# streamline

## User Guide

### Version 3.3

Ross

Production Technology Experts

# Thank You for Choosing Ross

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

Our mission is to:

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

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

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

David Ross
CEO, Ross Video
*dross@rossvideo.com*

## Ross Video Code of Ethics

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

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

# Streamline · User Guide


- Ross Part Number: **7800DR-004-3.3**
- 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

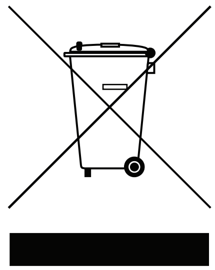
For customers that require a longer warranty period, Ross offers an extended warranty plan to extend the standard warranty period by one year increments. For more information about an extended warranty for your Streamline Server system, contact your regional sales manager.

## 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

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

| | |
| --- | --- |
| General Business Office: | (+1) 613 ● 652 ● 4886 |
| Fax: | (+1) 613 ● 652 ● 4425 |
| Technical Support: | (+1) 613 ● 652 ● 4886 |
| After Hours Emergency: | (+1) 613 ● 349 ● 0006 |
| E-mail (Technical Support): | techsupport@rossvideo.com |
| E-mail (General Information): | solutions@rossvideo.com |
| Website: | http://www.rossvideo.com |

# Contents

# Introduction

## A Word of Thanks

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

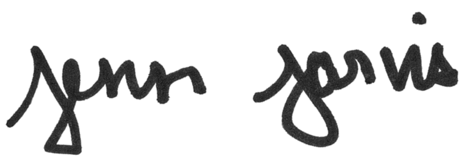
We are committed to providing you with the highest level of customer satisfaction possible. If, for any reason, you have questions or comments, please call Ross Video at +1-613-652-4886 or send us an e-mail at techsupport@rossvideo.com.

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,



Jenn Jarvis
Marketing Product Manager – Inception & Streamline
jjarvis@rossvideo.com

## About This Guide

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

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

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

## Documentation Conventions

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

### Interface Elements

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

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

### User Entered Text

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

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

### Referenced Guides

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

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

### Menu Sequences

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

### Important Instructions

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

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

## Getting Help

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

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

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

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

### Contacting Technical Support

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

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

#### North America

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

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

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

#### EMEA

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

Our telephone number is: +44 (0)1189502446

International toll free: +800 1005 0100

#### Emergency After-hours Support

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

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

International toll free: +800 1005 0100

### Online

E-mail: techsupport@rossvideo.com

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

# Getting Started

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

The following topics are discussed in this chapter:

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

# Supported Formats

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

## Thumbnail Viewing

Streamline supports the following image formats for thumbnail viewing:

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

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

## Video Playout

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

***Table 2.1 Supported Video Formats for Playout***

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

## Metadata Collection

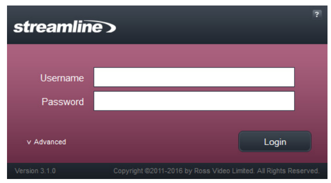
Streamline supports the gathering of structural metadata using the MediaInfo tool. Refer to the MediaInfo website for a list of analytics and supported file formats.

## Start Streamline

### To start Streamline

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

    The **Login** panel opens.




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

    Streamline opens.

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

### To close Streamline

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

## Streamline Workflow

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

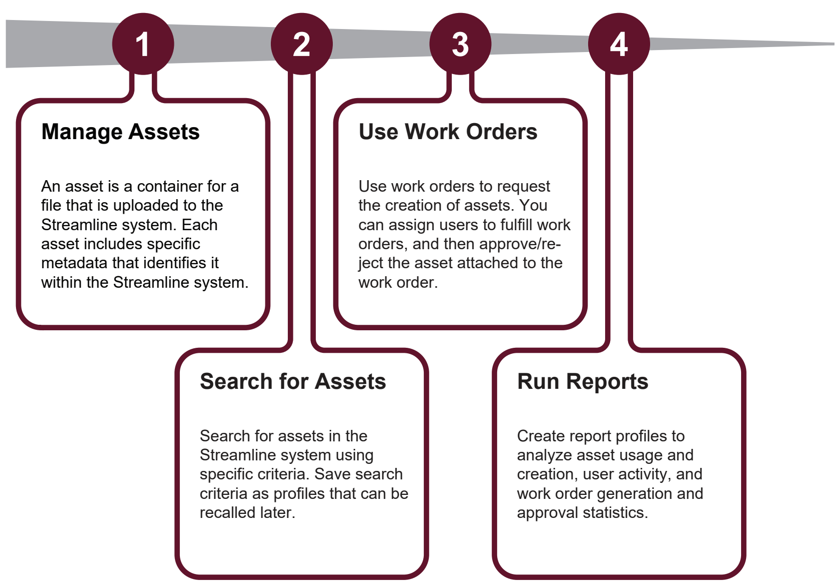



*Figure 2.1 Streamline Workflow*

## Manage Assets

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

## Search for Assets

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

## Use Work Orders

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

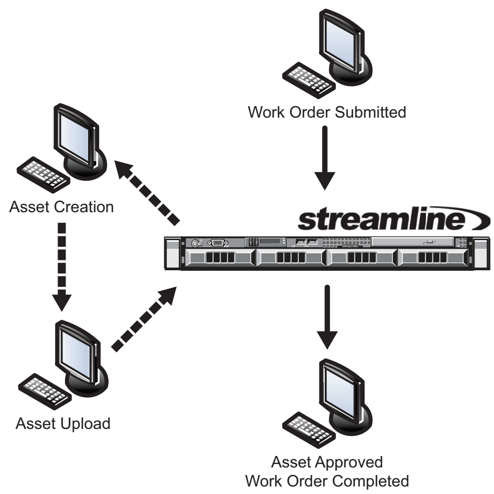



*Figure 2.2  Work Order Workflow*

### Work Order Submitted

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

### Asset Creation

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

#### Asset Upload

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

#### Asset Approved

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

### Run Reports

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

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

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

## Exploring the Streamline User Interface

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

### Main Toolbar

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

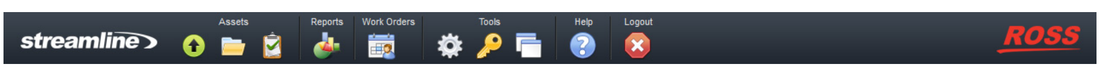
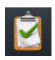
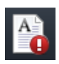
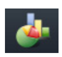
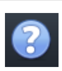



*Figure 2.3 Streamline Main Toolbar*

The main toolbar contains the following icons:

***Table 2.2  Main Toolbar Icons***

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

## Assets Panel

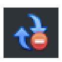
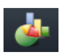
The Assets panel lists assets in a table or tile layout, allowing you to quickly access individual assets or search the Streamline system for specific assets. From the Assets panel you can select assets to upload, delete, modify, and share files. A thumbnail represents the asset in the panel. If the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

**For More Information on...**

- adding an asset to the Streamline system, refer to the section "**Uploading Assets**" on page 3–2.

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

***Table 2.3  Assets Panel Toolbar (Top)***

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

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

***Table 2.4  Assets Panel Toolbar (Bottom)***

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

## Upload Assets Panel Overview

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

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

***Table 2.5  Upload Assets Toolbar***

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

## Asset Editor Panel Overview

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

**For More Information on...**

- the available types of metadata, refer to the section "**Metadata Overview**" on page 3–2.
- editing assets, refer to the section "**Editing the Metadata for an Asset**" on page 3–5.

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

***Table 2.6  Asset Editor (Top) Toolbar Icons***

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

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

***Table 2.7 Asset Editor (Bottom) Toolbar Icons***

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

## Asset Approvals Panel

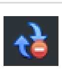
The Asset Approvals lists the assets for which Streamline users have requested your approval. Only those users with the appropriate permissions can approve or reject assets. After a user approves or rejects an asset, Streamline removes the asset from the Asset Approvals panel.

**For More Information on...**

- approving assets, refer to the section "**Approving and Rejecting an Asset**" on page 3–12.

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

***Table 2.8 Asset Approvals Toolbar Icons***

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

## Work Orders Panel

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

**For More Information on...**

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

The top toolbar includes the following icons:

***Table 2.9 Work Orders Toolbar (Top) Icons***

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

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

***Table 2.10 Work Orders Toolbar (Bottom) Icons***

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

## Work Order Editor Panel Overview

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

**For More Information on...**

- submitting a work order, refer to the section "**Creating a Work Order**" on page 4–2.
- approving an asset, refer to the section "**Approving and Rejecting an Asset**" on page 3–12.

A Work Order Editor panel includes the following icons:

***Table 2.11 Work Order Editor Toolbar Icons***

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

## Reports Panel

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

**For More Information on...**

- creating a report, refer to the section "**Creating a New Report**" on page 8–5.
- running a report, refer to the section "**Running a Report**" on page 8–8.

The toolbar in the Reports panel includes the following icons:

***Table 2.12  Reports Toolbar Icons***

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

## Panel Positions and Perspectives

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

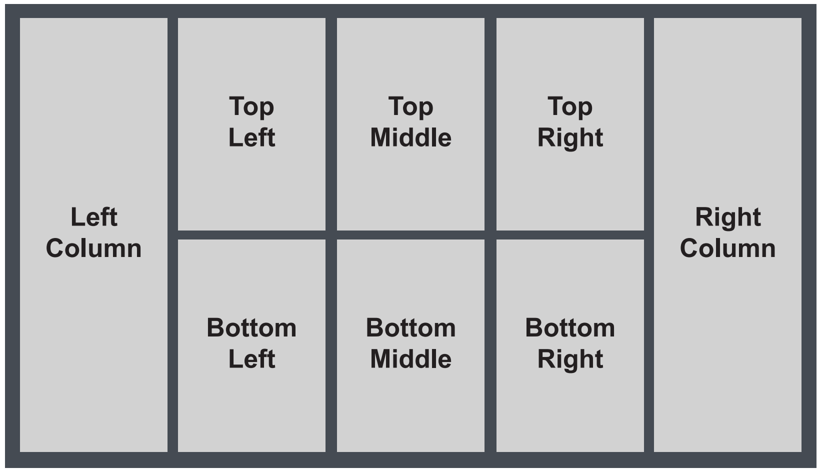



*Figure 2.4 Arrangement of the Eight Panel Positions*

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

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

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

## Default Panel Positions

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

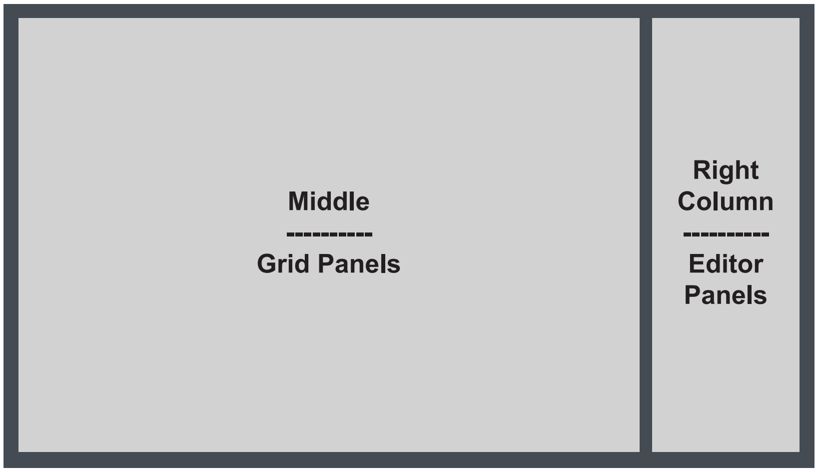



*Figure 2.5 Default of Panel Layout*

Default layout positions are as follows:

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

**For More Information on...**

- creating and managing perspectives, refer to the section "**Working With Perspectives**" on page 10–2.

## Move a Panel from One Layout Position to Another

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

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

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

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

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

**For More Information on...**

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

## Rearrange Panel Tabs Within a Layout Position

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

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

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

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

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

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

## Navigating within Panels

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

**To resize a panel**

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

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

**To close a panel**

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

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

### Navigating within Column-Based Panels

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

The following panel types are column-based:

- Asset Approvals
- Assets
- Work Orders
- Reports

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

*Table 2.13 Column-based Panel Navigation*

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

# Managing Assets

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

The following topics are discussed in this chapter:

- Metadata Overview
- Uploading Assets
- Editing the Metadata for an Asset
- Organizing Assets in Folders
- Linking Assets
- Sharing Files in Streamline
- Requesting Approval for an Asset
- Previewing a Media File
- Approving and Rejecting an Asset
- Sending Assets to Targets
- Deleting an Asset

# Metadata Overview

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

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

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

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

#### For More Information on...

- reports, refer to the section “**Report Criteria Overview**” on page 8–3.
- creating search profiles, refer to the section “**Saving Criteria as a Profile**” on page 7–6.

# Uploading Assets

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

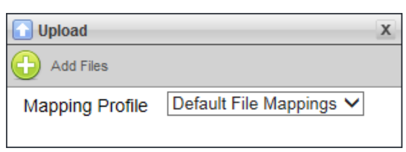
## Uploading a Single Asset Through the Upload Panel

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

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

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

   The **Upload** panel opens.

2. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the Streamline asset created by uploading a media file:

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

   Your Streamline system may contain additional mapping profiles.

3. To select the media file to upload, perform one of the following actions:

   - Drag and drop the media file from its location to the **Upload** panel; or
   - In the **Upload** panel, click the **Add Files** icon, navigate to the file location, and click **Open**.

4. In the **Upload** panel, click the **Upload** button next to the file thumbnail to upload the file to the Streamline system.

## Uploading Multiple Assets Through the Upload Panel

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

**To upload multiple assets through the Upload panel**

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

   The **Upload** panel opens.

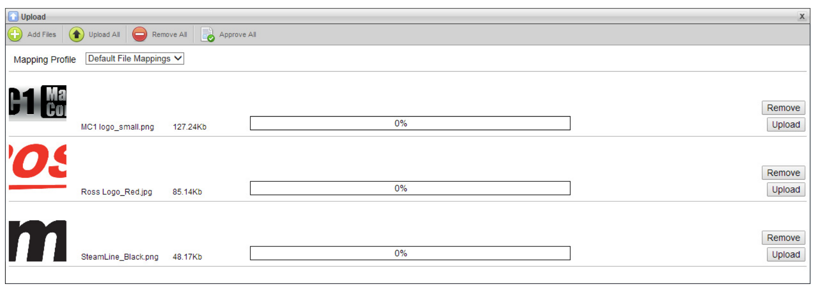
2. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the Streamline asset created by uploading a media file:

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

   Your Streamline system may contain additional mapping profiles.

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

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




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

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

## Uploading Video Clips and Proxies

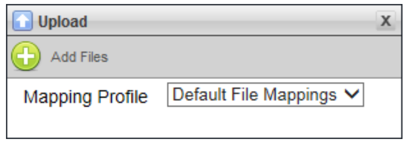
You can upload proxies and thumbnails and have them automatically associated as one asset. Keep the following in mind when uploading video clips, proxies, and thumbnails:

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

#### To upload a video clip

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

   The **Upload** panel opens.




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

   Your Streamline system may contain additional mapping profiles.
3. In the **Upload** panel, click the **Add Files** icon.

   The **File Upload** dialog opens.
4. Navigate to the file location and select the files for the video clip. Ensure that all files use the same filename nomenclature. For example, to create an asset named senator1, you would upload the following files:
   - Essence file (e.g. senator1.avi)
   - Proxy file (e.g. senator1.avi.proxy.mp4)
   - Thumbnail file (e.g. senator1.avi.thumbnail.png)
5. Click **Open**.

   The **File Upload** dialog closes and the **Upload** panel now lists the selected files.
6. In the **Upload** panel, click the **Upload All** icon in the main toolbar.

## Removing Files from the Upload Panel

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

Once a media file is removed from the panel, it will not be uploaded to the Streamline system. You must repeat the procedure "**To upload an asset through the Upload panel**" on page 3–2 to add it to the Streamline system.

#### To remove a file from the Upload panel

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

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

#### To remove all files from the Upload panel

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

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

## Approving Assets in the Upload Panel

You can approve a collection of assets before they are uploaded to the Streamline system. You must have permission to approve assets. To approve a single asset, you must first upload it to the Streamline system and then use the procedure "**To approve an asset using the Asset Editor panel**" on page 3–12 to approve it.

**To approve multiple assets using the Upload panel**

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

   The assets are uploaded to the Streamline system.

## Uploading an Asset Through a Watch Folder

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

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

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

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

# Editing the Metadata for an Asset

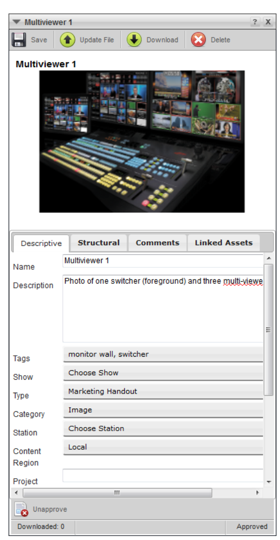
As you edit the fields in the Asset Editor panel, a red asterisk (*) displays next to the asset name in the panel header to indicate the asset has unsaved changes. If you exit the panel without saving, you are prompted to save or discard your changes before proceeding.You must have permission to edit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

**To edit the metadata for an asset**

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

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

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



3. To edit the descriptive metadata for the asset:
   a. Click the **Descriptive** tab.
   b. Edit the provided fields.
   c. Click the **Save** icon to apply your changes.
4. To add a comment to the asset:
   a. Click the **Comments** tab.
   b. Click the **Add Comment** icon.
   c. Type your text in the provided field.
5. Click **Save**.

# Organizing Assets in Folders

Streamline systems routinely contain a very large number of assets. You can use the Folders tree view in the Asset panel to organize assets in the manner that you prefer.

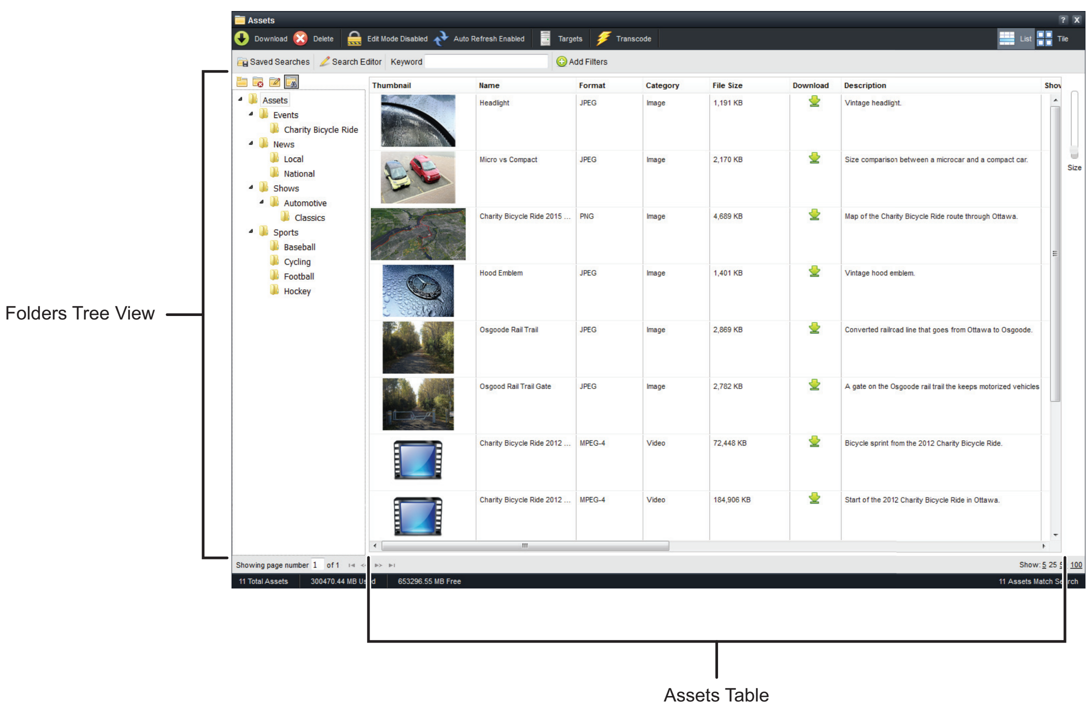
## Adding Folders to the Folders Tree View

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

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

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

   The **Assets** panel opens.

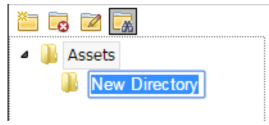



   On a new Streamline system, the **Folders** tree view only contains an **Assets** folder.

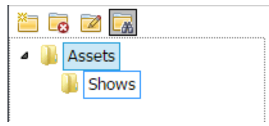
2. In the **Folders** tree view, select the folder to which you want to add a folder.

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

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




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




## Moving Assets into Folders

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

#### To move an asset into a folder

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

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

## Managing Folders in the Folders Tree View

Folder management includes the following tasks:

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

#### To rename a folder

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

#### To delete a folder

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

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

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

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

## Using the Folders Tree View to List Assets

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

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

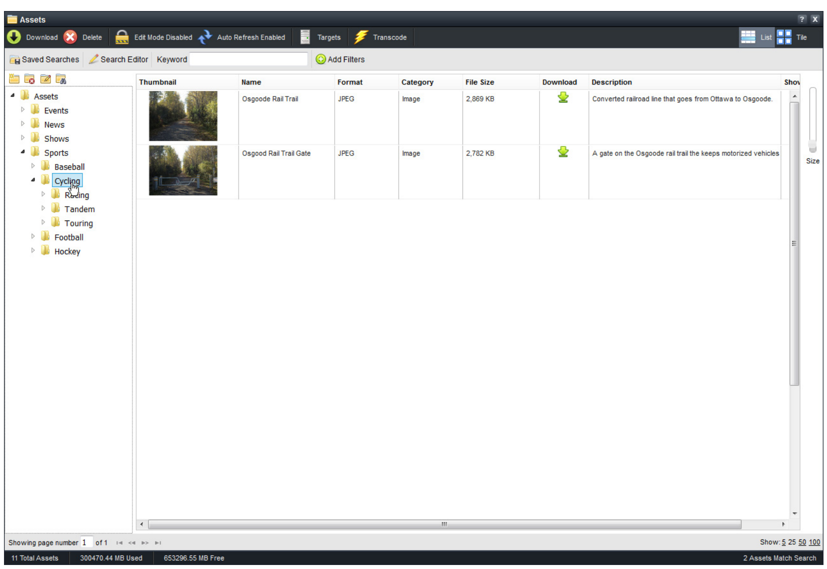
#### To list assets using the Folders tree view

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

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

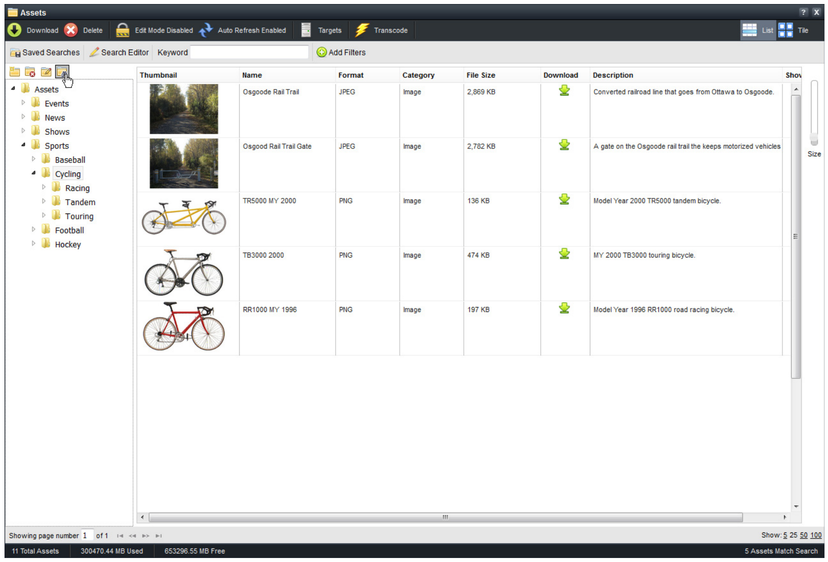
2. In the **Folders** tree view, expand folders so that you can see the folder that you want to list.
3. Select the folder to list.

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



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

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




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

#### For More Information on...

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

## Linking Assets

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

#### To verify whether an asset is linked to another

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

   The **Assets panel** opens.

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

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

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

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

#### To link an asset

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

   The **Assets panel** opens.

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

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

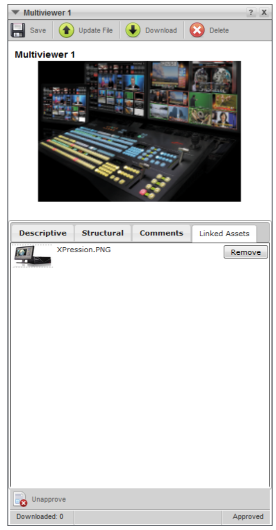
3. Click the **Linked Assets** tab.

4. In the **Assets** table:

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

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

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




#### To remove a link to an asset

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

   The **Assets panel** opens.

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

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

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

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

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

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

## Sharing Files in Streamline

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

#### To download a media file to your computer

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

   The **Assets panel** opens.

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

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

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

   The **Download** dialog opens.

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

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

**To update a media file**

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

   The **Assets panel** opens.

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

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

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

   The **Upload** dialog opens.


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

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

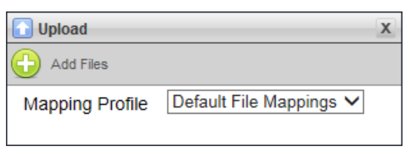
## Requesting Approval for an Asset

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

**To request approval for an asset**

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

   The **Upload** panel opens.




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

   Your Streamline system may contain additional mapping profiles.

3. Perform one of the following:
   - Drag and drop the media file from its location to the **Upload** panel; or
   - In the **Upload** panel, click the **Add Files** icon, navigate to the file location, and click **Open** to close the dialog.

4. In the **Upload** panel, click the **Upload** button next to the file thumbnail to upload the file to the Streamline system.

5. In the **Assets** panel, double-click the asset you wish to submit for approval.

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

6. In the **Asset Editor** panel, click the **Request Approval** icon located in the bottom toolbar.

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

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

## Previewing a Media File

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

**To preview a the media file of an asset**

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

   The **Assets** panel opens.

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

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

3. Select the **Descriptive** tab in the **Asset Editor** panel.

4. In the **Descriptive** tab, click the thumbnail of the asset.

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

## Approving and Rejecting an Asset

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

### Using the Asset Editor Panel

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

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

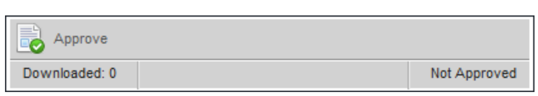
1. In the main toolbar, click the **Assets Browser** icon.

   The **Assets panel** opens.

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

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

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




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

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

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

   The **Assets panel** opens.

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

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

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

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

## Using the Asset Approvals Panel

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

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

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

   The **Asset Approvals** panel opens.

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


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

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

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

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

   The **Asset Approvals** panel opens.

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

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

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

# Sending Assets to Targets

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

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

## Viewing the Assets that are Suitable for a Target

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

**To view the assets that are suitable for a target**

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

   The **Assets** panel opens.

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

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

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

## Sending an Asset to a Target

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

**To send an asset to a target**

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

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

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

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

# Deleting an Asset

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

**To delete an asset from Streamline**

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

   The **Assets** panel opens.

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

   The asset row is now highlighted in the table.

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

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

# Managing Work Orders

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

The following topics are discussed in this chapter:

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

## Work Order Editor Panel Overview

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

### Details Tab

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

### Attachments Tab

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

### Comments Tab

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

## Creating a Work Order

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

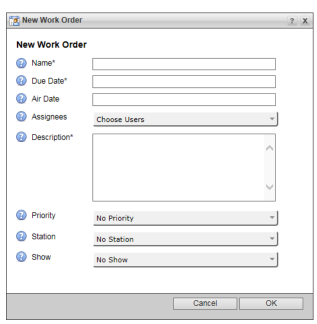
**To create a new work order**

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

   The **Work Orders** panel opens.

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

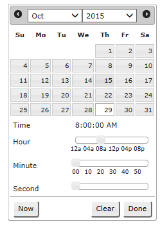
   The **New Work Order** dialog box opens.




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

4. Select the **Due Date** when the work order must be completed and submitted by. You must set a due date for all work orders.

   a. Click the **Due Date** box to open the **Calendar** tool.




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

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

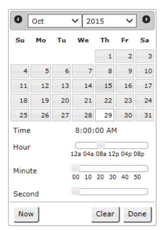
   c. Drag the **Hour**, **Minute**, and **Second** sliders to specify the start time.

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

   d. Click **Done**.

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

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




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

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

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

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

   d. Click **Done**.

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

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

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

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

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

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

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

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

## Adding Assets to a Work Order

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

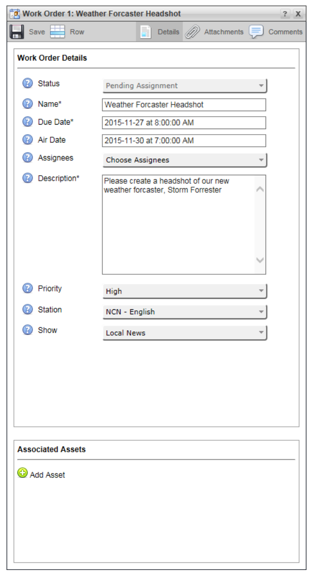
**To add an asset to a work order**

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

   The **Work Orders** panel opens.

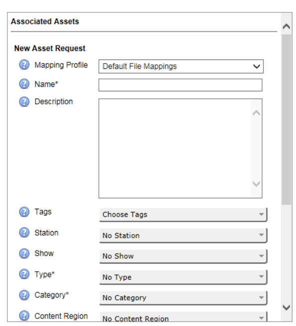
2. In the **Work Orders** panel, double-click the work order to which to add one or more assets.

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




3. In the **Associated Assets** section, click the **Add Asset** icon.

   The **New Asset Request** section opens.




4. Use the **Mapping Profile** list to select the mapping profile to use to import media file metadata into the Streamline asset created from the media file:

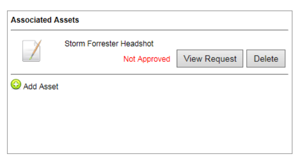
   - **Default File Mappings** — refer to the section "**Default File Mappings**" on page A–2 to view mappings.
   - **Dublin Core** — refer to the section "**Dublin Core**" on page A–3 to view mappings.

   Your Streamline system may contain additional mapping profiles.

5. In the **Name** box, enter a unique identifier for the asset. You must enter a name for each asset that you add to a work order.

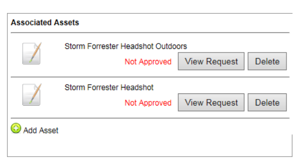
6. In the **Description** box, enter additional information about the asset.
7. Use the **Tags** list to select the keywords to associate with the asset. In the list, select the check box to the left of each keyword to associate with the asset.
8. Use the **Station** list to select the call sign of the commercial television station identified with the asset.
9. Use the **Show** list to select the program or segment with which to associate the asset.
10. Use the **Type** list to select the application or the intended use for the asset. You must select a type for each asset that you add to a work order.
11. Use the **Category** list to select the type of media type contained in the asset; for example, an image or a video clip. You must select a category for each asset that you add to a work order.
12. Use the **Content Region** list to select the geographical or network affiliate level to associate with the asset.
13. In the **Project** box, enter the project or assignment with which to associate the asset.
14. In the **Event** box, enter a historical incident, holiday, or other occurrence of significance to associate with the asset. For example, Christmas or the Olympics.
15. In the **Language** box, enter the language used in the asset.
16. In the **Rights** box, enter information about the intellectual property rights held in and over the asset.
17. In the **Creator** box, enter the name of the person responsible for creating the content for the asset.
18. In the **Talent** box, enter the news anchor, performer, or announcer that the asset features.
19. In the **Camera Operator(s)** box, enter the videographer that provided video footage for the asset.
20. Click **Save**.

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

    Streamline also adds a placeholder for the defined asset to the **Assets** panel.

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

## Editing a Work Order

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

**To edit work order requirements**

1. In the main toolbar, click the **Work Orders** icon to open the **Work Orders** panel.
2. In the **Work Orders** panel, double-click the work order to edit.

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

3. In the **Work Order Editor** toolbar, select the **Details** tab.
4. Edit the provided settings as required.

   Whenever you change the value of a work order setting, Streamline displays a red asterisk (*) to the left of the work order name to indicate that the work order has unsaved changes.
5. In the **Work Order Editor** toolbar, click the **Save** icon to save the changes made to the work order.

## Delete Assets from a Work Order

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

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

1. In the **Associated Assets** section of a work order open in a **Work Order** panel, locate the asset to delete.
2. Click the **Delete** button associated with the asset to delete.
3. In the **Alert** dialog that opens, click **OK**.

   Streamline deletes the selected asset from the **Associated Assets** section of the work order and the associated asset placeholder from the **Assets** panel.

# Attaching Files to a Work Order

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

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

**To attach a file to a work order**

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

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

   The work order opens in the **Work Order Editor** panel.
3. In the **Work Order Editor** panel toolbar, select the **Attachments** tab.

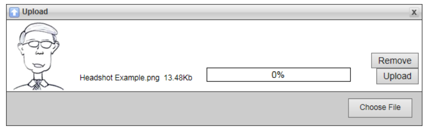
   The **Attachments** tab opens.
4. In the **Attachments** tab toolbar, click the **Attach** icon.

   The **Upload** dialog opens.


5. Click **Choose File**.

   The **Choose File Upload** dialog opens.
6. In the **Choose File Upload** dialog, navigate to the file to attach to the work order.
7. Click **Open**.

8. A thumbnail of the selected file opens into the **Upload** dialog box.




9. In the **Upload** dialog, click **Upload**.

   Streamline uploads the selected file to the **Attachments** tab of the **Work Order** panel.

10. To enter a description for an attachment:

    a. In the **Attachments** tab, click the **Description** cell associated with the attachment to describe.

    b. Press the **Space Bar**.

    c. In the text box that opens, enter a description for the attachment.

    d. After entering a description, click **Save**.

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

#### To delete an attachment from a work order

1. In the **Work Order Editor** panel toolbar, click the **Attachments** tab.
2. In the **Attachments** table, select the attachment to delete.
3. In the **Attachments** tab toolbar, click the **Delete** icon.

   An **Alert** dialog opens.

4. In the **Alert** dialog, click **OK**.

   Streamline deletes the selected attachment from the work order.

## Adding Comments to a Work Order

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

#### To add comments to a work order

1. In the **Work Order Editor** toolbar, click the **Comments** tab.

   The **Comments** tab opens.

2. In the **Comments** tab toolbar, click the **Add Comment** tab.

   A text box opens in the **Comments** tab.

3. In the provided text box, enter a comment for the work order.
4. Click the **Save** below the text box.

   Streamline adds the entered comment to the **Attachment** tab alone with the creation date and time of the comment.

## Completing a Work Order

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

**Assignee**

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

**Approver**

- "**To approve an asset using the Asset Editor panel**" on page 3–12 or
- "**To approve assets using the Asset Approvals panel**" on page 3–13

## Deleting a Work Order

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

**To delete a work order**

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

   The **Work Orders** panel opens.
2. In the **Work Orders** table, select the work order to delete.
3. In the **Work Order Editor** panel toolbar, click the **Delete** icon.

   An **Alert** dialog opens.
4. In the **Alert** dialog, click **OK**.

   Streamline deletes the selected work order.

# AP GraphicsBank Feeds

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

This chapter discusses the following topics:

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

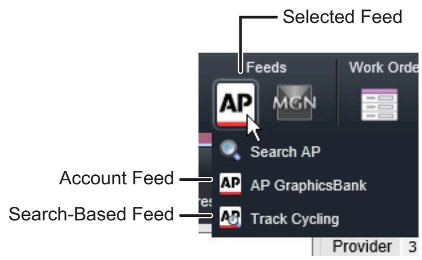
# View the Content in an AP GraphicsBank Feed

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

**To view the content in an AP GraphicsBank feed**

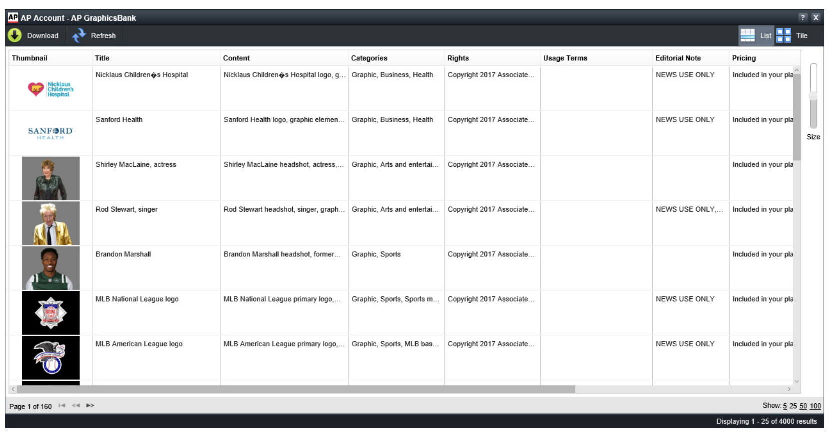
1. In the main toolbar, point to the **AP GraphicsBank** icon.

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




2. Click the name of the feed to open.

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



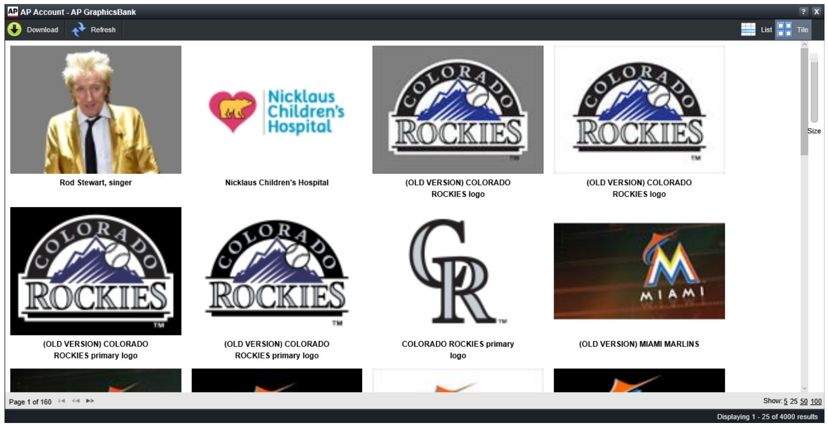

3. Drag the **Size** slider to enlarge or reduce the size of the thumbnail images displayed for the feed content items.

4. When the **Feed View** panel cannot display all of the content contained in a feed on a single page, use the following controls in the bottom toolbar of the **Feed View** panel to view all of the content:

   - — click button to view the first page of content.
   - — click button to view the previous page of content.
   - — click this button to view the next page of content.
   - **Show** — click the following links to set the number of content items to display on a page:
     - **5** — display 5 content items on a page.
     - **25** — display 25 content items on a page.
     - **50** — display 50 content items on a page.
     - **100** — display 100 content items on a page.

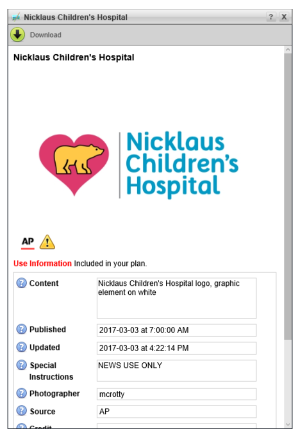
5. To display feed content thumbnail images, click the **Tile** icon in the toolbar.

   The **Feed View** panel displays content as thumbnail images.




6. To once again display feed content in table format, click the **List** icon in the toolbar.
7. To view more information about a content item, double-click the item.

   The **AP GraphicsBank Item Viewer** panel opens for the selected content item.




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

## Edit a Search-Based Feed

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

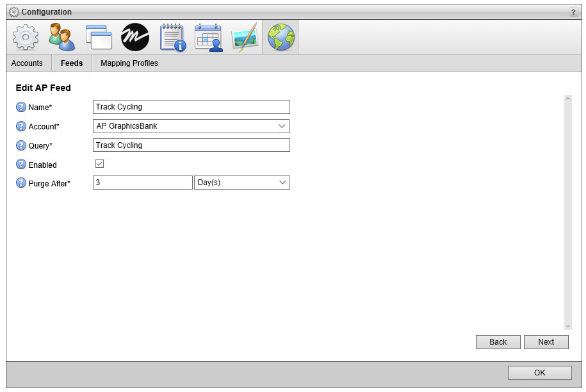
**To edit a Search-Based feed search**

1. View the results of a Search-Based feed.

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

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

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

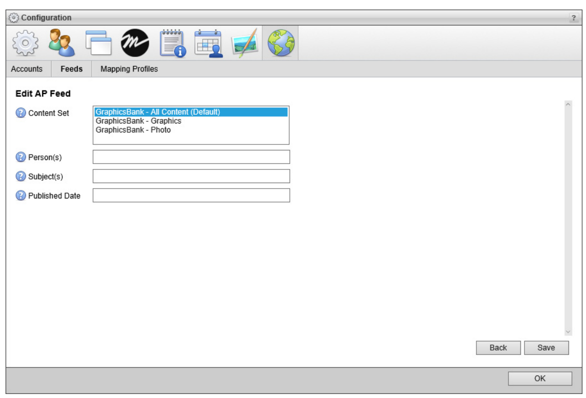



3. In the **Name** box, enter a name for the Search-Based feed.
4. Use the **Account** list to select the configured AP GraphicsBank account to search for and purchase AP GraphicsBank content.
5. In the **Query** box, enter the term or terms with which to search for content in the AP GraphicsBank.

   Use the * (asterisk) character as a wild card to match one or more characters.
6. Select the **Enabled** check box to active the feed and make it available to all users.
7. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

   The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.
8. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
9. Click **Next**.

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

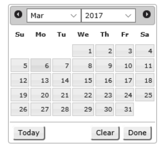



10. Use the **Content Set** list to select the type of AP GraphicsBank content to search, graphics or photos.
11. In the **Person(s)** box, enter the name or names of people that content must feature. Use a comma to separate multiple names.
12. In the **Subject(s)** box, enter the AP GraphicsBank category 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.

13. 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**.

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

    The **Configured Feeds** page opens.

15. Click **OK**.

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

## AP GraphicsBank One-Time Searches

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

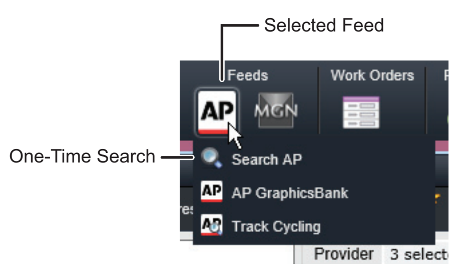
### Create an AP GraphicsBank One-Time Search

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

**To create an AP GraphicsBank One-Time search**

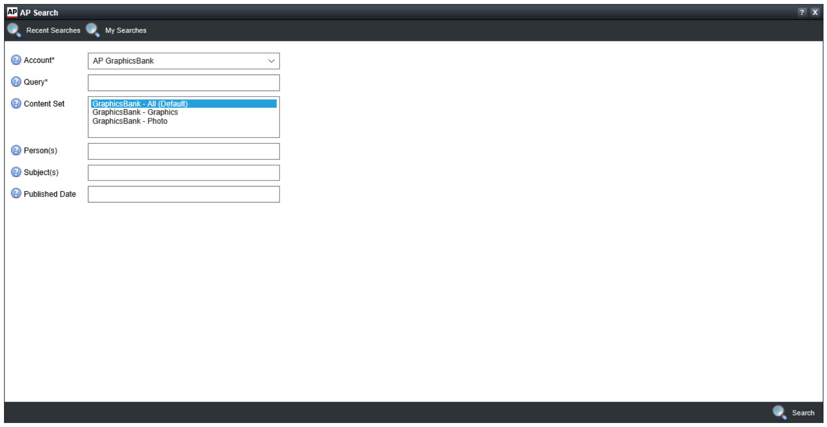
1. In the main toolbar, point to the AP **AP GraphicsBank** icon.

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




2. Click **Search AP**.

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




3. Use the **Account** list to select the configured AP GraphicsBank account to search for and purchase AP GraphicsBank content.
4. 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 wild card to match one or more characters.
5. Use the **Content Set** list to select the type of AP GraphicsBank content to search, graphics or photos.
6. In the **Person(s)** box, enter the name or names of people that content must feature. Use a comma to separate multiple names.
7. In the **Subject(s)** box, enter the AP 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.
8. 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.

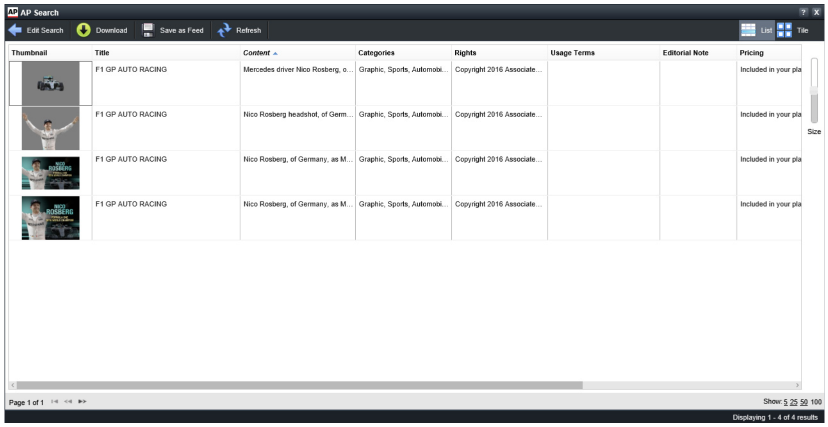
   d. In the **Calendar** area, select the day for the publish date.

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

   e. Click **Done**.

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

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



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

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

## Edit an AP GraphicsBank One-Time Search

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

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

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

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

2. To edit the AP GraphicsBank One-Time search open in the **Feed View** panel, do the following:

   a. In the toolbar, click the **Edit Search** icon.

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

   b. Edit the search parameters as required to refine your search.

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

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

## Save an AP GraphicsBank One-Time Search

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

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

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

   The **Feed View** panel displays the results of the selected AP GraphicsBank One-Time search.
2. In the toolbar, click the **Save as Feed** icon.

   Streamline saves the open AP GraphicsBank One-Time search as an AP GraphicsBank feed. The **Feed View** panel toolbar updates to display AP GraphicsBank feed tools. You can use the **Configure** tool to edit the name of the new AP GraphicsBank feed.
3. The next time you want to open your new **AP GraphicsBank** feed, use the **AP GraphicsBank** list in the main toolbar to select the feed.

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

## Download AP GraphicsBank Content

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

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

✶ When you download an AP GraphicsBank content item into an existing asset, the AP GraphicsBank metadata overwrites all of the metadata associated with the existing asset.

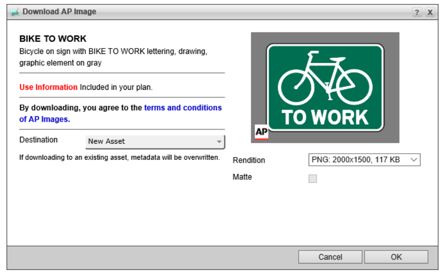
#### To download content from the AP GraphicsBank

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

   The **Feed View** panel displays the results of the selected AP GraphicsBank feed ore One-Time search.
2. In the **Feed View** panel, select the content item to download.

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

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




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

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

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

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

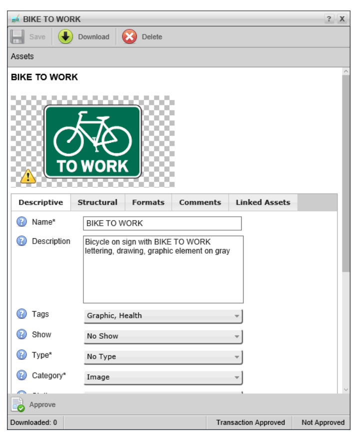
6. Select the **Matte** check box to download only the matte for the selected content item, not the image.

   The **Matte** check box is only available for AP GraphicsBank graphics in JPG format.

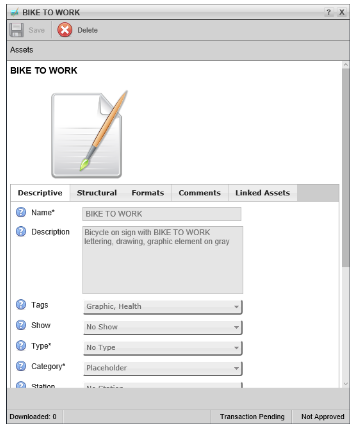
7. Click **OK**.

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

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



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




#### For More Information on...

- editing asset metadata, refer to the procedure “**To edit the metadata for an asset**” on page 3–5.
- approving assets, refer to the section “**Approving and Rejecting an Asset**” on page 3–12.

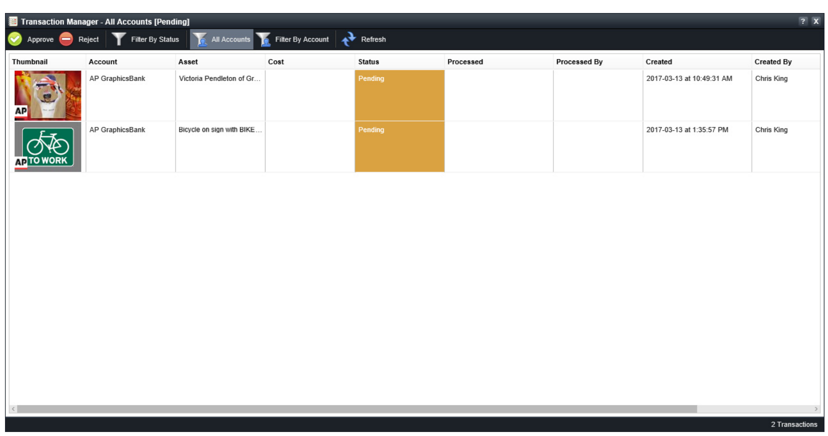
## Approve a Requested Download

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

#### To approve a requested download

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

   The **Transaction Manager** panel opens.



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

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

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

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

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

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

   The **Approve Transaction** dialog box opens.


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

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

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

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

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

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

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

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

# MGN Online Feeds

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

This chapter discusses the following topics:

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

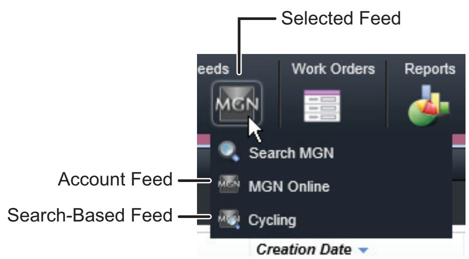
## View the Content in an MGN Online Feed

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

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

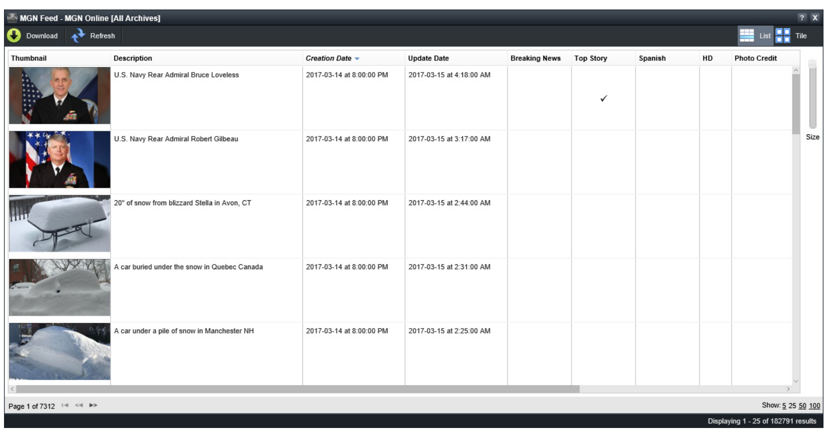
1. In the main toolbar, point to the **MGN** icon.

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




2. Click the name of the feed to open.

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



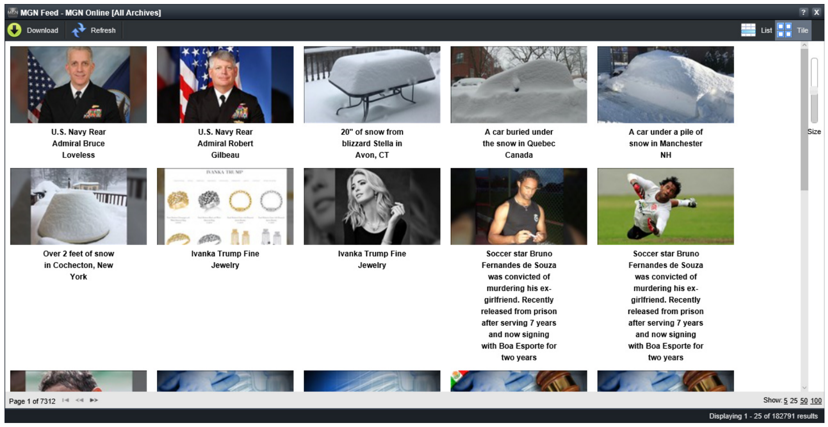

3. Drag the **Size** slider to enlarge or reduce the size of the thumbnail images displayed for the feed content items.

4. When the **Feed View** panel cannot display all of the content contained in a feed on a single page, use the following controls in the bottom toolbar of the **Feed View** panel to view all of the content:

   - — click button to view the first page of content.
   - — click button to view the previous page of content.
   - — click this button to view the next page of content.
   - **Show** — click the following links to set the number of content items to display on a page:
     - **5** — display 5 content items on a page.
     - **25** — display 25 content items on a page.
     - **50** — display 50 content items on a page.
     - **100** — display 100 content items on a page.

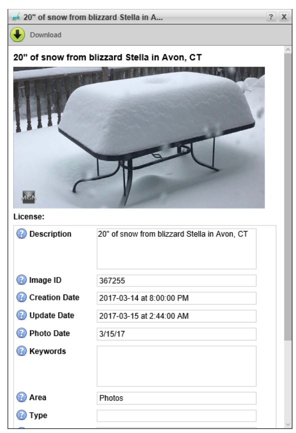
5. To display feed content thumbnail images, click the **Tile** icon in the toolbar.

   The **Feed View** panel displays content as thumbnail images.




6. To once again display feed content in table format, click the **List** icon in the toolbar.
7. To view more information about a content item, double-click the item.

   The **MGN Online Item Viewer** panel opens for the selected content item.




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

## Edit a Search-Based Feed

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

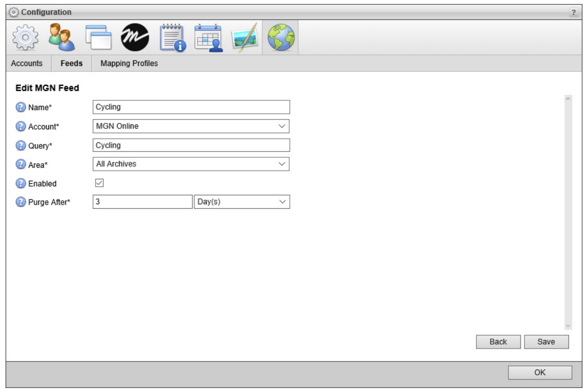
### To edit a Search-Based feed search

1. View the results of a Search-Based feed.

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

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

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




3. In the **Name** box, enter a name for the Search-Based feed.
4. Use the **Account** list to select the configured MGN Online account to search for and purchase MGN Online content.
5. In the **Query** box, enter the term or terms with which to search for content in MGN Online.

   Use the * (asterisk) character as a wild card to match one or more characters.
6. Use the **Area** list to select the MGN Online gallery or archive in which to search for content: **Top Stories**, **Graphics**, **Elements**, **Photos**, **My Archive**, or **NewsToons**.
7. Select the **Enabled** check box to active the feed and make it available to all users.
8. In the **Purge After** box, enter the amount of time after which to delete old content from the feed.

   The purge after time must be greater than or equal to 15 minutes and less than or equal to 60 days.
9. Use the list to the right of the **Purge After** box to select the time unit (**Days**, **Hours**, or **Minutes**) for the time entered in the **Purge After** box.
10. After completing the required feed parameter edits, click **Save**.

    The **Configured Feeds** page opens.
11. Click **OK**.

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

## MGN Online One-Time Searches

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

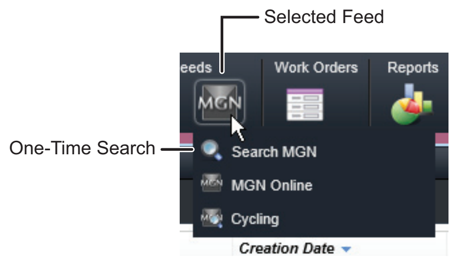
## Create an MGN Online One-Time Search

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

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

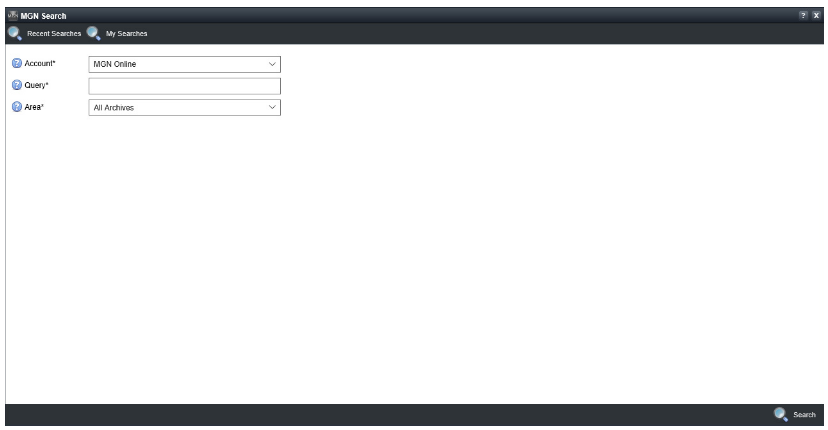
1. In the main toolbar, point to the **MGN** icon.

   A list opens displaying the available MGN Online feeds of the selected type opens.




2. Click **Search MGN**.

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

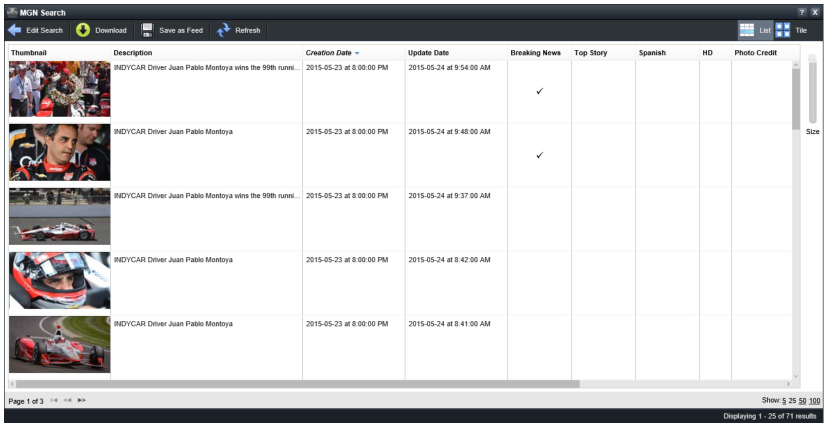



3. Use the **Account** list to select the configured MGN Online account to search for and purchase MGN Online content.
4. In the **Query** box, enter the term or terms with which to search for content in the MGN Online.

   Use the * (asterisk) character as a wild card to match one or more characters.
5. Use the **Area** list to select the MGN Online gallery or archive in which to search for content: **Top Stories**, **Graphics**, **Elements**, **Photos**, **My Archive**, or **NewsToons**.

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

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




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

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

## Edit an MGN Online One-Time Search

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

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

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

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

2. To edit the MGN Online One-Time search open in the **Feed View** panel, do the following:

   a. In the toolbar, click the **Edit Search** icon.

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

   b. Edit the search parameters as required to refine your search.

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

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

## Save an MGN Online One-Time Search

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

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

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

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

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

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

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

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

## Download MGN Online Content

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

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

#### To download content from the MGN Online

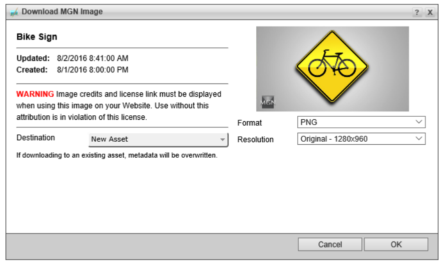
1. Use one of the following methods to view the MGN Online content item to download in the **Feed View** panel:
   - Use the **MGN** list in the main toolbar to open an MGN Online feed.
   - Create a new MGN Online One-Time search.
   - In the **AP Search** dialog box, use the **Recent Searches** menu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

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

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

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

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




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

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

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

5. Use the **Format** list to select the image format to download from the selected content item.

6. Use the **Resolution** list to select image size to download from the selected content item.

7. Click **OK**.

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


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

**For More Information on...**

- editing asset metadata, refer to the procedure “**To edit the metadata for an asset**” on page 3–5.
- approving assets, refer to the section “**Approving and Rejecting an Asset**” on page 3–12.

# Searching Streamline

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

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

The following topics are discussed in this chapter:

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

## Using a Quick Search

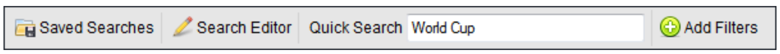
Each panel provides a search toolbar that enables you to create Quick Searches by entering text in the provided box of the toolbar. Streamline searches all text-based metadata elements and displays the content that matches or partially matches the text you specified. The Quick Search box is not case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

***Table 7.1 Quick Search Queries***

| Search Query | Finds Items Containing |
|---|---|
| El | elections, elves, ELECT |
| Elections Night | the exact phrase "Elections Night" |

#### To create a quick search

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




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

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

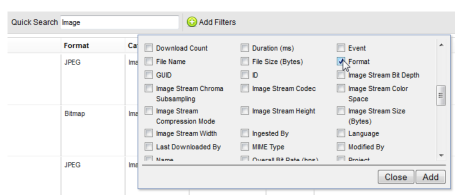
### Filtering the Quick Search Results

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

#### To filter the results of a search

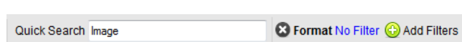
1. In the panel toolbar, click the **Add Filters** icon.

   The **Search Criteria** dialog opens.

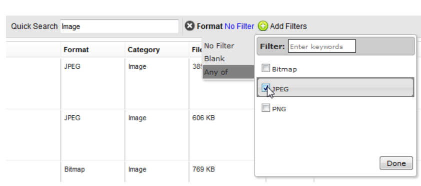



2. Select the metadata to use as a search criteria in the dialog and click **Add**.

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




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




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

5. Click **Done** to apply your changes.

   The toolbar updates to include the new filter. The panel table displays the results with the new criteria.

6. To remove a filter, click the icon next to the filter in the toolbar.

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

## Using the Search Editor

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

***Table 7.2 Search Editor Options***

| Icon | Name | Description |
|---|---|---|
| | Saved Searches | Provides a list of search criteria that are saved as individual profiles that you can recall. |
| | New | Enables you to specify new search criteria and save your settings to a new search profile. |
| | Save | Saves the current search criteria, prompts for a name to identify the search profile if not already specified. |
| | Save As | Saves the current search criteria as a new search profile. |
| | Quick Search | Searches all text-based metadata fields for the specified text. |
| | Not | When this box is selected, any content that matches the specified criteria are not included in the final search results. |
| | Field | Lists the available metadata elements to search in. |
| | Type | The options in this menu are dependent on what is selected in the Field menu. |
| | Value (Min) | Specifies the lowest value to match against. In the case of a range based match, this field specifies the minimum value in the range (inclusive). |
| | Max | Specifies the highest value to match against. In the case of a range based match, this field specifies the maximum value in the range (inclusive). |
| | Delete | Removes the associated filter from the search criteria. |
| | AND | Adds another set of criteria to the search. Note that AND filters are grouped together. |
| | OR | Adds an alternative to the criteria specified above it. |

## Search by Metadata Elements

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

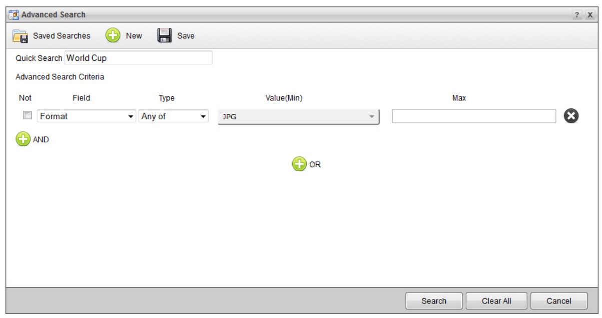
#### To create a search based on metadata fields

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

   The **Search Editor** window opens.

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

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




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

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

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

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

## Search by Date

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

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

#### To search by date

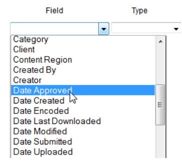
1. From the panel toolbar, click the **Edit Search** icon.

   The **Search Editor** window opens.

2. In the toolbar, click the **New** icon.

3. In the **Field** menu, select one of the metadata elements that is date dependent.

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




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

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

5. If you want to find Streamline content with a date after a selected date:
   a. In the **Time** menu, select **After**.
   b. Click the **Value (Min)** box to open the **Calendar** tool.
   c. In the **Date** selector, click the start date.

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

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

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

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

## Recalling a Search Profile

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

#### To recall a search profile

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

   A list of saved search profiles opens.

2. Select a saved search from the list.

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

## Saving Criteria as a Profile

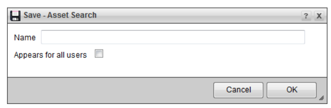
Once you save your search, it is made available in the Saved Searches list of the panel. Depending on your user permissions, search profiles can be recalled only by you or made available to any Streamline user. You can then quickly update the panel table any time by selecting the profile from the list.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

#### To save the search criteria to a profile

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

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

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




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

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

## Editing a Search

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

#### To edit a search

1. If you are editing a previously saved search profile:
   a. In the panel toolbar, hover your cursor over the **Saved Searches** icon.
   b. Select a saved search from the provided list.

   The panel table automatically updates to display the results based on the saved search criteria.
2. In the toolbar, click the **Search Editor** icon.

   The **Search Editor** window opens.
3. Edit the criteria to refine your search results.
4. Click **Save** to apply the current criteria to the search profile.

# Managing Reports

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

The following topics are discussed in this chapter:

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

## Workflow

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

The following figure (**Figure 8.1**) shows a graphical example of how filtering and grouping selects assets for an assets report:

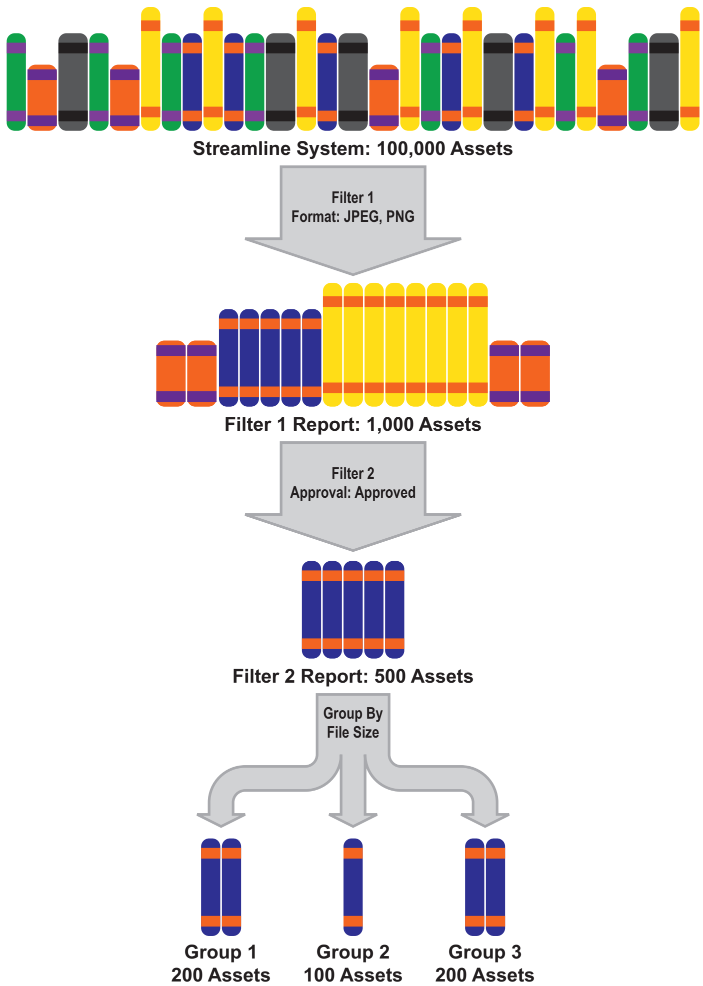



*Figure 8.1 Graphical Example of an Assets Report*

# Report Criteria Overview

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

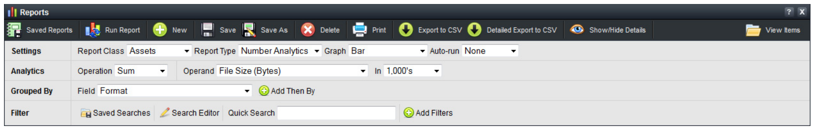



*Figure 8.2 Reports Panel Toolbars*

The report criteria are organized into the following toolbars:

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

Each toolbar is summarized in the following sections.

## Settings Toolbar

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

### Report Class

The Report Class determines the base for the report.

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

### Report Type

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

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

### Graph

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

### Auto-run

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

## Analytics Toolbar

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

### Operation

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

### Operand

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

### Start and End

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

### In

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

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

## Grouped By Toolbar

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

### Field

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

### Then By

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

## Filter Toolbar

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

**For More Information on...**

- creating search profiles, refer to the section "**Using the Search Editor**" on page 7–3.

## Creating a New Report

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

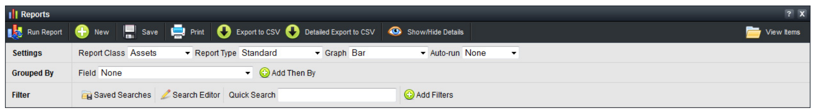
**To create a new report**

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

   The **Reports** panel opens.

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

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




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

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

5. Specify how to display the report results by selecting one of the following options from the **Graph** menu:
   - **Bar** — depicts data using rectangular horizontal bars of different lengths. The bar lengths are proportional to the values that they represent. Note that the Y-axis is depicted horizontally.
   - **Calendar** — visualization used to show activity over the course of a specified time frame.
   - **Column** — depicts data using rectangular vertical bars of different heights. The bar heights are proportional to the values that they represent.
   - **Doughnut** —displays data as percentages of the whole where each category is represented as a slice. This graph is the same as a pie chart only it includes a blank center which can be used to display additional, related data.
   - **Line** — information is displayed as a series of data points connected by straight line segments. This graph is typically used to depict a trend in data over intervals of time, allowing the line to be drawn chronologically.
   - **Pie** — a circular chart divided into sectors to illustrate relative sizes of data. The arc length of each sector is proportional to the quantity it represents.
   - **Scatter** — depicts a compilation of data where the position of each point is determined by two specified variables.

- **Stacked Bar** — depicts data as items stacked side by side differentiated by colored bars or strips to show multiple values for individual categories, or lines, to show multiple values over time. Stacked bar graphs are commonly used when the sum of the values is as important as the individual items. As with the standard bar graph, the Y-axis is depicted horizontally.
- **Stacked Column** — depicts data as items stacked one on top of each other, differentiated by colored bars or strips to show multiple values for individual categories.

6. In the **Auto-run** menu, specify whether the same report is automatically run repeatedly with no more intervention required. The Reports panel must be visible in order for reports to run.

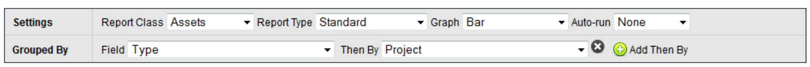
## Creating a Standard Report

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

### To create a standard report

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

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




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

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

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

## Creating a Numerical Analytic Report

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

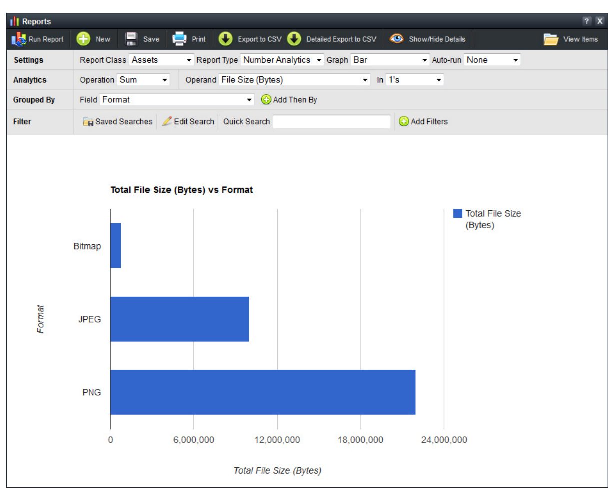



*Figure 8.3 Numerical Analytic Report*

**To create a numerical analytic report**

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

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

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

## Creating a Date Analytic Report

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

**To create a date analytic report**

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

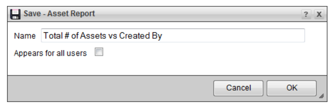
## Saving a Report

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

#### To save a report

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

   The **Save Report** dialog opens.




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

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

## Running a Report

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

#### To configure a report to auto-run

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

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

   A list of available saved report profiles displays.
3. Select a report profile from the provided list.

   The **Reports** panel updates with the criteria for the selected report profile.
4. In the **Auto-run** menu, select how often to update the report results in the **Reports** panel.
5. Click the **Save** icon in the **Reports** main toolbar to save your changes.

#### To run a report

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

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

   A list of available saved reports displays
3. Select a report from the provided list.

   The **Reports** panel updates with the criteria for the selected report.
4. Click the **Run Report** icon to update the results displayed in the **Reports** panel.

## Editing a Report

You must have permission to edit a report.

**To edit a saved report**

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

   The **Reports** panel opens.

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

   A list of available saved report profiles is displayed.

3. Select a report from the provided list.

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

4. Edit the criteria provided in the **Reports** toolbar. For a details on the available options, refer to the procedure "**To create a new report**" on page 8–5.

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

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

## Deleting a Report

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

**To delete a report**

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

   The **Reports** panel opens.

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

   A list of available saved reports is displayed.

3. Select a report from the provided list.

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

4. Click the **Delete** button.

   A confirm dialog displays.

5. Click **OK**.

# Messaging

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

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

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

This chapter discusses the following topics:

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

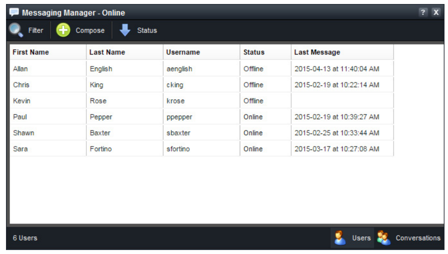
## Set Your Messaging Status

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

**To set your messaging status**

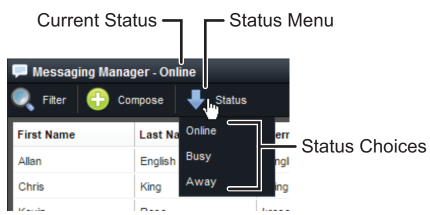
1. From the main toolbar, click or tap the **Messaging** icon.

   The **Messaging Manager** opens.




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

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




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

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

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

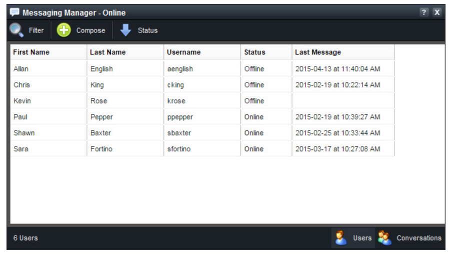
## Chat With Another User

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

**To chat with another user**

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

   The **Messaging Manager** opens.

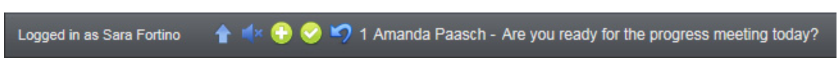



2. In the **Name** column, double-click the name of the user with which to start a one-on-one chat.

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

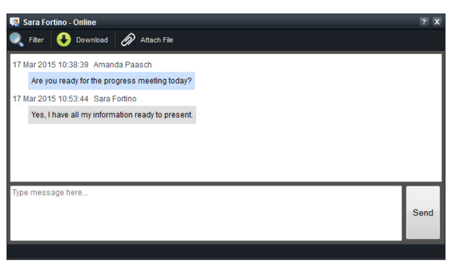

3. In the **Type message here** box, enter a message to send to the other user in the one-on-one chat.
4. Click or tap **Send** to send the message entered in the **Type message here** box to the other user in the one-on-one chat. You can also send a message by pressing **Return** after entering a message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

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




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

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



## Invite Users to a Conversation

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

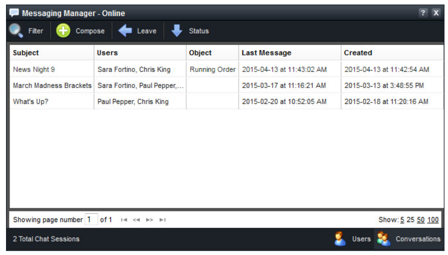
**To start a conversation with multiple users**

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

   The **Messaging Manager** opens.

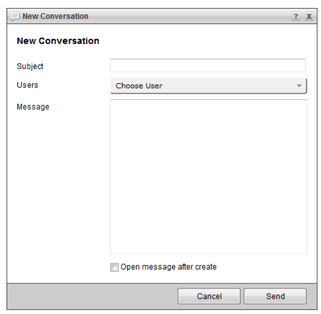
2. In the bottom toolbar of the **Messaging Manager**, click or tap the **Conversations** icon.

   The **Conversations** tab opens.




3. From the **Messaging Manager** toolbar, click or tap the **Compose** icon.

   The **New Conversation** dialog box opens.




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

4. In the **Subject** box, enter the subject of your new conversation.

   When users receive notification of a new conversation, Streamline displays the conversation subject and first message in the status bar at the bottom of the Streamline window.

5. Use the **Users** list to select the users that you want to include in your conversation.

   a. In the **User** list, select the check box to the left of each user that you want to include in your conversation.

      To include all Streamline users in your conversation, select **System** from the **User** list.

   b. Clear the check box to the left of each user that you want to exclude from your conversation.

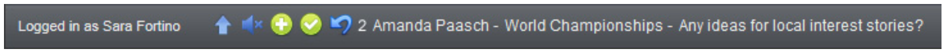
   c. Click or tap the **Close** icon.

6. In the **Message** box, enter the first message for your conversation with the users you selected from the **Users** list.

7. Select the **Open Message After Create** check box to open a **Conversation** panel for the new conversation after Streamline creates the new conversation.

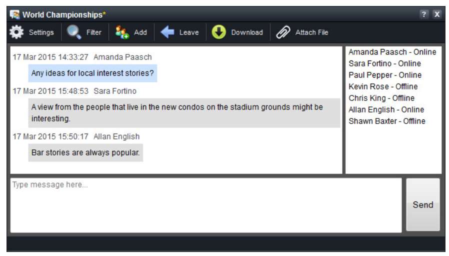
8. Click or tap **Send** to use the message entered in the **Message** box to start the new conversation with the users selected from the Users list.

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




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

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




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


## Manage a Conversation

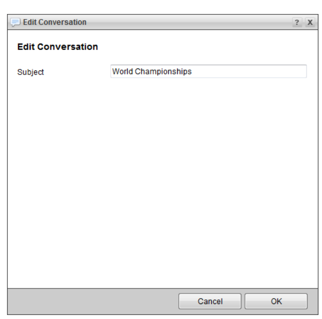
While participating in a conversation you can do the following to manage the conversation:

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

**To change the subject of a conversation**

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

   The **Edit Conversation** dialog opens.




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

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

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

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

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

**To end your participation in a conversation**

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

   An **Alert** opens.
2. Click **OK**.

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

**To leave a conversation from the Messaging Manager**

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

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

   The **Conversations** tab opens.
3. Select the conversation to leave.
4. From the **Messaging Manager** toolbar, click or tap the **Leave** icon.

   An **Alert** opens.
5. Click **OK**.

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

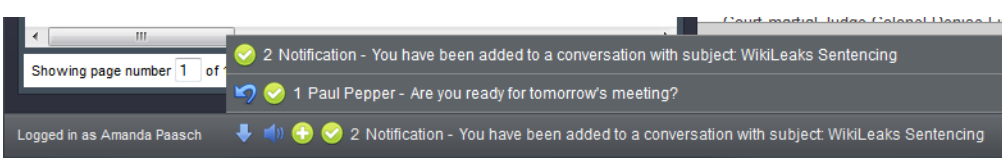
## Manage Message Notifications

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

**To manage notification messages**

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

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




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

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

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

## Filter Messages

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

#### To filter displayed messages

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

   The **Filter** section opens for the panel.


   When the **Filter** section is open, click or tap click or tap the **Filter** icon to close the **Filter** section.
2. In the **Filter By Message** box, enter a portion of the subject of the messages you are looking for.

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

   The **Messages** section of the panel updates to display only the messages that the selected users wrote.
4. Select the **Show attachments only** check box to only display messages in the **Messages** section that have an attached file.

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

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

## Send Files as Message Attachments

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

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

1. From the **Chat**, **Conversation**, or **Discussion** panel toolbar, click the **Attach File** icon.

   The **File Upload** alert opens.
2. Click **Browse**.

   The **File Upload** dialog box opens showing the file system of the local computer.
3. Locate the file to attach to the message.
4. Click **Open**.

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

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

1. From the **Chat**, **Conversation**, or **Discussion** panel toolbar, click the **Attach File** icon.

   The **File Upload** alert opens.

2. Click **Browse**.

3. To choose a file to attach, tap one of the following options:

   - **Take Photo** — use the mobile device camera to take a photo and attach the saved image file to the playlist item.
   - **Choose Existing** — select a photo from a photo library on the mobile device and attached the selected image file to the playlist item.

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

## Download Session Transcripts

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

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

1. From the **Chat**, **Conversation**, or **Discussion** panel toolbar, click or tap click or tap the **Download** icon.

2. Follow your web browser prompts to save the transcript to a text file.

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

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

# Configuring Streamline

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

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

The following topics are discussed in this chapter:

- Changing Your Streamline Password
- Working With Perspectives

## Changing Your Streamline Password

You must have permission to change your password within Streamline.

**To change your Streamline password**

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

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

   The **Change Password** dialog box opens.

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

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

6. Click **OK**.

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

## Working With Perspectives

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

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

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

Perspectives can include any or all panel types:

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

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

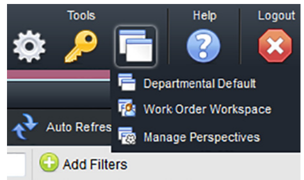
✶ Panels may not always appear exactly where you expect. As you open and close panels, Streamline adjusts the layout to optimize use of the available space. For example, if the current perspective includes a report in the left column and you use it to open only a report, the report occupies all the available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

## Open a Saved Perspective

#### To open a saved perspective

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

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




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

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

## Create a New Perspective

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

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

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

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

      The **Columns** list opens.

   b. Select columns as follows:

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

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

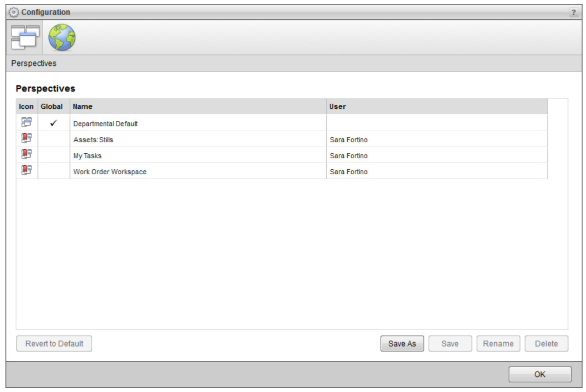
   d. Click **Close**.

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

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

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

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




5. Click **Save As**.

   The **Save Perspective As** page opens.

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

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

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

   The **Configuration** window closes.

## Rename a Perspective

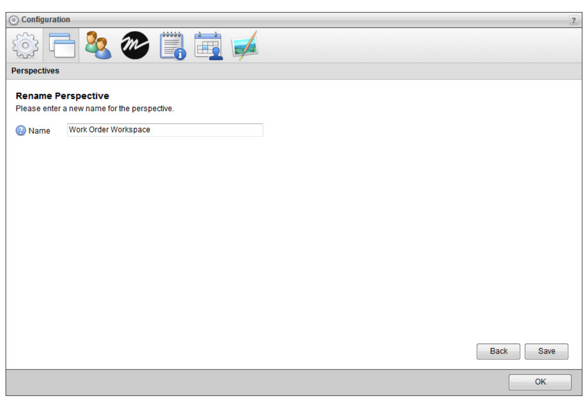
#### To rename a perspective

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

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

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

   The **Rename Perspective** page opens.




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

   The **Perspectives** list displays the new name of the selected perspective.

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

   The **Configuration** window closes.

## Change the Layout of a Perspective

**To change the layout of a perspective**

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

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

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

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

   The **Configuration** window closes.

## Revert a Perspective to the Default Layout

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

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

The following illustration describes the default layout.

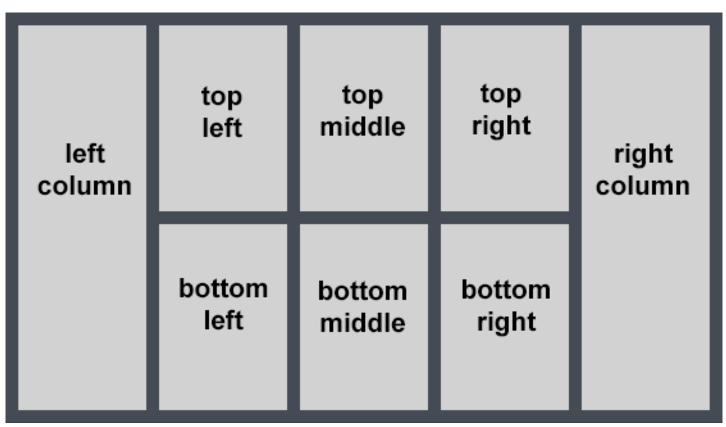



*Figure 10.1 Default Panel Layout*

Default layout positions are as follows:

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

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

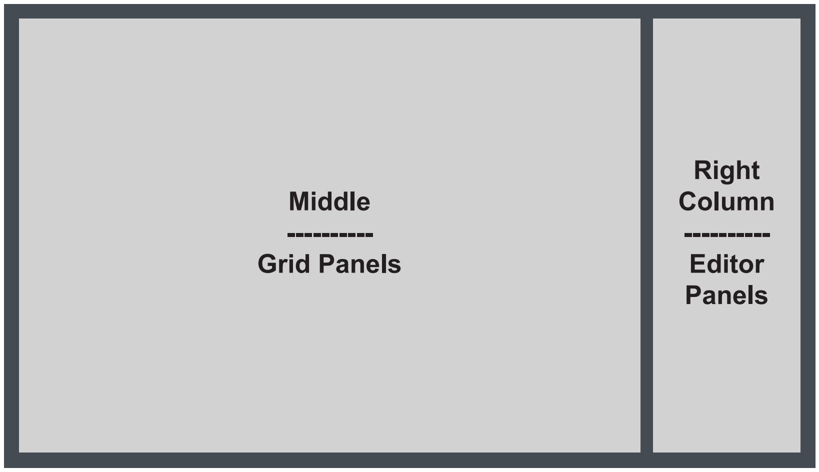



*Figure 10.2 Actual Layout with all Panel Types Open*

**To revert a perspective to the default layout**

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

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

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

3. Click **Revert to Default**.

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

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

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

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

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

   The **Configuration** window closes.

## Delete a Perspective

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

**To delete a perspective**

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

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

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

3. Click **Delete**.

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

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

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

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

   The **Configuration** window closes.

# Appendix A: Mapping Profiles

The sections in this appendix show the mapping of media file metadata properties to Streamline properties for the mapping profiles included with a Streamline 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 |