streamline

Configuration Guide

Version 3.3

Production Technology Experts

Thank You for Choosing Ross

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

Our mission is to:

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

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

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

David Ross
CEO, Ross Video
dross@rossvideo.com

Ross Video Code of Ethics

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

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

Streamline · Configuration Guide

- Ross Part Number: **7800DR-005-3.3**
- Release Date: June 11, 2018. Printed in Canada.
- Software Issue: **3.3**

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 Server systems to be free from defects under normal use and service a time period of 15 months from the date of shipment:

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

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

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

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

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

Extended Warranty

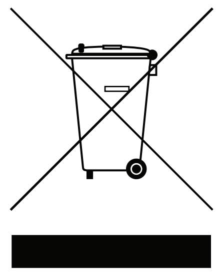
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Streamline Server system, contact your regional sales manager.

Environmental Information

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

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

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



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

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

Company Address

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Website:	http://www.rossvideo.com

Contents

Introduction

A Word of Thanks

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

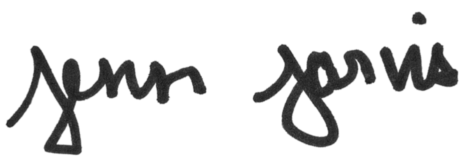
We are committed to providing you with the highest level of customer satisfaction possible. If, for any reason, you have questions or comments, please call Ross Video at +1-613-652-4886 or send us an e-mail at techsupport@rossvideo.com.

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

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

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

Yours Sincerely,



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About This Guide

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

- Chapter 1, "**Introduction**" summarizes the guide and provides important terms, conventions, and features.
- Chapter 2, "**Configuring System Properties**" provides instructions on how to configure a Streamline system.
- Chapter 3, "**Configuring User Permissions**" provides instructions on how to set role-base user permissions for Streamline users.
- Chapter 4, "**Configuring LDAP Authentication**" provides instructions on how to use LDAP to create Streamline user accounts and roles.
- Chapter 5, "**Managing Perspectives**" provides instructions on how to customize the layout of the Streamline user interface.
- Chapter 6, "**Configuring MOS Connections**" provides instructions on how to configure the MOS protocol connection between Streamline and XPression).
- Chapter 7, "**Configuring Custom Metadata**" provides instructions on how to define custom entities and attributes, and to manage existing attributes and define custom attributes
- Chapter 8, "**Managing Streamline Forms**" provides instructions on how to include and exclude attributes from a form, set attributes as requiring a value, and display attribute content as read-only.
- Chapter 9, "**Configuring Metadata Elements**" provides instructions on how to specify the choices available in the metadata lists displayed in the Streamline panels.
- Chapter 10, "**Selecting the Metadata to Upload**" provides instructions on how to create and mange mapping profiles that select the asset attributes in which to save media file metadata properties.
- Chapter 11, "**Configuring Work Order Notifications**" provides instructions on how to configure the e-mail addresses used to send and receive work order notifications.
- Chapter 12, "**Configuring Asset Properties**" provides instructions on how to configure the storage location, targets, and transcoders for the assets in your Streamline system.
- Chapter 13, "**Configuring Accounts**" provides instructions on how to create and modify the accounts Streamline uses to purchase content.
- Chapter 14, "**Configuring Feeds**" provides instructions on how to create and modify the feeds Streamline uses to select content to purchase from media services.
- Chapter 15, "**Selecting Feed Metadata to Ingest**" provides instructions on how to use mapping profiles to select the asset attributes in which to save feed content metadata property values.
- Appendix A, "**Appendix A: Mapping Profiles**" describes media file metadata properties to Streamline properties mappings contained the mapping profiles included with a Streamline system.

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

Documentation Conventions

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

Interface Elements

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

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

User Entered Text

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

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

Referenced Guides

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

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

Menu Sequences

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

Important Instructions

Star icons identify important instructions or features. For example:

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

Getting Help

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

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

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

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

Contacting Technical Support

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

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

North America

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

Our telephone number is: +1-613-652-4886

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

EMEA

Our EMEA center is located in Buckinghamshire, England, United Kingdom and is open Monday to Friday 8:30 a.m. to 5:00 p.m. GMT. After hours support is provided by our North America location.

Our telephone number is: +44 (0)1189502446

International toll free: +800 1005 0100

Emergency After-hours Support

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

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

International toll free: +800 1005 0100

Online

E-mail: techsupport@rossvideo.com

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

Configuring System Properties

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

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

This chapter discusses the following topics:

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

Accessing Streamline System Properties

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

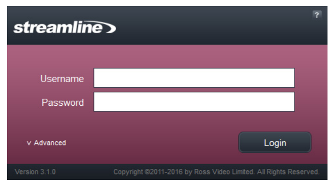
Streamline can be accessed using one of the following web browsers:

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

To access Streamline system properties

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

   The **Login** panel opens.



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

   The default system administrator login credentials are as follows:

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

3. Click **Login**.

   Streamline opens.

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

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

   The **Configuration** window opens.

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

Configure Database Connectivity

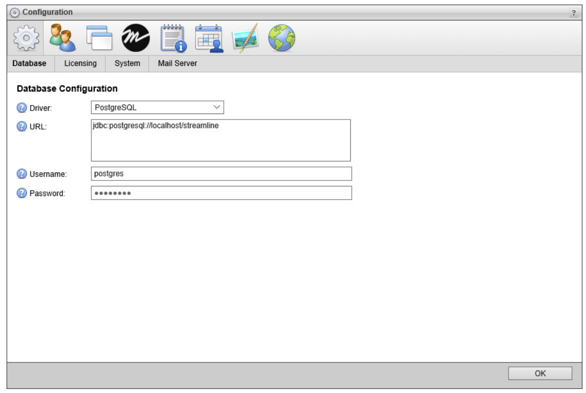
To configure database connectivity

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

   The **System** panel opens.

2. Click the **Database** tab.

   The **Database** tab opens.



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

   `jdbc:postgresql://localhost/streamline`

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

   The box looks empty, even after specifying a password.

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

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

Activate a Product Key

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

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

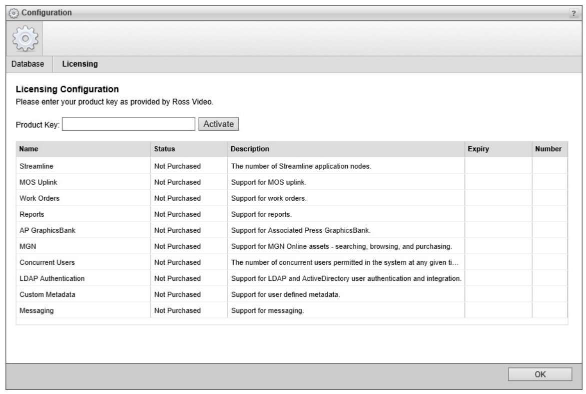
To activate a Streamline product key

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

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing** tab opens.



3. Obtain a Streamline product key from Ross Video Technical Support.

4. In the **Key** box, enter the product key obtained from Ross Video Technical Support.

5. Click **Activate**.

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

6. Click **OK**.

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

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

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

   The **Configuration** window closes.

8. Refresh your web browser window.

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

For More Information on...

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

Reactivate a Product Key

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

To reactivate a Streamline product key

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

   The **System** panel opens.

2. Click the **Licensing** tab.

   The **Licensing** tab opens.

3. Click **License Options**.

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

4. Click **Reactivate**.

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

5. Click **OK**.

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

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

   The **Configuration** window closes.

7. Refresh your web browser window.

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

Deactivate a Product Key

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

To deactivate a Streamline product key

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

   The **System** panel opens.

2. Click the **Licensing** tab.

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

3. Click **License Options**.

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

4. Click **Deactivate**.

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

5. Click **OK**.

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

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

Set the Local Time Zone

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

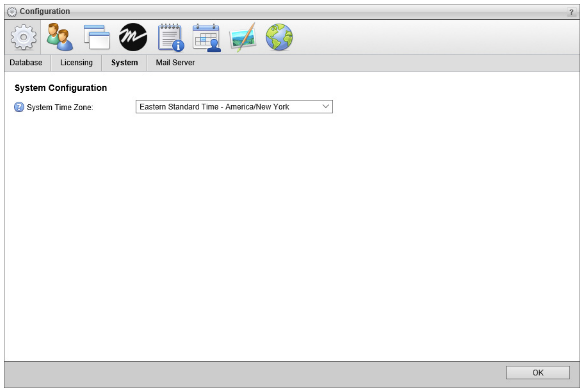
To set the time zone for your Streamline system

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

   The **System** panel opens.

2. Click the **System** tab.

   The **System** tab opens.



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

Configure the E-mail Server

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

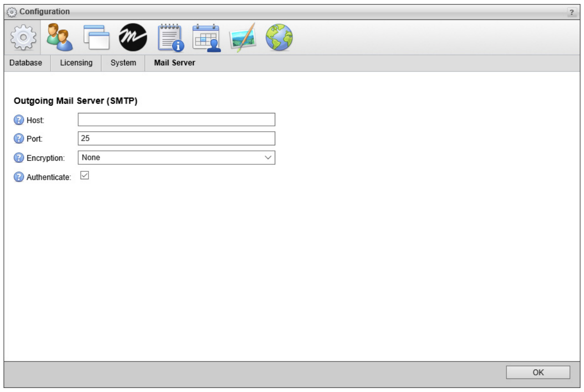
To configure the e-mail server

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

   The **System** panel opens.

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

   The **Mail Server** tab opens.



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

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

Configuring User Permissions

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

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

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

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

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

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

This chapter discusses the following topics:

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

Creating a User Role

To create a user role

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

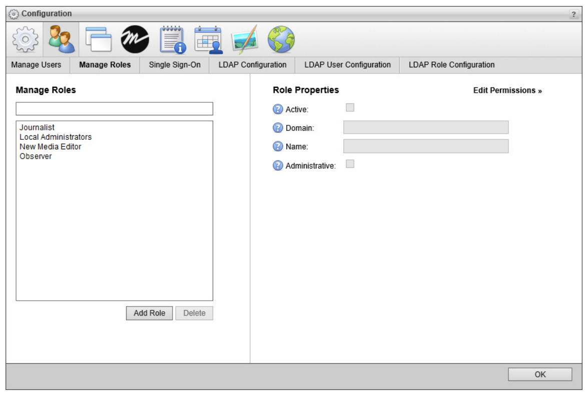
   The **Configuration** window opens.

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

   The **Users** panel opens.

4. Click the **Manage Roles** tab.

   The **Manage Roles** tab opens.



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

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

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

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

7. In the **Name** box, enter a name for the user role.
8. Select the **Administrative** check box to grant the user role all user permissions and enable the user role to configure all administrative settings.

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

9. Click **Edit Permissions**.

   The **Role Permissions** list opens.

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

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

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

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

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

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

For More Information on...

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

Modifying a User Role

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

To modify a user role

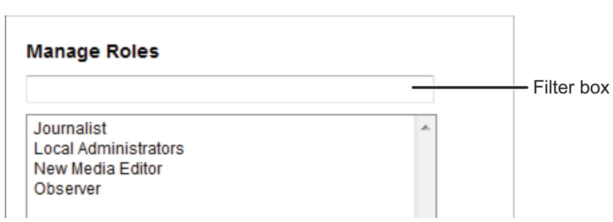
1. On the **Configuration** window toolbar, click the **Users** icon.

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

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

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

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



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

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

5. Click **Edit Permissions**.

   The **Role Permissions** list opens.

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

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

For More Information on...

- user roles, refer to the sections "**Creating a User Role**" on page 3–2, and "**Deleting a User Role**" on page 3–6.
- user accounts, refer to the sections "**Creating a User Account**" on page 3–7, "**Modifying a User Account**" on page 3–8, and "**Deleting a User Account**" on page 3–9.
- typical user permissions, refer to the section "**Typical User Role Permissions**" on page 3–4.

Typical User Role Permissions

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

Table 3.1 Assets

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

Table 3.2 Work Orders

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

Table 3.3 Reports

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

Table 3.4 Searches

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

Permission Dependencies

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

Table 3.5 Dependant Permissions

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

For More Information on...

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

Assigning Permissions

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

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

To assign permissions to a user role

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

   The **Users** panel opens.

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

   The **Manage Roles** tab opens.

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

   The **Role Permissions** list opens.

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

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

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

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

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

Deleting a User Role

You can delete user roles created in Streamline.

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

To delete a user role

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

   The **Users** panel opens.

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

   The **Manage Roles** tab opens.

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

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

5. Click **OK**.

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

For More Information on...

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

Creating a User Account

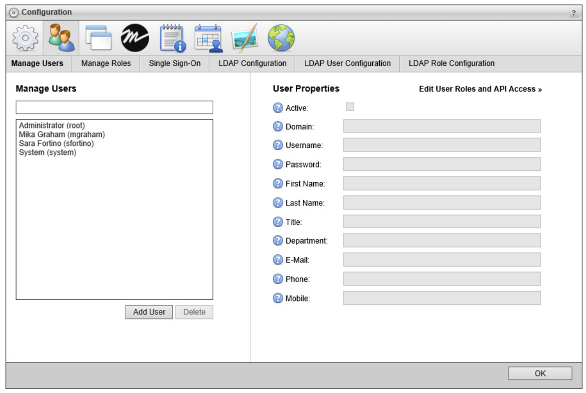
To create a user account

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

   The **Users** panel opens.

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

   The **Manage Users** tab opens.



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

   Streamline automatically saves property values set for a new user.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

14. Click **Edit User Roles**.

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

For More Information on...

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

Modifying a User Account

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

To modify a user account

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

   The **Users** panel opens.

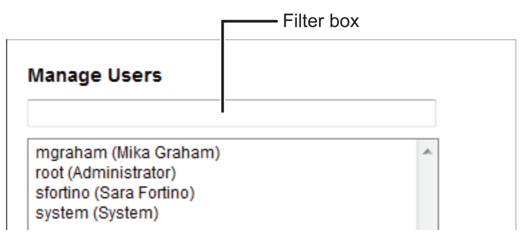
2. Click the **Manage Users** tab.

   The **Manage Users** tab opens.

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

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

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



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

   Streamline automatically saves property value changes made to a user.

5. Click **Edit User Roles**.

   The **User Roles** list opens.

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

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

For More Information on...

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

Deleting a User Account

You can delete user accounts created in Streamline.

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

To delete a user account

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

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

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

   A confirmation message opens, asking you if you want to delete the selected user.
5. Click **OK**.

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

For More Information on...

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

Configure Single Sign-On for Inception and Streamline

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

- “**Verify Matching Inception and Streamline Users**” on page 3–9
- “**Add a Single Sign-On Trust Relationship to Both Servers**” on page 3–10
- “**Create a Streamline MOS device on the Inception Server**” on page 3–11

Verify Matching Inception and Streamline Users

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

For More Information on...

- manually creating user accounts in a Streamline system, refer to the section “**Creating a User Account**” on page 3–7.
- using LDAP to add user accounts to a Streamline system, refer to the chapter, “**Configuring LDAP Authentication**” on page 4–1.
- adding user accounts to Inception, refer to the ***Inception Configuration Guide*** or **Online Help** system.

Add a Single Sign-On Trust Relationship to Both Servers

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

Inception Server

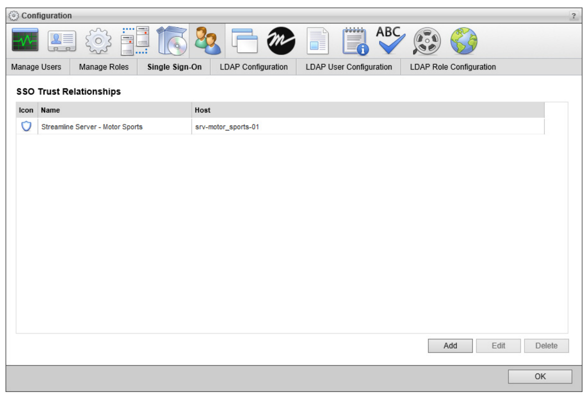
To add a single sign-on trust relationship with the Streamline system

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

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

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

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



5. Click **Add**.

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

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

   The **Configuration** window closes.

Streamline System

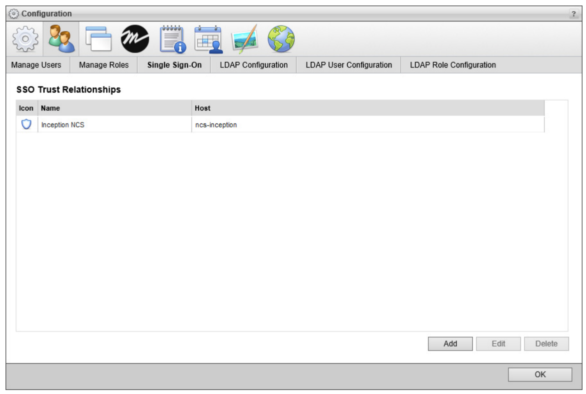
To add a single sign-on trust relationship with the Inception Server

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

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

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

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



5. Click **Add**.

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

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

   The **Configuration** window closes.

Create a Streamline MOS device on the Inception Server

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

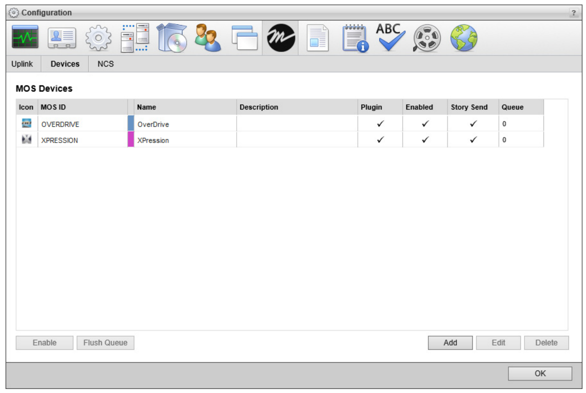
To add a Streamline MOS device to Inception

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

   The **MOS** panel opens.

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

   The **Devices** tab opens.



3. Click **Add**.

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

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

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

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

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

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

8. Click **Next**.

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

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

10. Click **Next**.

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

11. Click **Save**.

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

Manage Single Sign-On Trust Relationships

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

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

Edit Single Sign-On Trust Relationship Properties

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

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

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

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

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

Delete Single Sign-On Trust Relationships

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

To delete a single sign-on trust relationship

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

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

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

Configuring LDAP Authentication

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

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

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

This chapter discusses the following topics:

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

Connect to an LDAP Directory Server

To connect to an LDAP directory server

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

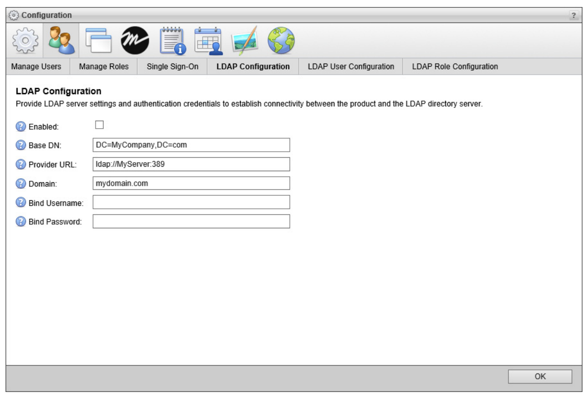
   The **Configuration** window opens.

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

   The **Users** panel opens.

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

   The **LDAP Configuration** tab opens.



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

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

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

   Example: `DC=MyCompany,DC=com`

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

   Example: `ldap://MyServer:389`

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

   Example: `rossvideo.com`

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

For More Information on...

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

Map to LDAP User Data

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

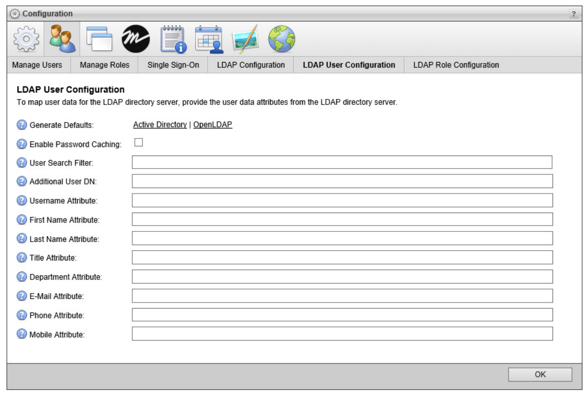
To map to LDAP user data

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

   The **Users** panel opens.

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

   The **LDAP User Configuration** tab opens.



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

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

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

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

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

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

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

   Example: `uid` or `sAMAccountName`

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

   Example: `givenName`

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

   Example: `sn`

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

    Example: `title`

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

    Example: `department`

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

    Example: `mail`

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

    Example: `telephoneNumber`

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

    Example: `mobile`

For More Information on...

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

Map to LDAP Group (Role) Data

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

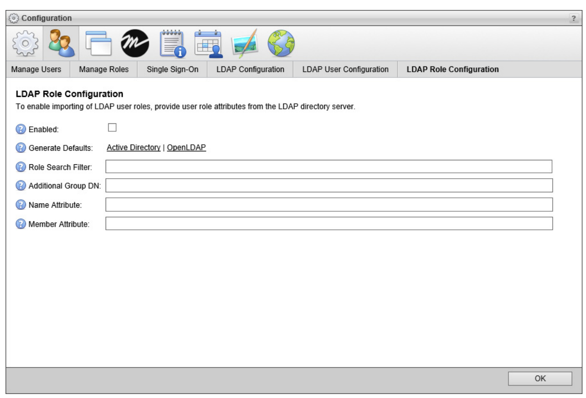
To map to LDAP group (role) data

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

    The **Users** panel opens.

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

    The **LDAP Role Configuration** tab opens.



3. To populate the **LDAP Roles Configuration** tab with editable default values, click one of the following **Generate Defaults** links:
    - **Active Directory** — your organization uses Active Directory.
    - **OpenLDAP** — your organization uses an OpenLDAP directory server.

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

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

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

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

   Example: `cn`

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

   Example: `memberOf`

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

For More Information on...

- LDAP Authentication, refer to the chapter "**Configuring LDAP Authentication**" on page 4–1
- how to connect to an LDAP directory server, refer to the section "**Connect to an LDAP Directory Server**" on page 4–2
- how to import LDAP user account data, refer to the section "**Map to LDAP User Data**" on page 4–3

Managing Perspectives

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

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

Perspectives can include any or all panel types:

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

This chapter discusses the following topics:

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

Creating a New Perspective

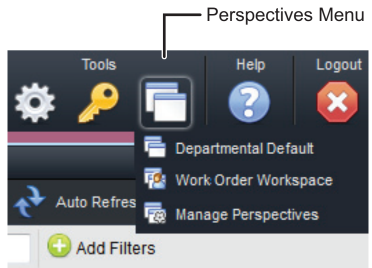
All Streamline users can create perspectives for their own use. Streamline administrators can also create global perspectives available to all users.

To create a new perspective for your own use

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

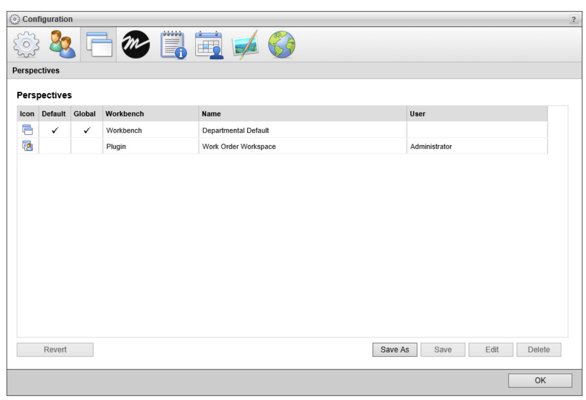
   For more information about repositioning panels, refer to the ***Streamline User Guide***.
4. In **Work Order**, **Reports**, and **Asset Browser** panels, display the panel columns to include in the perspective.

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



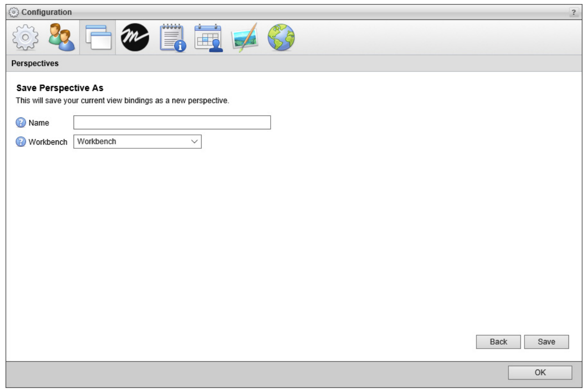
6. In the list, click **Manage Perspectives**.

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



7. Click **Save As**.

   The **Save Perspective As** page opens.



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

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

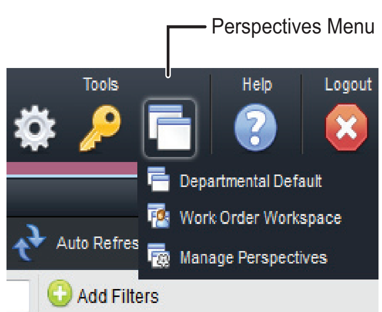
Opening a Saved Perspective

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

To open a saved perspective

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

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



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

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

Renaming a Perspective

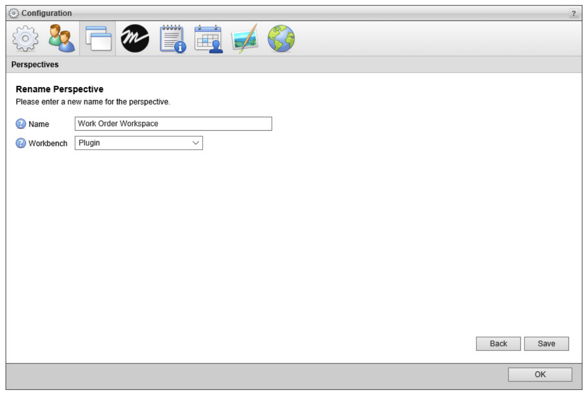
To rename a perspective

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

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

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

   The **Rename Perspective** page opens.



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

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

6. Use the **Workbench** list to select the environment in which to use the new perspective. The available options are as follows:
   - **Workbench** — use the perspective in Streamline.
   - **Plugin** — use the perspective in the Streamline plugin.
7. Click **OK** to close the **Configuration** window.

Changing the Layout of a Perspective

To change the layout of a perspective

1. Rearrange the panels in a perspective to form the new layout for the perspective.
2. In the **Work Order Manager**, **Reports Manager**, and **Asset Browser** panels, display the panel columns to include in the perspective.
3. On the main toolbar, use the **Perspectives** icon to select **Manage Perspectives** from the list.

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

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

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

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

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

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

Reverting a Perspective to the Default Layout

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

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

The following illustration describes the default layout.

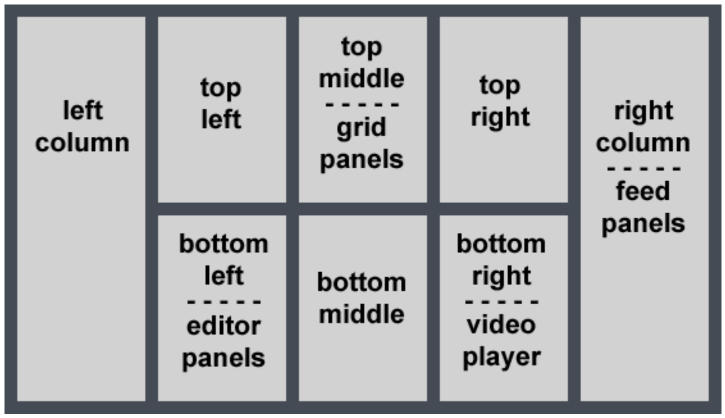


Figure 5.1 Default Panel Layout

Default layout positions are as follows:

- Grid-based panels open in the top middle box. These include the Work Order Manager, Reports Manager, the Asset Browser, and the Approval Manager panels.
- The Asset Editor and Work Order Editor interfaces open in the right column.

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

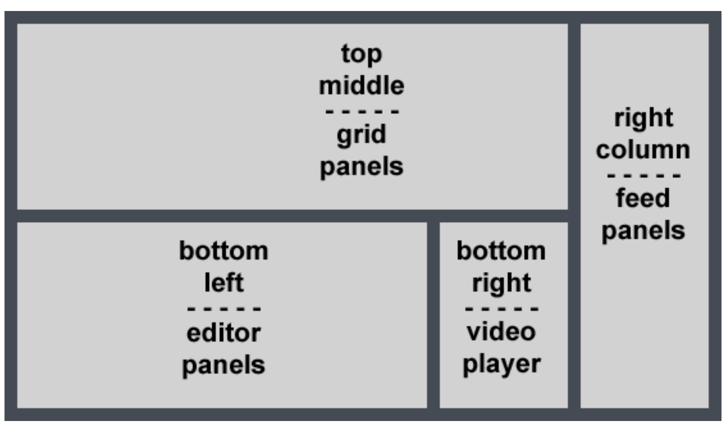


Figure 5.2 Actual Layout with all Panel Types Open

To revert a perspective to the default layout

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

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

2. In the **Perspective** list, select the perspective to apply the default layout.

3. Click or tap **Revert to Default**.

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

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

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

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

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

Making a User Perspective Global

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

To make a perspective global

1. Log in to Streamline as an administrator.

   Only administrators can make a perspective available to all users.

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

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

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

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

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

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

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

To make a global perspective user-specific

1. As an administrator, use the **Perspectives** icon to select **Manage Perspectives** from the list.

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

2. In the **Perspectives** list, select the global perspective to make user-specific.

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

   When the selected perspective is the set default perspective, complete the procedure “**To remove a perspective as the default perspective**” on page 5–7 before continuing with the next step in this procedure.

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

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

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

Setting the Default Perspective

When a user first opens Streamline, the default perspective opens selected panels in set positions. Users continue to use the default layout until they move a panel or open a saved perspective. Any global perspective can be set as the default perspective for Streamline users.

To set the default perspective

1. Log in to Streamline as an administrator.

   Only administrators can set the default perspective for all users.

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

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

3. In the **Perspectives** list, select the global perspective to set as the default perspective for all users.

   A check mark in the **Global** column of the **Perspectives** list indicates the global perspectives that you can select to set as the default perspective.

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

   A check mark displays in the **Default** column of the selected perspective. You can only set one perspective as the default perspective.

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

To remove a perspective as the default perspective

1. Log in to Streamline as an administrator.

   Only administrators can remove a perspective as the default perspective.

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

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

3. In the **Perspectives** list, select the current default perspective.

   A check mark in the **Default** column of the **Perspectives** list indicates the current default perspective.

4. Click **Remove as Default**. This option is only available to Streamline administrators.

   Streamline removes the check mark from the **Default** column of the selected perspective. Without selected default perspective, Streamline uses a built-in perspective as the default perspective.

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

Deleting a Perspective

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

To delete a perspective

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

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

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

3. Click or tap **Delete**.

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

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

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

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

Configuring MOS Connections

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

This chapter discusses the following topics:

- Connecting Streamline with XPression
- Uplinking Streamline Assets with an NCS

Connecting Streamline with XPression

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

API Access

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

To setup a Streamline user account for API access with XPression

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

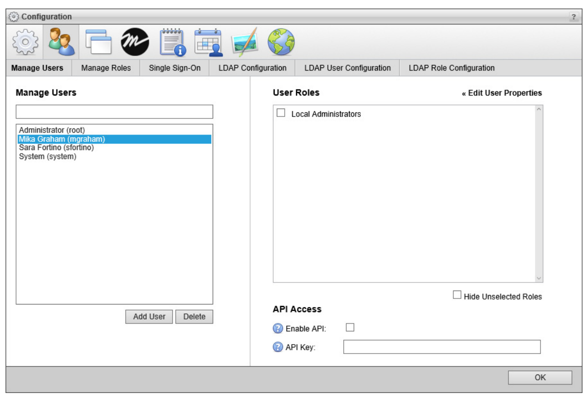
   The **Configuration** window opens.

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

   The **Manage Users** tab of the **Users** panel opens.

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

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



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

   Streamline automatically enters an XPression API key in the **API Key** box that identifies the Streamline system to your XPression system.

7. Copy the text displayed in the **API Key** field.
8. Click **OK** to apply your changes and close the **Configuration** window.

XPression MOS Connection

After setting an API key for a Streamline user account, you can configure a MOS connection between Streamline and XPression.

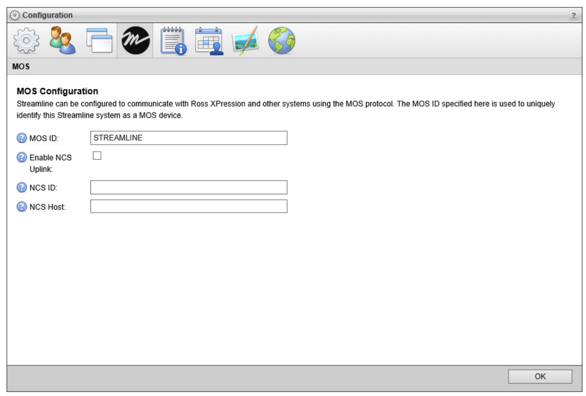
To configure a MOS connection between Streamline and XPression

1. In your XPression system, create a MOS device to represent the Streamline system.
2. Record the MOS device identifier (MOS ID) for your Streamline system.
3. Log in to Streamline as a system administrator.
4. On the main toolbar, click the **Configuration** icon.

   The **Configuration** window opens.

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

   The **MOS** panel opens.



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

   The MOS ID uniquely identifies the Streamline system as a MOS device.

7. Click **OK**.

For More Information on...

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

Uplinking Streamline Assets with an NCS

Streamline systems can be configured to uplink assets to an NCS, like Ross Inception, using the MOS protocol.

✶ You require a MOS Uplink license for your Streamline system to uplink assets with an NCS.

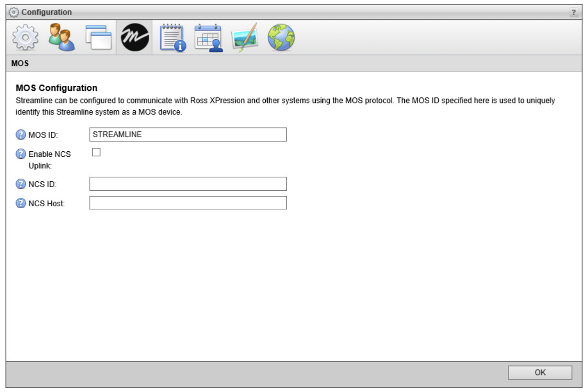
To configure an uplink between a Streamline system and an NCS

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

   The **Configuration** window opens.

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

   The **MOS** panel opens.



   When the following check boxes do not display on the MOS panel, your Streamline system does not have a MOS Uplink license:

   - **Enable NCS Uplink**
   - **NCS ID**
   - **NCS Host**

4. Select the **Enable NCS Uplink** check box to establish a connection between the Streamline system and the NCS specified in the **NCS ID** and **NCS Host** boxes.
5. In the **NCS ID** box, enter the NCS ID of your NCS.
6. In the **NCS Host** box, enter the hostname or IP address of the NCS gateway.
7. Click **OK**.

Configuring Custom Metadata

Custom metadata configuration enables you to define custom entities and attributes, and to manage existing attributes and define custom attributes for the following Streamline entities:

- Assets
- Work Orders

The custom entities and attributes that you define are local to your Streamline system and independent of standard Streamline entities and attributes. This feature also provides a method of representing cross-product metadata.

This chapter discusses the following topics:

- Create Custom Entities
- Manage Custom Entities
- Plan Custom Attributes
- Create Custom Attributes
- Manage Attributes
- Create Choice Lists for Custom Attributes
- Manage Choice Lists and Choices

Create Custom Entities

Custom entities enable you to design Streamline grids to store information that is particular to your organization. After you create a custom entity, you can specify the metadata to store in the entity by adding custom attributes to the entity.

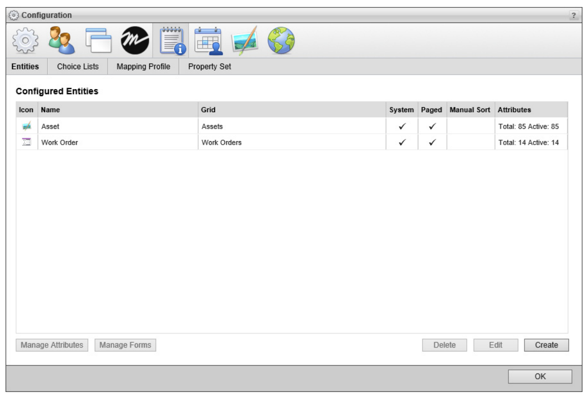
To create a custom entity

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

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

   The **Metadata** panel opens.
4. Click the **Entities** tab.

   The **Entities** tab opens.



5. Click **Create**.

   The **Create Entity** page opens.
6. In the **Name** box, enter the name to display for the custom entity in the **Custom Entities** list on the main toolbar.
7. In the **Grid Name** box, enter the grid name to display in the title bar of the Streamline grid associated with the entity.
8. Select the **Paged Grid** check box if you want to use pages to display the information contained in the custom entity. When you select this option, Streamline adds paging controls to the bottom of the Streamline grid associated with the entity.
9. Select the **Manual Sort** check box if you want users to manually sort the information contained in the custom entity by drag and drop. Selecting this option disables column sorting.
10. Select the **Globally Searchable** check box to include the information contained in the custom entity in global searches of Streamline content. The more entities that you include in global searches, the longer it takes Streamline to report the results of a global search.
11. Click **Next**.

    The next page opens and displays the **Icon** list for you to select an icon to identify your custom entity.

12. Use the **Icon** list to select an icon to identify your custom entity and display in the title bar of the Streamline grid associated with the entity.

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

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

       Streamline displays a **Browse** button.

    b. Click **Browse**.

       The **File Upload** dialog box opens.

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

    d. Click **Open**.

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

13. Click **Save**.

    Streamline adds the new custom entity to the **Configured Entities** page.

14. To view the new custom entity, select it from the **Custom** list on the main toolbar.

    Streamline automatically adds the **ID**, **Modified**, **Modified By**, **Created**, and **Created By** attributes to all custom entities. You can also add your own custom attributes to your new custom entity.

For More Information on...

- creating custom attributes for entities, refer to the sections "**Plan Custom Attributes**" on page 7–4 and "**Create Custom Attributes**" on page 7–5.

Manage Custom Entities

Manging the custom entities on your Streamline system includes the following procedures:

- Edit Custom Attribute Properties
- Delete Custom Attributes

Edit Custom Entity Properties

Streamline enables you to edit all of the properties of an existing custom entity.

To edit the properties of a custom entity

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the custom entity to edit.
2. Click **Edit**.

   The **Edit Entity** page opens for the selected custom entity.
3. Edit the custom entity properties as required.
4. Click **Next**.

   The next page of custom entity properties opens.
5. Edit the additional custom entity properties as required.
6. Click **Save**.

   Streamline updates the custom entity and opens the **Configured Entities** page.
7. To view the updated custom entity, select it from the **Custom** list on the main toolbar.

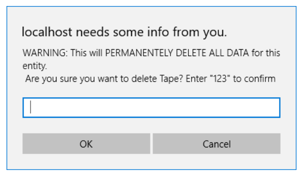
Delete Custom Entities

✶ When you delete a custom entity you also delete the custom attributes and attribute data associated with the custom entity.

To delete a custom entity

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the custom entity to delete.
2. To be able to restore a custom entity after you delete it, record the **Name** and **Grid Name** of the selected custom entity. You can use the recorded **Name** and **Grid Name** to recreate the deleted custom entity.
3. Click **Delete**.

   An **Alert** opens.

   To keep the custom entity, click **Cancel**.
4. In the confirmation message, enter `123` in the text box and click **OK**.

   Streamline deletes the selected custom entity from the **Configured Entities** page. Deleting a custom entity also deletes the custom attributes and attribute data associated with the custom entity.

Plan Custom Attributes

Before you start using the Metadata panel to add custom attributes to Streamline, you should answer the following questions to help you plan the definition of your custom attributes:

- In which Streamline grid do you want users to enter or view data for the custom attribute?

  The association between Streamline entities and grids is as follows:
  - › **Assets** — the **Assets** panel lists the assets available on a Streamline system.
  - › **Work Order** — the **Work Orders** panel lists requests to develop content for assets.
  - › **Custom** — custom entity panels that store information particular to your organization.
- What type of data do you want to save in the custom attribute: text, numeric, date, time, true/false, or Streamline user?

✶ Changing the data type for a custom attribute that contains data can cause loss of data.

- Do you want users to select custom attribute values from a choice list?

✶ Editing the choice list used to select data for a custom attribute that contains data can cause loss of data.

Create Custom Attributes

After completing your custom attribute plan, you are ready to start the process of adding custom attributes to your Streamline system. The following diagram (**Figure 7.1**) illustrates the different phases of the custom attribute creation workflow.

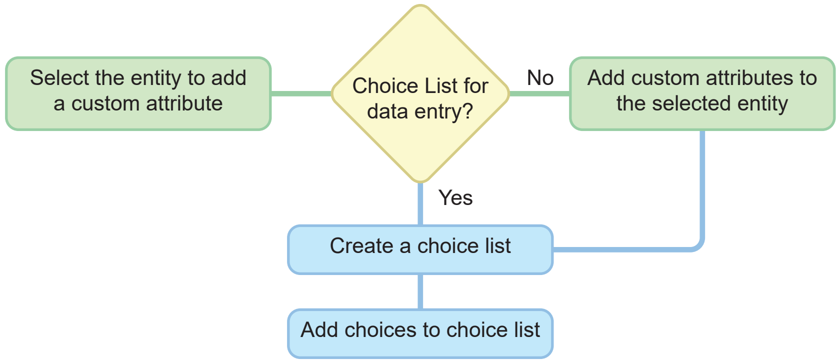
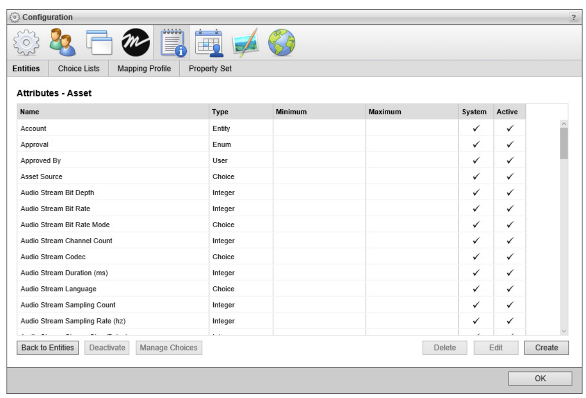


Figure 7.1 Custom Attribute Creation Workflow

To create a custom attribute for a Streamline or custom entity

1. In the **Configured Entities** table, select the Streamline or custom entity to add a custom attribute.
2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.



3. Click **Create**.

   The **Create Attribute** page opens.

4. In the **Name** box, enter the column name to display for the custom attribute in the Streamline grid associated with the entity.
5. In the **Key Name** box, enter the name to use as the identifier for the custom attribute. When you click in this box, Streamline enters a suggested key name that you can edit.

✶ You cannot change the **Key Name** of a custom attribute after you save the custom attribute.

6. Use the **Type** list to select the type of data that users can enter in the custom attribute.

✶ You cannot change the **Type** of a custom attribute after you save the custom attribute.

The available data types are as follows:

- **Single-Line String** — character string on a single line.
- **Multi-Line String** — character string on multiple lines, press Enter to start a new line.
- **Integer** — whole number without a fractional part.
- **Decimal** — decimal number that may contain a fractional part.
- **Date** — calendar date (year, month, day).
- **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).
- **Duration** — duration time (hh:mm:ss).
- **Boolean** — logical Boolean (true or false).
- **User** — a single Streamline user.
- **Multiple User** — one or more Streamline users.
- **Choice** — a single selection from a choice list.
- **Multiple Choice** — one or more selections from a choice list.

7. Depending on the selected **Type** for the custom attribute, continue creating your custom attribute with the following steps or procedures:

- **Single-Line String** — continue with step **8** in this procedure.
- **Multi-Line String** — continue with step **8** in this procedure.
- **Integer** — continue with step **8** in this procedure.
- **Decimal** — continue with step **8** in this procedure.
- **Date** — continue with step **8** in this procedure.
- **Date & Time** — continue with step **8** in this procedure.
- **Duration** — continue with step **8** in this procedure.
- **Boolean** — refer to the section "**Boolean Type Configuration**" on page 7–8.
- **User** — refer to the section "**User Type Configuration**" on page 7–9.
- **Multiple User** — refer to the section "**Multiple User Type Configuration**" on page 7–10.
- **Choice** — refer to the section "**Choice Type Configuration**" on page 7–11.
- **Multiple Choice** — refer to the section "**Multiple Choice Type Configuration**" on page 7–12.

8. Depending on the selected **Type** for the custom attribute, enter one of the following values to set the **Minimum** for the custom attribute:

Type	Minimum Value
Single-Line String	Enter the minimum number of characters that the entered text must contain.
Multi-Line String	Enter the minimum number of characters that the entered text must contain.
Integer	Enter the minimum value for the entered whole number.
Decimal	Enter the minimum value for the entered decimal number.
Date	Use the Calendar tool to select the start date of the valid date range for the custom attribute.
Time	Enter the minimum duration for the entered time (hh:mm:ss).
Date & Time	Use the Calendar tool to select the start date and time of the valid date and time range for the custom attribute.

9. Depending on the selected **Type** for the custom attribute, enter one of the following values to set the **Maximum** for the custom attribute:

Type	Value
Single-Line String	Enter the maximum number of characters that the entered text must contain.
Multi-Line String	Enter the maximum number of characters that the entered text must contain.
Integer	Enter the maximum value for the entered whole number.
Decimal	Enter the maximum value for the entered decimal number.
Date	Use the Calendar tool to select the end date of the valid date range for the custom attribute.
Time	Enter the maximum duration for the entered time (hh:mm:ss).
Date & Time	Use the Calendar tool to select the end date and time of the valid date and time range for the custom attribute.

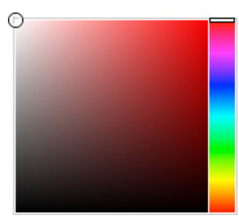
10. Depending on the selected **Type** for the custom attribute, enter one of the following values to set the **Default** for the custom attribute:

Type	Value
Single-Line String	Enter the default text for the custom attribute.
Multi-Line String	Enter the default text for the custom attribute.
Integer	Enter the default whole number value for the custom attribute.
Decimal	Enter the default decimal number value for the custom attribute.
Date	Use the Calendar tool to select the default date for the custom attribute.
Time	Enter the default time (hh:mm:ss) for the custom attribute.
Date & Time	Use the Calendar tool to select the default date and time for the custom attribute.

✶ Default Values must fall within the **Minimum** and **Maximum** values set for the custom attribute.

11. Click the **Empty Cell Color** color square.

    The **Color Picker** opens.



12. Use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that do not contain data.

    Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

13. For the **Populated Cell Color** setting, click the **Background** color square to use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that contain data.

14. Click the **Foreground** color square to use the **Color Picker** to select the text color that Streamline uses to display custom attribute cells that contain data.
15. In the **Description** box, enter a description of the custom attribute.

    Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
16. Click **Save**.

    Streamline adds the new custom attribute to the **Custom Attributes** page of the selected entity.
17. To view the new custom attribute, open the Streamline grid associated with the entity that to which you added the custom attribute.

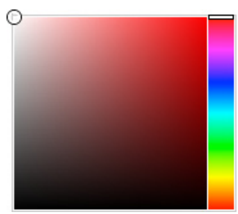
Boolean Type Configuration

When you select Boolean as the Type for a custom attribute, you need to configure settings that are specific to the Boolean data type.

To configure a Boolean type custom attribute

1. Select the **Default Value** check box to set **true** as the default value for the custom attribute. Clear the **Default Value** check box to set **false** as the default value for the custom attribute.
2. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.



3. Use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.
4. Click the **Checked Cell Color** color square to use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that contain a selected check box.
5. In the **Description** box, enter a description of the custom attribute.

   Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
6. Click **Save**.

   Streamline adds the new custom attribute to the **Custom Attributes** page of the selected entity.
7. To view the new custom attribute, open the Streamline grid associated with the entity that to which you added the custom attribute.

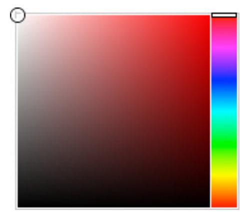
User Type Configuration

When you select User as the Type for a custom attribute, you need to configure settings that are specific to the User data type.

To configure a User type custom attribute

1. Use the **Included Roles** list to select one or more roles that contain the Streamline users that are suitable for the custom attribute.
2. Select the **Exclude Inactive** check box to exclude inactive Streamline users from the list of available users for the custom attribute. Clear this check box to include inactive Streamline users in the list of available users for the custom attribute.
3. Use the **Default Value** list to select the default Streamline user for the custom attribute.
4. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.

5. Use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.
6. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that contain a selected Streamline user.
7. Click the **Fore** color square to use the **Color Picker** to select the text color that Streamline uses to display custom attribute cells that contain a selected Streamline user.
8. In the **Description** box, enter a description of the custom attribute.

   Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
9. Click **Save**.

   Streamline adds the new custom attribute to the **Custom Attributes** page of the selected entity.
10. To view the new custom attribute, open the Streamline grid associated with the entity that to which you added the custom attribute.

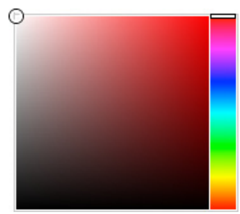
Multiple User Type Configuration

When you select Multiple User as the Type for a custom attribute, you need to configure settings that are specific to the Multiple User data type.

To configure a Multiple User type custom attribute

1. Use the **Included Roles** list to select one or more roles that contain the Streamline users that are suitable for the custom attribute.
2. Select the **Exclude Inactive** check box to exclude inactive Streamline users from the list of available users for the custom attribute. Clear this check box to include inactive Streamline users in the list of available users for the custom attribute.
3. In the **Minimum** box, enter the minimum number of Streamline users that a user must select for the custom attribute.
4. In the **Maximum** box, enter the maximum number of Streamline users that a user is allowed to select for the custom attribute.
5. Use the **Default Value** list to select the default Streamline user or users for the custom attribute.
6. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.

7. Use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.
8. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that contain a selected Streamline user or users.
9. Click the **Fore** color square to use the **Color Picker** to select the text color that Streamline uses to display custom attribute cells that contain a selected Streamline user or users.
10. In the **Description** box, enter a description of the custom attribute.

    Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
11. Click **Save**.

    Streamline adds the new custom attribute to the **Custom Attributes** page of the selected entity.
12. To view the new custom attribute, open the Streamline grid associated with the entity that to which you added the custom attribute.

Choice Type Configuration

When you select Choice as the Type for a custom attribute, you need to configure settings that are specific to the Choice data type.

To configure a Choice type custom attribute

1. Use the **Choice List** list to select the choice list that contains applicable values for the custom attribute.

   If the Choice List list does not contain a suitable choice list, follow these steps to create a new choice list:

   a. Click **Create** to the left of the **Choice List** list.

      The **Choice List** list changes to the **Choice List Name** box.

   b. In the **Choice List Name** box, enter a name for the new choice list.

   c. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:

      - **Single-Line String** — character string on a single line.
      - **Integer** — whole number without a fractional part.
      - **Decimal** — decimal number that may contain a fractional part.
      - **Date** — calendar date (year, month, day).
      - **Duration** — duration time (hh:mm:ss).
      - **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).

   d. New choice lists do not contain choices. After you save the custom attribute, refer to the procedure "**To add choices to a choice list**" on page 7–16 to add choices to a new choice list.

2. Use the **Order** list to select how to order the choices in the selected choice list. The available ordering methods are as follows:

   - **As Entered** — the order in which choices where added to the choice list.
   - **Alphabetical Ascending By Name** — A to Z by choice name.
   - **Alphabetical Descending By Name** — Z to A by choice name.
   - **Natural Ascending By Value** — lowest to highest choice value.
   - **Natural Descending By Value** — highest to lowest choice value.

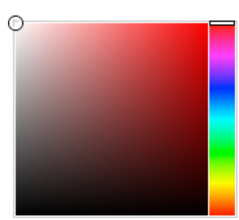
3. Select the **Free Add** check box to enable users to add choices to the choice list while editing a custom attribute.

4. Use the **Default Value** list to select a choice from the choice list as the default value for the custom attribute.

   This list is not available when you create a new choice list.

5. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.



6. Use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

7. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that contain a selected choice.
8. Click the **Fore** color square to use the **Color Picker** to select the text color that Streamline uses to display custom attribute cells that contain a selected choice.
9. In the **Description** box, enter a description of the custom attribute.

   Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.
10. Click **Save**.

    Streamline adds the new custom attribute to the **Custom Attributes** page of the selected entity.
11. To view the new custom attribute, open the Streamline grid associated with the entity that to which you added the custom attribute.

Multiple Choice Type Configuration

When you select Multiple Choice as the Type for a custom attribute, you need to configure settings that are specific to the Multiple Choice data type.

To configure a Multiple Choice type custom attribute

1. Use the **Choice List** list to select the choice list that contains applicable values for the custom attribute.

   If the Choice List list does not contain a suitable choice list, follow these steps to create a new choice list:

   a. Click **Create** to the left of the **Choice List** list.

      The **Choice List** list changes to the **Choice List Name** box.

   b. In the **Choice List Name** box, enter a name for the new choice list.

   c. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:

      - **Single-Line String** — character string on a single line.
      - **Integer** — whole number without a fractional part.
      - **Decimal** — decimal number that may contain a fractional part.
      - **Date** — calendar date (year, month, day).
      - **Duration** — duration time (hh:mm:ss).
      - **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).

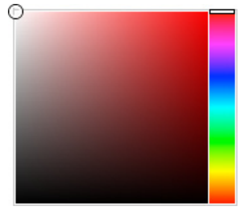
   d. New choice lists do not contain choices. After you save the custom attribute, refer to the procedure "**To add choices to a choice list**" on page 7–16 to add choices to a new choice list.
2. Use the **Order** list to select how to order the choices in the selected choice list. The available ordering methods are as follows:

   - **As Entered** — the order in which choices where added to the choice list.
   - **Alphabetical Ascending By Name** — A to Z by choice name.
   - **Alphabetical Descending By Name** — Z to A by choice name.
   - **Natural Ascending By Value** — lowest to highest choice value.
   - **Natural Descending By Value** — highest to lowest choice value.
3. In the **Minimum** box, enter the minimum number of choices that a user must select for the custom attribute.
4. In the **Maximum** box, enter the maximum number of choices that a user is allowed to select for the custom attribute.
5. Use the **Default Value** list to select the default choice or choices for the custom attribute.

   This list is not available when you create a new choice list.

6. Click the **Empty Cell Color** color square.

   The **Color Picker** opens.



7. Use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that do not contain data.

   Drag the slider on the right side of the **Color Picker** to select a color, and then click in the area to the left to select the color shade. As you use the **Color Picker**, the color square displays the selected color and a box to the right displays the HTML color code of the selected color. You can also enter an HTML color code in the box to select a color. As you enter an HTML color code, the color square displays the color of the entered code.

8. For the **Populated Cell Color** setting, click the **Back** color square to use the **Color Picker** to select the background color that Streamline uses to display custom attribute cells that contain a selected choice.

9. Click the **Fore** color square to use the **Color Picker** to select the text color that Streamline uses to display custom attribute cells that contain a selected choice.

10. In the **Description** box, enter a description of the custom attribute.

    Only the **Create Attribute** and **Edit Attribute** pages display the description of a custom attribute.

11. Click **Save**.

    Streamline adds the new custom attribute to the **Custom Attributes** page of the selected entity.

12. To view the new custom attribute, open the Streamline grid associated with the entity that to which you added the custom attribute.

Manage Attributes

Manging the attributes associated with an Streamline entity includes the following procedures:

- Change Attribute Active Status
- Edit Custom Attribute Properties
- Delete Custom Attributes

Change Attribute Active Status

Streamline displays all Active attributes in their associated grids or forms. Inactive attributes are hidden from their associated grids and forms. Inactive attributes do not lose user entered data.

To change the active status of a attribute

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the Streamline entity that contains the custom attribute to change.

2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.

3. In the **Attributes** table, select the attribute to change.

4. Change the active status for the selected attribute as follows:
   - If the selected attribute is active, click **Deactivate**.

     Streamline grays out the selected attribute and removes the check mark from the **Active** column of the attribute to indicate that the attribute is inactive and hidden from grids and forms.
   - If the selected attribute is inactive, click **Activate**.

     Streamline adds a check mark to the **Active** column of the selected attribute to indicate that the custom attribute is active and available in grids and forms.

Edit Custom Attribute Properties

To maintain data integrity, Streamline only allows you to edit some of the properties of an existing custom attribute. You cannot edit the properties of system attributes.

To edit the properties of a custom attribute

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the Streamline entity that contains the custom attribute to edit.
2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.
3. In the **Attributes** table, select the custom attribute to edit.

   The **Edit Attribute** page opens.
4. Edit the custom attributes properties as required.

   Properties that you cannot edit are grayed out.
5. Click **Save**.

   Streamline updates the custom attribute and opens the **Attributes** page of the selected entity.
6. To view the updated custom attribute, open the Streamline grid associated with the entity that contains the updated custom attribute.

Delete Custom Attributes

After you delete a custom attribute, you can restore the custom attribute data by creating a new custom attribute with the same Key Name and Type as the deleted custom attribute.

To delete a custom attribute

1. From the **Configured Entities** table in the **Entities** tab of the **Metadata** panel, select the Streamline entity that contains the custom attribute to delete.
2. Click **Manage Attributes**.

   The **Attributes** page opens for the selected entity.
3. In the **Attributes** table, select the custom attribute to delete.
4. To be able to restore custom attribute data after you delete a custom attribute, record the **Key Name** and **Type** of the selected custom attribute. Use the recorded **Key Name** and **Type** to create a new custom attribute to restore the data from the deleted custom attribute.
5. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected custom attribute. To keep the custom attribute, click **Cancel**.
6. In the confirmation message, click **OK**.

   Streamline deletes the selected custom attribute from the Streamline entity.

Create Choice Lists for Custom Attributes

A choice lists contains a list of choices from which users can select for a value for custom attributes with a data type of Choice or Multiple Choice. Choice lists help simplify data entry and control the data entered for a custom attribute.

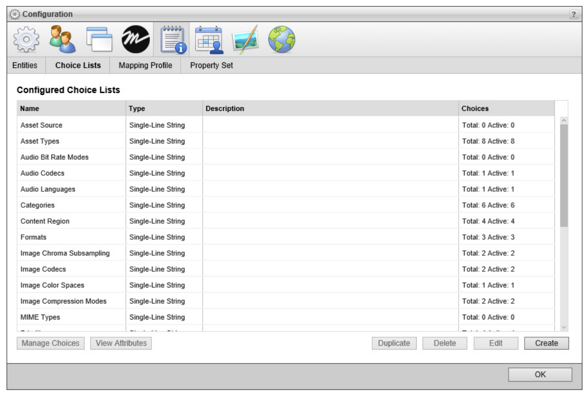
To create a choice list

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

   The **Metadata** panel opens.

2. Click the **Choice Lists** tab.

   The **Choice Lists** tab opens.



3. Click **Create**.

   The **Create Choice** page opens.

4. In the **Name** box, enter a name for the new choice list.

5. Use the **Choice List Type** to select the data type for the choices in the new choice list. The available data types are as follows:

   - **Single-Line String** — character string on a single line.
   - **Integer** — whole number without a fractional part.
   - **Decimal** — decimal number that may contain a fractional part.
   - **Date** — calendar date (year, month, day).
   - **Date & Time** — calendar date (year, month, day) and time of day (hh:mm:ss).
   - **Duration** — duration time (hh:mm:ss).

6. In the **Description** box, enter a description of the choice list.

   Only the **Configured Choice Lists** page displays the description of a choice list.

7. Click **Save**.

   Streamline adds the new choice list to the **Configured Choice Lists** page.

New choice lists do not contain choices, refer to the procedure "**To add choices to a choice list**" on page 7–16 to add choices to a new choice list.

Add Choices to Choice Lists

New choice lists created from the Create Attribute or Create Choice List pages of the Metadata panel do not contain choices. After you create a choice list you need to add choices to the choice list.

To add choices to a choice list

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

   The **Metadata** panel opens.

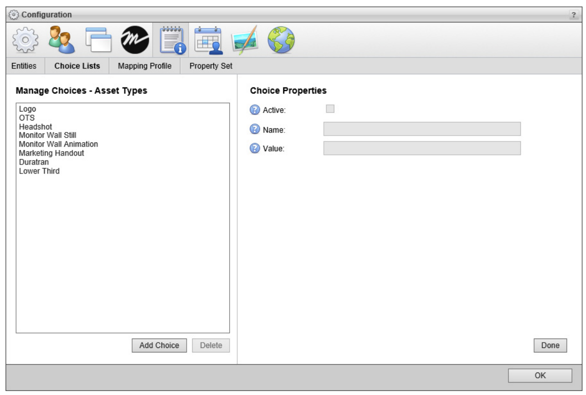
2. Click the **Choice Lists** tab.

   The **Choice Lists** tab opens.

3. In the **Configured Choice Lists** table, select the choice list to add choices.

4. Click **Manage Choices**.

   The **Manage Choices** page opens.



5. In the **Manage Choices** section, click **Add Choice**.

   Streamline creates a new choice named "New Choice" and saves the property values set for the new choice.

6. In the **Choice Properties** section, select the **Active** check box to activate the new choice and enable users to select this choice from the choice list. Clear this box to deactivate the choice and remove it from the choice list.

✶ Deactivating a choice also removes the choice from all of the custom attributes assigned the choice.

7. In the **Name** box, enter the name to display in the choice list that a user selects to choose this choice for a custom attribute.

8. In the **Value** box, enter the value that Streamline stores when a use selects this choice. When you click in this box, Streamline enters a suggested value that you can edit.

   This value is sent as the value for a custom attribute when your Streamline Server sends out MOS messages and RSS feeds.

9. To add another choice to the choice list, click **Add Choice** in the **Manage Choices** section. To finish adding choices to a choice list, click **Done** in the **Choice Properties** section.

Manage Choice Lists and Choices

Manging choice lists includes the following procedures:

- View Choice List Usage
- Duplicate Choice Lists
- Edit Choice List Properties
- Delete Choice Lists

Manging the choices in a choice list includes the following procedures:

- Edit Choices in a Choice List
- Delete Choices From a Choice List

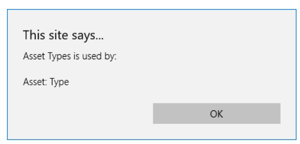
View Choice List Usage

Viewing the attributes of a choice list shows you the custom attributes that use the selected choice list, which is good information to check before editing a choice list.

To view the custom attributes that use a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to view usage information about.
2. Click **View Attributes**.

   A message opens with a list of the custom attributes that use the selected choice list.



3. Click **OK** to close the usage message.

Duplicate Choice Lists

Duplicating existing choices lists is a quick method of creating new choice lists.

To duplicate a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to duplicate.
2. Click **Duplicate**.

   Streamline adds a duplicate of the selected choice list to the **Configured Choice Lists** table, and names the new choice list "New Choice List" or "New Choice List (#)". You can edit the new choice list to change the name of the choice list. Manage the new choice list to add choices to the choice list.

Edit Choice List Properties

To maintain data integrity, Streamline only allows you to edit some of the properties of an existing choice list.

To edit the properties of a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to edit.
2. In the **Custom Attributes** table, select the custom attribute to edit.

   The **Edit Attribute** page opens for the selected custom attribute.

3. Edit the custom attributes properties as required.

   Properties that you cannot edit are grayed out.

4. Click **Save**.

   Streamline updates the custom attribute and opens the **Custom Attributes** page of the selected entity.

Delete Choice Lists

To maintain data integrity, Streamline only allows you to delete choice lists that are not used to enter data in a custom attribute.

To delete a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list to delete.
2. Click **Delete**.

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

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

   Streamline deletes the selected choice list from the **Configured Choice Lists** table.

Edit Choices in a Choice List

Streamline allows you to edit all of the properties of a choice.

✶ Changing the value of a choice may cause data loss if the choice is assigned to custom attributes.

To edit the properties of a choice in a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list that contains the choice to edit.
2. Click **Manage Choices**.

   The **Manage Choices** page opens.

3. In the **Choices** list, select the choice to edit.

   The **Choice Properties** section displays the properties of the selected choice.

4. Edit the choice properties as required. When you edit a choice, keep in mind the following conditions:
   - Clearing the **Active** check box removes the selected choice from the choice list and from all of the custom attributes assigned the choice.
   - Changing the **Name** of a choice changes the choice name displayed in the choice list and all of the custom attributes assigned the choice.
   - Changing the **Value** of a choice may cause data loss if the choice is assigned to custom attributes.
5. Click **Done** or select another choice in the **Choices** list to save the edited choice.

   When you edit the **Value** of a choice, an alert opens warning that changing the choice value may cause data loss if the choice is assigned to custom attributes. Click **OK** to save the new value for the choice or click **Cancel** to keep the old value for the choice.

Delete Choices From a Choice List

After you delete a choice from a choice list, you can restore the choice by re-adding it to the choice list using the same Name and Value.

To delete a choice from a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list that contains the choice to edit.
2. Click **Manage Choices**.

   The **Manage Choices** page opens.
3. In the **Choices** list, select the choice to delete.
4. To be able to restore a choice after you delete it, record the **Name** and **Value** of the selected choice. Use the recorded **Name** and **Value** to re-add the choice to the choice list.
5. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected choice. To keep the choice, click **Cancel**.
6. In the confirmation message, click **OK**.

   Streamline deletes the selected choice attribute from the **Choices** list.

Managing Streamline Forms

Streamline enables you to include and exclude attributes from a form, set attributes as requiring a value, and display attribute content as read-only. You can customize the forms associated wit the following Streamline entities:

- Asset
  - › Details — Descriptive tab in the Asset Editor panel
  - › Request — New Asset Request section in the Work Order panel
- Work Orders
  - › Create — New Work Order dialog box
  - › Details — Work Order Details section in the Work Order panel

This chapter discusses the following topics:

- Manage Forms

Manage Forms

You can customize the forms associated with the Asset and Work Order entities to match your workflow and enable users to quickly enter the required information for assets and work orders.

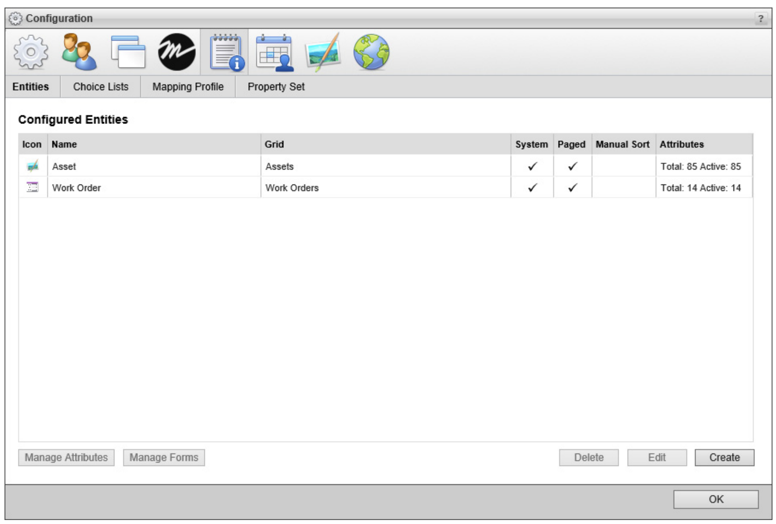
To manage the forms for an entity

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

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

   The **Metadata** panel opens.
4. Click the **Entities** tab.

   The **Entities** tab opens.

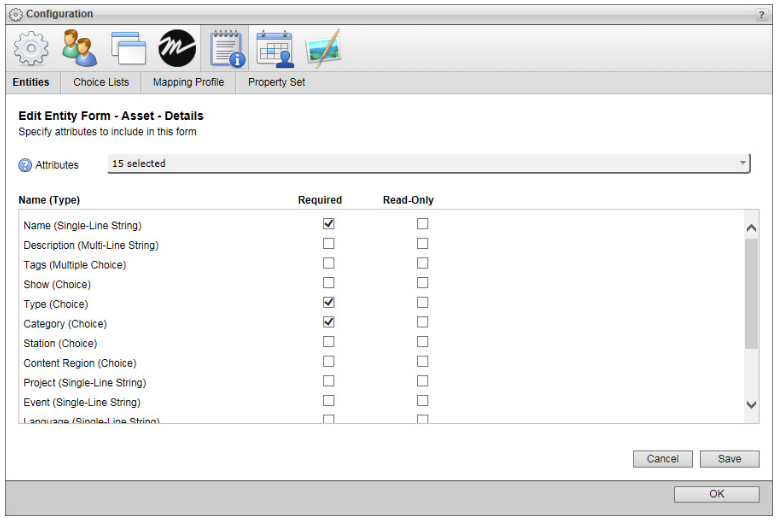


5. From the **Configured Entities** table in the **Entities** tab, select the entity associated with the form to customize. The entities that have associated forms as follows:
   - **Asset**
   - **Work Orders**
6. Click **Manage Forms**.

   The **Forms** page opens for the selected entity. The available forms depend on the selected entity.
   - **Asset**
     › **Details** — Descriptive tab in the Asset Editor panel
     › **Request** — New Asset Request section in the Work Order panel
   - **Work Orders**
     › **Create** — New Work Order dialog box
     › **Details** — Work Order Details section in the Work Order panel
7. From the **Forms** table, select the form to edit.

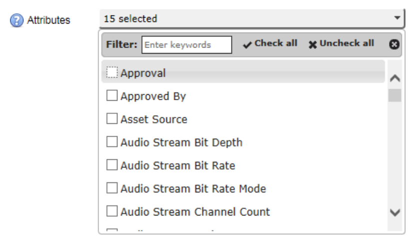
8. Click **Edit**.

   The **Edit Entity Form** for the selected form opens.



9. Use the **Attributes** list to select the entity attributes to include in the entity form. The **Attributes** list contains all of the system and custom attributes associated with the entity associated with the selected entity form.

   a. In the **Attributes** list, select the check box to the left of each entity that you want to include in the form.



   b. Clear the check box to the left of each entity that you want to exclude from the form.

   c. Click the **Close** icon.

   Streamline closes the **Attributes** list and adds the selected attributes to the **Edit Entity Form** page.

10. For the attributes in a form that users are required to set value for, select the **Required** check box to the right of the attribute in the list of attributes included in the form.

11. For the attributes in a form that users can view but not edit, select the **Read-Only** check box to the right of the attribute in the list of attributes included in the form.

✶ Do not select the **Read-Only** check box for attributes that are set as **Required**.

12. After configuring a form, click **Save**.

    Streamline saves the revised form and opens the **Forms** page.

13. Click **Back to Entities** to return the **Configured Entities** page.

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

For More Information on...

- creating custom attributes for an entity, refer to "**Create Custom Attributes**" on page 7–5.

Configuring Metadata Elements

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

This chapter discusses the following topics:

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

Pre-defined Metadata Elements

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

Asset Source

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

Asset Type

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

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

Categories

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

Content Region

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

Formats

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

Priorities

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

Shows

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

Stations

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

Tags

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

Managing the Choices for Metadata Elements

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

To add a new choice to a metadata element

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

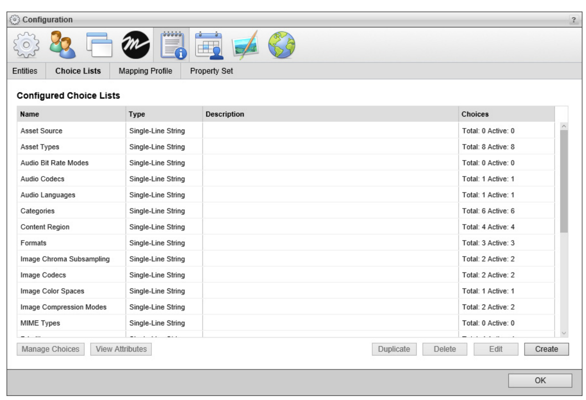
   The **Configuration** window opens.

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

   The **Metadata** panel opens.

4. Click the **Choice Lists** tab.

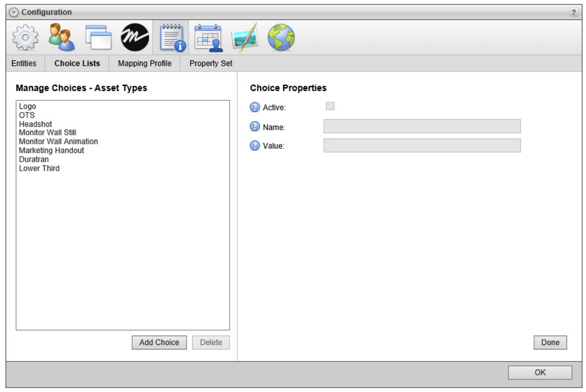
   The **Choice Lists** tab opens.



5. In the **Configured Choice Lists** table, select the choice list to add choices.

6. Click **Manage Choices**.

   The **Manage Choices** page opens.



7. In the **Manage Choices** section, click **Add Choice**.

   Streamline creates a new choice named “New Choice” and saves the property values set for the new choice.

8. In the **Choice Properties** section, select the **Active** check box to activate the new choice and enable users to select this choice from the choice list. Clear this box to deactivate the choice and remove it from the choice list.

✶ Deactivating a choice also removes the choice from all of the custom attributes assigned the choice.

9. In the **Name** box, enter the name to display in the choice list that a user selects to choose this choice for a custom attribute.

10. In the **Value** box, enter the value that Streamline stores when a use selects this choice. When you click in this box, Streamline enters a suggested value that you can edit.

    This value is sent as the value for a custom attribute when your Streamline Server sends out MOS messages and RSS feeds.

11. To add another choice to the choice list, click **Add Choice** in the **Manage Choices** section. To finish adding choices to a choice list, click **Done** in the **Choice Properties** section.

Delete Choices From a Choice List

After you delete a choice from a choice list, you can restore the choice by re-adding it to the choice list using the same Name and Value.

To delete a choice from a choice list

1. From the **Configured Choice Lists** table in the **Choice Lists** tab of the **Metadata** panel, select the choice list that contains the choice to edit.

2. Click **Manage Choices**.

   The **Manage Choices** page opens.

3. In the **Choices** list, select the choice to delete.

4. To be able to restore a choice after you delete it, record the **Name** and **Value** of the selected choice. Use the recorded **Name** and **Value** to re-add the choice to the choice list.

5. Click **Delete**.

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

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

   Streamline deletes the selected choice attribute from the **Choices** list.

Selecting the Metadata to Upload

When you upload a media file, Streamline reads the XMP and Windows metadata from the media file and stores it in the Streamline asset created for the media file. Streamline uses mapping profiles to select the asset attributes in which to save media file metadata properties.

This chapter discusses the following topics:

- Plan a Mapping Profile
- Create Custom Attributes
- Create a Property Set
- Manage Property Sets
- Create a Mapping Profile
- Manage Mapping Profiles

Plan a Mapping Profile

Streamline mapping profiles pair media file metadata properties with asset attributes. On upload of a media file, Streamline reads information from the media file metadata properties and saves the information in that associated attributes of the asset created for the media file.

Before you create a mapping profile you need to do the following:

- **Custom Attributes** — you need define custom attributes for media file metadata properties that Streamline does not import by default.
- **Property Set** — for the types of media files that you want to upload to Streamline, you need to build a list of the media file properties that contain the information that you want to save with assets.

For More Information on...

- creating custom attributes, refer to the section "**Create Custom Attributes**" on page 7–5.

Create Custom Attributes

Custom attributes enable you to save information from media file metadata properties that are not supported by the default Streamline asset attributes. You can add custom attributes to Streamline entities, or you can create custom entities for your custom attributes.

Before you start creating a mapping profile, confirm that your Streamline system contains the appropriate attributes to save information from the metadata properties of the media files that you intend to upload.

For More Information on...

- creating custom attributes, refer to the section "**Create Custom Attributes**" on page 7–5.

Create a Property Set

A property set contains a list of media file metadata properties from which Streamline can read information. When building a property set you do not need to enter each property into the set, just select the type of media file or files that contain the properties that you want a include in the property set.

To create a property set

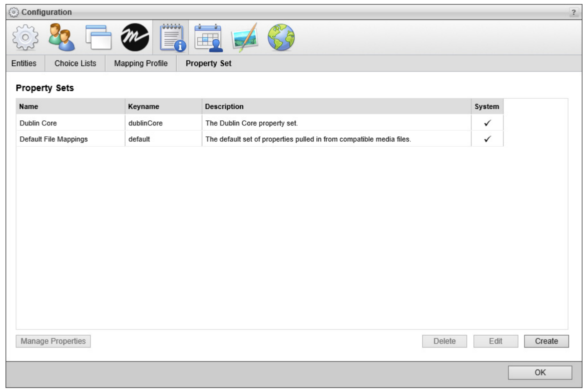
1. Log in to your Streamline Server as a system administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

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

   The **Metadata** panel opens.

4. Click the **Property Set** tab.

   The **Property Set** tab opens.



   Streamline systems contain the following system property sets that you cannot edit or delete:

   - **Default File Mappings** — refer to the section “**Default File Mappings**” on page A–2 to view mappings.
   - **Dublin Core** — refer to the section “**Dublin Core**” on page A–3 to view mappings.

5. Click **Create**.

   The **Property Set** page opens.

6. In the **Name** box, enter the name for the property set.
7. In the **Key Name** box, enter the identifier for the property set. When you click in this box, Streamline enters a suggested key name that you can edit.
8. In the **Description** box, enter a description of the property set.
9. Click **Save**.

   The **Property Set** page closes and Streamline adds the new property set to the **Property Sets** page.

Add Media File Properties to a Property Set

After you create a property set, you can add properties to the property set by selecting the type of media file or files that contain the properties that you want in the property set. You can add all of the media file properties that you want to ingest into a single property set, or you can create individual property sets that contain specific types media file properties. You can use one or more property sets to build a mapping profile.

To add media file properties to a property set

1. From the **Property Set** tab, select the property set to which to add media file properties.
2. Click **Manage Properties**.

   The **Property Set** page opens for the selected property set.

3. Click **Upload File**.

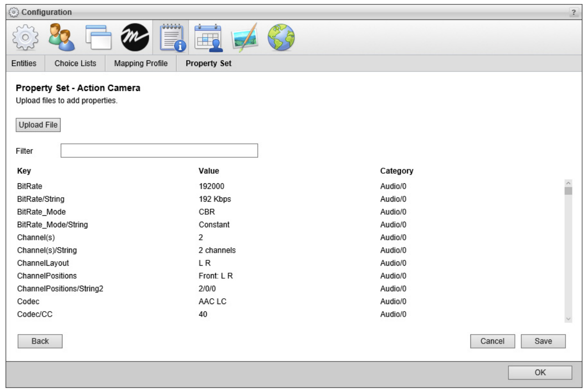
   The **Choose File to Upload** dialog opens.

4. In the **Choose File to Upload** dialog, navigate to and select the type of media file that contains the metadata properties to add to the selected property set.

   For quicker loading of metadata properties, select media files with a small file size.

5. Click **Open**.

   The **Choose File to Upload** dialog closes and Streamline displays the metadata properties read from the selected media file in the **Property Set** page.



   To add more media file properties to a property set, click **Upload File**. Streamline adds the properties from the additional selected media file to the properties list.

6. To filter the property list, enter in the **Filter** box a portion of the **Key**, **Value**, or **Category** associated with the properties you are looking for. Clear the **Filter** box to list all of the loaded media file properties.
7. Click **Save**.

   Streamline adds the loaded media file properties to the property list and opens the **Property Sets** page.

Manage Property Sets

Manging the property sets on your Streamline system includes the following procedures:

- Edit Property Sets
- Delete Property Sets

Edit Property Sets

Streamline enables you to edit the properties of an existing property set. After editing a property set, Streamline updates the mapping profiles that reference the property set with the new properties of the property set.

To edit the properties of a property set

1. From the **Property Set** tab, select the property set to edit.
2. Click **Edit**.

   The **Property Set** page opens for the selected property set.

3. Edit the property set properties as required.
4. Click **Save**.

   Streamline updates the property set and opens the **Property Sets** page.

Delete Property Sets

Streamline only allows you to delete property sets that are not currently referenced by a mapping profile.

To delete a property set

1. From the **Property Set** tab, select the property set to delete.
2. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected property set. To keep the property set, click **Cancel**.
3. In the confirmation message, click **OK**.

   Streamline deletes the selected property set from the **Property Sets** page.

Create a Mapping Profile

Streamline mapping profiles contain one or more mappings that pair default values or media file metadata property values with asset attributes. On upload of a media file, Streamline uses a mapping profile to save set default values or read media file metadata values in the associated attributes of the asset created from the media file.

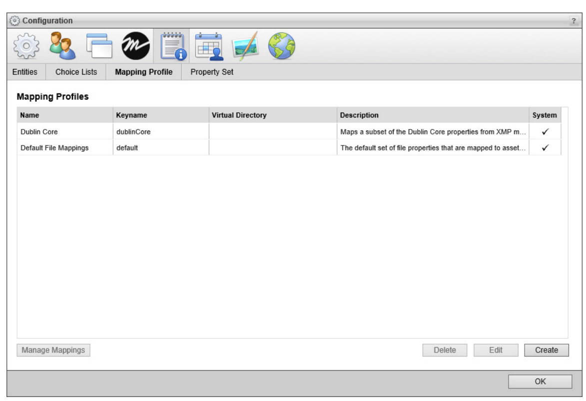
To create a mapping profile

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

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

   The **Metadata** panel opens.
4. Click the **Mapping Profile** tab.

   The **Mapping Profile** tab opens.



   Streamline systems contain the following system mapping profiles that you cannot edit or delete:

   - **Default File Mappings** — refer to the section “**Default File Mappings**” on page A–2 to view mappings.
   - **Dublin Core** — refer to the section “**Dublin Core**” on page A–3 to view mappings.

5. Click **Create**.

   The **Mapping Profile** page opens.

6. In the **Name** box, enter the name for the mapping profile.
7. In the **Key Name** box, enter the identifier for the mapping profile. When you click in this box, Streamline enters a suggested key name that you can edit.
8. In the **Virtual Directory** box, enter the directory path to the folder in the **Assets** panel **Folder** tree view to store the assets created by uploading media files using the mapping profile. Use a backslash (\) to separate the folders in the directory path. For example:

Tree View	Directory Path
Assets	
News	News
Local	News\Local

9. In the **Description** box, enter description of the property set.
10. Use the **Inherit From** list to select the mapping set to use to ingest the structural properties from uploaded media files into the asset created for the media file.
11. Click **Save**.

    The **Mapping Profile** page closes and Streamline adds the new mapping profile the **Mapping Profiles** page.

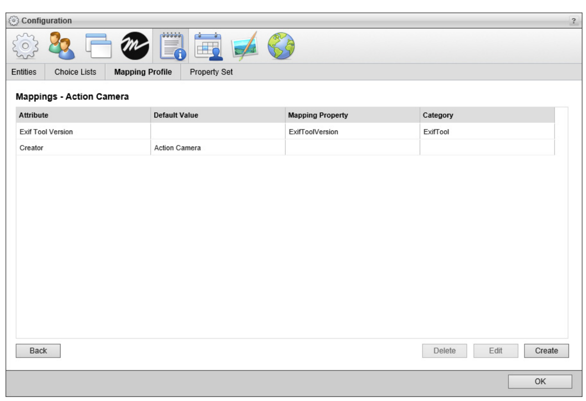
Add Mappings to a Mapping Profile

After you create a mapping profile, you can add mappings to the profile to define the values to enter in the attributes of the asset created by uploading a media file to Streamline. Mapping profiles can contain mappings that use media file properties from one or more property sets to set the value for an asset attribute.

To add mappings to a mapping profile

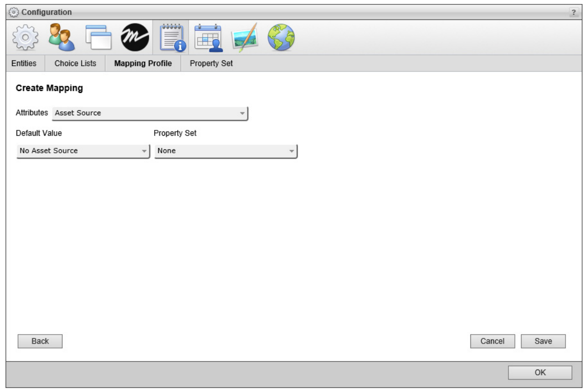
1. From the **Mapping Profile** tab, select the mapping profile to which to add mappings.
2. Click **Manage Properties**.

   The **Mappings** page opens.



3. Click **Create**.

   The **Create Mapping** page opens.



4. Use the **Attributes** list to select the asset attribute for which to set a value. Attributes with a gray background already have a set mapping and cannot be selected.
5. To enter a value for the selected attribute, use the provided **Default Value** text box or list to enter or select a value for the selected attribute.
6. To set the value of the selected attribute from a media file property:
   a. Use the **Property Set** list to select the property set that contains the media file property to set the value for the selected attribute.
   b. Use the **Mapping Property** list to select the media file property to set the value for the selected attribute. This list is only available after selecting a property set from the **Property Set** list.
   c. For date attributes, enter in the **Date Format** box the date format of the date value contained in the media file property. Use the Java Simple Date Format to enter the data format. This box is only available after selecting a date attribute from the Attributes list.
7. Click **Save**.

   The **Create Mapping** page closes and Streamline adds the new mapping to the **Mappings** page.
8. To add more mappings to the mapping profile, click **Create** and then repeat step **3** to step **7**.

For More Information on...

- the Java Simple Date Format, refer to the web page http://docs.oracle.com/javase/7/docs/api/java/text/SimpleDateFormat.html.

Manage Mapping Profiles

Manging the mapping profiles on your Streamline system includes the following procedures:

- Edit Mappings
- Delete Mappings from a Mapping Profile
- Edit Mapping Profiles
- Delete Mapping Profiles

After editing a mapping profile, Streamline updates the watch folders that use the revised mapping profile to upload media files.

Edit Mappings

You can edit the properties of a mapping to change the values ingested into asset attributes.

To edit the properties of a mapping

1. From the **Mapping Profile** tab, select the mapping profile that contains the mapping to edit.
2. Click **Manage Mappings**.

   The **Mappings** page opens for the selected mapping profile.
3. In the **Mappings** table, select the mapping to edit.

   The **Edit Mapping** page opens.
4. Edit the mapping properties as required.
5. Click **Save**.

   Streamline updates the mapping and opens the **Mappings** page.

Delete Mappings from a Mapping Profile

Deleting a mapping from a mapping profile does not change any of the assets that were loading into Streamline using the mapping profile from which you deleted a mapping.

To delete a mapping from a mapping profile

1. From the **Mapping Profile** tab, select the mapping profile that contains the mapping to delete.
2. Click **Manage Mappings**.

   The **Mappings** page opens for the selected mapping profile.
3. In the **Mappings** table, select the mapping to delete.
4. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected mapping. To keep the mapping, click **Cancel**.
5. In the confirmation message, click **OK**.

   Streamline deletes the selected mapping from the **Mappings** page.
6. Click **Back** to return to the **Mapping Profiles** page.

Edit Mapping Profiles

Streamline enables you to edit the properties of an mapping profile.

To edit the properties of a mapping profile

1. From the **Mapping Profile** tab, select the mapping profile to edit.
2. Click **Edit**.

   The **Mapping Profile** page opens for the selected mapping profile.
3. Edit the mapping profile properties as required.
4. Click **Save**.

   Streamline updates the mapping profile and opens the **Mapping Profiles** page.

Delete Mapping Profiles

Streamline only allows you to delete mapping profiles that are not currently used by a watch folder to upload media files.

To delete a mapping profile

1. From the **Mapping Profile** tab, select the mapping profile to delete.
2. Click **Delete**.

   A confirmation message opens, asking whether you want to delete the selected mapping profile. To keep the mapping profile, click **Cancel**.
3. In the confirmation message, click **OK**.

   Streamline deletes the selected mapping profile from the **Mapping Profiles** page.

Configuring Work Order Notifications

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

This chapter discusses the following topics:

- Enable Work Order Notifications via E-mail

Enable Work Order Notifications via E-mail

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

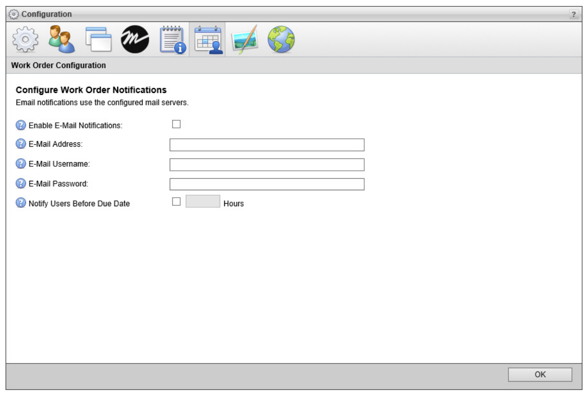
To enable work order notifications

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

   The **Configuration** window opens.

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

   The **Work Order Configuration** panel opens.



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

Configuring Asset Properties

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

This chapter discusses the following topics:

- Specify the Asset Storage Location
- Targets
- Transcoders
- Watch Folders

Specify the Asset Storage Location

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

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

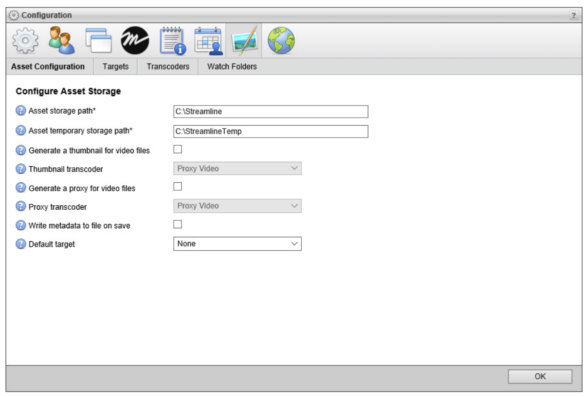
Mapping to a Folder on the Local Server Drive

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

To map the asset storage location to a folder

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

   The **Configure Asset Storage** panel opens.



2. In the **Asset Storage Path** box, enter the full path to the folder that Streamline uses to store asset files.

✶ Streamline must have read and write permissions to the selected folder.

3. In the **Asset Temporary Storage Path** box, enter the full path to the folder that Streamline uses to temporarily store asset files until completely uploaded to Streamline. After a successful asset file upload, Streamline moves the asset file to the folder set in the **Asset Storage Path** box.

✶ Streamline must have read and write permissions to the selected folder.

4. To generate thumbnail images for ingested video files, do the following:
   a. Select the **Generate a thumbnail for video files** check box
   b. Use the **Thumbnail transcoder** list to select the transcoder with which to generate thumbnail images for ingested video files. This list contains the transcoders defined on the **Transcoders** tab in the **Asset** panel.
5. To generate proxy videos for ingested video files, do the following:
   a. Select the **Generate a proxy for video files** check box
   b. Use the **Proxy transcoder** list to select the transcoder with which to generate proxy videos for ingested video files. This list contains the transcoders defined on the **Transcoders** tab in the **Asset** panel.
6. Select the **Write metadata to file on save** check box to write the metadata associated with the uploaded asset file to a text file when Streamline saves the asset associated with the asset file.
7. Use the **Default Target** list to select the target to automatically send uploaded asset files.

   Streamline uses targets to push assets to devices; such as, video servers for playout. Targets are defined on the Targets tab in the Asset panel.
8. Click **OK** to save settings and close the **Configuration** panel.

For More Information on...

- defining targets, refer to the section “**Targets**” on page 12–4.
- defining transcoders, refer to the section “**Transcoders**” on page 12–9.

Mapping to a Folder on the Network

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

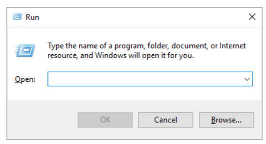
- A Microsoft® Windows® account that has full permissions to read, write, modify, and remove files and folders inside the directory you wish to map to.
- A Streamline user account with full administrator permissions.

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

To map the storage location to a folder on the network

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

   The **Run** dialog box opens.

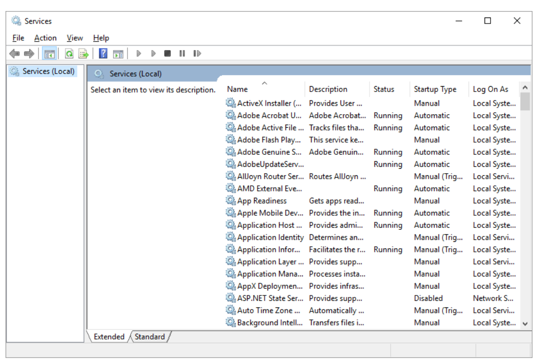


3. In the **Open** box, type the following application name:

   `services.msc`

4. Click **OK**.

   The **Services** dialog box opens.



5. In the **Services** list, locate and select the **Ross Streamline** service.
6. Click **Stop** for the **Ross Streamline** service.
7. Right-click the service and select **Properties**.
8. Select the **Log On** tab.
9. In the **Log on as:** area, select **This Account**.

10. Ensure that your Microsoft® Windows® account has all the necessary permissions on the folder you want to map to on the network.
11. Ensure that you specify the domain properly if it is a domain account as opposed to the local computer account.
12. In the **Services** dialog box, click **Start** for the **Ross Streamline** service.
13. Wait at least one minute to ensure your changes have taken effect.
14. Log in to Streamline.
15. Specify the full path to the folder using the procedure "**To map the asset storage location to a folder**" on page 12–2.

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

Enabling Public Sharing of a Media Folder

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

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

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

Targets

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

Add a Target

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

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

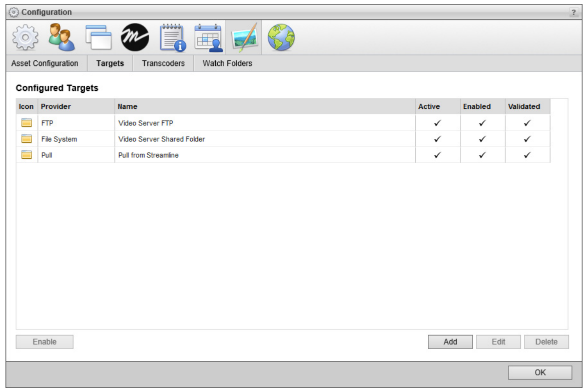
To add a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.



3. Click **Add**.

   The **Attach Target** page opens.

4. Use the **Device** list the select the device to which the target will push assets.

   Based on the selected **Device**, Streamline automatically selects a **Target Type**.

5. To override the automatically selected **Target Type**, use the **Target Type** list to select the type of target to add. The available target types are as follows:

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

6. Click **Next**.

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

7. In the page that opens, configure the selected **Target Type** as follows:

   Abekas Target Configuration

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

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

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

   d. In the **Path** box, enter the full pathname on the Abekas video server of the shared folder in which to save assets pushed from Streamline to the Abekas video server. This folder must be accessible to Streamline.

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

File System Target Configuration

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

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

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

d. Select the **Preserve File Path** check box to preserve the Streamline virtual file system path of the asset after transferring the asset file to the target file system. Clear this check box to place the asset file on the target with a file system path set by the target.

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

FTP Target

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

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

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

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

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

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

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

h. Select the **Ignore Extensions on Delete** check box to ignore file extensions when deleting assets from an FTP server that strips extensions from uploaded asset files. Clear this check box to use file extensions when deleting assets from an FTP server.

i. ignore file extensions when deleting assets from the FTP server. Clear this check box to match file extensions when deleting assets from the FTP server.

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

Pull Target

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

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

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

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

8. On the **Target Configuration** page, use the **Icon** list to select an icon to identify the target.

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

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

      Streamline displays a **Browse** button.

   b. Click **Browse**.

      The **File Upload** dialog box opens.

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

   d. Click **Open**.

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

9. Select the **Require Approval** check box to only allow users to send approved assets to the target. Clear this check box to allow users to send unapproved or approved assets to the target.

   This check box is not available for **Pull** targets.

10. In the **Remove from Target After** box, enter the amount of time after which to delete unused assets from the target.

    This box is not available for **Pull** targets.

11. Use the list to the right of the **Remove from Target After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Remove from Target After** box.

    This list is not available for **Pull** targets.

12. Select the **Send File Pointer** check box to set a file pointer to the target instead of the video file.

    This check box is not available for **Pull** targets.

13. Use the **Transcoder** list to select the transcoder that Streamline uses transcode the asset video file before pushing the video file to the target. This list contains the transcoders defined on the **Transcoders** tab in the **Asset** panel.

    This list is not available for **Pull** targets.

14. Use the **Clip Name Case** list to select the capitalization of clip names on the target. The available options are as follows:

    - **Default** — use the same capitalization as the asset filename (Sports Intro).
    - **All Uppercase** — change all letters to uppercase (SPORTS INTRO).
    - **All Lowercase** — change all letters to lowercase (sports intro).

15. Select the **Replace Spaces With Underscores** check box to replace all spaces in a clip name with underscore (_) characters.

    For example: the clip name `Sports Intro` would change to `Sports_Intro`.

16. In the **Max Clip Name Length** box, enter the maximum length in characters for clip names on the target.

    The maximum clip length does not include the file extension. Clip names for assets with filenames longer than the set maximum clip name length are truncated to the set length.

17. Click **Edit Filter** to open the **Search Editor** window to define a filter that controls the assets that users can send to the target.

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

18. Select the **Supports Existence Checking** check box for targets that support the re-transfer of asset files when the target no longer contains the file associated with the requested asset. Clear this check box for targets that do not support asset re-transfer.

19. Click **Save**.

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

For More Information on...

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

Manage Available Targets

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

To enable or disable a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.

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

   Depending on the state of the selected target, Streamline displays either the **Enable** or **Disable** button below the **Configured Targets** list.

4. Do one of the following to control the availability of the selected target on your Streamline system:

   - **Enabled Targets** — if the selected target is currently enabled, click **Disable**.

     The disabled target is no longer available to receive files pushed to it by Streamline users.

   - **Disabled Targets** — if the selected target is currently disabled, click **Enable**.

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

Edit Targets

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

To edit a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.

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

4. Click **Edit**.

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

5. Edit the target type configuration settings as required.

6. Click **Next**.

   The **Target Configuration** page opens.

7. Edit the target configuration settings as required.

8. Click **Save**.

Delete Targets

To delete a target

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

   The **Configure Asset Storage** panel opens.

2. Click the **Targets** tab.

   The **Targets** tab opens.

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

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

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

Transcoders

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

Add a Transcoder

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

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

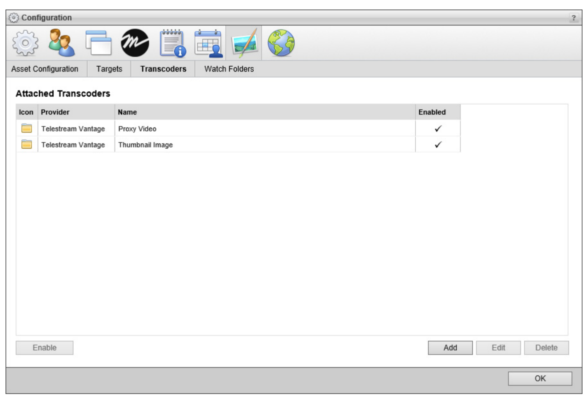
To add a transcoder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Transcoders** tab.

   The **Transcoders** tab opens.



3. Click **Add**.

   The **Attach Transcoder** page opens.

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

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

5. Click **Next**.

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

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

   Vantage Transcoder Configuration

   a. In the **Name** box, enter a name for the transcoder.
   b. In the **URL** box, enter the URL of the Telestream Vantage server.
   c. In the **Shared Path** box, enter the full pathname of the folder in which to save transcoded output files. This folder must be accessible by both the Streamline system and the Telestream Vantage server.
   d. In the **Suffix** box, enter in this box the text to add to the end of the input file name to create the name for the output file.
   e. Select the **Transcode Video Files on Ingest** check box to use this transcoder to automatically transcode video files ingested by Streamline.
   f. Click **Next**.
   g. On the **Target Configuration** page, click **Browse**.
   h. In the **File Upload** dialog box, select the **Vantage flip descriptor** file to create a thumbnail or preview video for assets.
   i. Click **Open** to save the new transcoder and add it to the **Attached Transcoders** list.

   Watch Folder Transcoder Configuration

   a. In the **Name** box, enter a name for the transcoder.
   b. In the **Input Path** box, enter the full pathname of the input folder from which the transcoder takes input files for transcoding. This folder must be accessible by both the Streamline system and the transcoder.
   c. In the **Output Path** box, enter the full pathname of the folder in which to save transcoded output files. This folder must be accessible by both the Streamline system and the transcoder.
   d. In the **Suffix** box, enter in this box the text to add to the end of the input file name to create the name for the output file.
   e. Click **Next** to save the new transcoder and add it to the **Attached Transcoders** list.

   XPression Transcoder Configuration

   a. In the **Name** box, enter a name for the transcoder.
   b. In the **XPression Video Coder Path** box, enter the executable path for the XPression Video Coder software installed on the Streamline system.
   c. Select the **Transcode Video Files on Ingest** check box to use this transcoder to automatically transcode video files ingested by Streamline.
   d. Click **Save** to save the new transcoder and add it to the **Attached Transcoders** list.

For More Information on...

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

Edit Transcoders

To edit a transcoder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Transcoder** tab.

   The **Transcoders** tab opens.

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

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

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

   The **Target Configuration** page opens.

7. Edit the target configuration settings as required. You cannot change the transcoder type.
8. For **Telestream Vantage** transcoders, click **Next** to edit the **Vantage flip descriptor** file used to create thumbnails or preview videos for assets.
9. Click **Next** to save your changes.

Delete Transcoders

To delete a transcoder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Transcoder** tab.

   The **Transcoders** tab opens.

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

   A confirmation dialog box opens.

5. Click **OK**.

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

Watch Folders

Streamline users can place media file in designated watch folders to automatically upload the media files to a Streamline system using the mapping profile associated with the watch folder. After uploading the media file, Streamline creates a new asset for the media file. New assets are named the same as the loaded media file, but without the filename extension.

Watch folders can exist locally on the Streamline computer or remotely on a network drive. Streamline users must have read and write access to watch folders so that they can place files in a watch folder and view the files that the watch folder contains.

✶ For watch folders on a network drive, the user that runs the Streamline service on the Streamline computer must have full access to the network drive that contains the watch folders.

To add a watch folder

1. On the Streamline computer or on a network drive, create a watch folder or folders for users to place media files for automatic upload.

   Verify that Streamline users have read and write access to the watch folder. For network drive watch folders, verify that the Streamline user has full access to the network drive that contain the drop folders

2. Create the mapping profiles to use with watch folders to upload media files to the Streamline system. Each watch folder can have an associated mapping profile.

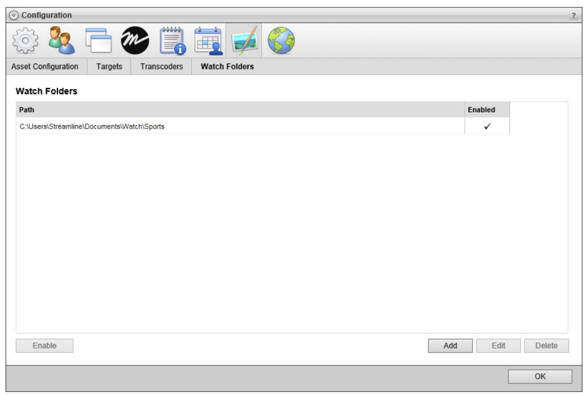
   For instructions on how to create mapping profiles, refer the section “**Create a Mapping Profile**” on page 10–5.

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

   The **Configure Asset Storage** panel opens.

4. Click the **Watch Folders** tab.

   The **Watch Folders** tab opens.



5. Click **Add**.

   The **Watch Folder Configuration** page opens.

6. In the **Path** box, enter the full pathname of the watch folder.

7. Use the **Mapping Profile** list the select the mapping profile to set attribute values for the assets created by Streamline uploading the media files from in the watch folder.

8. Select the **Enable Polling** check box to check the watch folder for new files at the time interval set in the **Polling Interval** box.

   Enable this check box for network watch folders for more reliable detection of new media files. For local watch folders, clear this check box for quicker detection of new media files.

9. When you select the **Enable Polling** check box, enter in the **Polling Interval** box the amount of time in milliseconds to wait between successive checks of the watch folder for new media files to upload.

10. Click **Save**.

    Streamline adds the new watch folder to the **Watch Folders** list. New watch folders are enabled by default.

Manage Available Watch Folders

You can create any number of watch folders for your Streamline system. You can enable or disable the watch folders on your Streamline system match the requirements of your users.

To enable or disable a watch folder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Watch Folders** tab.

   The **Watch Folders** tab opens.

3. In the **Watch Folders** list, select the watch folder to enable or disable.

   Depending on the state of the selected watch folder, Streamline displays either the **Enable** or **Disable** button below the **Watch Folders** list.

4. Do one of the following to control the availability of the selected watch folder on your Streamline system:

   - **Enabled Watch Folders** — if the selected watch folder is currently enabled, click **Disable**.

     Streamline no longer uploads media files from the disabled watch folder.

   - **Disabled Watch Folders** — if the selected target is currently disabled, click **Enable**.

     Streamline uploads the media files placed in the enabled watch folder.

Edit Watch Folders

When editing a target, you change the path and mapping profile of a watch folder.

To edit a watch folder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Watch Folders** tab.

   The **Watch Folders** tab opens.

3. In the **Watch Folders** list, select the watch folder to edit.
4. Click **Edit**.

   The **Watch Folder Configuration** page for the selected watch folder opens.

5. Edit the watch folder configuration settings as required.
6. Click **Save**.

Delete Watch Folders

To delete a watch folder

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

   The **Configure Asset Storage** panel opens.

2. Click the **Watch Folders** tab.

   The **Watch Folders** tab opens.

3. In the **Watch Folders** list, select the watch folder to delete.

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Streamline deletes the selected watch folder from the **Watch Folders** list. Deleting a watch folder from Streamline does not delete the associated folder from the operating system.

Configuring Accounts

Through configured accounts you can purchase content from media services and directly load the purchased assets into Streamline. Use the Accounts and Feeds panel to create and modify the accounts Streamline uses to purchase content.

This chapter discusses the following topics:

- AP GraphicsBank Account Configuration
- MGN Online Account Configuration
- Enable or Disable an Account
- Delete an Account

AP GraphicsBank Account Configuration

AP GraphicsBank offers an extensive library of over 500,000 ready-to-use graphics and graphic elements for on-air and digital use. From within Streamline you can quickly download purchased graphics and integrated the graphics into your production systems.

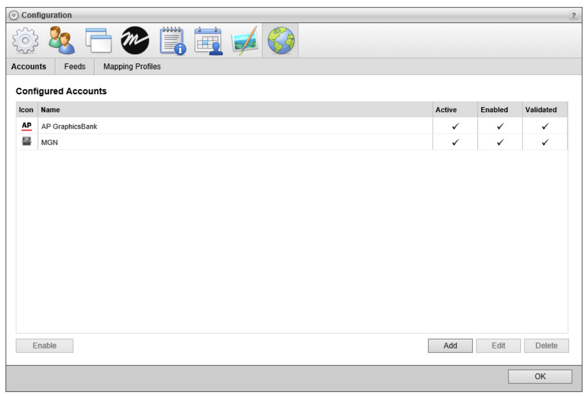
To create an AP GraphicsBank account

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

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
4. Click the **Accounts** tab.

   The **Accounts** tab opens.



5. Click **Add**.

   The **Create New Account** settings open.
6. Use the **Account** list to select **AP GraphicsBank**.
7. Click **Next**.

   The **Create AP Account** settings open.
8. In the **Name** box, enter a unique name for the AP GraphicsBank account.

   AP GraphicsBank account names must be unique on a Streamline Server.
9. In the **Purge After** box, enter the amount of time after which to delete old content from the associated AP GraphicsBank managed feed.

   The purge after time must be greater than or equal to 15 minutes and less than or equal to 180 days.
10. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
11. Click **Next**.

    The AP GraphicsBank account settings open.
12. In the **API Key** box, enter a the API key that you received from Associated Press for your AP GraphicsBank account.

    If you have not received your API key, please contact **AP Customer Support** (http://aphelp.ap.org/).

13. In the **Queries Per Day** box, enter a the number of AP GraphicsBank queries that your API key allows you to run in a day.
14. In the **Queries Per Second** box, enter a the number of AP GraphicsBank queries that your API key allows you to run in a second.
15. Click **Save**.

    Streamline adds the new AP GraphicsBank account to the list of available accounts.

To edit an AP GraphicsBank account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.
3. In the **Configured Accounts** list, select the **AP GraphicsBank** account to edit.
4. Click **Edit**.

   The **Edit AP Account** settings open.
5. Edit accounts settings as required.
6. Click **Next** and **Back** to access the available accounts settings.
7. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- how to assign account management permissions, refer to the section “**Assigning Permissions**” on page 3–5.
- how to enable or disable accounts, refer to the section “**Enable or Disable an Account**” on page 13–5
- how to delete accounts, refer to the section “**Delete an Account**” on page 13–6

MGN Online Account Configuration

MGN Online is America’s premier resource for still and animated news graphics. From within Streamline you can quickly download purchased graphics and integrated the graphics into your production systems.

To create an MGN Online account

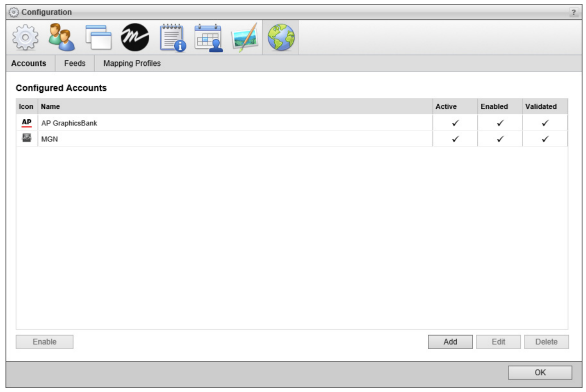
1. Log in to your Streamline Server as a system administrator.
2. On the main toolbar, click the **Configuration** icon. If the **Configuration** icon is not visible, you are not an administrator and cannot configure the server.

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

4. Click the **Accounts** tab.

   The **Accounts** tab opens.



5. Click **Add**.

   The **Create New Account** settings open.

6. Use the **Account** list to select **MGN Online**.

7. Click **Next**.

   The **Create MGN Account** settings open.

8. In the **Name** box, enter a unique name for the MGN Online account.

   MGN Online account names must be unique on a Streamline Server.

9. In the **Purge After** box, enter the amount of time after which to delete old content from the associated MGN Online managed feed.

   The purge after time must be greater than or equal to 15 minutes and less than or equal to 180 days.

10. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.

11. Click **Next**.

    The MGN Online account settings open.

12. In the **User ID** box, enter the user ID for your MGN Online account.

    If you do not know the **User ID** and **User Key** for your MGN Online account, log in to **MGN Online** (http://new.mgnonline.com/Account/Login?ReturnUrl=%2f3rd-party-access) to retrieve your credentials.

13. In the **User Key** box, enter the user key for your MGN Online user ID.

14. Click **Save**.

    Streamline adds the new MGN Online account to the list of available accounts.

To edit an MGN Online account

1. On the **Configuration** window toolbar, click the  **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the **MGN Online** account to edit.

4. Click **Edit**.

   The **Edit MGN Account** settings open.

5. Edit accounts settings as required.
6. Click **Next** and **Back** to access the available accounts settings.
7. After completing the required account setting edits, click **Save** on the last page of account settings.

For More Information on...

- how to assign account management permissions, refer to the section "**Assigning Permissions**" on page 3–5.
- how to enable or disable accounts, refer to the section "**Enable or Disable an Account**" on page 13–5
- how to delete accounts, refer to the section "**Delete an Account**" on page 13–6

Enable or Disable an Account

Streamline automatically enables all new accounts that you create. You can disable an account, making it unavailable to users. Temporarily disabling accounts enables you to create many accounts and manage which ones are available for purchasing. You can create any number of accounts, but your Streamline license limits the number of accounts that you can enable at one time.

Only active accounts are available for publishing. To activate an account you must enable and validate the account. Streamline validates accounts by connecting to the application associated with the account.

To disable an account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the enabled account to disable.
4. Click **Disable**.

   Streamline removes the check marks from the **Active** and **Enabled** columns of selected account.

To enable an account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the disabled account to enable.
4. Click **Enable**.

   Streamline adds check marks to the **Active** and **Enabled** columns of selected account.

Delete an Account

You cannot delete an account that contains links to an Inception story.

To delete an account

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Accounts** tab.

   The **Accounts** tab opens showing the list of available accounts.

3. In the **Configured Accounts** list, select the account to delete.
4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Streamline deletes the selected account from the list of accounts.

Configuring Feeds

Feeds enable your to select content from media services to purchase and load into Streamline. Use the Accounts and Feeds panel to create and modify the feeds Streamline uses to select content to purchase from media services.

This chapter discusses the following topics:

- AP GraphicsBank Feed Configuration
- MGN Online Feed Configuration
- Enable or Disable a Feed
- Delete a Feed

AP GraphicsBank Feed Configuration

AP GraphicsBank feeds enable you to search the extensive Associated Press GraphicsBank library of over 500,000 ready-to-use graphics and graphic elements for on-air and digital use. Follow the procedures in this section to create or edit a feed to search the AP GraphicsBank for content.

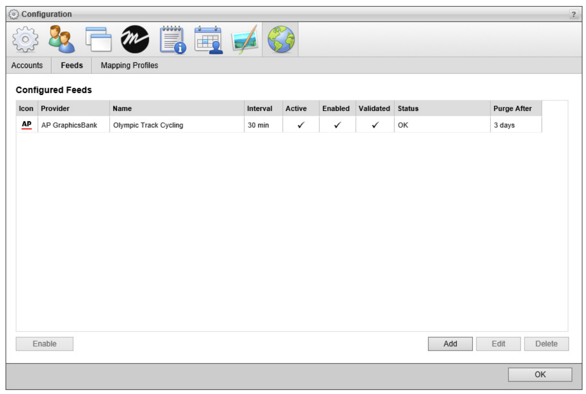
To create an AP GraphicsBank feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens.



3. Click **Add**.

   The **Create New Feed** settings open.

4. Use the **Feed** list to select **AP GraphicsBank**.
5. Click **Next**.

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

6. In the **Name** box, enter a name for the AP GraphicsBank feed.
7. Use the **Account** list to select the configured AP GraphicsBank account to search for and purchase AP GraphicsBank content.
8. In the **Query** box, enter the term or terms with which to search for content in the AP GraphicsBank.

   Use the `*` (asterisk) character as a wildcard to match one or more characters.

9. Select the **Enabled** check box to active the feed and make it available to all users.
10. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

    The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.

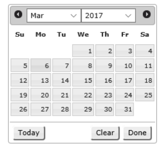
11. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
12. Click **Next**.
13. Use the **Content Set** list to select the type of AP GraphicsBank content to search, graphics or photos.
14. In the **Person(s)** box, enter the name or names of people that content must feature. Use a comma to separate multiple names.

15. In the **Subject(s)** box, enter the AP GraphicsBank category or categories of which content must be a part. Use a comma to separate multiple categories.

    The AP GraphicsBank Subject Vocabulary defines the available categories.

16. Select the date on which the AP GraphicsBank must have published content.

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

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

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

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

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

    e. Click **Done**.

    Streamline adds the new AP GraphicsBank feed to the list of configured feeds. To view AP GraphicsBank content found by the feed, open the feed in the **Feed Viewer** panel.

17. Click **Save**.

    Streamline adds the new AP GraphicsBank feed to the list of available feeds.

To edit an AP GraphicsBank feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.

3. In the **Configured Feeds** list, select the **AP GraphicsBank** feed to edit.

4. Click **Edit**.

   The **Edit AP Feed** settings open.

5. Edit feed settings as required.

6. After completing the required feed setting edits, click **Save**.

For More Information on...

- how to disable feeds, refer to the section "**Enable or Disable a Feed**" on page 14–5
- how to delete feeds, refer to the section "**Delete a Feed**" on page 14–6

MGN Online Feed Configuration

MGN Online feeds enable you to search America's premier resource for still and animated news graphics. Follow the procedures in this section to create or edit a feed to search MGN Online for content.

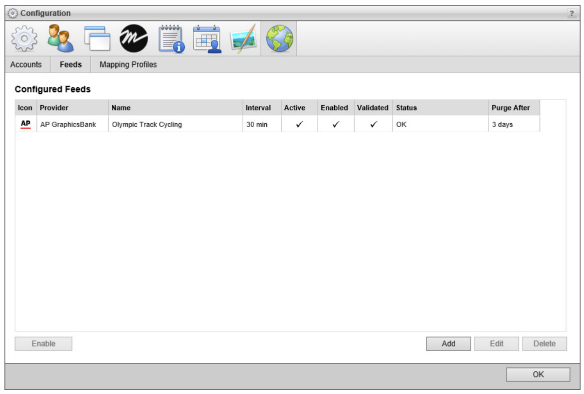
To create an MGN Online feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens.



3. Click **Add**.

   The **Create New Feed** settings open.

4. Use the **Feed** list to select **MGN Online**.
5. Click **Next**.

   The **Create MGN Feed** settings opens.

6. In the **Name** box, enter a name for the MGN Online feed.
7. Use the **Account** list to select the configured MGN Online account to search for and purchase MGN Online content.
8. In the **Query** box, enter the term or terms with which to search for MGN Online content.

   Use the * (asterisk) character as a wildcard to match one or more characters.

9. Use the **Area** list the select the type of content for which to search.
10. Select the **Enabled** check box to active the feed and make it available to all users.
11. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

    The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.

12. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
13. Click **Next**.

    Streamline adds the new MGN Online feed to the list of configured feeds. To view MGN Online content found by the feed, open the feed in the **Feed Viewer** panel.

To edit an MGN Online feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.
3. In the **Configured Feeds** list, select the **MGN Online** feed to edit.
4. Click **Edit**.

   The **Edit AP Feed** settings open.
5. Edit feed settings as required.
6. After completing the required feed setting edits, click **Save**.

For More Information on...

- how to disable feeds, refer to the section "**Enable or Disable a Feed**" on page 14–5
- how to delete feeds, refer to the section "**Delete a Feed**" on page 14–6

Enable or Disable a Feed

When you create a feed you can choose to enable to feed and make it available to users. When you do not want users to access information ingested by a feed, you can disable the feed to make it unavailable to users.

To disable a feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.
3. In the **Configured Feeds** list, select the feed to disable.
4. Click **Disable**.

   Streamline removes the check marks from the **Active** and **Enabled** columns of selected feed.

To enable a feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.
2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.
3. In the **Configured Feeds** list, select the disabled feed to enable.
4. Click **Enable**.

   Streamline adds check marks to the **Active** and **Enabled** columns of selected account.

Delete a Feed

To delete a feed

1. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

   The **Accounts and Feeds** panel opens.

2. Click the **Feeds** tab.

   The **Feeds** tab opens showing the list of available feeds.

3. In the **Configured Feeds** list, select the feed to delete.

4. Click **Delete**.

   A confirmation dialog box opens.

5. Click **OK**.

   Streamline deletes the selected searched-base feed from the list of feeds.

Selecting Feed Metadata to Ingest

When you download content from a feed, Streamline reads the metadata from the content and saves it in the Streamline asset created for the downloaded feed content. Streamline uses a mapping profile to select the asset attributes in which to save feed content metadata property values.

This chapter discusses the following topics:

- Create Feed Content Property Mappings
- Manage Feed Content Property Mappings

Create Feed Content Property Mappings

For each content provider available to Streamline, you can create mappings between content provider metadata properties or default values and Streamline asset attributes. When you use a feed to download content from a content provider, Streamline uses mappings to save read content metadata values or set default values in the associated attributes of the asset created from the downloaded feed content.

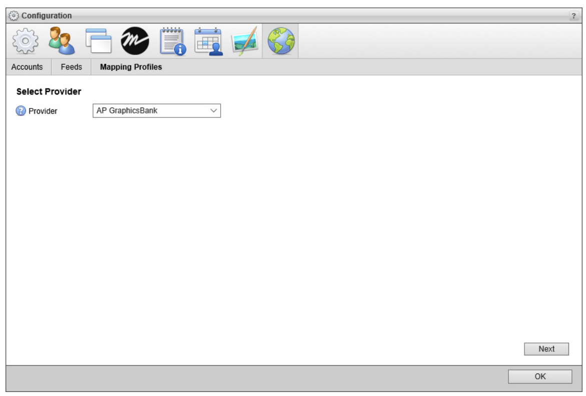
To create mappings for a content provider

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

   The **Configuration** window opens.
3. On the **Configuration** window toolbar, click the **Accounts and Feeds** icon.

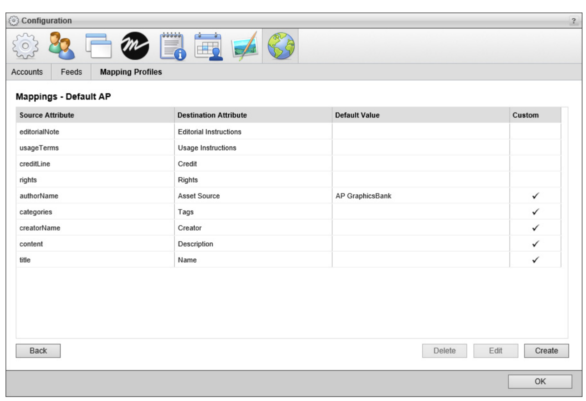
   The **Accounts and Feeds** panel opens.
4. Click the **Mapping Profiles** tab.

   The **Mapping Profiles** tab opens.



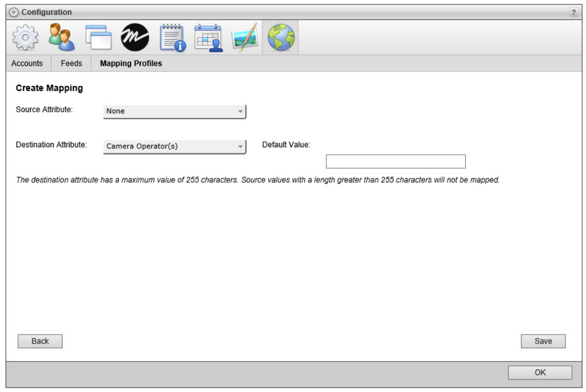
5. Use the **Provider** list to select the content provider for which to create mappings.
6. Click **Next**.

   The **Mappings** page opens to list the set mappings for the selected content provider.



7. Click **Create**.

   The **Create Mapping** page opens.



8. Use the **Source Attribute** list to select the content provider attribute from which to read a value the value to save in an asset attribute. Select **None** to set a default value instead of reading a value from an attribute.

   You can filter the **Source Attribute** list by typing any part of an attribute name in the **Filter** box. As you enter an attribute name, the list automatically updates to only show attribute names that match what you have entered. Clear the **Filter** box to list all available content provider attributes

9. Use the **Destination Attribute** to select the asset attribute in which to save the read or set value for the selected **Source Attribute**.

   You can filter the **Destination Attribute** list by typing any part of an attribute name in the **Filter** box. As you enter an attribute name, the list automatically updates to only show attribute names that match what you have entered. Clear the **Filter** box to list all available content provider attributes

10. Enter in the **Default Value** box the default value to set for the selected **Destination Attribute**.

    Streamline always uses the set **Default Value** when **None** is the selected **Source Attribute**. When a content provider attribute is the selected **Source Attribute**, Streamline only uses the set **Default Value** when the content provider attribute contains no value.

11. Click **Save**.

    Streamline saves the defined mapping and opens the **Mappings** page.

12. Repeat step **7** to step **11** for each mapping that you want to define for a content provider.

Manage Feed Content Property Mappings

Manging the feed content mappings on your Streamline system includes the following procedures:

- Edit Mappings
- Delete Mappings

After editing mappings, Streamline uses the revised mappings for new content that you download from a feed. The asset properties do not change for previously downloaded feed content.

Edit Mappings

You can edit the properties of a mapping to change the values ingested into asset attributes.

To edit the properties of a mapping

1. In the **Mappings** table of the **Mappings** page, select a mapping to edit that has a check mark displayed in the **Custom** column.

   You can only edit **Custom** mappings. The **Edit Mapping** page opens.

2. Edit the mapping properties as required.
3. Click **Save**.

   Streamline updates the mapping and opens the **Mappings** page.

Delete Mappings

Deleting a mapping does not change any of the assets that were loading into Streamline from a feed associated with the content provider that uses deleted mapping.

To delete a mapping from a mapping profile

1. In the **Mappings** table of the **Mappings** page, select a mapping to delete that has a check mark displayed in the **Custom** column.

   You can only delete **Custom** mappings.

2. Click **Delete**.

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

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

   Streamline deletes the selected mapping from the **Mappings** table.

Appendix A: Mapping Profiles

The sections in this appendix describes media file metadata properties to Streamline properties mappings contained the mapping profiles included with a Streamline system.

This appendix lists the mappings contained in the following mapping profiles:

- Default File Mappings
- Dublin Core

Default File Mappings

This profile maps standard media file properties to Streamline asset attribute properties.

Table A.1 Mappings Contained in the Default File Mapping Profile

Asset Attribute	Media File Property	XMP Category
encodedDate	Encoded_Date	General
format	Format	General
duration	Duration	General
overallBitRate	OverallBitRate	General
fileSize	FileSize	General
videoStreams_duration	Duration	Video
videoStreams_bitRate	BitRate	Video
videoStreams_codec	Codec	Video
videoStreams_width	Width	Video
videoStreams_height	Height	Video
videoStreams_pixelAspectRatio	PixelAspectRatio	Video
videoStreams_displayAspectRatio	DisplayAspectRatio	Video
videoStreams_rotation	Rotation	Video
videoStreams_frameRateMode	FrameRate_Mode/String	Video
videoStreams_frameRate	FrameRate	Video
videoStreams_frameCount	FrameCount	Video
videoStreams_interlacement	Interlacement	Video
videoStreams_standard	Standard	Video
videoStreams_colorSpace	ColorSpace	Video
videoStreams_chromaSubsampling	ChromaSubsampling	Video
videoStreams_bitDepth	BitDepth	Video
videoStreams_compressionMode	Compression_Mode	Video
videoStreams_streamSize	StreamSize	Video
videoStreams_language	Language	Video
audioStreams_duration	Duration	Audio
audioStreams_bitRate	BitRate	Audio
audioStreams_samplingRate	SamplingRate	Audio
audioStreams_samplingCount	SamplingCount	Audio
audioStreams_channels	Channels	Audio
audioStreams_bitDepth	BitDepth	Audio
audioStreams_language	”Language	Audio
audioStreams_streamSize	StreamSize	Audio
audioStreams_codec	Codec	Audio

Table A.1 Mappings Contained in the Default File Mapping Profile

Asset Attribute	Media File Property	XMP Category
imageStreams_codec	Codec	Image
imageStreams_width	Width	Image
imageStreams_height	Height	Image
imageStreams_colorSpace	ColorSpace	Image
imageStreams_chromaSubsampling	ChromaSubsampling	Image
imageStreams_bitDepth	BitDepth	Image
imageStreams_compressionMode	Compression_Mode	Image
imageStreams_streamSize	StreamSize	Image

Dublin Core

This profile contains the all of the mappings from the Default mapping profile and adds mappings for the standard Dublin Core metadata properties. For more information about Dublin Core metadata properties, refer to the web page http://wiki.dublincore.org/index.php/User_Guide.

Table A.2 Additional Mappings Contained in the Dublin Core Mapping Profile

Asset Attribute	Media File Property	XMP Category
encodedDate	Encoded_Date	General
format	Format	General
description	Description	XMP
rights	Rights	XMP
language	Language	XMP
tags	Subject	XMP>
contentRegion	Coverage	XMP
creator	Creator	XMP
name	Title	XMP
type	Type	XMP