# streamline Xchange

# User Guide

**VERSION 10.3**

ROSS

# THANK YOU FOR CHOOSING ROSS VIDEO

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
*david.ross@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.)*

## About this Guide

- Ross Part Number: **7800DR-016-10.3**
- Release Date: June 27, 2025. Printed in Canada.
- Software Issue: **10.3**

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

## Copyright



## Patents

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

## Warranty and Repair Policy

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

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

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

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

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

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

## Extended Warranty

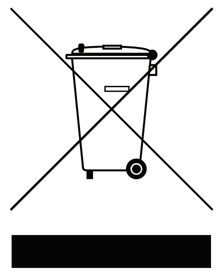
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Streamline Pro Server system, contact your regional sales manager.

## Environmental Information

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

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

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



If you need more information on the collection, reuse, and recycling systems, please contact your local or regional waste administration. You can also contact Ross Video for more information on the environmental performances of our products.

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

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

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

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

The Hazardous substances tables are available on our website at:

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

### 电器电子产品中有害物质的使用

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

“电器电子产品有害物质限制使用管理办法”也被称为中国RoHS。

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

有害物质表在我们的网站：

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

## Company Address


| Ross Video Limited | Ross Video Incorporated |
|---|---|
| 8 John Street<br>Iroquois, Ontario<br>Canada, K0E 1K0 | P.O. Box 880<br>Ogdensburg, New York<br>USA 13669-0880 |

| | |
|---|---|
| **General Business Office:** | (+1) 613.652.4886 |
| **Fax:** | (+1) 613.652.4425 |
| **Technical Support:** | (+1) 613.652.4886 |
| **After Hours Emergency:** | (+1) 613.349.0006 |
| **Email (Technical Support):** | techsupport@rossvideo.com |
| **Email (General Information):** | solutions@rossvideo.com |
| **Website:** | http://www.rossvideo.com |

# Contents

# Introduction

## A Word of Thanks

Thank you for choosing Ross Video Xchange Suite as your media asset management solution.

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

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

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

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

Yours Sincerely,

*Alan Dabul*

Alan Dabul
Product Manager - MAM + Storage
adabul@rossvideo.com

## About This Guide

This guide contains the following chapters that cover the use of the Xchange Suite:

1. **Introduction** — summarizes the guide and provides important terms, and conventions.
2. **Exploring the Streamline Xchange User Interface** — summarizes the main screens and panels of the Xchange Suite user interface.
3. **Streamline Xchange Workspace** — describes how to configure a workspace to meet your workflow requirements.
4. **Streamline Xchange Upload Manager** — describes how to upload media files to Xchange.
5. **Editing Metadata in Streamline Xchange** — describes how to edit metadata information attached to assets.
6. **Searching for Assets in Streamline Xchange** — describes how to search for assets.
7. **Markers and Subclips** — describes how to create and manage markers and subclips.
8. **Attaching Associated Files** — describes how to attach files to assets and manage the attached files.
9. **Streamline Xchange Library** — describes how to work with folders in the Xchange Library.
10. **System Monitor** — describes how to use the System Monitor screen to monitor the status Xchange.
11. **Project Dashboard** — describes how to use the System Monitor to Project Dashboard screen to view the project activity in Xchange and manage projects.
12. **Adding Users and Groups** — describes how to add users and groups to your Xchange system.
13. **Smart Bins** — describes how to add Smart bins to your Xchange system.
14. **Metadata and Forms** — describes how to add metadata and forms to your Xchange system.

If you have questions pertaining to the operation of Xchange Suite, please contact us at the numbers listed in the section "**"Contacting Technical Support**" on page 1–3". 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 "**Managing Large Projects**" in the ***Xchange Suite MAM Panel User 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 Xchange Suite software, you must obtain feature licenses from Ross Video Technical Support before users can access Xchange Suite features.

# Contacting Technical Support

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

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

### North America

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

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

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

### EMEA

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

Our telephone number is: +44 (0)1189502446

International toll free: +800 3540 3545

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

### Australia

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

Our local support telephone number is: 1300 007 677

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

### Online

E-mail: techsupport@rossvideo.com

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

# Getting Started

Streamline Xchange Suite is a Web-based platform to store, share, edit, review, approve, archive, and prepare your footage from anywhere. The metadata-driven application features a comment, rating and media activity tracking system for finding the assets you need, when you need them. Additional functionality includes the ability to create markers and subclips with embedded metadata for use later in the production.

This chapter discusses the following topics:

- Start Streamline Xchange
- Exploring the Streamline Xchange User Interface
- Streamline Xchange Media Player
- Streamline Xchange Results Panels
- Xchange Media Manager Actions
- Streamline Xchange Media Details Panel

# Start Streamline Xchange

Streamline Xchange user-rights and permissions determine what a user can and cannot do. Permissions are based on users and groups, which have been pre-established with management during system configuration.

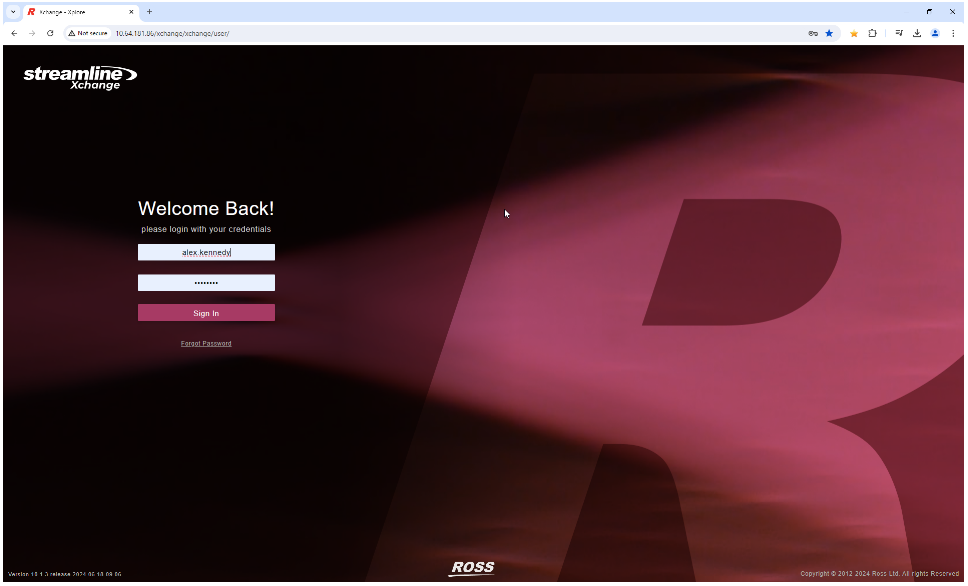



*Figure 2.1 Login Screen*

- **Login** — use an HTML5 web browsers to open the Streamline Xchange web page provided by your Streamline Xchange administrator and log in.

# Exploring the Streamline Xchange User Interface

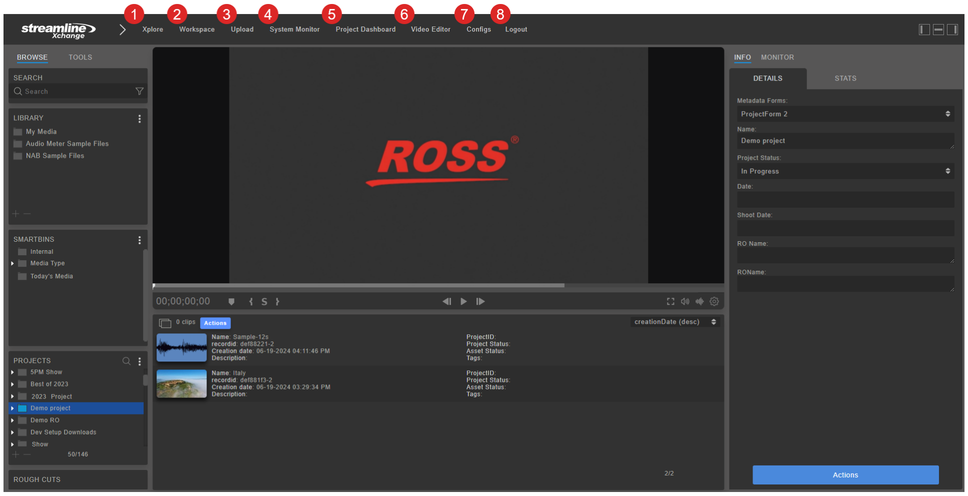



*Figure 2.2 Main Screen*

1) **Xplore** — this option brings the User to the Main Screen of Streamline Xchange (as shown above)
2) **Workspace** — facilitates the customization of Workspaces node is used to Add, Edit, Delete, Copy, Set as Default, and Hide/Show additional workspaces.
3) **Upload Manager** — facilitates the ingest of media with tagging functionality.
4) **System Monitor** — displays activity within Streamline Xchange.
5) **Project Dashboard** — displays activity of the projects, is used to see, add, edit or Delete projects.
6) **Multiview** — this option allows the user to select from the list of sources, toggle advanced text, select from the number of players, and mute audio.
7) **Configs** — facilitates the configuration of the system.
8) **Video Editor** — click this tab to open the Streamline Pro Web Video Editor.

   ✶ This tab is only available for systems that purchase the Streamline Pro Video Editor license.

9) **Logout** — log off to Streamline Xchange system.

## Main Toolbar

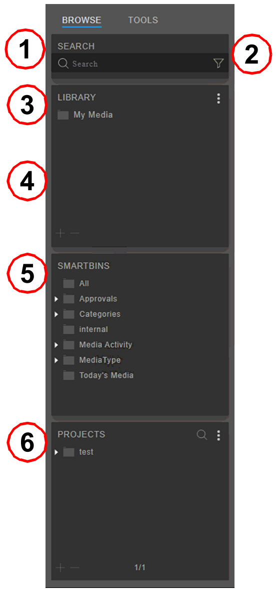



*Figure 2.3  Browse Tab*

1) **SEARCH** — searches through name, description and record ID.
2) **ADVANCED SEARCH** — clicking the Filter icon next to Search reveals in-depth search categories.
3) **LIBRARY** — the content database.
4) **MY MEDIA** — these bins receive all assets uploaded by the current logged-in user. My Media is accessible through the Streamline Xchange Panel for Adobe Premiere, enabling editors to access and edit from its media. Additional bins can be created in the Library; then anything uploaded goes into My Media and can be dragged and dropped into other libraries.
5) **SMART BINS** — contain pre-defined search queries. Smart bins are created and managed at an administration level. If a group has permission to see a smart bin, the bin will appear the same to that group and all other groups with the same access. Under categories all the different "Customers" can be found.
6) **PROJECTS** — organizational collections of media that users can view and share. Media can be added by uploading or dragging and dropping existing media into the project.
7) **ROUGH CUTS** — use the rough cut area to create a sequence of video and audio clips that you wish to perform basic edits — such as trimming, clip selection, and organization of the clips — in the timeline editor before the final sequence is ready.

## Menu Sidebar Tools Tab

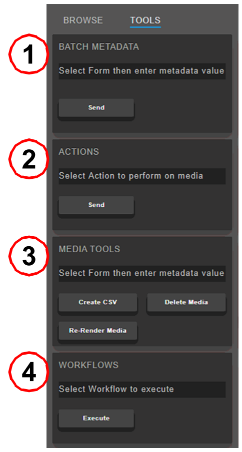



*Figure 2.4 Tools Tab*

1) **BATCH METADATA EDIT** — If clips have common characteristics or need to be retrieved as a group, they need the same metadata. BATCH METADATA EDIT allows multiple clips to receive the same metadata simultaneously.
2) **ACTIONS** — represent automated scripted events to be performed on highlighted media or projects.
3) **MEDIA TOOLS** — additional functions including deletion of assets.
4) **WORKFLOWS** — select the script (configured on the Workflow Server) to be executed.

## Streamline Xchange Media Player

The Streamline Xchange Media Player enables users to playback media. Within the player, users can create markers and subclips that become part of the media file. They are accessible to other users who call the clip up in Streamline Xchange or work with it in an Adobe Premiere Pro environment.

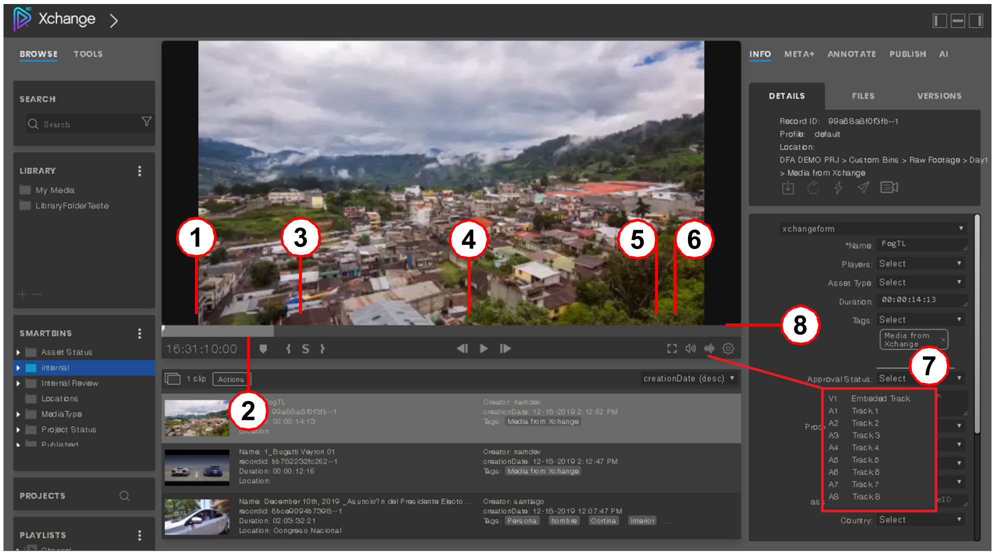



*Figure 2.5  Video Player Screen*

1) **Timecode** — Streamline Xchange inherits timecode from the original material.

2) **Marker** — a Marker is a reference point made at a specific point in time. After it is set, it can be named and given a description. This information will move with the clip for communication with the editor.

3) **Subclip Creation** — use the following buttons to create subclips:
   - **{** — Mark In
   - **}** — Mark Out
   - **S** — after using Mark In and Mark Out to define the area, S creates the subclip and displays it in the media details panel at right.

4) **Player Controls** — from left to right the controls are as follows:
   - **One Frame Back**
   - **Play**
   - **One Frame Forward**

   Streamline Xchange keyboard shortcut equivalents:
   - **J** — backwards play. The play speed varies depending on how many times the key is pressed.
   - **K** — pause
   - **L** — forward play The play speed varies depending on how many times the key is pressed.

5) **Full Screen** — allows for full screen playback from Xchange monitor.

6) **Master Volume** — adjustment of playback volume for media loaded into the Xplore monitor.

7) **Audio Wave Form** — allows monitoring of discreet audio channels on clips loaded into the Streamline Xchange Monitor.

8) **Media Quality** — change the playback resolution here. This affects any clips loaded into the monitor until the setting is revised. For the best quality, select the highest setting the current bandwidth can tolerate.

## Streamline Xchange Results Panels

Just below the Streamline Xchange Media Player are clips representing either search results or assets inside of a highlighted bin or smart bin.

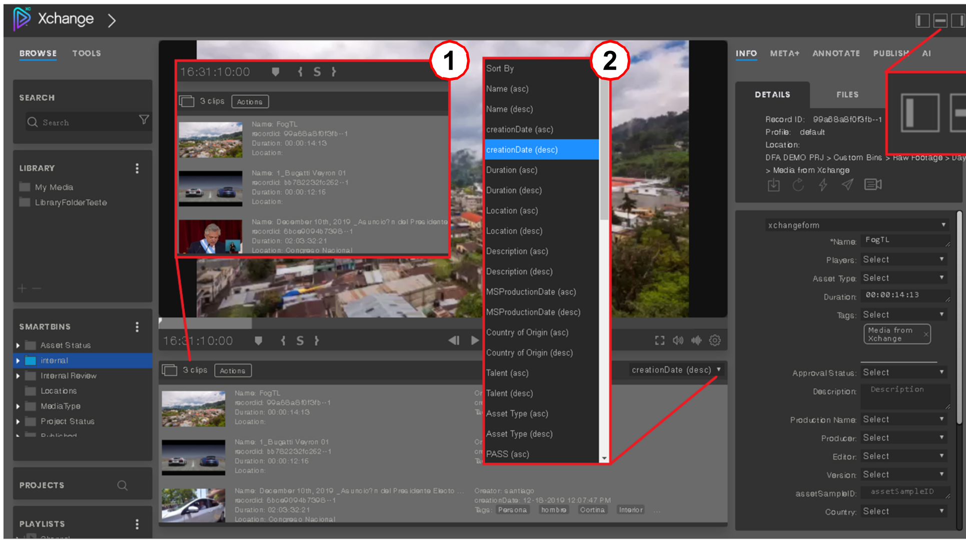



*Figure 2.6 Streamline Xchange Results Panel*

1) **Multiple Clip Selection** — clicking this button alerts Streamline Xchange that multiple clips are about to be selected.
2) **Sort By** — clips in the MEDIA PANEL can be sorted by a variety of categories.
3) **Screen Layouts** — each button represents a different Streamline Xchange layout based on priorities users need with certain functions.

## Xchange Media Manager Actions

The Streamline Xchange Media Manager has the actions available to manage the media assets within the projects or the media without an associated project.

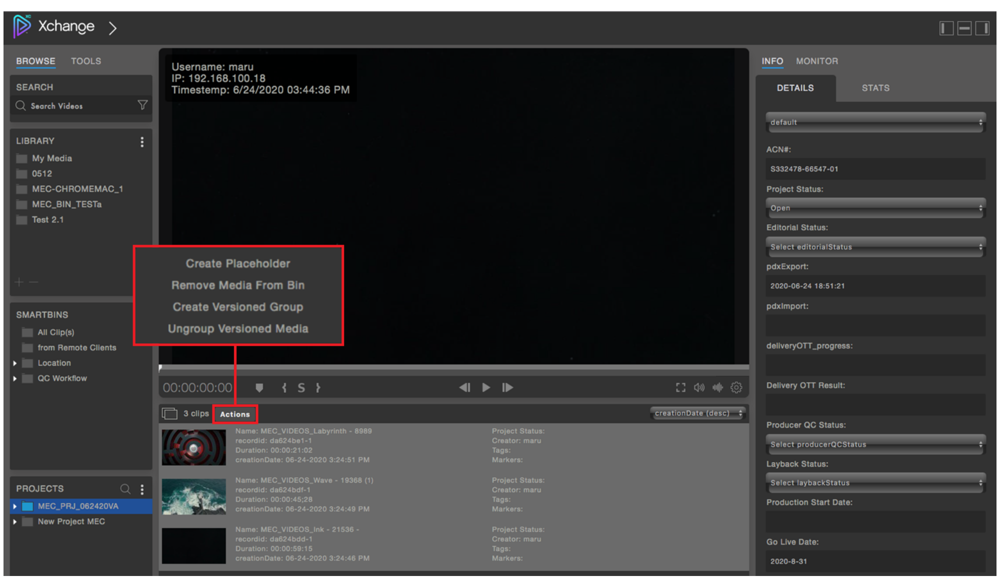



*Figure 2.7 Media Manager Panel*

The following actions are available in the Streamline Xchange Media Manager:

- **Create Placeholder**
- **Remove Media From Bin** — only available when the media asset is associated with a project.
- **Create Versioned Group**
- **Ungroup Versioned Media**

## Create Placeholder

The Create Placeholder action creates an asset within the system with no files or media available. Usually used for situations where information or metadata is needed before the media or file is available within the system.

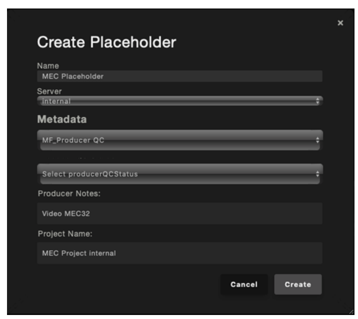
#### To create a placeholder

1. In the **Menu Sidebar**, click th e **Browse** tab.

   The **Browse** tab opens.

2. In the **PROJECTS** section of the **Browse** tab, select the **Project** and the **Bin** where you want to create a placeholder.
3. In the **Media Manager**, click **Actions** and then select **Create Placeholder**.

   The **Create Placeholder** dialog box opens.




   Forms and necessary information are personalized by the client.

4. In the **Name** box, enter a name for the placeholder.
5. Use the **Server** list to select the server on which to create the placeholder.
6. In the **Metadata** section, enter the necessary metadata for the placeholder.
7. Click **Create**.

   The **Media Manager**, displays the new placeholder.

# Streamline Xchange Media Details Panel

The Media Details panel reacts to the asset highlighted in the Results Panel. When an asset is selected in the Results panel, the Info tab displays metadata associated with the selected asset. The Info tab also contains a section to enter additional metadata for the selected asset.

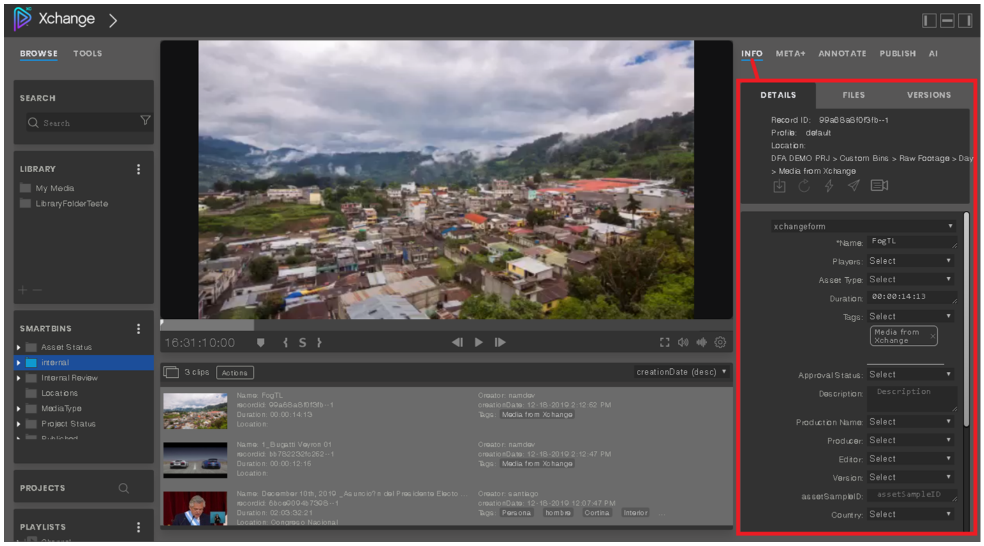



*Figure 2.8 Media Details Panel*

## META+ Tab

When you select an asset the META+ tab opens to display the embedded and not editable metadata associated with the selected asset.

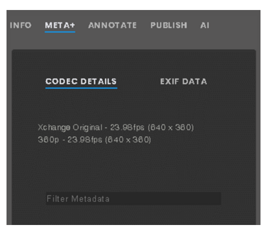



*Figure 2.9 Media Details Panel META+ Tab*

## ANNOTATE

The ANNOTATE tab contains the following tabs:

- **MARKERS** — displays the timeline markers set for the selected asset.
- **SUBCLIPS** — displays the subclips defined in the selected asset.
- **CAPTIONS** — enables the addition of captions to the selected asset.

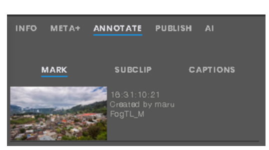



*Figure 2.10 Media Details Panel ANNOTATE Tab*

## Info Tab Media Buttons

The Media Details panel Info tab contains the following row of buttons displayed below the asset image that you can use to manage the selected asset:

-  **Download** — Field users retrieve assets from storage through Streamline Xchange. Users select quality and location and the asset is retrieved.
-  **Refresh** — updates media in the monitor.
-  **Sync Media** — synchronizes metadata, markers and subclips
-  **Download Link** — provides a link for outside users to view media. Use caution as it is connecting outsiders to shared storage.

# Streamline Xchange Workspace

The Xchange Workspace screen enables users to configure a workspace to meet their workflow requirements. Users must have permission to create workspaces to be able to configure them.

This chapter discusses the following topic:

- Create and Configure a Workspace

# Create and Configure a Workspace

Users must have permission to create workspaces to be able to configure them.

**To create and configure a workspace**

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

   The **Login** screen opens.

2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

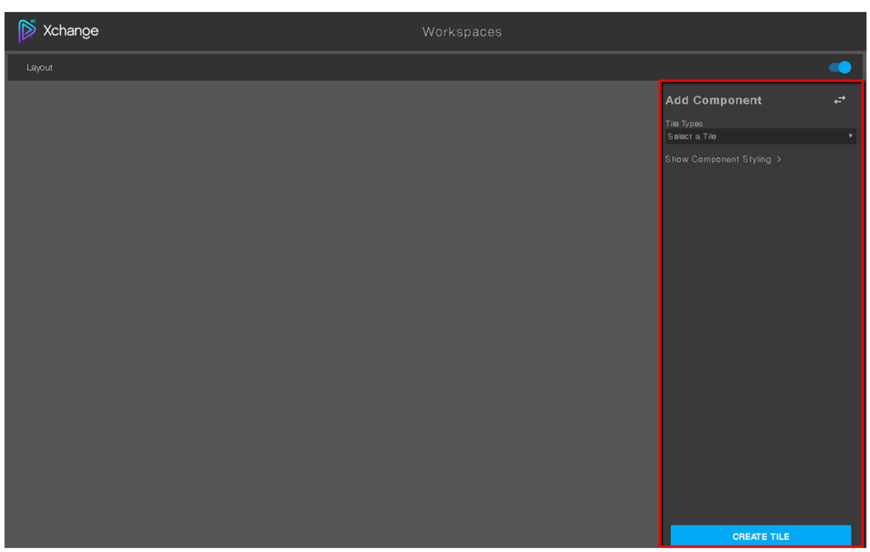
   Xchange opens.

4. From the main menubar, click **Workspace**.

   The **Workspaces** screen opens


5. In the top right corner of the **Workspaces** screen, click the **Edit Workspace** slider to move it to the right.

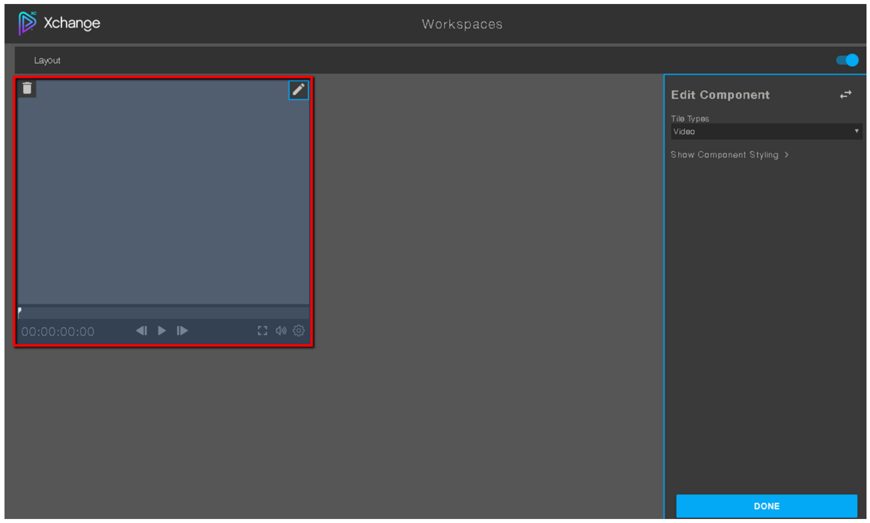
   The **Add Component** selection opens.



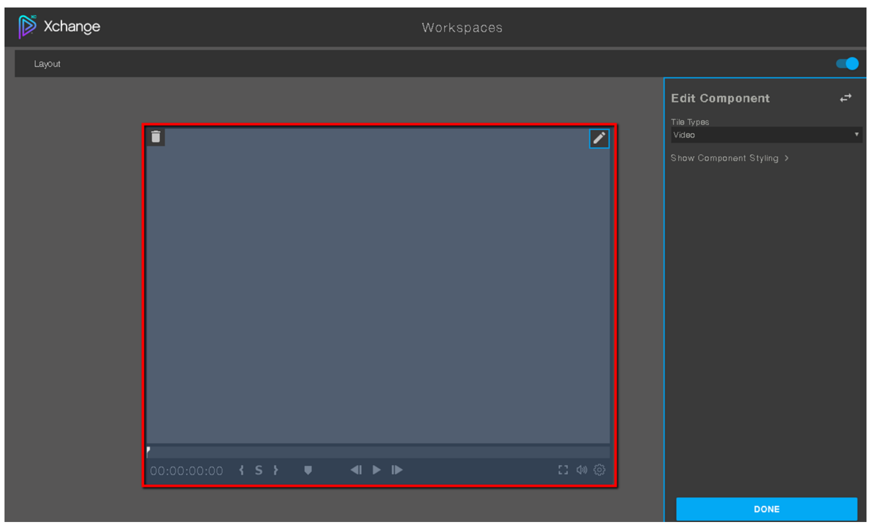

6. In the **Add Component** section, use the **Tile Type** list to select the type of tile to add to your workspace.

7. After selecting the type of tile to add, click **CREATE TILE**.

   A new tile of the selected tile type opens in your workspace.




8. To position the tile in your workspace, click and drag the tile to the required position in the workspace.
9. To resize the tile, click and drag any border or corner of the tile.




10. Use the following tools to manage a tile:

    -  **Delete** — delete the tile from the workspace.
    -  **Edit** — edit the tile type and styling.

11. Repeat steps **6** to **10** to add and position the tiles that you require in your workspace.
12. After completing your workspace, use the **Layout** menu to select **Save as New Workspace**.

    The **Layout** menu also contains the following commands:

    - **New** — create a new workspace layout.
    - **Open** — open a saved workspace layout.
    - **Clear** — delete all tiles from the open workspace.

# Streamline Xchange Upload Manager

The Streamline Xchange Upload Manager accesses external resources to copy media from the original locations into Streamline Xchange. Prior to uploading, Streamline Xchange presents forms that offer fields to input metadata to be attached to the clips. Forms customized for specific cases narrow down the metadata fields to those that apply to a specific circumstance. If there are categories of metadata on more than one form, multiple forms can be filled out prior to upload. Any metadata input on a form is automatically attached to media being uploaded.

This chapter discusses the following topics:

- Upload Media to Streamline Xchange
- Metadata Forms

## Upload Media to Streamline Xchange

The Upload Manager enables you to accesses external resources to copy media from the original locations into Streamline Xchange. You can also attach metadata to the media that you upload to Streamline Xchange.

**To upload media to Streamline Xchange**

1. Use an HTML5 web browsers to open the Streamline Xchange web page provided by your Streamline Xchange administrator:

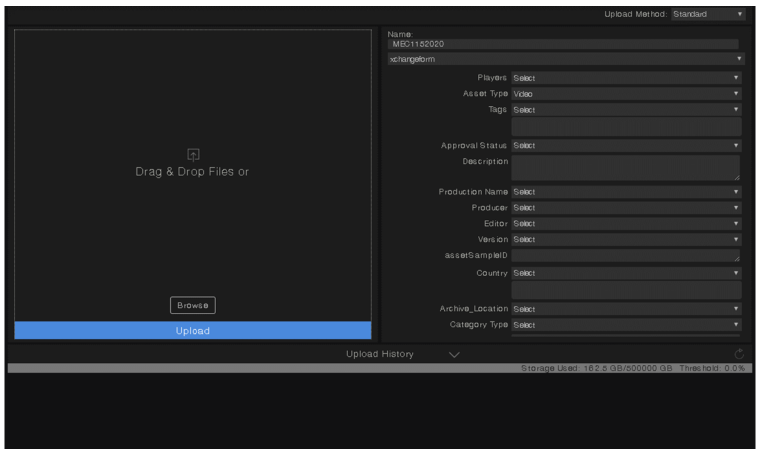
   The **Login** screen opens.

2. In the **Login** screen, enter your Streamline Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

   **Streamline Xchange** opens.

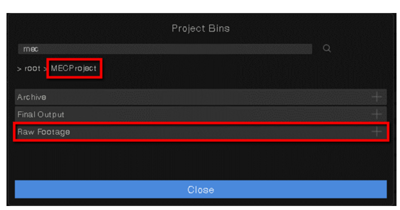
4. From the main menubar, click **Upload**.

   The **Upload Manager** screen opens




5. Use one of the following methods to add the media to upload to the upload list:
   - **Drag & Drop** — drag one or more media files from a storage location into the **Drag & Drop Files** area.
   - **Browse** — click **Browse** in the **Drag & Drop Files** area to use a file browser to select the media files to upload.
6. Use the **Projects** list to select the Streamline Xchange project to receive uploaded media.

   The **Project Bins** dialog box opens.




7. Navigate to the bin to receive uploaded media.
8. Click **Close**.

   The **Project Bins** dialog box closes.

9. Use the right hand panel of the **Upload Manager** to enter the required and optional metadata for the media files loaded in the upload list for ingest. Required metadata fields in a form are marked with ***** (asterisk).

   The organization's Ingest Form opens by default. The entered metadata is attached to all clips ingested from the upload list. You can change the metadata associated with individual clips after they are stored in Streamline Xchange.

✶ Streamline Xchange will not let you upload media files without entering information the required metadata for the files.

10. In the **Drag & Drop Files** area, click **Upload**.

    Streamline Xchange ingests the media files from the upload list and associates the entered metadata with each ingested clip.

## Metadata Forms

Streamline Xchange Metadata forms facilitate customized metadata input. Your organization can utilize several forms that define specific metadata to be used for certain departments or functions. Many forms can be used to tag or assign metadata to an asset. An asset will receive the latest metadata entered in any fields of any form attached to it.


*Figure 4.1 Example Metadata Form*

# Editing Metadata in Streamline Xchange

Metadata is information that makes up the core of searchable attributes in a media asset management system like Streamline Xchange. Some metadata is created when the a media file is ingested or a clip is created. Additional metadata can be attached to the assets stored in Streamline Xchange. You can also edit or delete the metadata attached to assets. Streamline Xchange uses forms to categorize metadata based on functionality.

This chapter discusses the following topic:

- Single Asset Metadata Editing
- Multiple Asset Metadata Editing

## Single Asset Metadata Editing

It is best to edit assets one at a time when the metadata you are editing is specific to individual assets.

**To edit the metadata attached to a single asset**

1. Use an HTML5 web browsers to open the Streamline Xchange web page provided by your Streamline Xchange administrator:

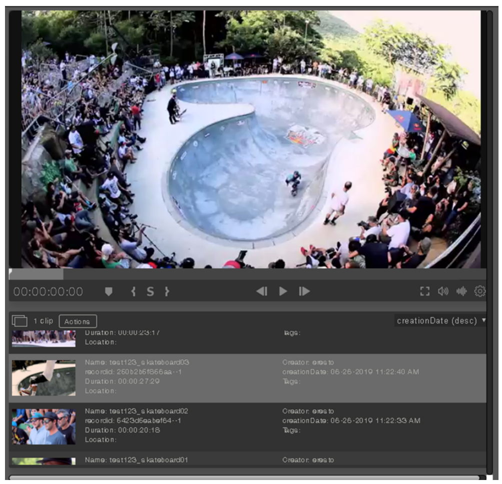
   The **Login** screen opens.

2. In the **Login** screen, enter your Streamline Xchange login credentials in the **Username** and **Password** boxes.

3. Click **Sign In**.

   **Streamline Xchange** opens.

4. In the **Results** panel, select the asset for which to edit metadata.




5. In the top right panel, click the **INFO** tab.

   The **INFO** tab opens.

6. In the **INFO** tab, click the **DETAILS** tab.

   The **DETAILS** tab opens displaying a thumbnail of the selected asset. The section below the thumbnail contains options to select the FORM, enter metadata information, or edit metadata information.


7. Use the list at the top of the section to select the **form** to use to edit metadata information.

   Each form contains specific set of fields to attach information to an asset. Forms are available for several different organizational circumstances. Your Streamline Xchange administrator can build new forms and edit existing forms.

8. Edit the metadata information contained fields of the selected form.

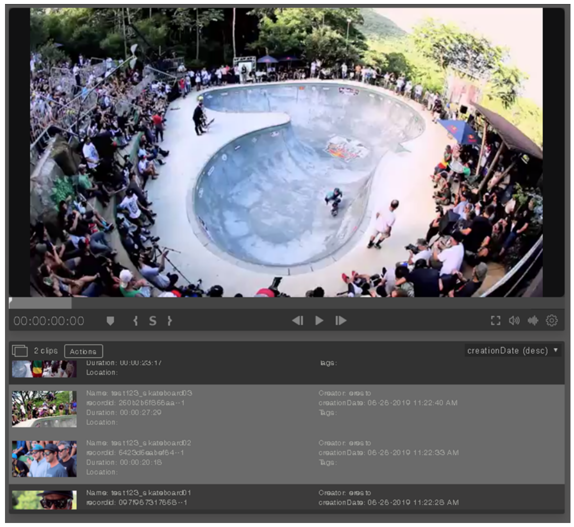
   Streamline Xchange automatically saves the metadata information that you enter.

## Multiple Asset Metadata Editing

When multiple assets require the same metadata information you can edit all of the assets at one time.

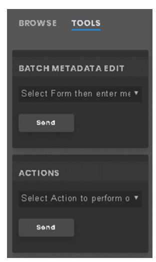
**To edit the metadata attached to multiple assets**

1. In the **Results** panel, select two or more assets that you want to attach the same metadata information.



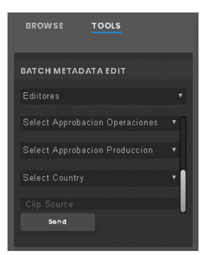

2. In the **Menu Sidebar**, click the **TOOLS** tab.

   The **TOOLS** tab opens.




3. In the **BATCH METADATA EDIT** section, use the **Select Form** list to select the form to enter metadata information for the selected assets.

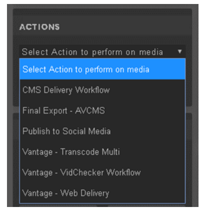
   The selected form opens.




4. Edit the metadata information contained fields of the selected form.
5. Click **Send**.

   Streamline Xchange sends the entered metadata information to all of the selected assets.

6. The **ACTIONS** section contains a list of automated scripted events that you can select to performed on selected assets or projects. If appropriate, select an action to run on your selected assets.




7. In the **META TOOLS** section you can click **Create CSV** to export the metadata attached to the selected assets to a Comma Separated Values (.csv) file. You can open the exported .csv file in a spreadsheet application.

   Depending on your user privileges, you can also use the following tools in the **META TOOLS** section:

   - **Delete Media** — delete the selected assets from Streamline Xchange.
   - **Re-Render Media** — re-render the selected assets.
   - **Send to Transcode** — transcode the selected assets into another media format.

# Searching for Assets in Streamline Xchange

Media, assets, clips, and materials are all terms used for the assets managed in Streamline Xchange. Metadata is the core to finding and organizing assets in Streamline Xchange. Searching and rearranging contents depends on efficient metadata input.

Searching assets requires knowing one piece of metadata that is attached to an asset. With just one piece of information you can retrieve many assets. With more pieces of information you can narrow your results down to the assets your require. With exact information you can find an asset or group of assets with a single search.

This chapter discusses the following topic:

- Simple Searches
- Advanced Searches
- Recent Searches
- Favorite Searches
- Media Retrieval

## Simple Searches

Simple searches search by asset name, description, date, or record ID. A simple search will display any assets that match the search entry, so any instance of these categories will produce results. Simple searches can be configured to search up to ten additional attributes.

Searches only match exact keywords, so it is recommended to use short search queries and to avoid using spaces with multiple keywords. For example, search for "beach" or "2024", but *not* "beach 2024" to retrieve an asset named "cancun_beach_July2024". Keyword separators that are supported include commas and semi-colons, and these can be used in place of spaces.

✶ **NOTE**: Searches for dates will only match date field attributes, and will not match dates or numbers included in the asset name or other metadata. Simple searches by date have been enhanced to return date formats, but to ignore string text (even if the string text includes numbers). Numbered assets, such as 'asset-01032024', are not flagged as a date in Streamline Xchange v10.0.6 and later.

#### To use a simple search to find assets

1. Use an HTML5 web browsers to open the Streamline Xchange web page provided by your Streamline Xchange administrator:

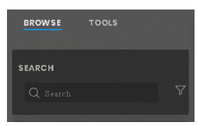
   The **Login** screen opens.

2. In the **Login** screen, enter your Streamline Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

   **Streamline Xchange** opens.

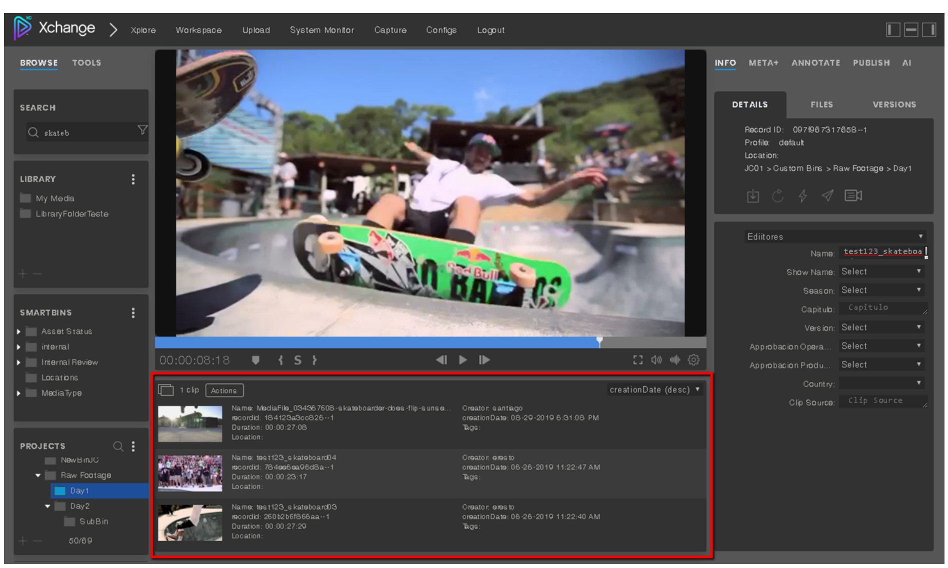
4. In the **Menu Sidebar**, click the **BROWSE** tab.

   The **BROWSE** tab opens, which contains the **SEARCH** section.




5. In the **Search** box, enter a word or part of a word contained in the name, description, or record ID of the assets to retrieve.

   The **Results** panel displays the assets with names, descriptions, or record IDs that match the entered search.



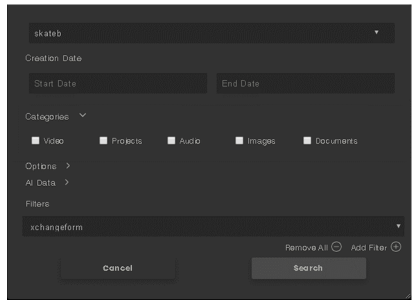
# Advanced Searches

Advanced searches include parameters and filters that enable you to define more specific and detailed searches.

**To define an advanced search**

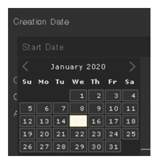
1. In the **Search** section of the **BROWSE** tab, click the  **Filter** icon.

   The **Parameters** section opens.




2. To select the start of a registration date range that retrieved assets must match, complete the following steps:

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

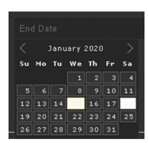



   b. In the **Date** selector, click the start date.

   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.

3. To select the end of a registration date range that retrieved assets must match, complete the following steps:

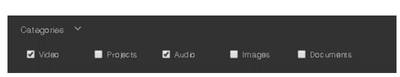
   a. Click in the **End Date** box to open the **Calendar** tool.



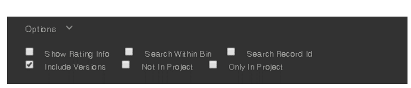

   b. In the **Date** selector, click the end date.

   If you do not set an end date, the search will use a date range that starts at the set start date and ends on the current date. The end date cannot be the same as the set start date.

4. In the **Category** filter, select the check boxes associated with the categories that assets must be part of to be retrieved. Clear all of the category check boxes to retrieve assets from all categories.

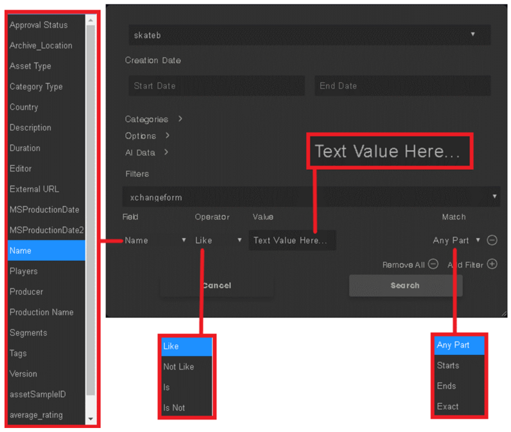



5. Expand the **Options** filter.
6. In the **Options** filter, select the check boxes associated with the options that assets must have to be retrieved. Clear all of the options check boxes to retrieve assets with all options.



7. Filters enable you to define specific characteristics to narrow your search results. Click **Add Filter**.

   The **Filter** section opens for you to define a filter for your search.




8. After defining parameters and filters for you search, click **Search**.

   The **Results** panel displays the assets that match your defined search.

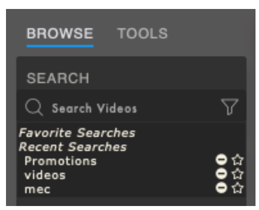
## Recent Searches

After running one or more searches, Streamline Xchange temporally saves your run as suggestions for your future searches.

### To run recent searches

1. Use the **Search** section in the **BROWSE** tab to run some asset searches.
2. Click in the **Search** box.

   Streamline Xchange display a list of your recently run searches.




3. Select a search from the **Recent Searches** list to re-run the search.

   The **Results** panel displays the assets that match the selected search.
4. To remove a recent search from the **Recent Searches** list, complete the following steps:

   a. Click the  **Remove** icon to the right of the recent search to remove.

      An **Alert** opens.

   b. Click **Ok**.

      Streamline Xchange removes the selected recent search from **Recent Searches** list.

## Favorite Searches

You can save often used searches as favorites searches to make them always available. Favorite searches can be saved when you create a search or from your recent searches.

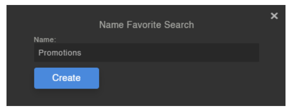
**To make a favorite out of a new search**

1. Use the **Search** section in the **BROWSE** tab to define and run a new search.

   The **Results** panel displays the assets that match your new search.

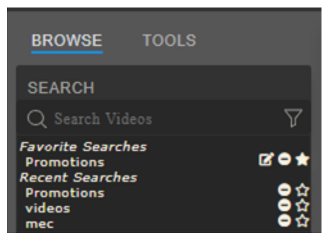
2. In the **Search** box, click the **Favorite** icon.

   The **Name Favorite Search** dialog box opens.




3. In the **Name** box, enter a name for the new favorite search.
4. Click **Create**.

   Streamline Xchange adds the new favorite search to the **Favorite Searches** list.



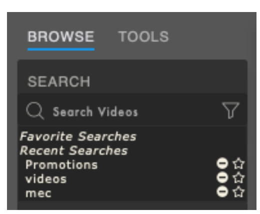

### Save Recent Searches to Favorites

Streamline Xchange only saves recent searches temporarily. You can permanently save any search displayed in the Recent Searches list as a favorite search.

**To save a recent search as a favorite search**

1. Click in the **Search** box.

   Streamline Xchange displays your **Recent Searches** list.




2. Click the **Favorite** icon to the right of the recent search to save as a favorite search.

   Streamline Xchange saves the selected recent search as a favorite search and adds it to the **Favorite Searches** list.

## Manage Favorite Searches

After you build up a library of favorite searches, you may want to rename or delete some of your searches.

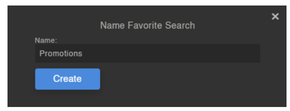
1. To rename a search, complete the following steps:

   a. Click in the **Search** box.

      Streamline Xchange displays your **Favorite Searches** list.

   b. Click the **Rename** icon to the right of the favorite search to rename.

      The **Name Favorite Search** dialog box opens.




   c. In the **Name** box, enter a new name for the selected favorite search.

   d. Click **Create**.

2. To delete a search from the **Favorite Searches** list, click the **Favorite** icon to the right of the favorite search to delete. You can also complete the following steps to delete a favorite search:

   a. Click the **Remove** icon to the right of the favorite search to delete.

      An **Alert** opens.

   b. Click **Ok**.

   Streamline Xchange deletes the selected search from **Favorites Searches** list.

## Media Retrieval

Registered media is usually sent to specific your company projects and bins. Using any search method retrieves media from all that is registered into Streamline Xchange, including media residing in a specific Project or Bin.

Any media registered by an individual also "lives" in **My Media** and can be copied to any other location. The asset, database record, never moves. Assets always copy. Copying an asset does not duplicate media on the file system.

## Moving and Copying Media

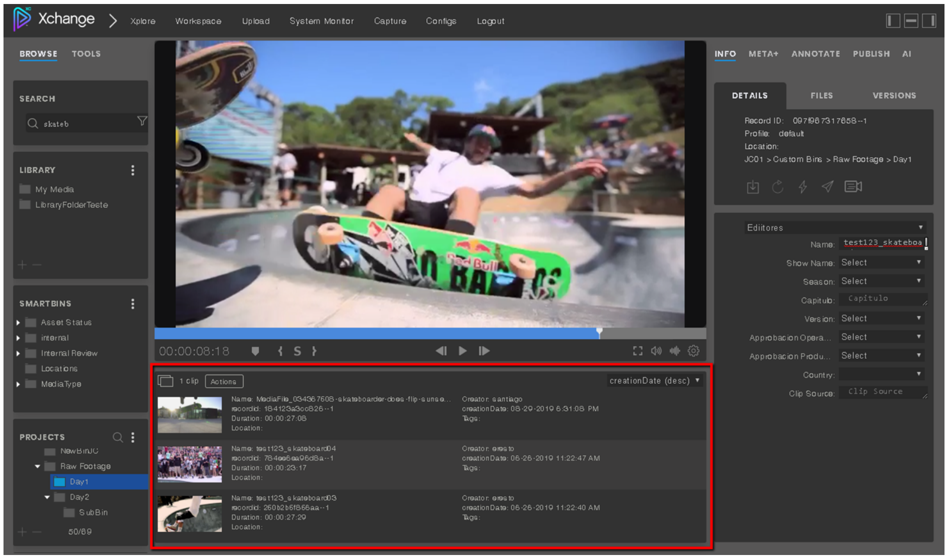
Drag and drop moves or copies media from one location to another. Media can live in many different folders or bins simultaneously. There is always one high-res and proxy asset that Streamline Xchange points to and from any or many locations.

✶ Only users with the appropriate permission level can delete media from Streamline Xchange.

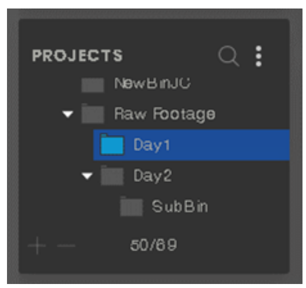
### To move or copy media

1. Use a search or open a project to list the assets to move or copy in the **Results** panel.

   The **Results** panel displays the retrieved assets.

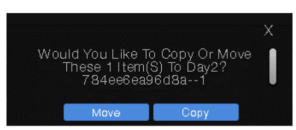



2. In the **Projects** section, use the tree view to select the **Bin** to which to move or copy assets.




3. Click and drag assets from the **Results** panel to their new **Bin** in the **Projects** section, then release the mouse button.

   The **Copy or Move** dialog box opens.




4. Click **Move** to move the selected assets to the new location or **Copy** to copy the assets.

   The **Copy or Move** dialog box closes and the selected assets move or copy to their new location

# Markers and Subclips

Markers enable you to add information to points along the timeline of an asset. Subclips identify smaller segments of an asset without replicating media.

✶ Deleting the asset that a subclip references removes the subclip content and renders the subclip empty.

This chapter discusses the following topic:

- Searching for Markers and Subclips
- Adding Markers
- Subclips

# Searching for Markers and Subclips

The ANNOTATE tab gives you an overview of the markers and subclips. In the ANNOTATE tab you can search, sort, and mark completed markers and subclips.


*Figure 7.1 ANNOTATE Tab*

### To search for markers and subclips

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

   The **Login** screen opens.

2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

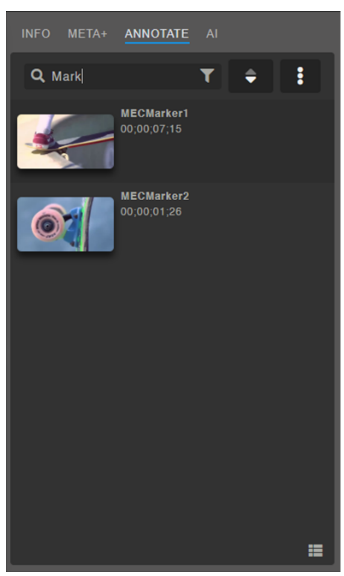
   **Xchange** opens.

4. In the top right panel, click the **ANNOTATE** tab.

   The **ANNOTATE** tab opens.

5. In the **Search** box, enter a word or part of a word o search for assets by name or markers and subclips by description.

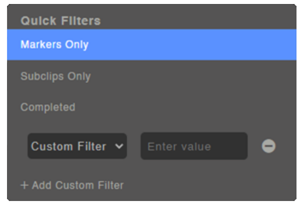
   The **ANNOTATE** tab displays the assets, markers, and subclips retrieved by your search.



6. To search by type, complete the following steps:

   a. In the **Search** box, click the **Filter** icon.

      The **Quick Filters** dialog box opens.




   b. Select the type of object to retrieve with your entered search.

      The **ANNOTATE** tab updates to display the objects that match your entered search and selected type.

## Adding Markers

Markers enable you to add information to points along the timeline of an asset.

**To add a marker to an asset**

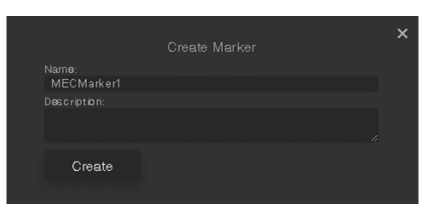
1. Open the asset to add makers to in the **Video Player** screen.
2. Play or drag the playhead to the position in the clip to mark.


   You can use the following keyboard shortcuts to navigate through a clip:

   - **J** — backwards play. Play speed varies with the number of times the key is pressed.
   - **K** — pause.
   - **L** — forwards play. Play speed varies with the number of times the key is pressed.

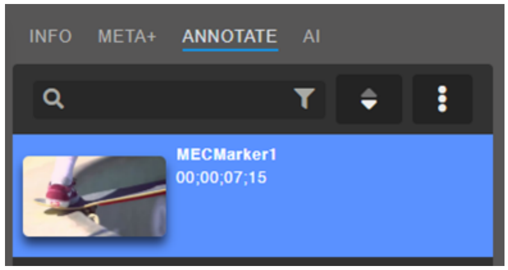
3. Click the **Marker** icon or press the **P** key.

   The **Create Marker** dialog box opens.



4. In the **Name** box, enter a name for the marker.
5. In the **Description** box, enter a description of the marker.
6. Click **Create**.

   Xchange adds your new marker to the **ANNOTATE** tab.

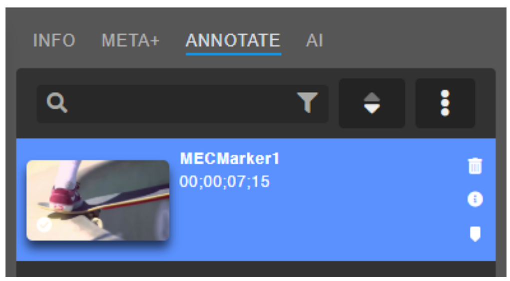



## Adding More Information

Users that have access to the Information option can view or modify the metadata attached to a marker. The Information option also enables you to add comments to a maker.

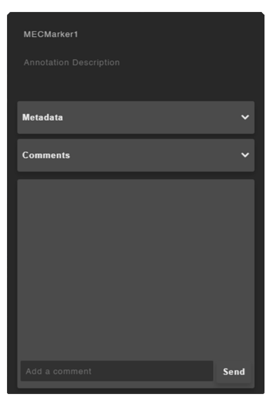
**To use the Information option**

1. In the **ANNOTATION** tab, select the maker to view metadata or add comments.



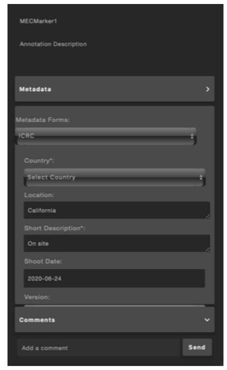

2. Click the **Information** icon associated with the marker.

   The **Information** dialog opens for the maker.



3. Click **Metadata** to view and modify marker metadata.

   The **Metadata** section expands to display the metadata associated with the marker. The fields and status will vary as they are customizable.

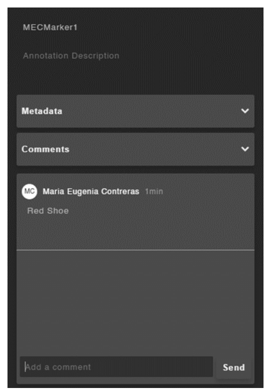



4. To add a comment to the maker, complete the following steps:

   a. In the **Add a comment** box at the bottom of the dialog box, enter a comment to add to the marker.

   b. Click **Send**.

   The **Comments** section display your comment.




5. To reply to a comments made by other users, complete the following steps:

   a. Select the comment to which you want to send a replay.

   b. Click the  **Reply** icon associated with the comment.

   c. In the **Reply** box, enter your reply.

   d. Click **Send**.

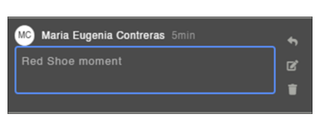
   The **Comments** section displays your reply.

6. To edit a comment, complete the following steps:

   a. Select the comment to edit.

   b. Click the  **Edit** icon associated with the comment.

   A blue border highlights the comment to indicate that your can edit the comment.



c. Edit the comment as required.

d. Click **Send**.

The **Comments** section displays the updated comment.

7. To delete a comment, complete the following steps:

a. Select the comment to delete.

b. Click the **Delete** icon associated with the comment.

An **Alert** opens.

c. Click **Ok** to delete the comment.

Xchange deletes the selected comment from the **Comments** section.

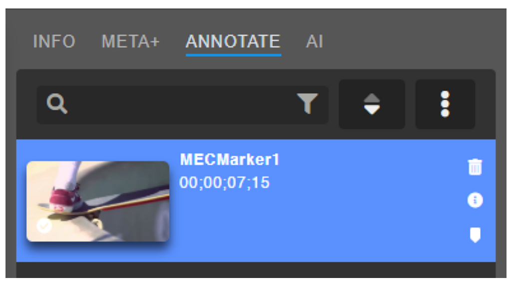
## Managing Markers

You can change the location of a marker on the timeline or delete the marker from the timeline.

**To manager makers on the timeline**

1. To reposition a maker, complete the following steps:

a. In the **ANNOTATION** tab, select the maker to reposition on the timeline.




b. Click the **Position** icon associated with the marker.

Xchange highlights the selected marker on the timeline.

c. On the timeline, click and drag the highlighted marker to a new position.

d. Release the mouse button.

Xchange places the maker at the selected location.

e. Click the **Reset In / Out** icon below the maker.

Xchange saves the new maker position.

2. To delete a marker from the timeline, complete the following steps:

a. In the **ANNOTATION** tab, select the maker to delete from the timeline.

b. Click the **Delete** icon associated with the marker.

An **Alert** opens.

c. Click **Ok** to delete the maker.

Xchange deletes the selected marker from the **ANNOTATION** tab and the timeline.

## Subclips

Subclips identify smaller segments of an asset. You can user to break large clips into smaller and easier to handle pieces. A Subclip is made up of reference points to the source media. When you create a subclip, no additional media is replicated.

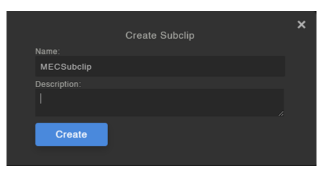
✶ Deleting the asset that a subclip references removes the subclip content and renders the subclip empty.

**To create a subclip**

1. Open the asset of which to create a subclip in the **Video Player** screen.
2. Play or drag the playhead to the start position for the subclip.


3. Click the **Marker** icon or press the **i** key.
4. Play or drag the playhead to the end position for the subclip.
5. Click the **Subclip** icon or press the **S** key to create a subclip with the set **In** and **Out** Points.

   The **Create Subclip** dialog box opens.




6. In the **Name** box, enter a name for the subclip.
7. In the **Description** box, enter a description of the subclip.
8. Click **Create**.

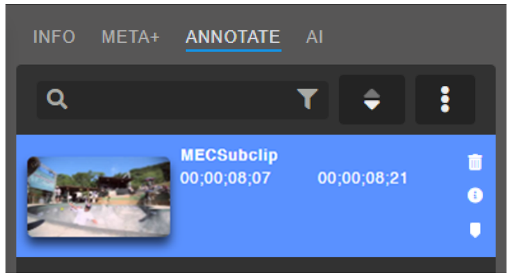
   Xchange adds the subclip to the **ANNOTATE** tab and the **Video Player** screen highlights the subclip on the timeline.

## Adding More Information

Users that have access to the Information option can view or modify the metadata attached to a subclip. The Information option also enables you to add comments to a subclip.

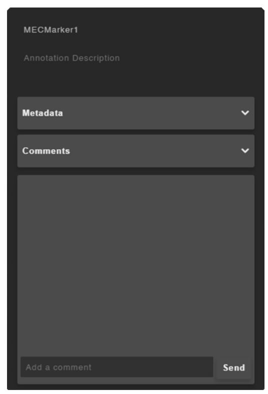
**To use the Information option**

1. In the **ANNOTATION** tab, select the subclip to view metadata or add comments.



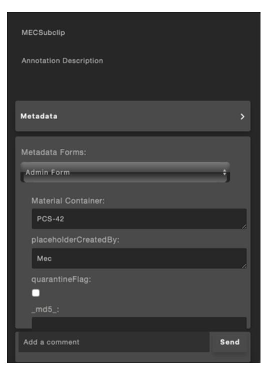

2. Click the **Information** icon associated with the subclip.

   The **Information** dialog opens for the subclip.



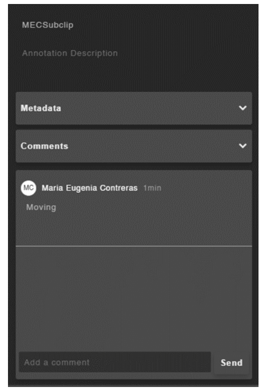

3. Click **Metadata** to view and modify subclip metadata.

   The **Metadata** section expands to display the metadata associated with the subclip. The fields and status will vary as they are customizable.



4. To add a comment to the subclip, complete the following steps:
    a. In the **Add a comment** box at the bottom of the dialog box, enter a comment to add to the subclip.
    b. Click **Send**.

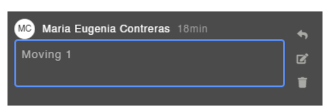
    The **Comments** section display your comment.




5. To reply to a comments made by other users, complete the following steps:
    a. Select the comment to which you want to send a replay.
    b. Click the  **Reply** icon associated with the comment.
    c. In the **Reply** box, enter your reply.
    d. Click **Send**.

    The **Comments** section displays your reply.
6. To edit a comment, complete the following steps:
    a. Select the comment to edit.
    b. Click the  **Edit** icon associated with the comment.

    A blue border highlights the comment to indicate that your can edit the comment.




    c. Edit the comment as required.
    d. Click **Send**.

    The **Comments** section displays the updated comment.
7. To delete a comment, complete the following steps:
    a. Select the comment to delete.
    b. Click the  **Delete** icon associated with the comment.

    An **Alert** opens.
    c. Click **Ok** to delete the comment.

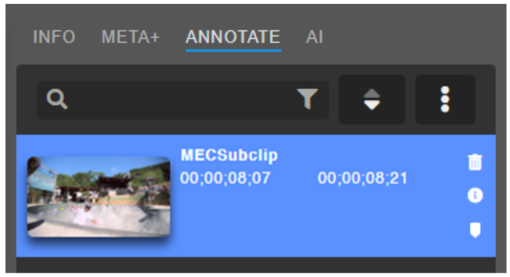
    Xchange deletes the selected comment from the **Comments** section.

## Managing Subclips

You can reposition a subclip on the timeline or delete the subclip from the timeline.

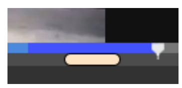
**To manager subclips on the timeline**

1. To reposition subclip, complete the following steps:
   a. In the **ANNOTATION** tab, select the subclip to reposition on the timeline.




   b. Click the **Position** icon associated with the subclip.

   Xchange highlights the selected subclip on the timeline.



   c. On the timeline, click and drag the start of the subclip to a new position.
   d. Release the mouse button.

   Xchange places the subclip start at the selected location.

   e. Click the **Reset In / Out** icon below the maker.

   Xchange saves the new subclip start position.

   f. On the timeline, click and drag the end of the subclip to a new position.
   g. Release the mouse button.

   Xchange places the subclip end at the selected location.

   h. Click the **Reset In / Out** icon below the maker.

   Xchange saves the new subclip end position.

2. To delete a subclip from the timeline, complete the following steps:
   a. In the **ANNOTATION** tab, select the subclip to delete from the timeline.
   b. Click the **Delete** icon associated with the subclip.

   An **Alert** opens.

   c. Click **Ok** to delete the subclip.

   Xchange deletes the selected subclip from the **ANNOTATION** tab and the timeline.

# Attaching Associated Files

Along with metadata and comments, you can also attach a file to an asset. Attaching files to assets is a good method of storing related documentation with an asset.

This chapter discusses the following topic:

- Attaching Files to Assets
- Managing Attached Files

## Attaching Files to Assets

The FILES tab in the INFO tab enables you to attach a file to an asset and manage the files attached to an asset.

✶ You can only attach one file to an asset.

**To attach a file to an asset**

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

   The **Login** screen opens.

2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

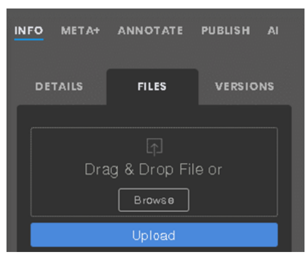
   **Xchange** opens.

4. Navigate to and select that asset to attach one or more files.
5. In the top right panel, click the **INFO** tab.

   The **INFO** tab opens.

6. In the **INFO** tab, click the **FILES** tab.

   The **FILES** tab opens.




7. Use one of the following methods to select the file to attach to the asset:
   - **Drag & Drop** — drag a file from a storage location into the **Drag & Drop File** area.
   - **Browse** — click **Browse** in the **Drag & Drop File** area to use a file browser to select the file to upload.
8. In the **Drag & Drop Files** area, click **Upload**.

   Xchange attaches the selected file to the asset and lists the file in the **FILES** tab.

## Managing Attached Files

You can change download the file attached to an asset or delete the attached file from the asset. When you want to attach a different file to an asset you must first delete the existing attached file from the asset.

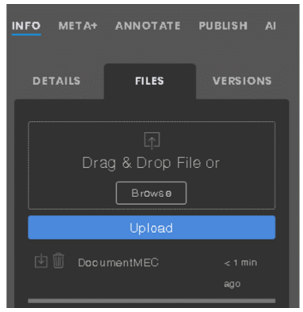
**To manager files attached to assets**

1. Navigate to and select that asset to attach one or more files.
2. In the top right panel, click the **INFO** tab.

   The **INFO** tab opens.

3. In the **INFO** tab, click the **FILES** tab.

   The **FILES** tab opens.




4. To download the attached file to your computer, click the  **Download** icon to the left of the file name.

   Xchange downloads the attached file to your computer.

5. To delete the attached file from the asset, click the  **Delete** icon to the left of the file name.

   Xchange deletes the file from the asset and removes it from the **FILES** tab.

# Streamline Xchange Library

The Streamline Xchange Library provides users a personal area within Streamline Xchange to sort, organize, and share assets.

This chapter discusses the following topic:

- Accessing the Streamline Xchange Library
- Adding Folders
- Sharing Folder Contents

## Accessing the Streamline Xchange Library

The My Media folder in the Library window automatically receives all assets uploaded by a user.

**To access the Xchange Library**

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

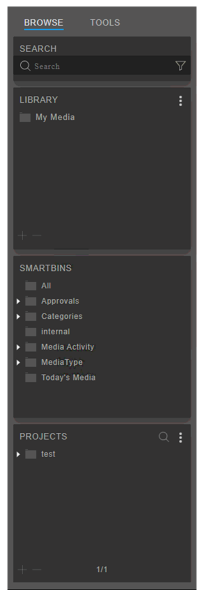
   The **Login** screen opens.

2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

   **Xchange** opens.

4. In the **Menu Sidebar**, click th e **Browse** tab.

   The **Browse** tab opens.




The **LIBRAY** section contains your **My Media** folder. Any assets that you upload through the UPLOAD MANAGER are automatically added to your **My Media** folder. Since only specific users upload media file, and often times through the **Streamline Xchange Premiere Panel**, you may find that your **My Media** folder is empty.

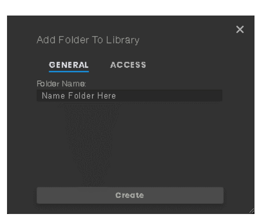
## Adding Folders

You can add folders to your Library panel to help you manage assets.

**To add folders to your Library**

1. In the **Library** section, click the  **Add** icon at the bottom of the section.

   The **Add Folder to Library** dialog box opens.




2. In the **Folder Name** box, enter a name for the folder.

3. Click **Create**.

   Xchange adds your new folder to the **Library** section.

4. You can now drag assets into your new folder from your **My Media** folder or from the **Xchange Results** panel.
5. Select your new folder to view the folder contents in the **Xchange Results** panel.

## Sharing Folder Contents

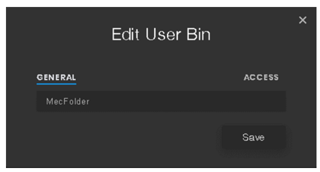
After creating folders and adding assets to them, you can share your folders and their contents with other Xchange users.

✶ If one of the users that has access to a shared folder deletes it, or any contents inside the folder, all users sharing that folder will lose the deleted folder of folder content. The contents remain in Xchange but the library can no longer access the link. Only user with delete privileges can delete library folders or assets Xchange.

**To share your folder contents with other users**

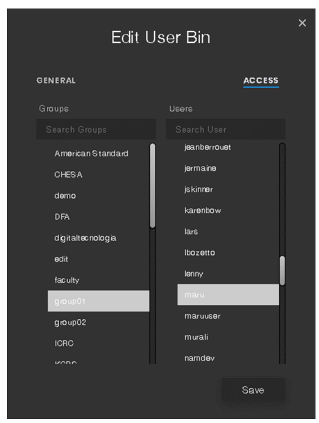
1. In the **Library** section, select the folder to share with other users.
2. Click the **Settings** icon in the upper right corner of the **Library** section.

   The **Edit User Bin** dialog box opens.




3. Click **ACCESS**.

   The **ACCESS** tab opens




4. Use the **Groups** list to select the **user groups** that can access the selected folder.
5. Use the **Users** list to select the **users** that can access the selected folder.
6. Click **Save**.

   Xchange adds the folder to the **Shared Location Library**. The selected user groups and users will have access to the selected folder the next time the log in to Xchange.

# System Monitor

The Xchange System Monitor screen enables you to monitor the status of Xchange. This tool is diagnostic only, and does not contain any adjustment settings.

This chapter discusses the following topic:

- Viewing the System Monitor
- Changing Update Frequency

## Viewing the System Monitor

The System Monitor screen enables you to watch or monitor the status of Xchange.

**To view the System Monitor**

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

   The **Login** screen opens.

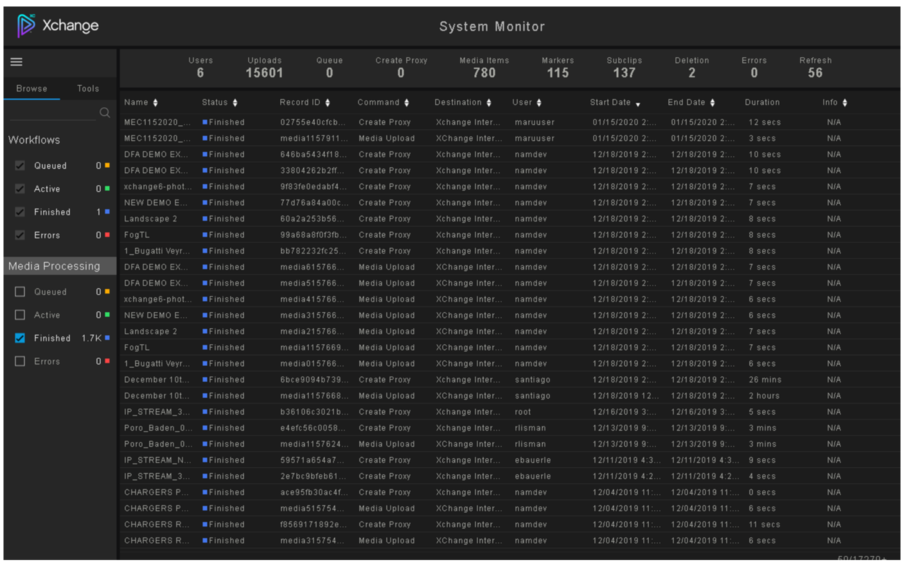
2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.

3. Click **Sign In**.

   **Xchange** opens.

4. From the main menubar, click **System Monitor**.

   The **System Monitor** screen opens.




The **Summary** section along the top of the **System Monitor** screen displays the following information:

- **Users** — the number of users currently logged in to Xchange.
- **Uploads** — the number of assets actively coming into Xchange.
- **Queue** — the number of assets waiting to initiate proxy rendering.
- **Create Proxy** — the number of assets currently creating proxy files. As the number of assets in the **Queue** decreases, the number of assets in **Create Proxy** increases.
- **Media Items** — the number of assets registered in Xchange. High resolution assets and their associated low resolution proxy files count as one media item in Xchange.
- **Markers** — the number of markers placed on Xchange clips.
- **Subclips** — the number of subclips defined in Xchange clips.
- **Deletion** — the number of items pending permanent deletion from Xchange. Only administrators can trigger and execute permanent deletion of media or assets.
- **Errors** — the number of current issues within Xchange.
- **Refresh** — the number of seconds before the next refresh of the **System Monitor** page.

The **Functions** table below the **Summary** section displays information about specific Xchange functions.

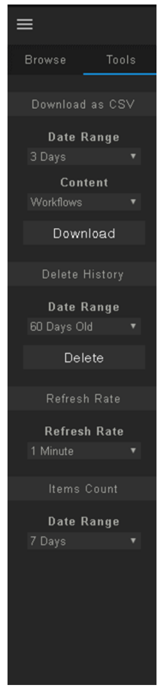
## Changing Update Frequency

You can use the Refresh Rate section in the Tools tab to control the time period between information refreshes of the System Monitor screen.

**To set the refresh rate for the System Monitor screen**

1. In the right panel of the **System Monitor** screen, click the **Tools** tab.

   The **Tools** tab opens.




2. In the **Refresh Rate** section, use the list to select the amount of time to wait between information refreshes of the **System Monitor** screen.

   The **LIBRAY** section contains your **My Media** folder. Any assets that you upload through the UPLOAD MANAGER are automatically added to your **My Media** folder. Since only specific users upload media file, and often times through the **Xchange Premiere Panel**, you may find that your **My Media** folder is empty.

# Project Dashboard

The Xchange Project Dashboard screen enables you to view the project activity in Xchange. You can also use the Project Dashboard screen to create, edit, or delete projects.

This chapter discusses the following topic:

- Viewing the Project Dashboard
- Creating New Projects
- Inspecting Projects
- Deleting Projects
- Searching for Projects

# Viewing the Project Dashboard

The Project Dashboard screen enables you to view the project activity in Xchange.

**To view the System Monitor**

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

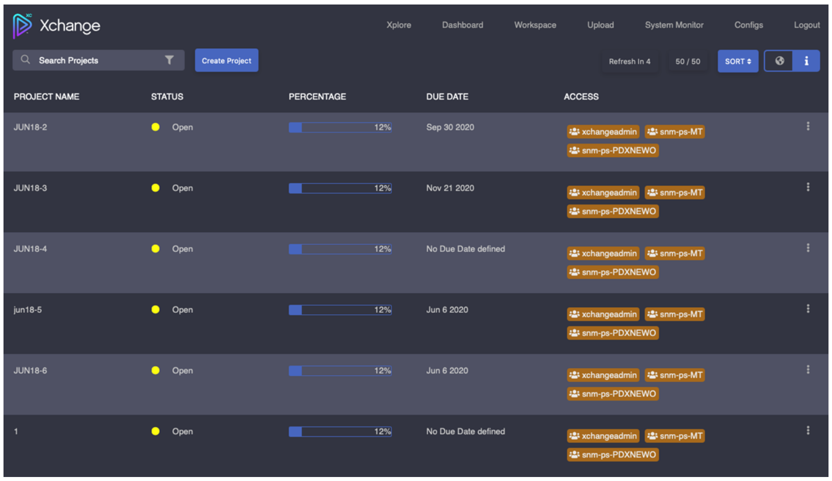
   The **Login** screen opens.

2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

   **Xchange** opens.

4. From the main menubar, click **Project Dashboard**.

   The **Project Dashboard** screen opens displaying information about the projects in your Xchange system.



5. To change the amount of time to wait between information refreshes of the **Project Dashboard** screen, complete the following steps:

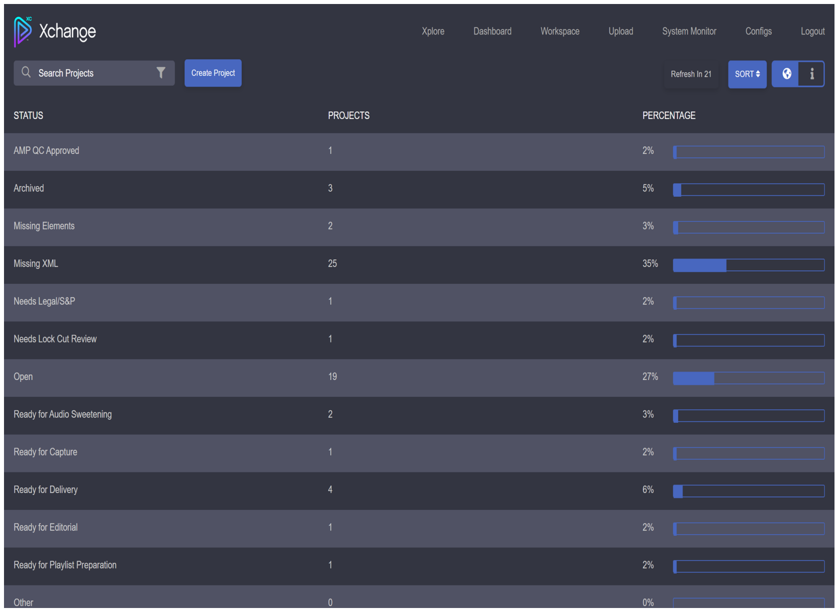
   a. In the upper right corner of the **Project Dashboard** screen, click **Refresh In**.

      The **Refresh** menu opens.


   b. Select the **number of seconds** to wait between information refreshes of the **Project Dashboard** screen. Select **Stop Refresh** to stop refreshing information in the **Project Dashboard** screen.

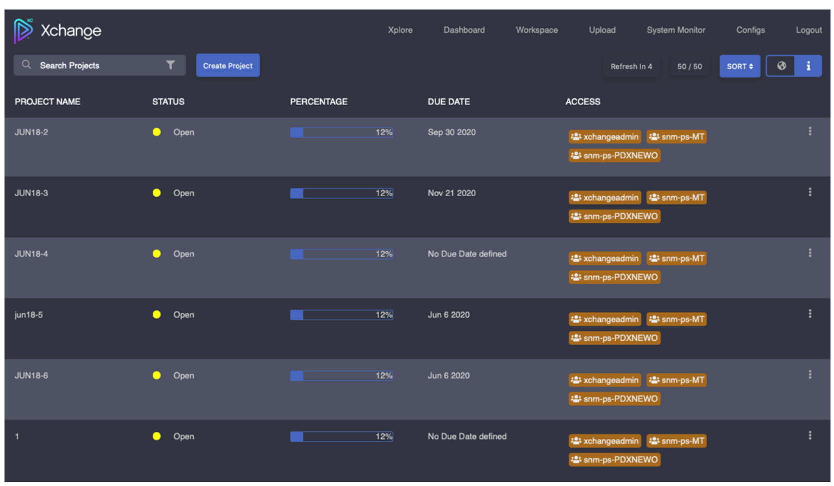
6. To change the **Project Dashboard** screen view to the **Informative** view, click the **Informative** icon.

   The **Project Dashboard** screen changes to the **Informative** view and displays projects by status, quantity, and percentage.




7. To change the **Project Dashboard** screen view to the **Global** view, click the **Global** icon.

   The **Project Dashboard** screen changes to the **Global** view and displays projects by status, quantity, and percentage.




8. Use the **Sort** menu to select how project information is sorted in the **Project Dashboard** screen.

9. The **Visible Projects** number displayed between the **Refresh In** and **SORT** menus displays the number of projects that the Project Dashboard is currently displaying out of the total number projects in your Xchange system.

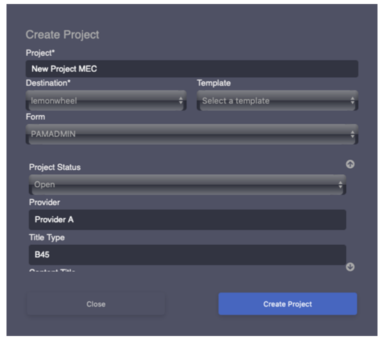
## Creating New Projects

You can also use the Project Dashboard screen to create new projects.

**To create a new project from the Project Dashboard**

1. At the top of the Project Dashboard screen, click Create Project.

   The Create Project dialog box opens.




2. In the **Project** box, enter a name for the project.
3. Use the **Destination** list to select the storage destination for the project.
4. Use the **Form** list to select the form to add more information about the project.

   Forms and permissions are customizable, each user or group can see the available forms and fields according to the requirements.
5. Enter information to complete the selected form.
6. Click **Create Project**.

   Xchange adds the new project to the **Project Dashboard** screen.

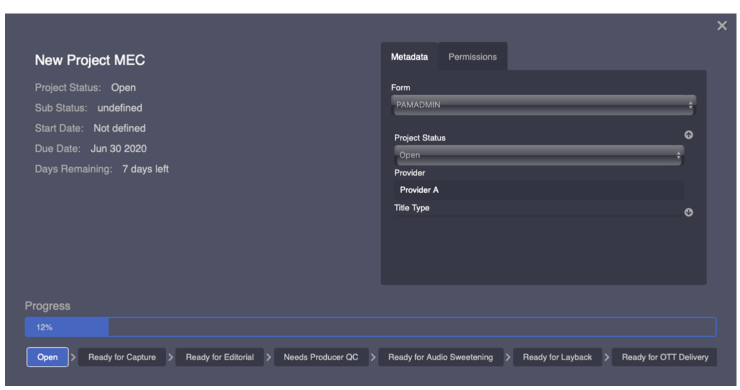
## Inspecting Projects

You can inspect a project to view and modify the metadata attached to the project. Inspecting a project gives you a view of the current status and progress of the project. You can also control user and group access permission to the project.

**To inspect a project**

1. In the **Project Dashboard**, use the **Settings** menu associated with the project to inspect to select **Inspect**.

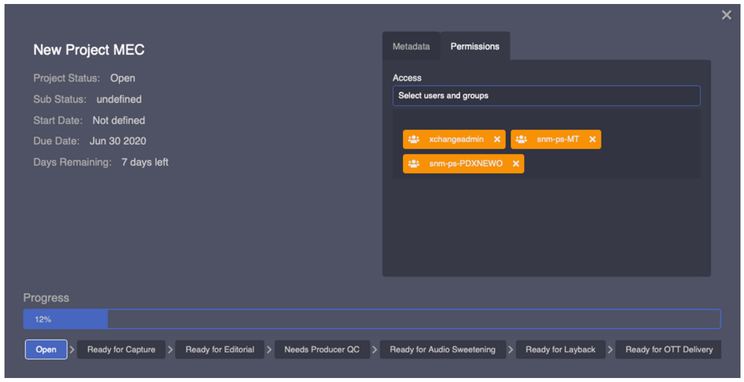
   The **Project Inspection** dialog box opens for the selected project.




The **Metadata** tab displays the metadata attached to the project.

2. To view user and group permissions set for the project, click the **Permission** tab.

   The **Permission** tab opens.




3. Use the **Access** box to select users or groups to access the project.
4. To remove access permission from a user or group, click the **X** associated with the **user** or **group** from which to remove access permission.

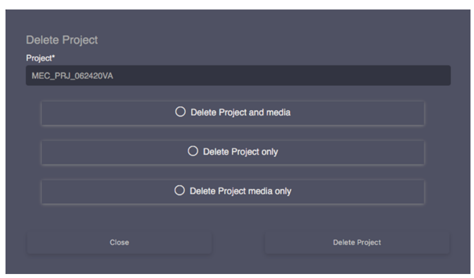
## Deleting Projects

When you delete a project you can choose to delete just the project, just the media, or both.

**To delete a project**

1. In the **Project Dashboard**, use the **Settings** menu associated with the project to delete to select **Delete**.

   The **Delete Project** dialog box opens.




2. Select the **option** that suits the amount of project data you want to delete.

   You can choose to delete just the project, just the media, or both.
3. Click **Delete Project**.

   An **Alert** opens.
4. Click **Agree** to delete the selected project. Click **Cancel** to keep the selected project.

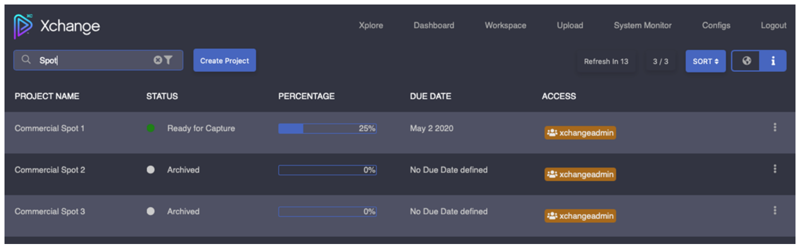
## Searching for Projects

You can use the Search box in the Project Dashboard to focus the projects displayed in the Project Dashboard.

**To search for projects in the Project Dashboard**

1. In the **Search** box, enter a word or part of a word contained in the name of the projects to retrieve.

   The **Project Dashboard** updates to display only the projects with names that contain the text entered in the **Search** box.




2. To once again view all available projects, click the  **Clear** icon in the **Search** box.

   The **Project Dashboard** updates to display all available projects.

# Adding Users and Groups

Users and groups are set up within Xchange to determine permissions to specific modules and assets. Module and asset permissions are usually set up for groups. Users can subscribe to a group to inherit the permissions set for the group. Some permissions can be set at both the group and user level.

This chapter discusses the following topic:

- Creating New Users
- Creating New Groups
- Group Settings

## Creating New Users

You must create a user for each person in your organization that need to work on your Xchange system. An Xchange user enables a person to log on to the Xchange system and it controls their permissions on the system.

**To create a new user**

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

   The **Login** screen opens.
2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

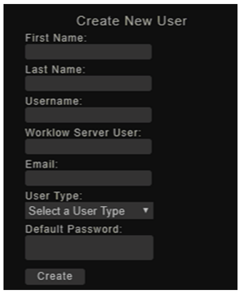
   **Xchange** opens.
4. From the main menubar, click **Configs**.

   The **Configs** screen opens.
5. In the panel on the left hand side of the screen, click **Users**.

   The **Config** screen displays a list of Xchange system users. For each user the list displays user name, last login date, and login location (IP address).

   To view the users currently logged in to your Xchange system, select the **Logged in Users** check box.
6. Click + in the lower left corner of the screen.

   The **Create New User** dialog box opens.




7. In the **First Name** box, enter the first or proper name of the user.
8. In the **Last Name** box, enter the last or family name of the user.
9. If the user is allowed to log in to the Workflow Server connected to the Xchange system, enter their Workflow user name in the **Workflow Username** box.
10. In the **Email** box, enter the corporate e-mail address of the user.
11. Use the **User Type** to select **Admin**, **Manager**, or **Standard** as the user's type.

    Based on their type, a user may have more or less options while working in the Xchange system.
12. In the **Password** box, enter a initial password for the user. All new users should have and initial password.

    After a user logs in to Xchange they can change their password. Passwords are case sensitive.
13. Click **Create**.

    Xchange adds the new user to the **Users** list.

# Creating New Groups

Module and asset permissions are usually set up for groups. Users can subscribe to a group to inherit the permissions set for the group. Some permissions can be set at both the group and user level.

✶ Never delete the **xchangeadmin** group, it is used for configuration purposes!

**To create a new group**

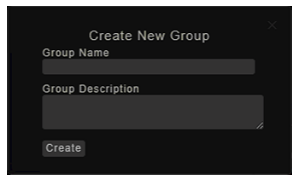
1. In the panel on the left hand side of the **Config** screen, click **Groups**.

   The **Config** screen displays a list of Xchange system groups.

   In the **Search** box at the top of the **Groups** list, enter a word or part of a word contained in name of the groups to retrieve. If the **Groups** list is too long for the **Config** screen to display, click **Load More** to display the next page of groups.

2. Click + in the lower left corner of the screen.

   The **Create New Group** dialog box opens.




3. In the **Group Name** box, enter a name for the group.
4. In the **Description** box, enter a description of the group.
5. Click **Create**.

   Xchange adds the new group to the **Groups** list.

# Group Settings

After you create a group, refer to the following section to apply group settings:

- **General** on page 12–4 — sets general setting for the group subscribers.
- **Users** on page 12–4 — subscribes users to the group.
- **Modules** on page 12–4 — sets the modules that group subscribers can access.
- **Forms** on page 12–5 — sets the forms and the default form used by group subscribers.
- **Smart Bins** on page 12–5 — sets the smart bins that group subscribers can access.
- **Destinations** on page 12–5 — sets the destinations and the default destination that group subscribers are allowed to use.
- **Workflow Server Actions** on page 12–6 — defines that actions exposed to group subscribers.
- **Render Profiles** on page 12–6 — sets the render profiles that group subscribers are allowed to use.
- **Workspaces** on page 12–6 — sets workspaces and the default workspace for group subscribers.

## General

New groups have no General settings selected. If you are not sure of the General settings to selected for your new group, check the Generals settings selected for an existing group.

Select the check box associated with a General setting to select it for your group. Clear the check box associated with as setting to remove it from the group. The available General settings are as follows:

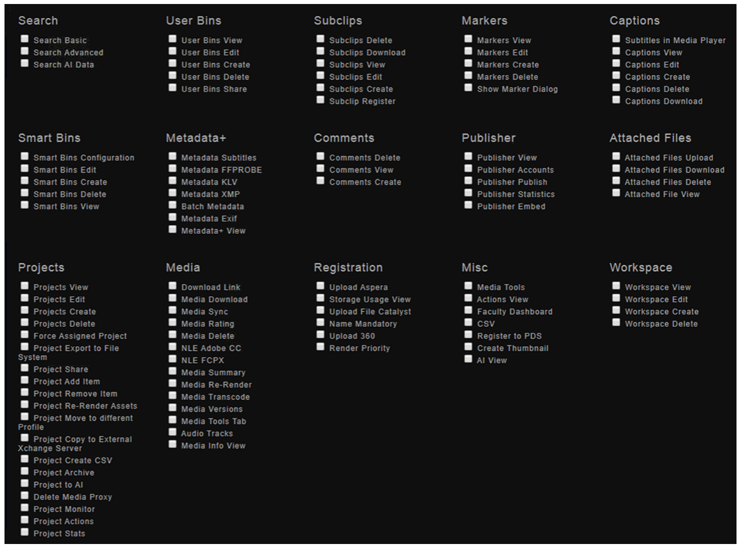


*Figure 12.1 General Settings*

## Users

To select the users that subscribe to a group, select the check boxes associated with the users the you want to subscribe to the group. Clear the check box associated with a user to unsubscribe the user for the group. An example Users list looks as follows:

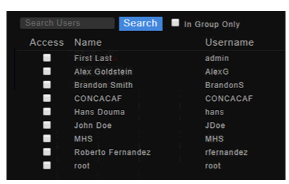


*Figure 12.2 Example Users List*

To view the users already subscribe to a group, select the **In Group Only** check box.

## Modules

Use Modules to define which functionality available to the users subscribed to the group. Select the check boxes associated with the modules that subscribed users can access. Clear the check box associated with a module to remove group access from the module. The available modules are as follows:

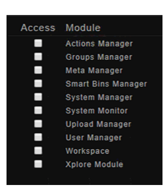


*Figure 12.3 Modules*

## Forms

Forms are used to display metadata. Various forms can be created to display metadata for different purposes. Multiple forms can contain the same metadata field.

There are different forms for media, projects, and Elastic Data Viewer (EDV). Select the check boxes associated with the forms to which subscribed users require access. Clear the check box associated with a form to remove group access from the form. A default forms can be set up for the Xchange Media Info and Registration sections. An example Forms list looks as follows:

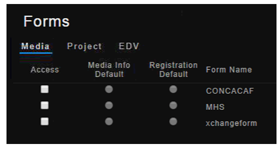



*Figure 12.4 Example Forms List*

## Smart Bins

Smart bins are filtered collections of assets. If a group does not have access to assets (for example through a smart bin) asset will not show up in searches. Select the check boxes associated with the smart bins to which subscribed users require access. Clear the check box associated with a smart bin to remove group access from the smart bin. An example smart bin list looks as follows:

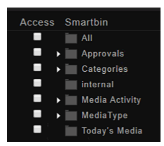



*Figure 12.5 Example Smart Bins List*

✶ Smart bins can also have sub bins. Granting access to the parent smart bin does not grant access to the underlying Sub Bins. You must also grant group access to Sub Bins if required.

## Destinations

An installation can consist of multiple Xchange and other MAM instances.

Use the MAM Servers list to select the destinations the subscribed users can access. Select the check boxes associated with the destinations to which subscribed users require access. Clear the check box associated with a destination to remove group access from the destination. An example Destinations list looks as follows:

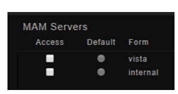



*Figure 12.6 Example MAM List*

Xchange is also capable of publishing to several social media instances, with appropriate licenses. Use the Social Servers list to select the social servers to which subscribed users can publish content. Select the check boxes associated with the social servers to which subscribed users require publishing access. Clear the check box associated with a social server to remove group access from the social server. An example Social Servers list looks as follows:

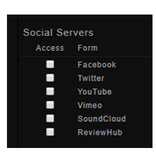



*Figure 12.7 Example Social Servers List*

## Workflow Server Actions

Xchange uses the Workflow Server platform to execute scripts. Use this list to select the actions on the Workflow Server that are available to subscribed users. Select the check boxes associated with the actions to which subscribed users require access. Clear the check box associated with an action to remove group access from the action.

## Render Profiles

Xchange uses different settings to create proxies for streaming, download, and others.

The available settings depend on the configuration of the Xchange platform. You can implement more than one Proxy quality for Streaming, Download, and others. Use this list to enable subscribed users to stream, download, and publish specific asset qualities,

Select the Default check box to set the associated profile as the default profile for subscribed users. Select the Re-Render check box enables subscribed users initiate a render job to create or re-create a proxy.

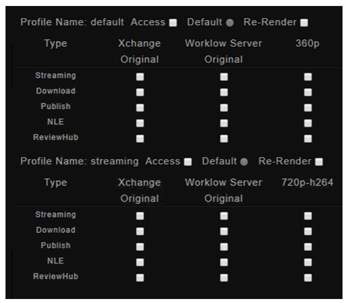



*Figure 12.8*

If you are not sure which check boxes to select, please use an existing group as a template.

## Workspaces

If you have defined multiple workspaces on your Xchange system, you can grant subscribed users access to one or more workspaces. Select the check boxes associated with the workspaces to which to grant subscribed users access. Clear the check box associated with a workspace to remove group access from the workspace. Select the Default option associated with the workspace that you want to be the default workspace for the subscribed users. An example Workspaces list looks as follows:

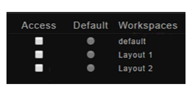



*Figure 12.9 Example Workspaces List*

# Smart Bins

Smart bins use filters to control the assets that they store. All users can create normal bins. Only administrators or users with the appropriate permissions can create smart bins.

This chapter discusses the following topic:

## Creating New Smart Bins

Only administrators or users with the appropriate permissions can create smart bins.

**To create a new Smart Bin**

1. Use a supported browser to open the Streamline Xchange web interface provided by your Streamline Xchange administrator:

   The **Login** screen opens.

2. In the **Login** screen, enter your Streamline Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

   **Streamline Xchange** opens.

4. From the main menubar, click **Configs**.

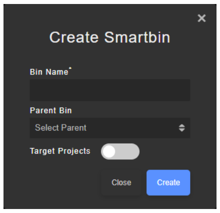
   The **Configs** screen opens.

5. In the panel on the left hand side of the screen, click **Smartbins**.

   The **Config** screen displays a list of the available Smart Bins on your Streamline Xchange system.

6. Click the + button in the lower left corner of the screen.

   The **Create Smartbin** dialog box opens.




7. In the **Create Smartbin** dialog, enter the following:
   › **Bin Name*** — Enter a meaningful name for the smart bin. This field is required, but can be edited after creation if necessary.
   › **Parent Bin** — Select the existing bin that you wish the smart bin to be added to.
   **Note**: If a parent bin is selected in the tree view prior to clicking the + button then it will be preselected.
   › **Target Projects** — If this button is enabled, this smart bin will only display projects that match the configured filters. If this button is disabled (default), this smart bin will only display assets that match the configured filters.
8. Click **Create**.

   Streamline Xchange will create your new smart bin in the selected parent bin.

9. To add filters to control which assets will be stored in your smart bin, see:
   › "**To set a filter for a Smart Bin**" on page 13–3

✶ **IMPORTANT**:

You must also go to the **Groups** and/or **Users** lists to select who will have access to the newly created smart bin. If you do not grant access then the Smart Bin will not be visible to users.

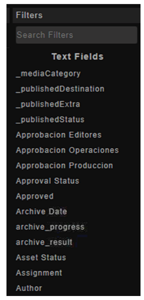
› See, "**To Allow Groups or Users Access to the Smart Bin**" on page 13–4

## Setting Smartbin Filters

Smartbins use filters to control the assets that they store. The right hand side of the screen lists the available metadata fields that can be used to set Smart Bin filters.

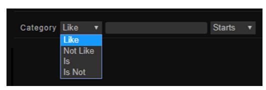
**To set a filter for a Smart Bin**

1. Drag and drop metadata fields from the Metadata Fields list to the middle area of the screen.




2. If the **Metadata Fields** list does not display the field your require, try using the **Search Filters** box at the top of the list to find the field.

   Use the Operators list to determine the filter criteria for the selected metadata field.




   The filter criteria **Is** and **Is Not** are absolute, if the criteria are not completely met, the result is false. The filter criteria **Like** and **Not Like** allow for partial matching within the **Search** string. The extra criteria in the last column are **Start**, **Ends**, and **Any Part**.

   It is possible to stack different filters and build a series of filters within the Smart Bin. All filter results must be true in order for an asset to show up inside a Smart Bin.

3. You must proceed to make the new smart bin available to users or user groups:

› "**To Allow Groups or Users Access to the Smart Bin**" on page 13–4

## Allowing Smart Bin Access

After creating a smart bin, it is important to grant access to the appropriate users or groups. Access can be assigned either during smart bin creation or afterwards.

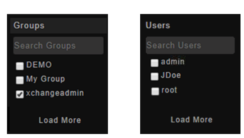



*Figure 13.1 Groups and User Access*

✶ **IMPORTANT**:
Smart bins may include sub bins. Granting access to a parent smart bin **does not** automatically grant access to its sub bins. If access to a sub bin in is required, permissions must be set separately for each one.

### To Allow Groups or Users Access to the Smart Bin

1. To grant access to Groups or Users, go to **Config > Smartbin**, and select the Smartbin you wish to edit.
2. Go to the **Groups** panel and/or **User** panel on the right side, and select all of the Groups or Users you wish to have access to the Smartbin.
3. To verify that the permissions have been applied, log out of Streamline Xchange, and log in as one of the users you granted access to. Confirm that the smart bin is available in the **Xplore > Browse** tab under the **Smartbin** panel.

### To Modify Access to Existing Smart Bins

1. Navigate to **Xplore > Browse** panel.
2. In the **Smartbin** panel, select the desired smart bin.
3. Click the ellipsis ⋮ button.
4. In the **Smartbin Access** dialog, select or de-select the appropriate Groups and/or Users to control access.

✶ **IMPORTANT**:

Remember that you must repeat this action to set permissions for each individual sub bin within a parent bin.

# Metadata and Forms

Metadata is important to enable fast searching and clear categorizing of assets within your Xchange system. Forms organize the display of metadata fields and enable a better overview of metadata fields assigned to assets.

This chapter discusses the following topic:

- Creating New Forms
- Adding Individual Metadata Fields

## Creating New Forms

After you create a form you can add metadata fields to the form.

#### To create a new form

1. Use an HTML5 web browsers to open the Xchange web page provided by your Xchange administrator:

   The **Login** screen opens.

2. In the **Login** screen, enter your Xchange login credentials in the **Username** and **Password** boxes.
3. Click **Sign In**.

   **Xchange** opens.

4. From the main menubar, click **Configs**.

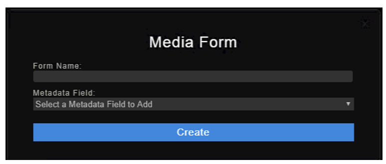
   The **Configs** screen opens.

5. In the panel on the left hand side of the screen, click **Metadata**.

   The **Config** screen displays a list of the available forms on your Xchange system, one for media and one for projects.

6. Click + in the lower left corner of the screen.

   The **Media Form** dialog box opens.




7. In the **Form Name** box, enter a name for the form.
8. Use the **Metadata Field** list to select a metadata field to add to the new form.

   When adding metadata fields to a form, there are several options you can set for that field. You can add metadata fields from the list on the right hand side by dragging and dropping these into the middle section of the Xchange screen.

   When importing metadata from other systems, metadata fields that are not in your Xchange system will be automatically populated. Automatically populated metadata fields are not on a form by default.

### Options

The following options are valid for the form only and can be different between individual forms:

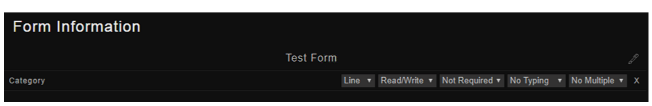



*Figure 14.1 Form Options*

- **Line** — use this list to select the number of lines that to display.
- **Read-Write** or **Read Only** — use this list to select if the metadata field value can be modified or if it is read-only.
- **Not Required** or **Required** — use this list to select if the metadata field value is mandatory or not.
- **No Typing** or **Allow Typing** — use this list to select if a user can enter free text in a metadata field or if they can only select from predefined values.
- **No Multiple** or **Allow Multiple** — use this list to select if a a user can select one or multiple predefined values.

## Predefined Values

In particular cases, it may be wise only to create pre-defined values for a metadata field.


*Figure 14.2 Form Predefined Values*

Enter the desired predefined values in the **Predefined Values** field, separated by commas. By selecting **No Typing** in the **Option** section, users must select a value for the metadata field from the set predefined values.

# Adding Individual Metadata Fields

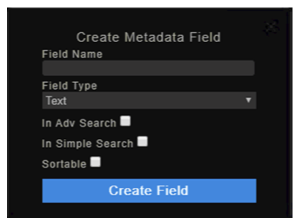
You can also add individual metadata fields to a form.

✶ In order to use your added fields, you must place the fields on a form.

**To add individual metadata fields to a form**

1. Click + in the lower left corner of the screen.

   The **Create Metadata Field** dialog box opens.




2. In the **Field Name** box, enter a name for the field.
3. Use the **Field Type** list to select whether the field is a **Text**, **Date**, **Flag**, or **Time** field.
4. Select the **In Adv Search** check box to incorporate the field in advanced searches.
5. Select the **In Simple Search** check box to incorporate the field in simple searches.
6. Select the **Sortable** check box to enable the value of the field to be used for sorting.
7. Click **Create Field**.

   Xchange creates the defined metadata field.

# Video Editor

If your MAM workflow includes the Ross Video Streamline Pro media asset manager, and your organization has purchased the Streamline Pro Video Editor license, then you can use the Streamline Xchange **Video Editor** tab to quickly access the Streamline Pro Video Editor web interface.

✶ For more details, please see the **Streamline Pro Web Video Editor User Guide v6.9**.

This chapter discusses the following topic:

- Starting the Video Editor

# Starting the Video Editor

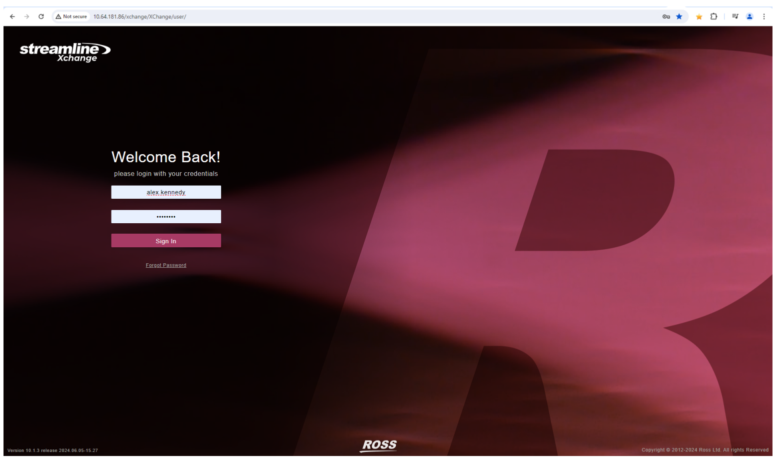
You can open the Streamline Pro Web Video Editor from the Streamline Xchange MAM user interface.

✶ **NOTE:** If you do not see a Video Editor tab in your Streamline Xchange expanded menu, please contact your system administrator. An enabled Streamline Pro Video Editor license is required.

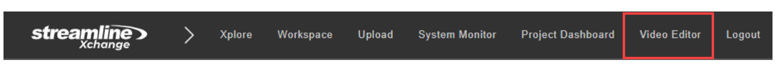
#### To open the Streamline Pro Web Video Editor

1. Use one of the following supported web browsers to open the Streamline Xchange Web Editor provided by your Streamline administrator:
   - Google Chrome™ 126.0 and later
   - Apple Safari® 17.4.1 and later

   *The Streamline Xchange Sign In page opens.*

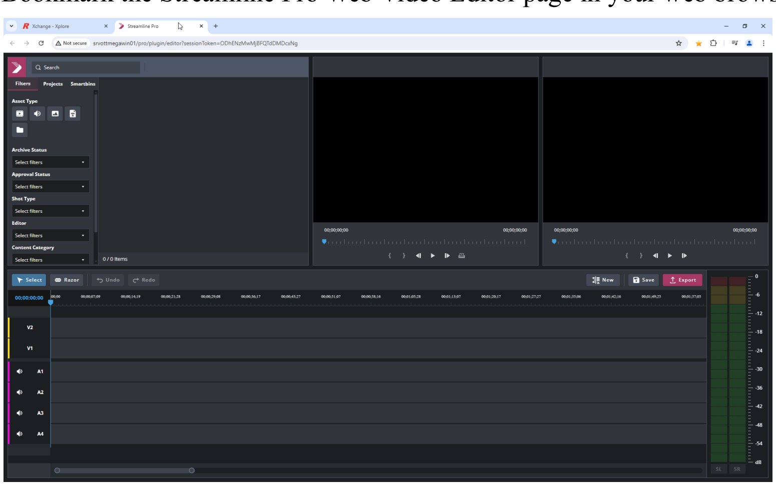
   
   

2. Enter your Streamline Xchange credentials in the **Username** and **Password** boxes.
3. From the top menu of Streamline Xchange, to expand the menu select the  button.
4. Select **Video Editor** to launch the Streamline Pro Web Video Editor.

   *The Streamline Pro Web Video Editor opens in a new Tab.*

5. Bookmark the Streamline Pro Web Video Editor page in your web browser.

✶ For your security, Streamline automatically logs you out after 30 minutes of inactivity. If you sign in from another device or browser tab, this session will automatically log you out.

#### To close the Streamline Pro Video Editor

1. In **Streamline Pro** tab, click the close icon ✕ to end the Streamline Pro Video Editor web session.
2. Go to the Streamline Xchange **Xchange - Xplore** tab, from the expanded menu click **Logout**.