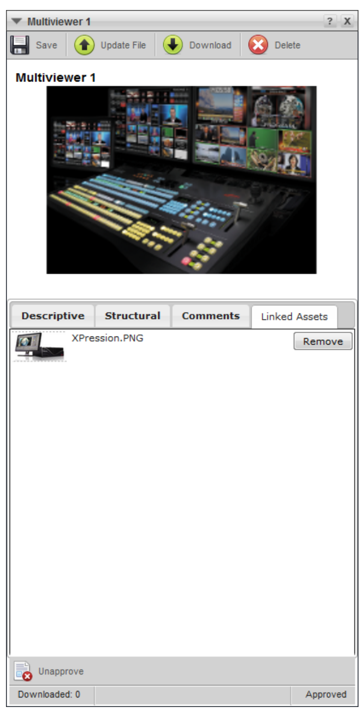
3. Click the **Linked Assets** tab.

4. In the **Assets** table:

   a. Select the thumbnail for the asset you want to link to.

   b. Drag and drop the asset selected in step a. to the **Linked Assets** tab of the selected asset.

   The **Linked Assets** tab updates to display a thumbnail that represents the asset you dragged and dropped.



To remove a link to an asset

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

2. In the **Assets** table, double-click the asset you want to verify the links to.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

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

   The **Linked Assets** tab lists the assets that are linked to the current asset.

4. In the **Linked Assets** tab, click the **Remove** button for the link you wish to delete.

   The thumbnail no longer displays in the **Linked Assets** tab and the link is removed between the assets.

Sharing Files in Streamline

You can also replace the media file attached to an asset in the Streamline system, or download a copy of the file to your local drive.

To download an asset file to your computer

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

2. In the **Assets** table, double-click the asset you wish to download the file for.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

3. In the **Asset Editor** panel, click the **Download** icon.

   The **Download** dialog opens.

✶ You can also select the **Download** icon from the cell in the **Assets Browser** table for the asset.

4. Select **Save File**.
5. Follow the on-screen instructions.

To update an asset file

1. In the main toolbar, click the **Assets Browser** icon.

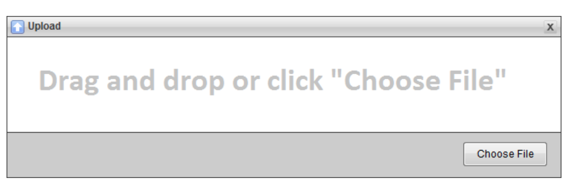
   The **Assets panel** opens.

2. In the **Asset** table, double-click the asset you wish to download the file for.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

3. In the **Asset Editor** panel, click the **Update File** icon.

   The **Upload** dialog opens.



4. Select a file to upload by performing one of the following:
   - Drag and drop the file from its location on your computer to the **Upload** dialog; or
   - In the **Upload** dialog, click **Choose File**, navigate to the file location, and click **Open** to upload the file to the Streamline system.

   The file is uploaded to the asset and replaces the previously attached file.

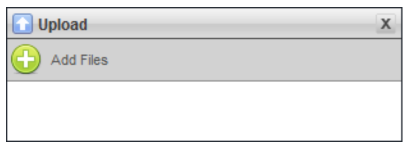
Requesting Approval for an Asset

When an asset is uploaded to the Streamline system, and you do not have approval permissions, it is automatically labeled as Unapproved. When you request approval for a new asset, users with approval permissions receive an entry in their Asset Approvals panels, noting that an asset is pending their approval.

To request approval for an asset

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

   The **Upload** panel opens.



2. Perform one of the following:
   - Drag and drop the asset file from its location to the **Upload** panel; or
   - In the **Upload** panel, click the **Add Files** icon, navigate to the file location, and click **Open** to close the dialog.
3. In the **Upload** panel, click the **Upload** button next to the file thumbnail to upload the file to the Streamline system.
4. In the **Assets** panel, double-click the asset you wish to submit for approval.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.
5. In the **Asset Editor** panel, click the **Request Approval** icon located in the bottom toolbar.

   The entry for the asset in the **Asset** panel is updated to include a check mark in the Submitted column.

   The bottom toolbar of the **Asset Editor** panel now reports “Pending Approval”.

Previewing an Asset File

You can preview the file(s) attached to an asset. This enables you to verify the file contents, and ensure the file matches the asset description or the work order criteria.

To preview an asset

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets** panel opens.
2. In the **Assets** table, double-click the asset you wish to download the file for.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.
3. Select the **Descriptive** tab in the **Asset Editor** panel.

4. In the **Descriptive** tab, click the thumbnail of the asset.
   - If you are previewing an image, the image is displayed in a new tab in your browser window.
   - If you are previewing an audio or video clip, and depending on your web browser settings, a copy of the file is automatically downloaded or you are prompted to open or save the file to your computer.

Approving and Rejecting an Asset

There are two methods for approving/rejecting an asset: the Asset Editor panel for the specific asset, or the Asset Approvals panel which lists all the assets pending your approval. Both methods are outlined in this section.

Using the Asset Editor Panel

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

To approve an asset using the Asset Editor panel

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

2. In the **Asset** table, double-click the asset you wish to download the file for.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

3. In the **Asset Editor** panel, click the **Approve** icon in the bottom toolbar.

   The bottom toolbar displays “Approved” in the bottom right corner of the toolbar. The **Approved** cell status in the Asset table for the asset is also updated.

To reject an asset using the Asset Editor panel

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

2. In the **Assets** table, double-click the asset you wish to download the file for.

   The asset row is now highlighted in the table and the **Asset Editor** panel for the asset opens.

3. In the **Asset Editor** panel, click the **Unapprove** icon in the bottom toolbar.

   The bottom toolbar displays “Not Approved” in the bottom right corner of the toolbar. The **Approved** cell status in the Asset table for the asset is also updated.

Using the Asset Approvals Panel

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

To approve assets using the Asset Approvals panel

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

   The **Asset Approvals** panel opens.

2. In the **Asset** table, select the asset(s) you wish to approve.

3. In the **Asset Approvals** panel, click the **Approve** icon in the toolbar.

   The approved asset(s) are no longer listed in the **Asset Approvals** panel, and their status is updated to "Approved" in the Streamline system.

To reject assets using the Asset Approvals panel

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

   The **Asset Approvals** panel opens.

2. In the **Asset** table, select the asset(s) you wish to reject.

3. In the **Asset Approvals** panel, click the **Reject** icon in the toolbar.

   The rejected asset(s) are no longer listed in the **Asset Approvals** panel, and their status is updated to "Not Approved" in the Streamline system.

Sending Assets to 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.

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

Viewing the Assets that are Suitable for a Target

When a filter is assigned to a target, Streamline only allows you to send assets to the target that match the assigned filter. In the Assets panel you can view the assets that match the target filter before you select an asset to send the target.

To view the assets that are suitable for a target

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets** panel opens.

2. In the **Assets** toolbar, use the **Targets** menu to select the target that you want to send assets to.

   The **Assets** table refreshes to display only the assets that are suitable for you to send to the selected target.

3. To view all of the assets in your Streamline system, use the **Targets** menu to select **None**.

Sending an Asset to a Target

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

To send an asset to a target

1. In the **Assets** table, double-click the asset you want to send to a target.

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

2. Use the **Send To** list to select the target to send the asset to.

   Streamline sends the selected asset to the selected target. An Alert opens when the selected asset is not suitable for the selected target.

Deleting an Asset

If you have permission, you can choose to delete an asset from the Streamline system. Any links between the removed asset and any current assets or work orders are also removed.

To delete an asset from Streamline

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets** panel opens.

2. In the **Assets** table, click the asset you wish to delete.

   The asset row is now highlighted in the table.

3. In the **Assets** toolbar, click the **Delete** icon.
4. Click **OK** to confirm.

   The asset is no longer listed in the **Assets** table.

Managing Work Orders

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

The following topics are discussed in this chapter:

- Work Order Editor Panel Overview
- Creating a Work Order
- Assigning a Work Order
- Editing a Work Order
- Attaching Files to a Work Order
- Deleting a Work Order

Work Order Editor Panel Overview

The Work Order Editor panel enables you to view details that are used to fulfill a specific work order, comments from other users, files uploaded that are associated with the work order, and approval status. Information in the Work Order Editor panel is organized into three tabs: Details, Attachments, and Comments. Each tab includes metadata fields that Streamline classifies into one of the following data types:

- **Date** — calendar date and time.
- **Floating point number** — a number that includes a fractional component. For example, 3.07.
- **Integer** — a whole number without a fractional component.
- **Menu choice** — data that results from a user selecting at least one item from a menu.
- **Text** — a sequence of characters.
- **User** — identity of a Streamline user as defined in the Configuration tool or your LDAP system.

Details Tab

The Details tab of a Work Order Editor panel enables you to provide media requirements, details on how the asset will be used, and set deadlines. A thumbnail at the bottom of the panel is also displayed. This thumbnail becomes the placeholder icon displayed in the Assets panel until the work order is completed.

The Details tab provides the following fields:

Table 4.1 Work Order Metadata

Field	Description	Data Type	Editable
Air Date	The date the ordered asset is expected to go on air	Date	✓
Assignees	The user that must fulfill the work order request.	Multiple menu choice	✓
Date Modified	Date the work order was last updated	Date	
Date Requested	Date the work order was requested	Date	
Description	Additional information about the request	Text	✓
Desired Format	Required file format for the asset that is to fulfill the work order	Menu choice	✓
Desired Type	Defines the application of the asset, or the intended use of the asset requested in the work order. For example, a logo or headshot.	Menu choice	✓
Due By	Date that the asset must be completed by	Date	✓
Modified By	Last user to update the work order	User	
Name	Name of the work order. When the work order is created, this is automatically applied to the name of the asset placeholder.	Text	✓
Priority	Level of importance of the work order.	Menu choice	✓
Requested By	The Streamline user who initially created and submitted the work order.	User	

Table 4.1 Work Order Metadata

Field	Description	Data Type	Editable
Show	Program or segment associated with the asset	Text	✓
Station	Call sign of the commercial television station identified with the asset requested in the work order	Text	✓
Status	Current status of the work order	System defined	
Work Order ID	A number that uniquely identifies the work order in the Streamline system.	Text	
Work Order Name	Text that summarize the work order purpose. Note that this name is inherited by the asset in the Streamline system.	Text	✓

Attachments Tab

This tab enables you to upload and attach media files to the work order. This tab is used to attach raw asset files that can be used by the work order assignee (e.g. graphics artist, editor) to fulfill the work order. The placeholder asset can be reached by clicking its icon in the Details tab.

✶ Attachments do not fulfill a work order.

The toolbar in the Attachments tab of a Work Order Editor panel includes the following icons:

Table 4.2 Attachments Toolbar Icons

Icon	Name	Description
	Attach	Displays the File Upload interface that enables you to add a file to the work order.
	Delete	Removes the selected attached file from the Work Order.

Comments Tab

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

Creating a Work Order

The Create Work Order icon displays in the Work Orders panel only if you have the permission to create work orders. When you submit your work order, a placeholder asset is automatically created with the same name as the work order.

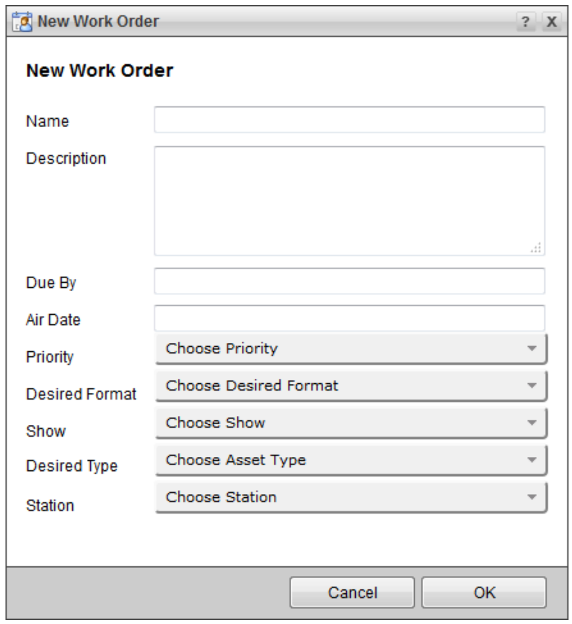
To create a new work order

1. In the main toolbar, click the **Work Orders** icon.

   The **Work Orders** panel opens.

2. In the **Work Orders** main toolbar, click the **Create Work Order** icon.

   The **New Work Order** dialog box opens.



3. In the **Name** field, type a unique identifier for the work order.
4. In the **Description** field, type a summary of the asset you are requesting.
5. In the **Due By** field, specify when the work order must be completed and submitted by.
6. In the **Air Date** field, specify the calendar date and time that the asset will be used in a broadcast.
7. In the **Priority** field, specify the level of importance of the work order. For example, a higher priority would be assigned to a work order that is due immediately versus a work order that is due in a week's time.
8. In the **Desired Format** field, specify how the data is encoded for storage in the asset file. For example, JPEG or PNG.
9. In the **Show** field, select the program or segment associated with the asset.
10. In the **Desired Type** field, select the object class of the asset. For example, image, video, audio, or document.
11. In the **Station** field, select the organization associated with the asset.
12. Click **OK** to submit the work order.

    A placeholder displays in the **Assets** panel for the work order, and the **Work Order** panel updates to include the new entry.

Assigning a Work Order

If a work order displays “Pending Assignment” in its Status field of the Work Orders table, a Streamline user is not currently assigned to complete the work order. You must have permission to assign work orders to other Streamline users.

To assign a work order to a Streamline user

1. In the main toolbar, click the **Work Orders** icon.

   The **Work Orders** panel opens.

2. In the **Work Orders** table, double-click the required work order row.

   The **Work Order Editor** panel opens with the details of the selected work order.

3. In the **Assignees** menu, select the Streamline user(s) to assign the work order to.

4. Click the **Save** icon in the **Work Order Editor** panel to apply your change.

   If configured for your Streamline system, an email notification is sent to the assignee of the work order and the work order creator.

Editing a Work Order

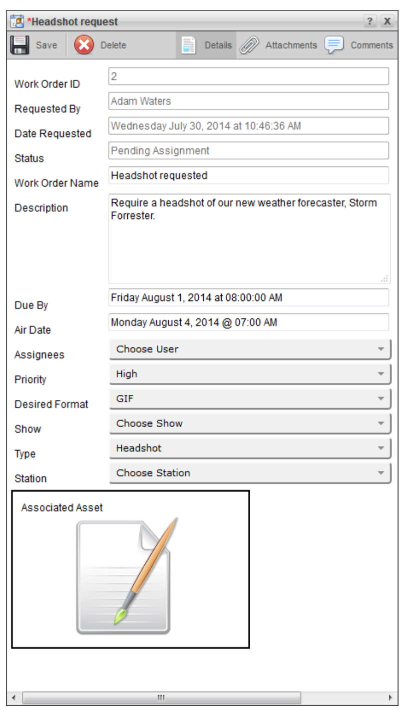
If Edit Mode is enabled, you can edit work orders directly in the Work Order table, or by double-clicking the work order in the table to display the required Work Order Editor panel. You must have permission to edit work orders.

To edit work order requirements

1. In the main toolbar, click the **Work Orders** icon to open the **Work Orders** panel.

2. In the **Work Orders** panel, double-click the work order to edit.

   The work order opens in the **Work Order Editor** panel.



3. In the **Work Order Editor** toolbar, select the **Details** tab.

4. Edit the provided fields as required.

   A red asterisk (*)displays next to the work order name at the top of the panel. This asterisk indicates that the work order has unsaved changes.

5. In the **Work Order Editor** toolbar, click the **Save** icon.

To add comments to a work order

1. In the main toolbar, click the **Work Orders** icon.

   The **Work Orders** panel opens.

2. In the **Work Orders** panel, double-click the work order to assign.

   The work order opens in the **Work Order Editor** panel.

3. In the **Work Order Editor** toolbar, select the **Comments** tab.

4. Click the **Add Comment** tab.

   An editable text field displays in the **Comments** view.

5. Type your comments in the field.

6. Click the **Save** button located below the text field.

Attaching Files to a Work Order

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

Only users with permission can upload files to a work order.

To attach a file to a work order

1. In the main toolbar, click the **Work Orders** icon.

   The **Work Orders** panel opens.

2. In the **Work Orders** panel, double-click the work order to attach a file to.

   The work order opens in the **Work Order Editor** panel.

3. In the **Work Order Editor** panel toolbar, select the **Attachments** tab.

4. Click the **Attach** icon.

   The **Upload** dialog displays.

5. Click **Browse**...

   The **File Upload** dialog displays.

6. Navigate to the file you wish to attach to the work order.

7. Click **Open** in the **File Upload** interface.

8. In the **Upload** dialog, click the **Upload** button next to the file thumbnail to attach the file to the work order.

To remove a file from a work order

1. In the **Work Order Editor** panel toolbar, select the **Attachments** tab.
2. Select the **Attachments** tab.
3. Select the file from the Attachments table.
4. Click the **Delete** icon.

Deleting a Work Order

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

To delete a work order

1. In the main toolbar, click the **Work Orders** icon.

   The **Work Orders** panel opens.
2. In the **Work Orders** table, click the work order for deletion.

   The row is highlighted in the table.
3. In the **Work Order Editor** panel toolbar, click the **Delete** icon.

✶ You can also press **CTRL+D**.

4. Click **OK** to confirm.

To delete the asset placeholder in the Assets panel

1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets** panel opens.
2. In the **Assets** table, click the asset placeholder that was associated with the work order.

   The row is highlighted in the table.
3. In the **Assets** panel toolbar, click the **Delete** icon.
4. Click **OK** to confirm.

Searching Streamline

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

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

The following topics are discussed in this chapter:

- Using a Quick Search
- Using the Search Editor
- Saving Criteria as a Profile
- Editing a Search

Using a Quick Search

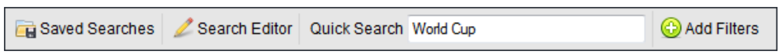
Each panel provides a search toolbar that enables you to create Quick Searches by entering text in the provided box of the toolbar. Streamline searches all text-based metadata elements and displays the content that matches or partially matches the text you specified. The Quick Search box is not case sensitive. The following table lists the valid search terms and operators for constructing a search query.

Table 5.1 Quick Search Queries

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

To create a quick search

1. From the main toolbar of the panel, enter the search text in the **Quick Search** box. In the example below, the text “**`World Cup`**” was entered.



2. Press **Enter** on your keyboard.

   The panel table updates to display the items that include “**`World Cup`**” or “**`WORLD CUP`**”.

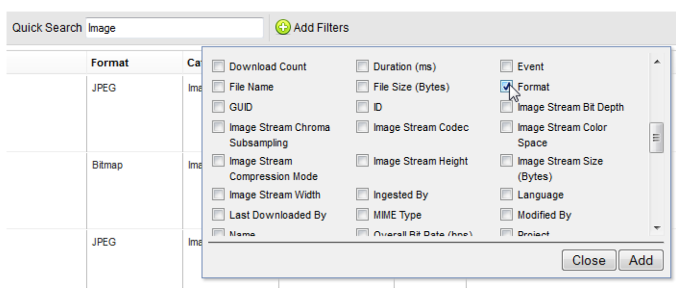
Filtering the Quick Search Results

Additional filters may be applied to the results displayed in the panel table. In the Filters dialog, you can select the metadata element(s) to filter out the items displayed in the panel table.

To filter the results of a search

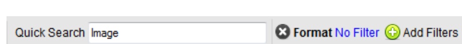
1. In the panel toolbar, click the  **Add Filters** icon.

   The **Search Criteria** dialog opens.

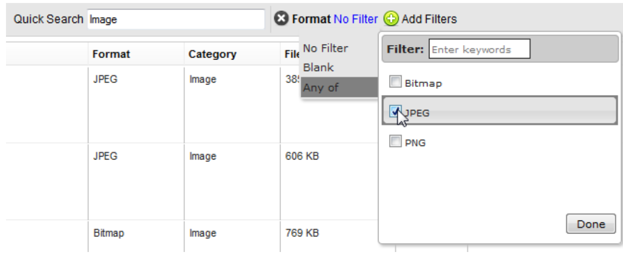


2. Select the metadata to use as a search criteria in the dialog and click **Add**.

   The toolbar updates to include the new criteria (set in blue text).



3. Select the new criteria to display the **Filter** dialog.



4. In the **Filter** dialog, select the boxes to filter the results in the panel table. A selected box includes the element. In the example above, the search criteria will look for any fields that include the word "`Image`", when the **Format** is set to **JPG**.
5. Click **Done** to apply your changes.

   The toolbar updates to include the new filter. The panel table displays the results with the new criteria.
6. To remove a filter, click the  icon next to the filter in the toolbar.

   The panel table updates to display content that is not filtered with removed criteria.

Using the Search Editor

The panels include a Search Editor window which is used to create searches and view the content that your searches finds in your Streamline system. Define a search query with one or more terms that the asset you are looking for must match, and then save the criteria as a search profile that can be recalled in the panel. The number of criteria that you specify is up to you, allowing a search to be as specific or general as required.

Table 5.2 Search Editor Options

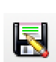
Icon	Name	Description
	Saved Searches	Provides a list of search criteria that are saved as individual profiles that you can recall.
	New	Enables you to specify new search criteria and save your settings to a new search profile.
	Save	Saves the current search criteria, prompts for a name to identify the search profile if not already specified.
	Save As	Saves the current search criteria as a new search profile.
	Quick Search	Searches all text-based metadata fields for the specified text.
	Not	When this box is selected, any content that matches the specified criteria are not included in the final search results.
	Field	Lists the available metadata elements to search in.
	Type	The options in this menu are dependent on what is selected in the Field menu.

Table 5.2 Search Editor Options

Icon	Name	Description
	Value (Min)	Specifies the lowest value to match against. In the case of a range based match, this field specifies the minimum value in the range (inclusive).
	Max	Specifies the highest value to match against. In the case of a range based match, this field specifies the maximum value in the range (inclusive).
	Delete	Removes the associated filter from the search criteria.
	AND	Adds another set of criteria to the search. Note that AND filters are grouped together.
	OR	Adds an alternative to the criteria specified above it.

Search by Metadata Elements

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

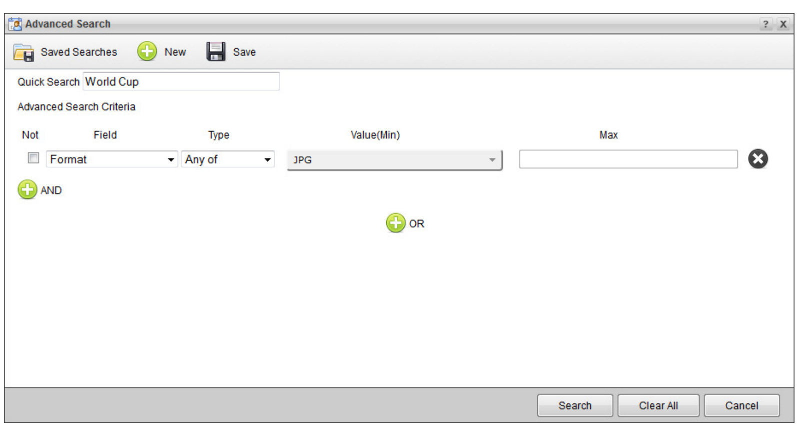
To create a search based on metadata fields

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

   The **Search Editor** window opens.

2. In the toolbar, click the **New** icon.
3. In the **Search Query** box, enter the text with which to search all text-based metadata in your Streamline system. If this field is left blank, no general query is applied.

   In the example below, the search will look for fields that include the text "`World Cup`".



4. Use the **Field**, **Match**, and **Value** fields in conjunction to specify a filter to apply to the search.

   In the example above, the search will include items with the text specified in step 3 and then narrow the results to any items that only include "`JPG`" as the specified Format.

5. Click the **AND** icon to add another filter to the search.

6. Click the **OR** icon to add an alternative filter to the search.
7. If you want to use the same criteria in a future search, click the **Save As** icon.
8. In the bottom toolbar, click **Search**.

   The panel table updates to display the items that match the search criteria specified in the **Search Editor** window.

Search by Date

After you define a search query, you can also filter your search results using an approval, creation or modification date that matches one of the following:

- **Start Date** — after the specified date when you only set a start date.
- **End Date** — before the specified date when you only set an end date.
- **Range** — between the specified dates when you only set a start date and an end date.

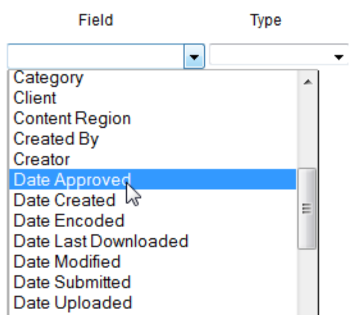
To search by date

1. From the panel toolbar, click the **Edit Search** icon.

   The **Search Editor** window opens.

2. In the toolbar, click the **New** icon.
3. In the **Field** menu, select one of the metadata elements that is date dependent.

   In the example below, the **Field** menu is set to **Date Approved**.



4. If you want to find Streamline content with a timestamp before a selected date:
   a. In the **Time** menu, select **Before**.
   b. Click the **Value (Min)** box to open the **Calendar** tool.
   c. In the **Date** selector, click the end date.

      The **Date** selector shows the current month. To view the calendar for a different month, click the **Arrows** on either side of the month name.
5. If you want to find Streamline content with a date after a selected date:
   a. In the **Time** menu, select **After**.
   b. Click the **Value (Min)** box to open the **Calendar** tool.
   c. In the **Date** selector, click the start date.

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

6. If you want to find Streamline content with a date within a date range:
   a. In the **Time** menu, select **Range**.
   b. Use the **Value (Min)** box to select the start of the date range.
   c. Use the **Max** box to select the end of the date range.
7. In the bottom toolbar, click **Search**.

   The panel table updates to display the items that match the search criteria specified in the **Search Editor** window.

Recalling a Search Profile

Each panel lists search profiles that can be recalled to update the table contents of that panel. If a search profile is user specific, the profiles are only available for that user to recall and edit. Global search profiles are available to any Streamline user.

To recall a search profile

1. In the panel toolbar, hover your cursor over the **Saved Searches** icon.

   A list of saved search profiles opens.
2. Select a saved search from the list.

   The panel table automatically updates to display the results based on the saved search criteria.

Saving Criteria as a Profile

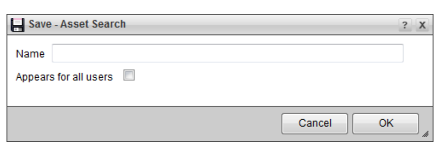
Once you save your search, it is made available in the Saved Searches list of the panel. Depending on your user permissions, search profiles can be recalled only by you or made available to any Streamline user. You can then quickly update the panel table any time by selecting the profile from the list. Note that a saved search profile applies to the panel that it was saved for.

To save the search criteria to a profile

1. Configure the search criteria to save to a profile as outlined in the section "**Using the Search Editor**".
2. From the panel toolbar, click the **Search Editor** icon.

   The **Search Editor** window opens.
3. Verify the search criteria are correct and apply any new filters as required.
4. Click the **Save** icon.

   The **Save -x** dialog displays where x represents the name of the panel you are currently searching in. In the example below, the search criteria were configured in the Assets Browser panel.



5. In the **Name** box, type a unique name for your search profile.
6. To make the search profile available to all Streamline users, select the **Appear for all users** box.
7. Click **OK** to save the search profile.

   The **Save Search** dialog closes and the new search profile is now available in the **Saved Searches** list of that panel.

Editing a Search

After creating a search you can edit the query criteria to refine the search results and update the panel table contents.

To edit a search

1. If you are editing a previously saved search profile:

    a. In the panel toolbar, hover your cursor over the **Saved Searches** icon.

    b. Select a saved search from the provided list.

    The panel table automatically updates to display the results based on the saved search criteria.

2. In the toolbar, click the **Search Editor** icon.

    The **Search Editor** window opens.

3. Edit the criteria to refine your search results.
4. Click **Save** to apply the current criteria to the search profile.

Managing Reports

A report is a set of user-defined criteria that is used to search the Streamline system display the results in a graphical representation. Reports can provide metrics on work orders, files ingested or downloaded, asset type and size, tracking of artist workloads.

The following topics are discussed in this chapter:

- Workflow
- Report Criteria Overview
- Creating a New Report
- Saving a Report
- Running a Report
- Editing a Report
- Deleting a Report

Workflow

Reports enable you to analyze the assets or work orders in the Streamline system, and organize the findings into a meaningful graphical layout within the Streamline interface. You can then save the results as a spreadsheet that can be viewed in Microsoft® Excel®, or print the results directly from the Reports panel.

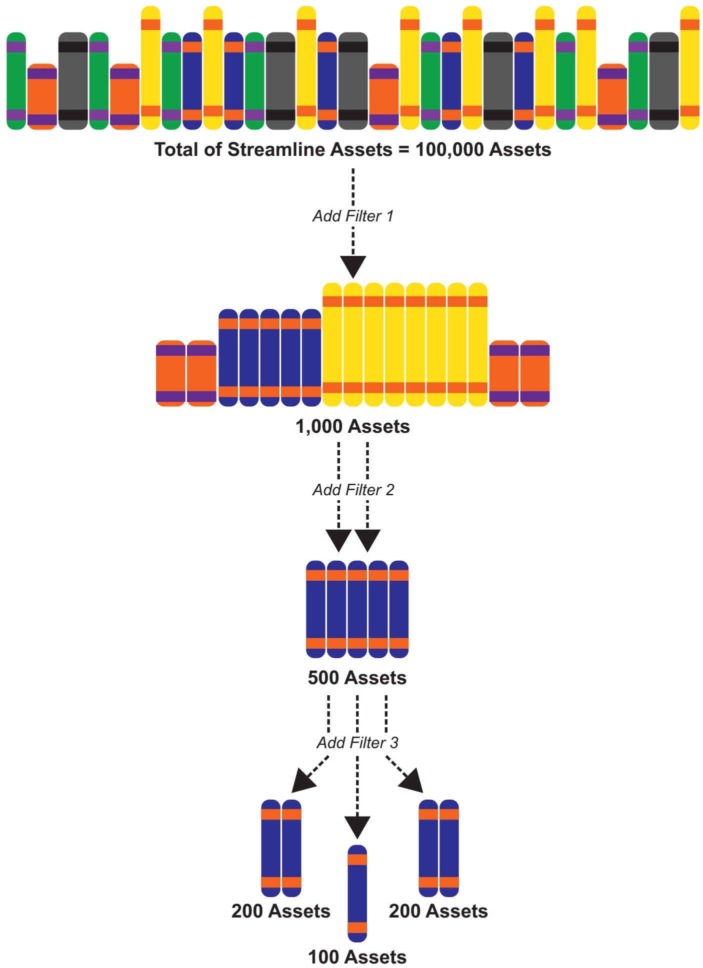


Figure 6.1 Asset Filtering

Report Criteria Overview

The toolbars in the Reports panel enable you to specify the criteria for the report.

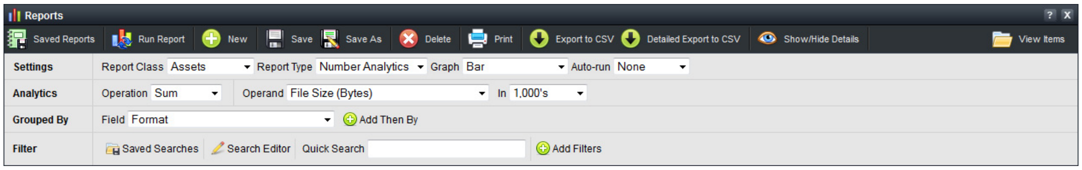


Figure 6.2 Reports Panel Toolbars

The report criteria are organized into the following toolbars:

- **Settings** — enables you to specify the what data to analyze (assets or work orders), how to display the results, and how frequently to automatically run the report.
- **Analytics** — when running reports that are analyzing numerical data or dates. Number Analytics only operates on numeric metadata fields. Date Analytics only operates on temporal metadata fields.
- **Grouped By** — the report takes all the assets or work order that fit the report criteria and groups them. For example, selecting “Station” will group assets by Station. Additional sub-diving of the groups can be done by adding more fields. For example, set **Grouped By** to **Station**, and set **Add Then By** to **Ingested By**. If there are 3 stations and 4 users, this gives 12 different bars to display on a graph.
- **Filter** — enables you to search the report results and apply more filters to narrow the scope of the results displayed in the graph.

Each toolbar is summarized in the following sections.

Settings Toolbar

The Settings toolbar provides the following menus that enable you to specify the basic mechanics of the report.

Report Class

The Report Class determines the base for the report.

- **Assets** — data collected in the report is sourced from the assets in the Streamline system.
- **Work Orders** — data collected in the report is sourced from the work orders in the Streamline system.

Report Type

The Report Type specifies whether the report will analyze textual data or numerical data. Note that the available criteria in the Grouped By and Filter menus are determined by the report type you select.

- **Standard** — creates a basic report that analyzes specific metadata elements and displays the results as a basic comparison that is not quantitative.
- **Number Analytics** — creates a report that analyzes metadata elements that are classified as numerical information such as the File Size and Overall Bitrate elements. Selecting this report type displays the Analytics toolbar.
- **Date Analytics** — creates a report that analyzes metadata elements that are classified as calendar dates such as the Date Created, Due Date, and Date Modified elements. Selecting this report type displays the Analytics toolbar.

Graph

The results of the report are displayed in the Reports panel as specified in the **Graph** menu.

Auto-run

Allows the user to designate the same report is automatically run repeatedly with no more intervention required. The Reports panel must be visible in order for reports to run.

Analytics Toolbar

The Analytics toolbar enables you to specify how the data is represented in the graph when analyzing data that is numerical or based on calendar dates.

Operation

The **Operation** field specifies the calculation to perform upon the field specified in the Operand field.

Operand

The **Operand** field lists all numeric metadata fields. The selected Operation is performed on the selected Operand and the result of that operation determines the dependent variable of the graph.

Start and End

When the Report Type is set to Date Analytics, the **Start** and **End** fields display in the Analytics toolbar. Use the Start and End menus in conjunction to specify the range of dates to analyze data from. For example, setting a the Start to July 1, 2014 and the End to July 15, 2014 will create a report that analyzes metadata between those dates only.

In

When the Report Type is set to Number Analytics, this field determines the number of units the co-ordinates in the graph.

When the Report Type is set to Date Analytics, this field determines how to represent the data in terms of Days, Hours, or Minutes.

Grouped By Toolbar

The options in the Grouped By toolbar enable you to specify how to group the results in the report.

Field

The **Field** menu determines the primary grouping of the graph (labeled along the X-axis).

Then By

The **Then By** field provides additional categories for an additional dimension to the number of groupings in the graph.

Filter Toolbar

The Filter toolbar provides the same options as when creating and using Search profiles. Use the Filter options to further narrow down the data represented in the report using the same criteria as you would a search, only using the results as defined by the options configured in the Settings, Analytics, and Grouped By toolbars as the basis for the search to start from.

For More Information on...

- creating search profiles, refer to the section “**Using the Search Editor**” on page 5–3.

Creating a New Report

This section outlines the common steps used to begin creating a report. This procedure applies to all Report Types. Subsequent sections outline how to create reports that are specific to a Report Type.

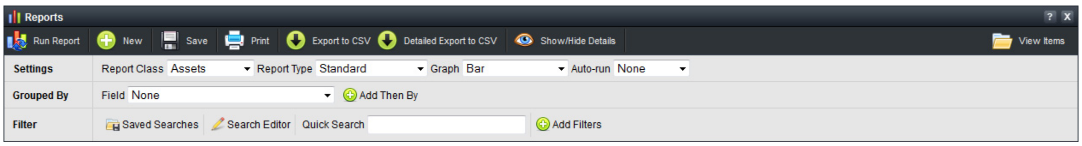
To create a new report

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

   The **Reports** panel opens.

2. In the **Reports** panel main toolbar, click the **New** icon.

   The **Report** table and menus in the toolbar are reset.



3. Specify what to base the report on by selecting one of the following options from the **Report Class** menu:
   - **Assets** — data collected in the report is sourced from the assets in the Streamline system. For example, the Y-axis of the report graph will represent the number of assets.
   - **Work Orders** — data collected in the report is sourced from the work orders in the Streamline system. This can include work orders pending approval, approved, or rejected. For example, the Y-axis of the report graph will represent the number of work orders.

4. Specify the type of data to analyze by selecting one of the following options in the **Report Type** menu:
   - **Standard** — creates a simple report that analyzes specified metadata elements.
   - **Number Analytics** — creates a report that analyzes metadata elements that include numerical information such as the File Size and Overall Bitrate elements. Selecting this report type displays the Analytics category in the report toolbar.
   - **Date Analytics** — creates a report that analyzes metadata elements include calendar dates such as the Date Created, Due Date, and Date Modified elements. Selecting this report type displays the Analytics category in the report toolbar.

5. Specify how to display the report results by selecting one of the following options from the **Graph** menu:
   - **Bar** — depicts data using rectangular horizontal bars of different lengths. The bar lengths are proportional to the values that they represent. Note that the Y-axis is depicted horizontally.
   - **Calendar** — visualization used to show activity over the course of a specified time frame.
   - **Column** — depicts data using rectangular vertical bars of different heights. The bar heights are proportional to the values that they represent.
   - **Doughnut** —displays data as percentages of the whole where each category is represented as a slice. This graph is the same as a pie chart only it includes a blank center which can be used to display additional, related data.
   - **Line** — information is displayed as a series of data points connected by straight line segments. This graph is typically used to depict a trend in data over intervals of time, allowing the line to be drawn chronologically.
   - **Pie** — a circular chart divided into sectors to illustrate relative sizes of data. The arc length of each sector is proportional to the quantity it represents.
   - **Scatter** — depicts a compilation of data where the position of each point is determined by two specified variables.
   - **Stacked Bar** — depicts data as items stacked side by side differentiated by colored bars or strips to show multiple values for individual categories, or lines, to show multiple values over time. Stacked bar graphs are commonly used when the sum of the values is as important as the individual items. As with the standard bar graph, the Y-axis is depicted horizontally.
   - **Stacked Column** — depicts data as items stacked one on top of each other, differentiated by colored bars or strips to show multiple values for individual categories.
6. In the **Auto-run** menu, specify whether the same report is automatically run repeatedly with no more intervention required. The Reports panel must be visible in order for reports to run.

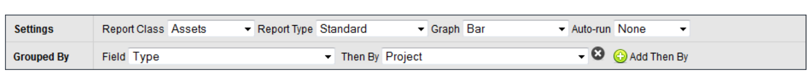
Creating a Standard Report

When creating a standard report, you select the metadata elements to analyze and chose filters based on separate elements.

To create a standard report

1. In the **Report Type** menu, select **Standard**.
2. Configure the other options in the **Settings** toolbar as outlined in the procedure “**To create a new report**”.
3. In the **Grouped By** toolbar, use the **Field** menu to specify the first metadata element to analyze.
4. To organize the results:

   a. Select the **Add Then By** icon to display the **Then By** menu in the **Reports** panel toolbar.

   b. In the **Then By** menu, specify the second metadata element to analyze. In the example above, the report will first organize results according to their Asset Type metadata, and then by their Project metadata.

   c. Continue to add more filters by selecting the **Add Then By** icon and configuring the **Then By** options.

5. Select the **Save** icon in the **Reports** panel toolbar to save your criteria as outlined in the procedure “**To save a report**” on page 6–8.

Creating a Numerical Analytic Report

This report type will first analyze metadata that is considered numerical, such as file size, clip duration, or overall bit rate.

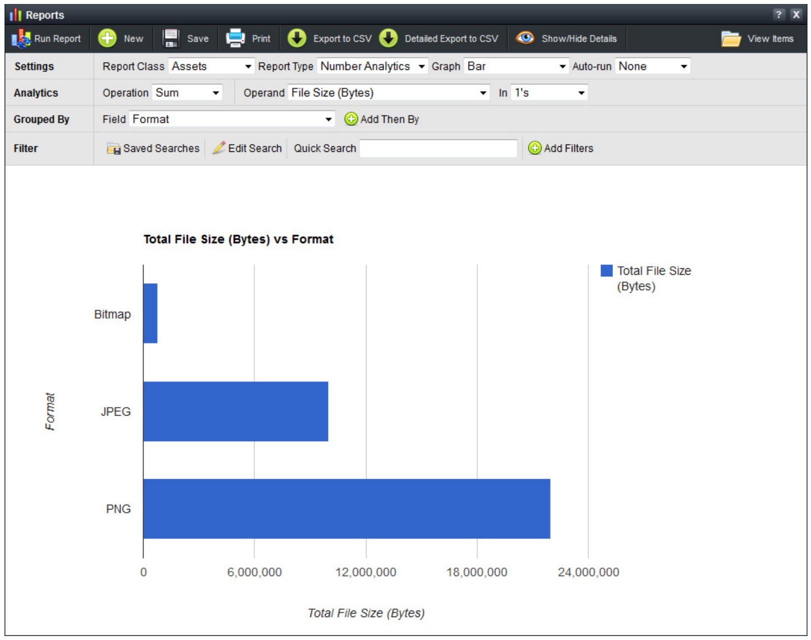


Figure 6.3 Numerical Analytic Report

To create a numerical analytic report

1. In the **Report Type** menu, select **Number Analytics**.

   The **Analytics** toolbar automatically displays in the **Reports** panel.

2. Configure the other options in the **Settings** toolbar as outlined in the procedure "**To create a new report**".

3. Define how to calculate the report metrics by selecting one of the following options from the **Operation** menu:

   - **Sum** — sum of all values specified by the report filter criteria.
   - **Average** — mean value of the data in the graph.
   - **Maximum** — highest value of the data to report.
   - **Minimum** — lowest value of the data to report.

4. In the **Operand** menu, select the numerical metadata to analyze. These values will be represented in the y-axis of most graphic layouts.

5. Use the **In** menu to specify the units that determine the co-ordinates of the graph.

6. In the **Grouped By** toolbar, use the **Field** and **Add Then By** options to define the second set of metadata to analyze. These values will be represented in the y-axis of most graphic layouts.

7. Select the  **Save** icon in the **Reports** panel toolbar to save your criteria as outlined in the procedure "**To save a report**" on page 6–8.

Creating a Date Analytic Report

A Date Analytic Report analyzes metadata elements that are classified as Date data types and then filtered based on a start date and end date.

To create a date analytic report

1. In the **Report Type** menu, select **Date Analytics**.
2. Configure the other options in the **Settings** toolbar as outlined in the procedure "**To create a new report**".
3. Define how to calculate the report metrics by selecting one of the following options from the **Operation** menu:
   - **Sum** — sum of all values specified by the report filter criteria.
   - **Average** — mean value of the data in the graph.
   - **Maximum** — highest value of the data to report.
   - **Minimum** — lowest value of the data to report.
4. In the **From** menu, specify the start date for the report to begin searching from.
5. In the **Till** menu, specify the end date for the report.
6. Use the **In** menu to specify the units that determine the co-ordinates of the graph.
7. In the **Grouped By** toolbar, use the **Field** and **Add Then By** options to define the second set of metadata to analyze. These values will be represented in the y-axis of most graphic layouts.
8. Select the **Save** icon in the **Reports** panel toolbar to save your criteria as a specific report as outlined in the procedure "**To save a report**" on page 6–8.

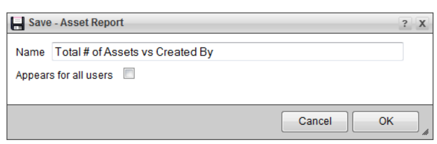
Saving a Report

Report profiles can be saved in Streamline and be made available to all users (global), or only to specific users and roles. You must have permission to save and use report profiles.

To save a report

1. Create your report as outlined in the previous sections.
2. Click the **Save** icon in the **Reports** panel toolbar.

   The **Save Report** dialog opens.



3. In the **Name** box, type a unique name for your report profile. A name is automatically provided based on the report criteria.
4. To make the report criteria available to all Streamline users, select the **Appear for all users** box.
5. Click **OK** to save the report.

   The **Save Report** dialog closes and the new report profile is now available in the **Saved Reports** list.

Running a Report

Report results can be automatically if you configure the auto-run option in the Reports panel when it remains open in the Streamline interface. However, you can load a saved report profile and update the Reports panel with the report results.

To configure a report to auto-run

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

   The **Reports** panel opens.

2. In the **Reports** main toolbar, hover your cursor over the **Saved Reports** icon.

   A list of available saved report profiles displays.

3. Select a report profile from the provided list.

   The **Reports** panel updates with the criteria for the selected report profile.

4. In the **Auto-run** menu, select how often to update the report results in the **Reports** panel.

5. Click the **Save** icon in the **Reports** main toolbar to save your changes.

To run a report

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

   The **Reports** panel opens.

2. In the **Reports** main toolbar, hover your cursor over the **Saved Reports** icon.

   A list of available saved reports displays

3. Select a report from the provided list.

   The **Reports** panel updates with the criteria for the selected report.

4. Click the **Run Report** icon to update the results displayed in the **Reports** panel.

Editing a Report

You must have permission to edit a report.

To edit a saved report

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

   The **Reports** panel opens.

2. In the **Reports** main toolbar, hover the cursor over the **Saved Reports** icon.

   A list of available saved report profiles is displayed.

3. Select a report from the provided list.

   The **Reports** panel updates with the saved criteria for the selected report.

4. Edit the criteria provided in the **Reports** toolbar. For a details on the available options, refer to the procedure "**To create a new report**" on page 6–5.

   A red asterisk (*) displays next to the **Save As** icon in the main toolbar as an indication that there are unsaved changes made to the report.

5. Select the **Save** icon in the **Reports** toolbar to save your changes.

Deleting a Report

You must have permission to delete a report from the Streamline system.

To delete a report

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

   The **Reports** panel opens.

2. In the **Reports** main toolbar, hover the cursor over the **Saved Reports** icon.

   A list of available saved reports is displayed.

3. Select a report from the provided list.

   The **Reports** panel updates with the saved criteria for the selected report.

4. Click the **Delete** button.

   A confirm dialog displays.

5. Click **OK**.

Configuring Streamline

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

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

The following topics are discussed in this chapter:

- Changing Your Streamline Password
- Working With Perspectives

Changing Your Streamline Password

You must have permission to change your password within Streamline.

To change your Streamline password

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

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

   The **Change Password** dialog box opens.

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

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

6. Click **OK**.

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

Working With Perspectives

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

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

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

Perspectives can include any or all panel types:

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

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

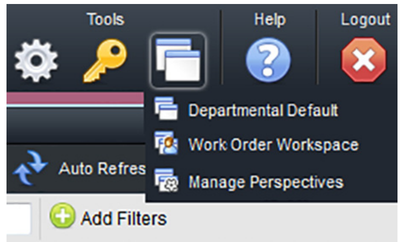
✶ Panels may not always appear exactly where you expect. As you open and close panels, Streamline adjusts the layout to optimize use of the available space. For example, if the current perspective includes a report in the left column and you use it to open only a report, the report occupies all the available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

Open a Saved Perspective

To open a saved perspective

1. To open the **Perspectives** list, in the main toolbar, point to the  **Perspectives** icon.

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



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

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

Create a New Perspective

To create a new perspective for your own use

1. Open one of each type of panel you want to include in the new perspective.
2. Rearrange the panels to the positions you want them to occupy in the perspective.

   For more information about repositioning panels, refer to the section "**To move a panel from one layout position to another**" on page 2–14.
3. In **Assets**, **Work Orders**, and **Reports** panels, display the panel columns to include in the perspective as follows.

   a. In the panel, right-click the title of any table column.

      The **Columns** list opens.

   b. Select columns as follows:

      - To include a column, select the check box to the left of the column name.
      - To remove a column, clear the check box to the left of the column name.

   c. Select the **Force fit columns** check box to automatically resize column widths to the table content.

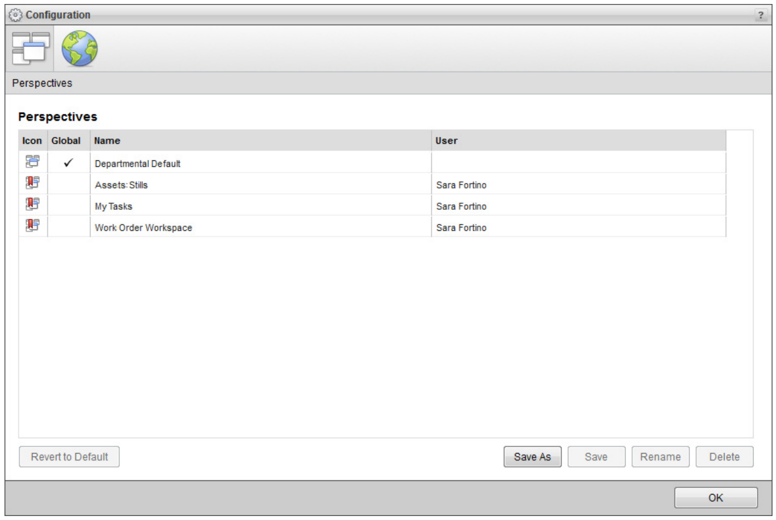
   d. Click **Close**.

   e. Click and drag columns to reposition columns in the table.

   f. Click and drag column dividers to manually resize the width of individual columns.

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

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



5. Click **Save As**.

   The **Save Perspective As** page opens.

6. In the **Name** box, type a name for the new perspective.
7. Click **Save**.

   The **Save Perspective As** page closes and Streamline displays the new perspective to the **Perspectives** list.

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

   The **Configuration** window closes.

Rename a Perspective

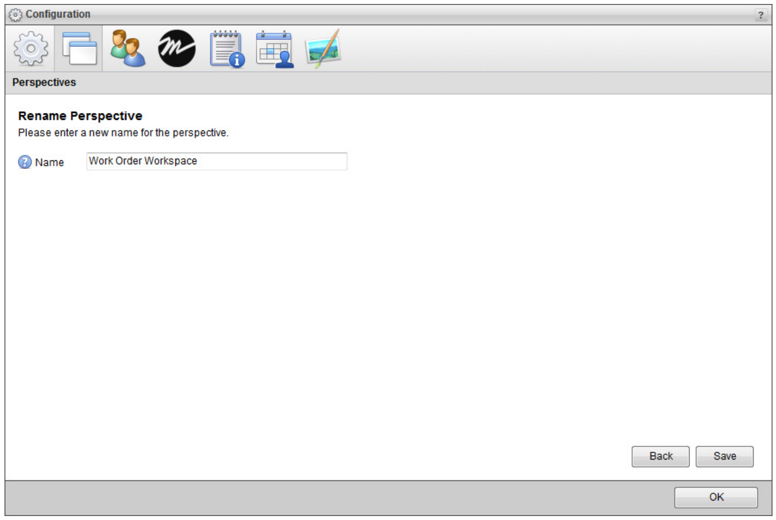
To rename a perspective

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, type a new name for the selected perspective.
5. Click **Save**.

   The **Perspectives** list displays the new name of the selected perspective.
6. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Change the Layout of a Perspective

To change the layout of a perspective

1. Rearrange the panels in a perspective to form the new layout for the perspective.
2. In **the** panels, display the table columns to include in the perspective.
3. On the main toolbar, use the  **Perspectives** icon to select **Manage Perspectives** from the list.

   The **Configuration** window opens, showing the **Perspectives** tab.
4. In the **Perspective** list, select the perspective for the new panel layout.
5. Click **Save**.

   A confirmation message opens, asking whether you want to overwrite the perspective.
6. In the confirmation message, click **OK**.

   The confirmation message closes and Streamline saves the set panel layout with the selected perspective.
7. In the bottom toolbar, click **OK**.

   The **Configuration** window closes.

Revert a Perspective to the Default Layout

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

You can revert a saved perspective to Streamline's default layout. This is useful if you want to make the default layout permanently available as a perspective, or if you want to use it as a starting point for creating a new customized perspective. When a user reverts to the default layout Streamline also reverts the columns displayed in the Work Order, Reports, and Assets panels to their default columns.

The following illustration describes the default layout.

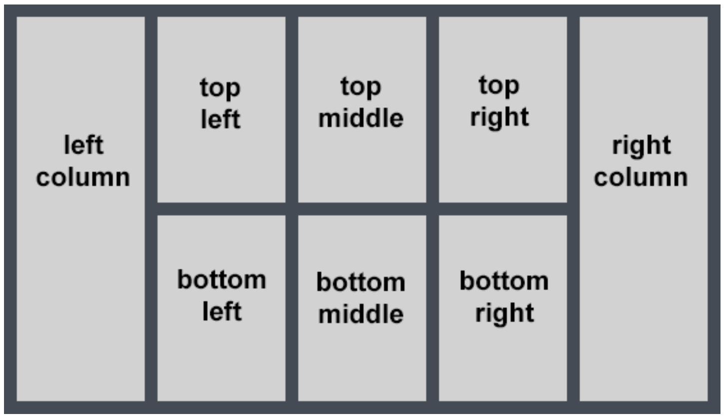


Figure 7.1 Default Panel Layout

Default layout positions are as follows:

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

By default, Streamline does not occupy all eight positions with a panel. Streamline does optimize a layout by expanding open panels to fill all available space. When you use the default layout and open instances of every type of panel, panels display as follows:

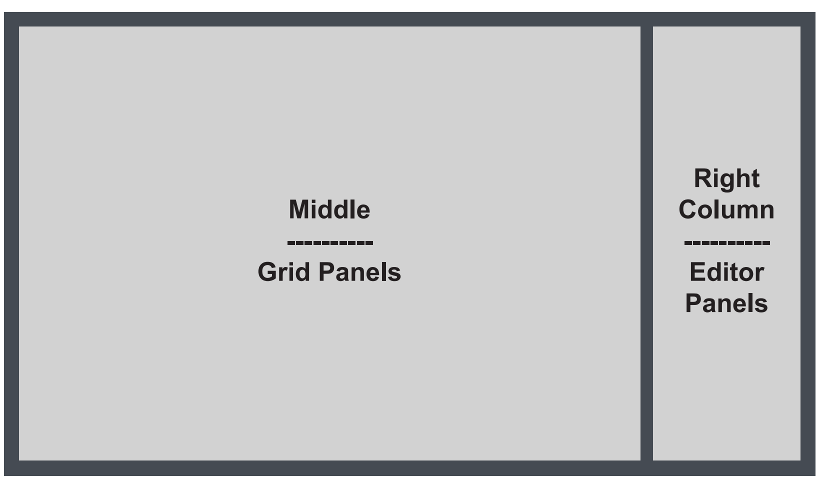


Figure 7.2 Actual Layout with all Panel Types Open

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 **Revert to Default**.

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

✶ There is no undo for this change. When you revert to the default layout Streamline also reverts the columns displayed in the Work Order, Reports, and Assets panels to their default columns. Click **Cancel** to keep the current perspective layout.

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

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

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

   The **Configuration** window closes.

Delete a Perspective

Streamline users can only delete perspectives that they created. You must login into Streamline as an administrator to delete global perspectives.

To delete a perspective

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

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

2. In the **Perspectives** list, select the perspective to delete.

3. Click **Delete**.

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

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

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

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

   The **Configuration** window closes.