



# Workflow Administration

# Copyrights and Trademark Notices

Copyright 2019, Telestream, LLC. All rights reserved worldwide. No part of this publication may be reproduced, transmitted, transcribed, altered, or translated into any languages without the written permission of Telestream. Information and specifications in this document are subject to change without notice and do not represent a commitment on the part of Telestream.

Telestream, CaptionMaker, Episode, Flip4Mac, FlipFactory, Flip Player, Gameshow, GraphicsFactory, Lightspeed, MetaFlip, Post Producer, ScreenFlow, Split-and-Stitch, Switch, Tempo, TrafficManager, Vantage, VOD Producer and Wirecast, are registered trademarks and Cricket, e-Captioning, iQ, iVMS, iVMS ASM, Inspector, MacCaption, Pipeline, Vantage Cloud Port, Vidchecker, and Surveyor are trademarks of Telestream, LLC. All other trademarks are the property of their respective owners.

# Contents

|   |          |
|---|----------|
| <b>Vantage Workflow Administration</b>                | <b>1</b> |
| <b>Configuring Vantage Workflow Components</b>        | <b>9</b> |
| Managing Catalogs                                     | 10       |
| Understanding Catalogs                                | 10       |
| Managing Catalogs with the Vantage Management Console | 11       |
| Creating and Deleting Catalogs                        | 12       |
| Creating and Deleting Catalog Folders                 | 12       |
| Configuring a Catalog or Folder Expiration Policy     | 13       |
| Managing Binders                                      | 14       |
| Understanding Binders                                 | 14       |
| Managing Binders with the Vantage Management Console  | 16       |
| Creating and Deleting Binders                         | 17       |
| Renaming a Binder                                     | 17       |
| Configuring a Binder Expiration Policy                | 18       |
| Managing Media Files in a Binder                      | 18       |
| Adding a Media File Reference                         | 18       |
| Removing a Media File Reference                       | 19       |
| Renaming a Media File Reference                       | 19       |
| Opening the Containing Folder                         | 19       |
| Opening a Media File with the Default Program         | 19       |
| Previewing a Media File                               | 19       |
| Managing Metadata Labels in Binders                   | 20       |
| Managing Binder Attachments                           | 21       |
| Capturing Inventory                                   | 22       |
| Adding a Remote Source                                | 23       |
| Previewing a Capture Source                           | 23       |
| Renaming a Source                                     | 23       |
| Finding Sources in Workflows                          | 23       |
| Deleting Sources                                      | 23       |
| Exporting and Importing Sources                       | 24       |
| Managing Workflow Design Items                        | 25       |
| Managing Vantage Workflows                            | 26       |
| Managing Workflows                                    | 27       |

|   |    |
|---|----|
| Opening a Workflow and Workflow Designer                              | 27 |
| Exporting Workflows   | 28 |
| Importing Workflows   | 29 |
| Refreshing the Workflow List  | 29 |
| Enabling Lightspeed Fallback  | 30 |
| Enabling and Disabling Expiration of Failed Jobs                      | 30 |
| Setting the Vantage Workflow Designer Grid Width/Height               | 31 |
| Managing Workflow Categories  | 31 |
| Managing Media Nicknames  | 34 |
| Understanding Media Nicknames   | 34 |
| Managing Media Nicknames  | 36 |
| Creating and Saving Media Nicknames                                   | 36 |
| Deleting Media Nicknames  | 36 |
| Searching for Media Nicknames in Workflows                            | 36 |
| Exporting and Importing Media Nicknames                               | 37 |
| Selecting All Unused Media Nicknames                                  | 37 |
| Managing Metadata Labels  | 37 |
| Understanding Metadata Labels   | 39 |
| Vantage Metadata Label Applications                                   | 40 |
| Managing Metadata Labels with the Vantage Management Console          | 41 |
| Creating and Saving Metadata Labels                                   | 41 |
| Adding and Saving Metadata Label Parameters                           | 42 |
| Duplicating a Parameter within a Metadata Label                       | 44 |
| Adding a Copy of a Metadata Label Parameter to Another Metadata Label | 44 |
| Deleting a Metadata Label Parameter                                   | 44 |
| Modifying Metadata Labels and Parameters                              | 45 |
| Previewing Metadata Labels and Values                                 | 45 |
| Sorting Metadata Label Parameters                                     | 45 |
| Deleting Metadata Labels  | 45 |
| Duplicating a Metadata Label  | 45 |
| Exporting and Importing Metadata Labels                               | 46 |
| Searching for Metadata Labels in Workflows                            | 46 |
| Selecting All Unused Metadata Labels                                  | 46 |
| Managing Attachment Nicknames   | 47 |
| Understanding Attachment Nicknames                                    | 47 |
| Managing Attachment Nicknames   | 48 |
| Creating and Saving Attachment Nicknames                              | 48 |
| Deleting Attachment Nicknames   | 48 |
| Exporting and Importing Attachment Nicknames                          | 48 |
| Searching for Attachment Nicknames in Workflows                       | 49 |
| Selecting All Unused Attachment Nicknames                             | 49 |
| Managing Variables  | 50 |
| Understanding Variables   | 50 |
| Managing Variables  | 51 |
| Creating and Saving Variables   | 51 |
| Modifying Variables   | 52 |
| Deleting Variables  | 52 |
| Duplicating a Variable  | 52 |

|  |    |
|--|----|
| Exporting and Importing Variables                      | 53 |
| Searching for Variables in Workflows                   | 54 |
| Selecting All Unused Variables                         | 54 |
| Managing Scripts                                       | 55 |
| Understanding Scripts                                  | 55 |
| Managing Scripts                                       | 55 |
| Adding and Saving a Script                             | 56 |
| Adding Inputs and Outputs                              | 57 |
| Renaming a Script                                      | 57 |
| Deleting Scripts                                       | 57 |
| Duplicating Scripts                                    | 57 |
| Finding Affected Workflows                             | 57 |
| Exporting and Importing Scripts                        | 58 |
| Managing Style Sheets                                  | 59 |
| Understanding Style Sheets                             | 59 |
| Managing Style Sheets                                  | 60 |
| Adding and Saving a Style Sheet                        | 60 |
| Renaming a Style Sheet                                 | 61 |
| Deleting Style Sheets                                  | 61 |
| Duplicating Style Sheets                               | 61 |
| Finding Affected Workflows                             | 61 |
| Exporting and Importing Style Sheets                   | 61 |
| Managing Actions                                       | 62 |
| Understanding Actions                                  | 62 |
| Managing Action Default Settings                       | 63 |
| Configuring the Resource Cost                          | 63 |
| Configuring Task Scheduling                            | 64 |
| Configuring Retry Settings                             | 64 |
| Exporting and Importing Action Default Settings        | 65 |
| Exporting and Importing Workflow Action Configurations | 66 |
| Related Action Management Topics                       | 68 |
| Managing Nexus Definitions                             | 69 |
| Understanding a Nexus                                  | 69 |
| Managing Nexus Definitions                             | 69 |
| Creating Nexus Definitions                             | 70 |
| Modifying a Nexus Definition                           | 70 |
| Deleting a Nexus Definition                            | 71 |
| Duplicating a Nexus Definition                         | 71 |
| Exporting and Importing Nexus Definitions              | 71 |
| Searching for Nexus Definitions in Workflows           | 72 |
| Refreshing the Nexus Definitions List                  | 72 |
| Viewing Workflow and Action Analytics                  | 73 |
| Viewing Action Analytics                               | 74 |
| Viewing Workflow Analytics                             | 75 |
| Exporting Workflow and Action Analytics                | 78 |
| Using Application Configurations                       | 79 |
| Configuring the Job Status Views                       | 79 |
| Configuring the Workflow Portal                        | 79 |

|   |            |
|---|------------|
| Configuring the Dublist Portal                        | 80         |
| Creating Report Configurations                        | 81         |
| Job Reports   | 81         |
| Managing Job Reports                                  | 82         |
| Creating and Saving a New Job Report Format           | 83         |
| Including and Excluding the Header Row                | 83         |
| Choosing the Report Format Columns                    | 83         |
| Duplicating a Job Report Format                       | 84         |
| Deleting a Job Report Format                          | 85         |
| Refreshing the Format List                            | 85         |
| Exporting and Importing Job Report Formats            | 85         |
| Service Reports                                       | 86         |
| Managing Service Reports                              | 87         |
| Creating and Saving a New Service Report              | 87         |
| Choosing the Report Type, Organization, and Options   | 88         |
| Choosing the Report Mode                              | 88         |
| Duplicating a Service Report Configuration            | 89         |
| Deleting a Service Report Configuration               | 89         |
| Refreshing the Service Reports Configuration List     | 89         |
| Exporting and Importing Service Report Configurations | 90         |
| Managing Fulfillment Schemes                          | 91         |
| Workorder Schemes                                     | 91         |
| Displaying the Workorder Schemes Panel                | 92         |
| Creating and Saving a New Workorder Scheme            | 92         |
| Renaming a Scheme                                     | 93         |
| Duplicating a Scheme                                  | 93         |
| Deleting a Scheme                                     | 93         |
| Creating Workorder Scheme Fields                      | 94         |
| Testing Schemes                                       | 96         |
| Duplicating a Workorder Scheme                        | 97         |
| Refreshing the Workorder Schemes List                 | 97         |
| Exporting and Importing Workorder Schemes             | 98         |
| Dublist Schemes                                       | 98         |
| Catch Schemes   | 98         |
| Managing Syndication                                  | 99         |
| Creating Syndication Templates                        | 99         |
| Displaying the Syndication Templates Panel            | 100        |
| Creating and Modifying a Syndication Template         | 100        |
| Renaming a Syndication Template                       | 102        |
| Duplicating a Syndication Template                    | 102        |
| Deleting a Syndication Template                       | 102        |
| Exporting and Importing Syndication Templates         | 103        |
| Filtering the Templates list                          | 103        |
| <b>Configuring Catch Server Schemes</b>               | <b>105</b> |
| Displaying the Catch Schemes Configuration Panel      | 106        |
| Creating a New Configuration                          | 107        |

|  |     |
|--|-----|
| Renaming a Configuration               | 107 |
| Duplicating a Configuration            | 107 |
| Deleting a Configuration               | 107 |
| Setting Options and Defining Fields    | 108 |
| Field Options                          | 108 |
| Testing Schemes                        | 110 |
| Refreshing the Catch Schemes List      | 111 |
| Exporting and Importing Configurations | 111 |





# Configuring Vantage Workflow Components

This chapter describes how to use the Vantage Management Console (VMC) to manage Vantage features that support workflow designers and operators.

---

**Note:** Features for which you do not have a license are disabled and indicate that you need a license to use them.

---

The following topics describe how to manage the features and components that support workflow design and operation:

- [Managing Catalogs](#)
- [Managing Binders](#)
- [Capturing Inventory](#)
- [Managing Workflow Design Items](#)
- [Viewing Workflow and Action Analytics](#)
- [Using Application Configurations](#)
- [Creating Report Configurations](#)
- [Managing Fulfillment Schemes](#)
- [Managing Syndication](#)

## Managing Catalogs

The following topics describe catalog management concepts and tasks:

- [Understanding Catalogs](#)
- [Managing Catalogs with the Vantage Management Console](#)
- [Creating and Deleting Catalogs](#)
- [Creating and Deleting Catalog Folders](#)
- [Configuring a Catalog or Folder Expiration Policy](#)

## Understanding Catalogs

Vantage *catalogs* serve as containers for the binders created by workflows (see [Managing Binders](#) on page 14). You can use catalogs to organize binders, define a binder expiration policy at the catalog level, and control access to binders. Vantage provides a default catalog named *Default Catalog*.

Similar in concept to file folders that organize files, Vantage catalogs organize the binders that are created each time a workflow runs. A *catalog folder* serves as a subfolder for a catalog or a catalog folder. Catalog folders allow you to further organize and group associated content together. For example, you might have a National Parks catalog, with a Yellowstone and a Yosemite folder. You can make as many folders as you need to organize your content, and you can create catalog folders in catalog folders to create a hierarchy.

Each catalog and catalog folder has an expiration policy that you can use to define when binders within that catalog or folder expire. For more information, see [Understanding Binders](#).

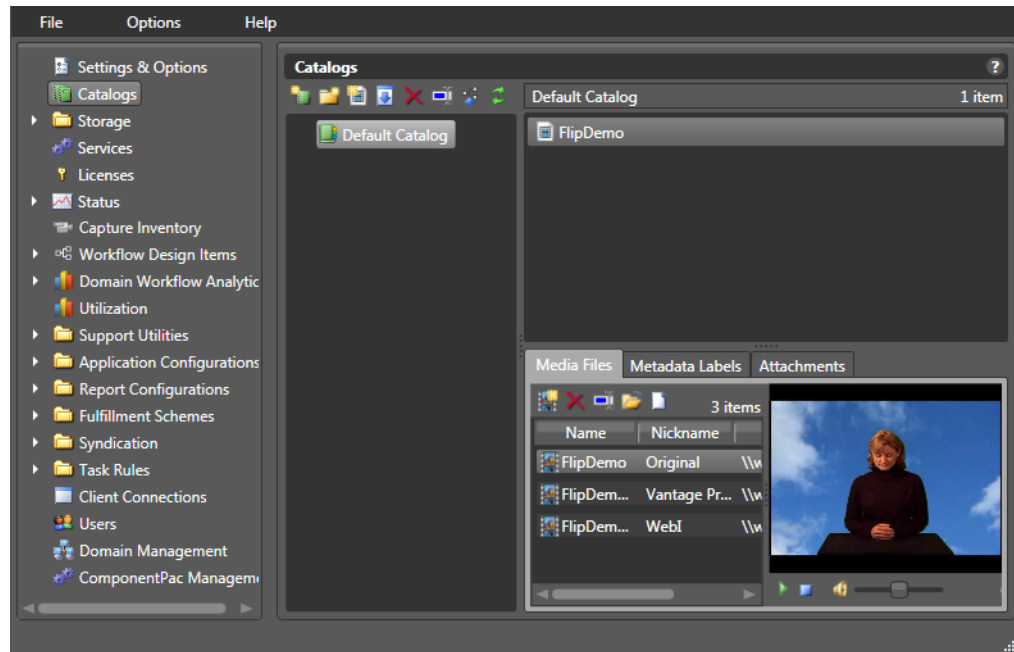
You can use catalogs to control operator access to binders. When configuring the Vantage Workflow Portal support (see [Configuring the Vantage Workflow Portal](#) in the *Vantage Domain Management Guide*), you can specify which operators can access a specific catalog or folder. For example, you can create catalogs for different organizations or departments, and then restrict operators to managing binders in the appropriate catalogs.

## Managing Catalogs with the Vantage Management Console

To start catalog management using the Vantage Management Console, open the Catalogs details panel as follows:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Catalogs.

Vantage displays the Catalogs panel:



Hover over a toolbar button to display a description for the button. Right-click in the Catalogs details panel (on or away from an object) to display a context menu for available options, described in this table.


| Option        | Description  |
|---------------|--|
| Import Folder | Select to import a Windows directory of media, which is organized in the manner you want the catalog organized. Vantage replicates the directory structure, and creates a binder for each media file located in the folder hierarchy being imported. |
| New Binder    | Select to create a new binder in the selected folder or catalog.   |
| New Catalog   | Select to create a new catalog.  |
| New Folder    | Select to create a new folder in the selected catalog.   |
| Properties    | Select to display and configure properties (including the expiration time) for the selected catalog/folder.  |

| Option  | Description   |
|---------|---|
| Refresh | Click to refresh the catalog list.  |
| Remove  | Select to permanently delete the selected catalog or folder.<br>Note: Removing a catalog/folder permanently deletes binders and Vantage store files as described in <a href="#">Understanding Binders</a> . |
| Rename  | Select to rename the catalog/folder.  |


## Creating and Deleting Catalogs

You can create as many catalogs as you need to meet the needs of your organization.

To create a new catalog, do the following:

1. Click the New Catalog button  in the toolbar (or right-click in the empty catalog space and select New Catalog).  
The Management Console displays a new catalog in the catalog tree, with the default text selected.
2. Type in the name of the new catalog and click away from the catalog.

To delete a catalog, do the following:

1. Select the catalog.
2. Click the Delete button  (or right-click and select Remove) to permanently delete the catalog.

---


**CAUTION:** Removing a catalog permanently deletes binders and Vantage store files as described in [Understanding Binders](#).

---

## Creating and Deleting Catalog Folders

Inside each catalog, you can create as many folders as you need to organize the media in this catalog. Folders can be created in a hierarchy, and you can drag them around to re-organize them.

To create a new folder, do the following:

1. Click the catalog or folder where you want to create a new folder.
2. Click the Add Folder button  in the toolbar (or right-click and select New Folder).  
The Vantage Management Console displays a new folder in the catalog explorer panel and also in the Folders panel, with the default text selected.
3. Type in the name of the new folder and click away from the folder.

To delete a folder, do the following:

1. Select the folder.

2. Click the Delete button **X** in the toolbar (or right-click and select Remove) to permanently remove the folder.

---

**CAUTION:** Removing a catalog folder permanently deletes binders and Vantage store files as described in [Understanding Binders](#).

---

## Configuring a Catalog or Folder Expiration Policy

A catalog or folder expiration policy defines the default expiration policy for *all* binders in the catalog or folder. If you change the expiration for existing binders in a catalog or subfolder, the same policy applies to new binders added to that catalog or folder.

The catalog/folder expiration policy can be overridden by a binder expiration policy as described in [Configuring a Binder Expiration Policy](#).

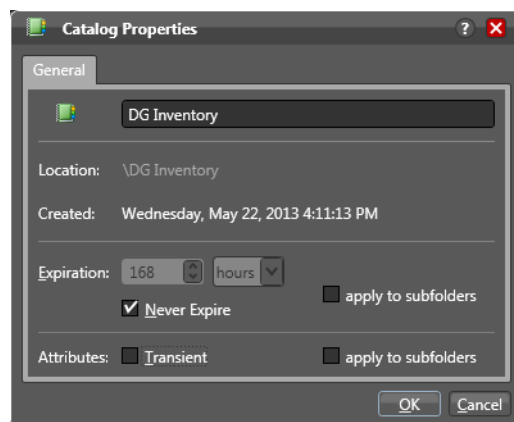
To configure the binder expiration policy, do the following:

1. Right-click a catalog or folder to configure, and select Properties (see the figure below).
2. Edit the binder expiration date or check the Never Expire checkbox. Checking *apply to subfolders* applies the expiration date to all folder levels in the catalog.
3. Check *Transient* if you want a catalog or folder to be deleted when all binders it contains expire, leaving it empty. If *Transient* is not checked, the catalog or folder is not deleted when empty.
4. Check *apply to subfolders* to apply the *Transient* attribute to all folder levels in the catalog, or leave it unchecked to apply the attribute only to the current level.
5. Click OK.

---

**Note:** The expiration policy can be set for individual binders when they are registered in a catalog; this is done using the workflow Register action.

---



## Managing Binders

The following topics describe binder management concepts and tasks:

- [Understanding Binders](#)
- [Managing Binders with the Vantage Management Console](#)
- [Creating and Deleting Binders](#)
- [Renaming a Binder](#)
- [Configuring a Binder Expiration Policy](#)
- [Managing Media Files in a Binder](#)
- [Managing Metadata Labels in Binders](#)
- [Managing Binder Attachments](#)

## Understanding Binders

When a workflow executes, Vantage creates a job and a *binder*. A binder is not a physical entity like a folder but a temporary list or collection of information for a particular job that is created when a workflow runs. The binder points to input files, output files, temporary files, metadata labels, and other references used by that job. The references in a binder identify both media files and non-media attachment files such as XML or PDF files.

Vantage uses binders as follows:

- Records the locations of all media files, attachment files, temporary files, and output files for a job.
- Stores metadata labels for a job.
- Retains job information for evaluation by a Vantage Workflow Portal operator and submission to a new workflow.
- Determines which files can be deleted when Vantage is done with a binder.
- Allows you to return to a job after processing and locate or view the files.

To manage binders, you need to understand how the workflows in your Vantage domain use the binders. For example, one workflow might be designed to produce output to be evaluated by a Vantage operator for approval. If the operator approves the output, the operator might forward the output of the first workflow to a second workflow for processing. When the output is forwarded, what is actually forwarded is the binder, which contains all the file references and metadata needed for the next job.

In the preceding example, the binder must be retained long enough for the operator to become aware of job completion, evaluate the results, and make a decision. You might want to retain the binder for an extra day, week, or month, for auditing purposes. However, if your business creates many workflows, you will eventually want to delete the binder and related temporary files to conserve disk space.

Vantage stores binders in the Vantage domain database. By default, binders are deleted according to an expiration policy defined for each workflow in Vantage Workflow

Designer. Workflow designers can also use Workflow Designer to manually delete jobs, which deletes the associated binders. This default setting places binder management under the control of Vantage workflow designers.

To extend binder management to support access from Vantage Management Console or Vantage Workflow Portal, you can use the Vantage Management Console to create *catalogs* (see [Managing Catalogs](#)). A catalog serves as a container or folder to which a binder can be associated. Because each catalog has its own expiration policy, some additional conditions must be met before a binder is deleted. Binders and the related temporary files are deleted only when all the following are true:

- The job expiration time is exceeded or an operator has deleted the job.
- The binder expiration defined in the catalog is exceeded or the binder is deleted.
- Temporary files to be deleted are not being used by any other unexpired binder.

---

**Note:** Only files in a Vantage Store are automatically deleted according to the above rules. By default, a Flip action output is saved to a Vantage store, so you should change the Flip output location or use a Copy, Deploy, or Move action to place files that you want to keep in an output directory. Files in an input or output folder can be deleted using a workflow Delete action, but such files are not automatically deleted when a job expires.

---

To associate a binder with a catalog, Workflow designers add a Register action to a workflow and configure it for the appropriate catalog. The Register action and catalog are required to retain a binder beyond the expiration period and keep it under the control of the Workflow Designer.

---

**Note:** TrafficManager workflows that use the Dublist action require that the binder name be set to match the ISCI code in the catalog. This ensures the binder and catalog are matched up when processed by the Workorder Monitor action.

---

As a Vantage administrator, you might need to manage binders as follows:

- Establish binder expiration times, so that the binders and related temporary files are deleted (to conserve disk space) at an appropriate time after job completion.
- View binder contents to evaluate or troubleshoot workflow operation.
- Submit a binder to a workflow to test workflow operation.
- Create, delete, rename, and modify binders as needed to support the development of workflows and manage Vantage resources.

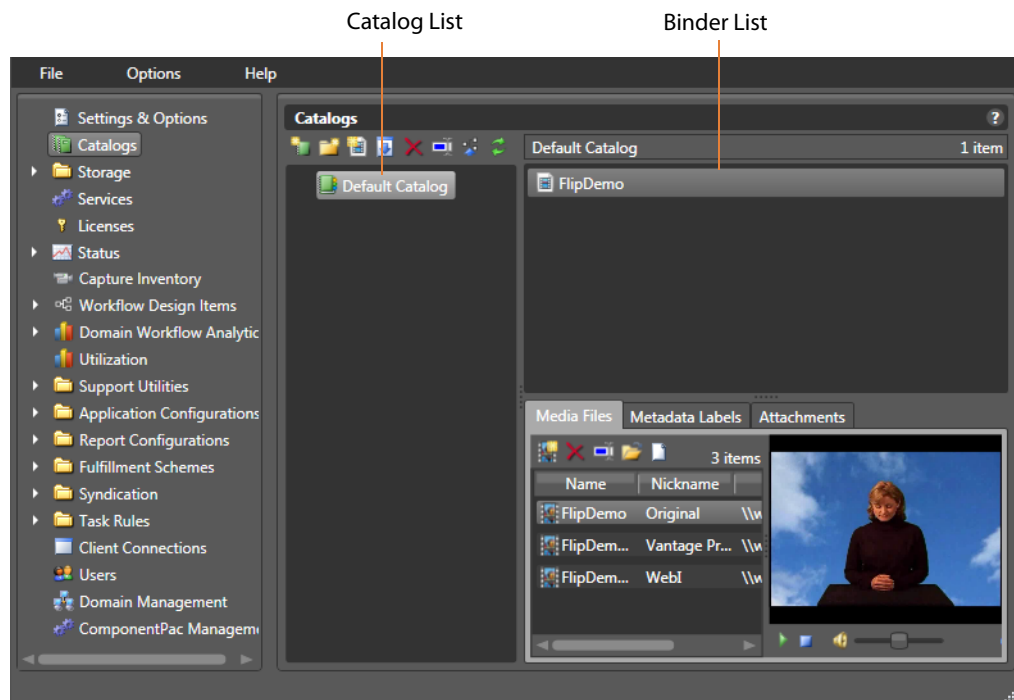
## Managing Binders with the Vantage Management Console

Vantage Management Console provides binder management only for binders that are associated with a catalog. The following tasks must be completed before you can manage binders with the Vantage Management Console:

1. You must create catalogs if you plan to use the Workflow Portal.
2. To use a catalog, you must create a workflow with a Register action that registers the binders containing your processed media files into catalogs.
3. Submitting a job to the Register workflow processes your media files, organizes them into binders, and registers the binders into catalogs.

When binders are associated with a catalog, you can manage binders as follows:

1. In the Management Console components panel, select Catalogs.  
Vantage displays the Catalogs details panel shown in the figure below.
2. In the Catalogs details panel, select a catalog in the list on the left; then select a binder from the list on the right.





## Creating and Deleting Binders


In normal operations, binders are created when a new job starts, and they are deleted as described in [Understanding Binders](#).

---


**Note:** The Vantage Management Console controls for creating and deleting binders are provided for testing and troubleshooting, not for regular maintenance.

---

To create a new binder, do the following:

1. Select the catalog to which you want to add the binder.
2. Click the New Binder button  (or right-click the catalog and select New Binder).  
The Management Console displays a file system dialog so that you can navigate to and select the media you want to assign the binder.
3. Select the target media file and click Open to create the binder for this media file.

To delete a binder, do the following:

1. Select the catalog and folder in which the binder resides.
2. Select the binder to remove.
3. Click the Delete button .

---

**CAUTION:** Removing a binder permanently deletes Vantage store files as described in [Understanding Binders](#).

---

## Renaming a Binder

To rename a binder, do the following:

1. Select the catalog and folder in which the binder resides.
2. Right-click a binder and select Properties.
3. Edit the binder name and click OK.

## Configuring a Binder Expiration Policy

The binder expiration policy overrides the binder configuration policy inherited from the parent catalog or folder.

To configure the binder expiration policy, do the following:

1. Select the catalog and folder in which the binder resides.
2. Right-click a binder and select Properties.
3. Edit the binder expiration date or check the Never Expire checkbox.
4. Click OK.

---

**Note:** The expiration policy can be set for individual binders when they are registered in a catalog; this is done using the workflow Register action.

---

## Managing Media Files in a Binder

To view and manage the media files referenced in a binder, click the target binder in the binder list, then click the Media Files tab. You can add and delete media file references to a binder, and you can rename the media file names listed in the binder.

Each binder may also contain references to metadata and attachments. You can view and manage these items by clicking the appropriate tab. You can also right-click a binder and select Properties to change the binder name or expiration policy.

Media Files Toolbar.



Mini-player controls.


## Adding a Media File Reference

When you add a media file to a binder, you select the file from a browse dialog, name the media file, and specify a *media nickname*.

Within a binder, each media and attachment file has a nickname; these nicknames are how Vantage workflows access the underlying files. Nicknames serve a dual purpose. First, because they are abstracted from the actual location of the underlying files, it allows workflows to be designed without worrying about the underlying file locations. Second, when a step in a workflow requires one or more input files, nicknames allow Vantage to pre-validate the workflow and availability of nicknames prior to execution.

However, binders may in fact be processed by more than one workflow simultaneously (either by using the Forward action or using the Vantage Workflow Portal). When this happens, Vantage cannot pre-detect which nicknames are necessary in each separate workflow. Administrators who build workflows in this way must take care to ensure that their design does not cause files necessary in one workflow to be deleted by another.

To add a media file reference, do the following:


1. Click the Add Media File button  in the toolbar (or right-click in the empty list area and select Add Media File).
2. In the Select the Media Version text box, type a media nickname or select an existing media nickname from the drop down list.
3. Click the Browse button and use the browse dialog to select a media file.
4. In the Enter the Name text box, enter the media file name that appears in the binder.

---

**Note:** The filename you specify in this dialog applies only to the name displayed in the binder. The original media filename remains unchanged.

---

## Removing a Media File Reference


To remove a media file reference from a binder, select the file, and click the Remove button  in the toolbar (or right-click and select Remove).

---

**Note:** Removing a file reference from a binder does not delete the source media file.

---

## Renaming a Media File Reference

To rename a media file reference, click the media file name, and enter a new name (or right-click and select Rename , and enter a new name).

---


**Note:** Renaming a media file does not rename the source media file.

---

## Opening the Containing Folder

To open the folder containing the selected media file, click the folder icon .

## Opening a Media File with the Default Program

To open the selected media file with your server's default media application, click the document icon .

## Previewing a Media File

To preview files in the Vantage Workflow Portal, use a workflow to create proxies in either the QuickTime H.264 or MP4 x264 format, and register the proxies into catalogs. Then use the portal to access the catalogs and preview the proxies.

You can use the Vantage Management Console to preview ASF, WMV, and MP4 media files. Select the media file on the Media Files tab, and use the playback controls below the media display area to the right of the Media Files tab.

---

**Note:** You can also preview ASF, WMV, and MP4 media directly in the Workflow Designer (right-click a job on the Job Status tab and select View Binder).

---

## Managing Metadata Labels in Binders

Metadata labels in a binder are stored in the Vantage domain database. Only one of each type of metadata label can be part of a binder (for example, a binder may contain one Identify label and one Curtains label, but not two Identify labels). Some labels may contain information that is specific to one media file—for example, an Identify label will typically contain file properties for one of the media files in a binder, not necessarily all of them.


You can use the Vantage Management Console to view and manage the metadata labels assigned to a binder. To view, add, delete, or modify the labels assigned to a binder, start by clicking the target binder in the binder list, then click the Metadata Labels tab.

---

**Note:** This topic discusses metadata label use with binders. For additional metadata label management information, see [Managing Metadata Labels](#).


---

### Adding a New Label

To add a new label, click the Add Labels  button in the toolbar (or right-click the empty file area and select Add Labels).

The Management Console displays a label list, so you can select the label you want to assign to the binder. Select the label and click OK to add the label to the binder.

### Removing a Label

To remove a label reference from a binder, select the label to remove, and click the Remove Label button  in the toolbar (or right-click and select Remove).

---

**Note:** This procedure removes the reference in the binder; it does not remove the metadata label from the Vantage domain.

---


### Modifying Label Parameter Values

To modify a label parameter value for the binder, select the label to display the parameters and values in the parameter detail table on the right. Select the parameter to edit and make your changes. Click Save to update the Vantage domain database with your changes.

## Managing Binder Attachments


To view and manage attachments—-independent files associated with this binder—click the target binder in the binder list, then click the Attachments tab. Binders can contain multiple attachments. You can add, delete and rename attachments.

### Adding a New Attachment

To add a new attachment, click the Add Attachments button  in the toolbar (or right-click in the empty list space and select Add Attachment).

The Management Console displays a file system dialog so that you can navigate to and select the file you want to assign the binder. Select the target attachment file, select an attachment tag, enter a name, and click OK to add the file reference to the binder for this media file.

### Removing an Attachment

To remove an attachment, select the attachment to permanently remove, and click the Delete button  in the toolbar (or right-click and select Remove).

---

**Note:** Removing an attachment does not delete the underlying file.

---

### Renaming an Attachment

To rename an attachment, select the attachment to rename, and enter the new name (or right-click and select Rename to enter the new name).

---


**Note:** Renaming an attachment does not rename the underlying file.

---

# Capturing Inventory

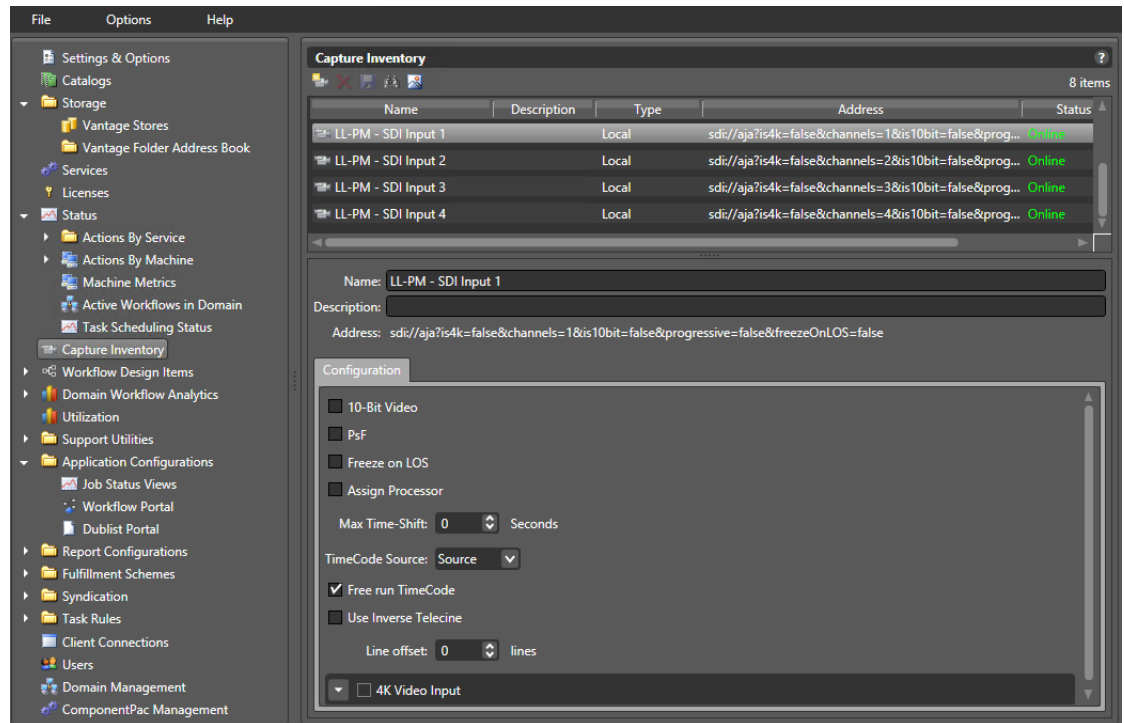
The Capture Inventory panel works only with the Lightspeed Live server. Refer to the *Lightspeed Live Capture Guide* for configuration details.

In general, the Capture Inventory panel allows assembling of an “address book” or a list of live sources available to this domain via Lightspeed Live servers.

Local SDI input sources are available when the Vantage Live service is added to the domain. You can click on a source to see the configuration panel and select configuration options. If you want to preview a source, click the Preview button .



After sources are listed here, they become available to the Capture action for inclusion in Vantage workflows.

The right columns report the source Address and Status. You can use these columns as a quick way to verify source availability.




## Adding a Remote Source


If a Vantage Capture service is running in the domain, remote sources associated with the service can be added to the Capture Inventory list. To add a new remote capture source to the domain, follow these steps:

1. Click the *Add a new remote capture source* button  in the toolbar.  
Vantage displays a list of sources available.
2. Select the source you want to add, and click OK.  
The Vantage Management Console adds the new source to the inventory list.
3. Enter a Name, Description, and Address, and make selections in the Configuration panel (see the *Lightspeed Live Capture Guide* for details).
4. Click the Save button .

## Previewing a Capture Source

To preview a capture video source, click the source in the list, and click the Preview button .

## Renaming a Source

To rename a source definition, select it in the list, edit the details, and click the Save button .


---

**Note:** Once a source is given a name, the name may be changed only if the source is NOT in use (not referenced by an action). To rename a source that is in use, you must first update the actions that use it to stop using that source. You can then rename the source, and update the actions again to use the new source name.


---

Modifying the inventory list to add a NEW named source has NO effect on running actions. You must edit the actions before they can recognize the new named Source.

## Finding Sources in Workflows

To locate workflows that use a particular capture source, select the source from the list and select the *Find workflows using this capture source* button . Affected workflows are listed.

## Deleting Sources

To remove a source from the list, click the Delete button  in the toolbar (or right-click and select Delete). Click Yes in the warning to confirm.

---

**Note:** Sources can be deleted only if they are not used anywhere. First update all actions that use the source to stop using it, then delete the source. When you remove a source from the list, the source is not disconnected—it is simply not available to Vantage workflows.


---

## Exporting and Importing Sources

Vantage allows you to export capture source descriptions to XML files, which you can then use to import the source descriptions into another Vantage domain.

To export all sources, click the Export drop down menu and select Export All.

To export selected sources, follow these steps:

1. Select the source to export. Ctrl-click or Shift-click to select multiple sources.
2. Click the Export button  to export a single source (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported source description.

The default file name is the source name, but you can change the file name.

---

**Note:** Changing the XML file name does not change the source name in the XML file.

---

To import a source description, follow these steps:

1. Click the Import button .
2. Navigate to locate and select the source description file to import, then click Open.

You can only import sources that have been previously exported as XML files.

---

**Note:** If you try to import a source description that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---



# Managing Workflow Design Items

The workflow design items described in this topic are configuration options that support workflow design, operation, and management. Some of these configuration options can be set for individual workflows using the Vantage Workflow Designer, but some configuration options are only available in the Vantage Management Console.

The following topics describe how to configure workflow design items using the Vantage Management Console:

- [Managing Vantage Workflows](#)
- [Enabling Lightspeed Fallback](#)
- [Enabling and Disabling Expiration of Failed Jobs](#)
- [Setting the Vantage Workflow Designer Grid Width/Height](#)
- [Managing Workflow Categories](#)
- [Managing Media Nicknames](#)
- [Managing Metadata Labels](#)
- [Managing Attachment Nicknames](#)
- [Managing Variables](#)
- [Managing Scripts](#)
- [Managing Style Sheets](#)
- [Managing Actions](#)
- [Managing Nexus Definitions](#)

## Managing Vantage Workflows

Typically, workflow designers manage workflows using Vantage Workflow Designer, and workflow operators manage the jobs that use workflows using Vantage Workflow Portal. The Vantage Management Console provides a limited set of workflow management options that allow you to do the following:

- View the workflows in a domain, sorted by category
- Select a workflow and open that workflow in Vantage Workflow Designer
- Export workflows to files for portability to other domains
- Import workflows previously exported to files

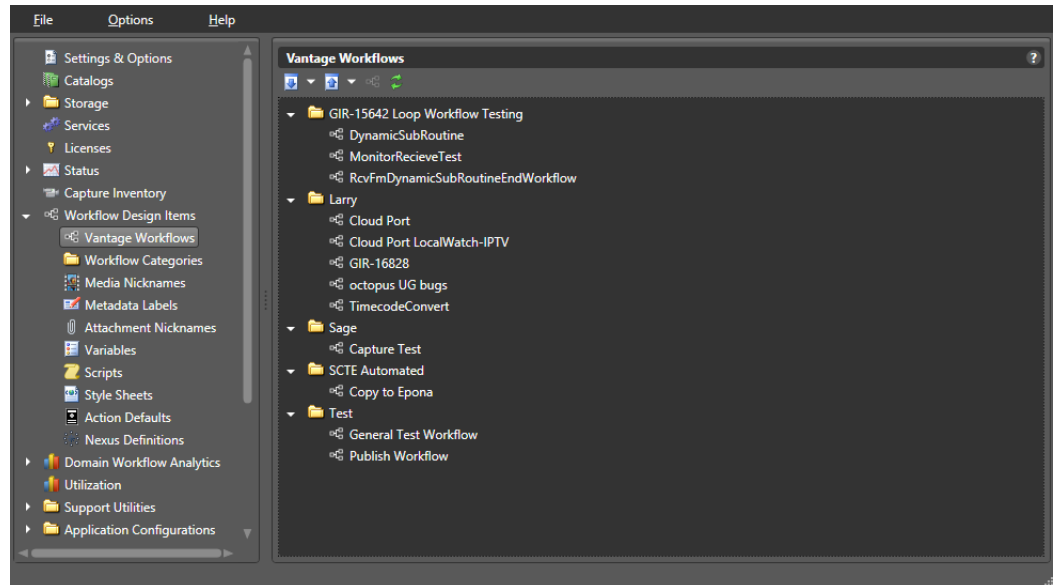
The following topics describe how to manage workflows with the Vantage Management Console:

- [Managing Workflows](#)
- [Opening a Workflow and Workflow Designer](#)
- [Exporting Workflows](#)
- [Importing Workflows](#)
- [Refreshing the Workflow List](#)


## Managing Workflows

Access workflow management in the Vantage Management Console as follows:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Workflow Design Items > Vantage Workflows.  
 Vantage displays the Vantage Workflows details panel shown in the figure below.
3. Double-click the category folders to hide or display the workflows in the categories.



## Opening a Workflow and Workflow Designer

You cannot edit a workflow with the Vantage Management Console, but you can select a workflow listed in the Vantage Management Console and open that workflow for management using the Vantage Workflow Designer. To launch Vantage Workflow Designer from Vantage Management Console and manage a workflow, select the workflow in Vantage Management Console and click the Workflow Designer button .

---

**Note:** If Vantage Workflow Designer is already open behind the Vantage Management Console, the Workflow Designer button flashes in the task bar. Click the task bar button to display the Workflow Designer in front of the Vantage Management Console.


---

## Exporting Workflows

Exported workflows are saved as XML files which can be directly re-imported back into Vantage. Items exported with workflows include media nicknames, attachment nicknames, variables, metadata labels, stores, and output folders. Items *not exported* are style sheets and catalogs; however, these items can be exported separately.

To export a workflow or categories with workflows, follow these steps:

1. In the Vantage Workflows panel, double-click a category folder to open it, and select an individual workflow to export. Alternatively, you can select a category folder to export the category and all the workflows it contains.

2. Click the Export button  or right-click and select Export. You can also click the Export button drop down list and select Export Workflows In Selected Category.

To export all or multiple categories and workflows together, click the Export button drop down list and select Export Workflows By Category. The Vantage Management Console displays a dialog with all categories listed. Check the ones you want to export, and click OK.

3. Use the file system dialog to save the workflows in the desired location.

If categories or workflow files having the same names already exist in the selected location, the Export dialog asks if you want to overwrite the existing file, rename it, or Cancel the operation. Additionally, a checkbox offers the option to “do this for all additional collisions” during the export. Check the box to apply your selection to all collisions, or uncheck to decide how to handle each collision individually.

The exported workflows are stored individually as XML files or in folders named for the workflow categories that contain the workflows. Each exported file and category folder is named the same in the file system as it is named in Vantage.


---

**Note:** Telestream recommends not changing exported file or category names.

---

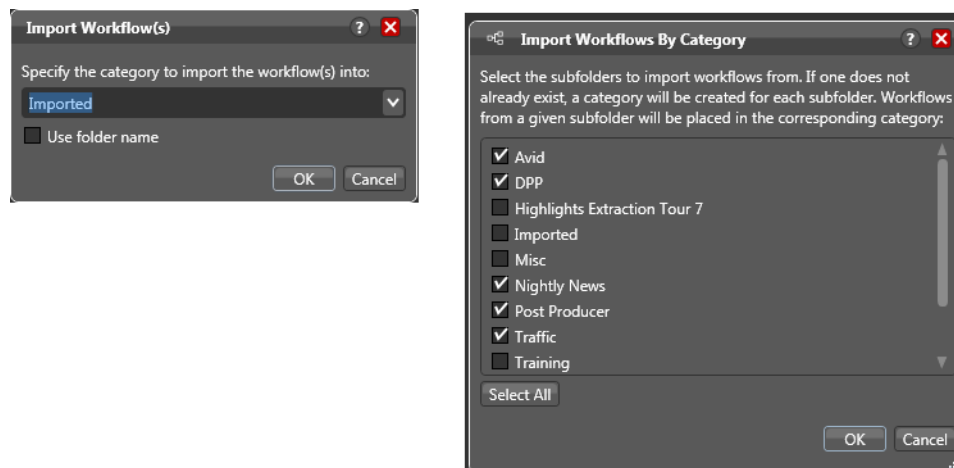
## Importing Workflows

To import one or more XML workflow files or categories and files, follow these steps:

1. Click the Import button . Alternatively, you can click the Import button drop-down menu or right-click in the workflows area, and select an option.

If you use the drop-down or context menu, you can Import Workflow(s) individually, or you can Import Workflows by Category, which imports all or selected categories and their workflows from a containing folder.

2. Navigate to the individual XML file or to the folder containing the workflow categories. Select the workflow file and click Open, or click Select Folder if you chose Import Workflow By Category. An Import dialog box opens.



3. In the Import dialog box, select the category for the file you are importing from the drop-down menu (or leave Imported as the default category), or select multiple categories if you are importing by category. (Select All lets you check or uncheck all categories at once.)
4. For individually imported files, you have additional category options: You can select the *Use folder name* checkbox to use the name of the folder where the workflow is currently stored, or you can type a new category name.
5. Click OK to import the file or the categories and files.

---

**Note:** When an imported workflow includes a variable of the same name and type as a variable in the domain database into which you are importing, Vantage updates the imported workflow to use the existing domain variable. This eliminates the problem of duplicate variables in the database after an import. However, if the variables have the same name but different types, the imported variable is added to the domain database. In this case, two variables of the same name will exist in the domain database.

---

## Refreshing the Workflow List

To refresh the list of Vantage workflows, click the Refresh button .

## Enabling Lightspeed Fallback

To ensure your Lightspeed jobs are still processed even when no Lightspeed servers are available, you can check the Enable Lightspeed Fallback option in the Vantage Management Console Settings and Options under the General tab. This will allow Lightspeed actions to execute in CPU multi-core mode rather than GPU mode so that any available CPU-based server can pick up the job. The fallback option is enabled by default.

## Enabling and Disabling Expiration of Failed Jobs

To use storage space efficiently, Vantage can regularly delete binders and any associated temporary files related to failed jobs.

---

**Note:** The feature only deletes binders and job-related files in a Vantage Store. By default, Flip action output is saved to a Vantage store, so you should use a Copy, Deploy, or Move action to place files that you want to keep in an output directory. Files in an input or output folder can be deleted using a workflow Delete action, but files in input and output folders are not automatically deleted when a job expires.


---

Each job has an expiration time and date, which can be disabled. If a job completes successfully and job expiration is enabled, the binder and all job-related files in the Vantage store are deleted when all the following are true:

- The job expiration time is exceeded or an operator has deleted the job.
- The binder expiration time for the catalog is exceeded or the binder is deleted.
- Temporary files to be deleted are not being used by any other unexpired binder.


If a job fails and the expiration period ends, the job is either retained or deleted, depending on configuration. When the Expire failed jobs feature is enabled, all job-related files in the Vantage store are deleted as described above for completed jobs. When Expire is disabled, the binder and job files are retained until manually deleted.

To enable or disable expiration of failed jobs, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Settings and Options.
3. Select the General tab.
4. To enable expiration of failed jobs, check the *Expire failed jobs* checkbox.
5. To retain failed jobs until manually deleted, clear the *Expire failed jobs* checkbox.
6. Click the Save button .

## Setting the Vantage Workflow Designer Grid Width/Height

Vantage Management Console allows you to define the width and height values for the Vantage Workflow Designer grid. To define these values, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Settings and Options.
3. Select the General tab.
4. Enter the width and height values.
5. Click the Save button .

## Managing Workflow Categories

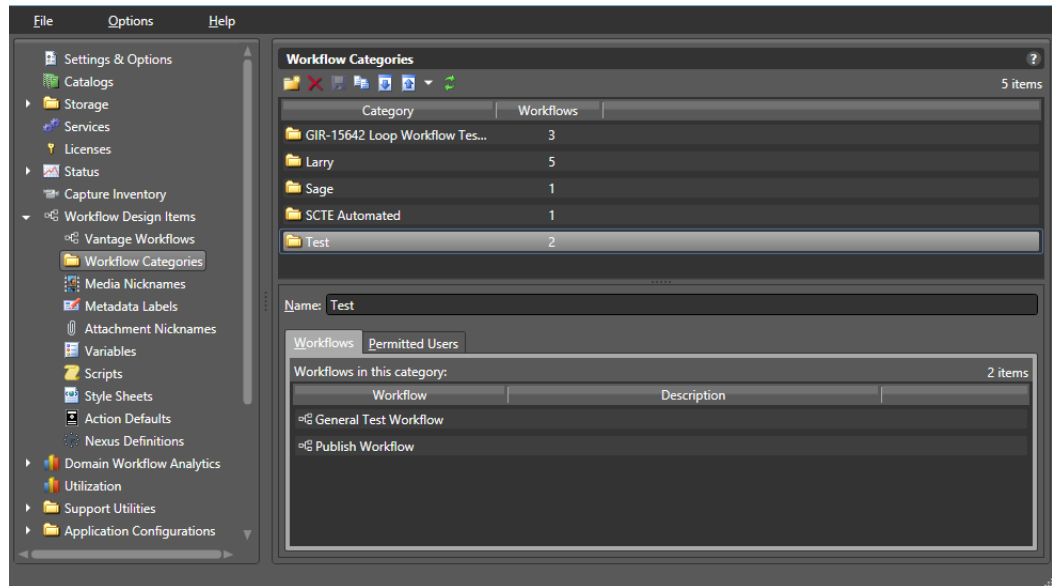
Workflow categories are folders that contain workflows. These folders can be created or deleted in Vantage Workflow Designer or Vantage Management Console. When managing categories in the Vantage Management Console, you can also do the following:





- Duplicate categories
- Export and import category folders
- Define which Vantage users can access the workflows in a category

To configure categories with the Vantage Management Console, do the following:




1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Workflow Design Items > Workflow Categories.  
 Vantage displays the Workflow Categories details panel shown in the figure, below.
3. Configure categories using the controls shown and listed in the following figure and table.
4. Configure user access to a category by selecting the category and clicking the Permitted Users tab. Select Everyone (the default) to allow all users access to the category. To restrict access, uncheck Everyone, and use the Add/Remove buttons to move users from the Available list on the left to the Permitted Users list on the right. This enables configuration access for only those users in the Permitted Users list.

5. Click the Save button .



| Button  | Description   |
|---|---|
| Create     | Click the Create button to create a new category (folder). Categories can also be created in the Workflow Designer.   |
| Delete     | Click the Delete button to delete a category (folder). A warning about losing all workflows in this category is displayed to prevent accidental removal of workflows.   |
| Save       | Click the Save button to save changes made in user permissions. If changes are not saved, you will be prompted to save upon leaving that category.  |
| Duplicate  | Click the Duplicate button to duplicate a selected category. Only the category (folder) is duplicated. None of the workflows in the folder are duplicated. However, all of the user permissions are duplicated in the new folder. |



| Button  | Description   |
|---|---|
| Import     | <p>To Import Categories from previously exported category XML files, click the Import button. A file system dialog opens, allowing you to navigate to the category files you want to import. Select the desired category XML files (Shift-click or Ctrl-click to select multiples), and click OK.</p> <p><b>Note:</b> If you attempt to import a category that is already present in the domain, Vantage prompts you to overwrite the category (click Yes) or cancel the import (click No). <b>Only categories are imported, not the workflows they contain.</b> To import categories and workflows, select Vantage Workflows and Import Workflows By Category.</p>   |
| Export     | <p>To export selected categories to XML files, select the Categories (Shift-click or Ctrl-click to select multiples), and click the Export button or click the drop-down menu next to the Export button, and use Export Selected. To export <i>all</i> categories, use the drop-down Export All selection next to the Export button.</p> <p>A file system dialog opens, allowing you to navigate to the server and directory where you want to save the XML files. You can save individual categories (Export Selected), or save all categories (Export All). The XML files by default are named the same as the category names, but can be changed before saving.</p> <p><b>Note:</b> Changing the name of the XML file does not change the name of the category in the XML file. <b>Exporting categories does not export the workflows they contain.</b> To export categories and their workflows, select Vantage Workflows and Import Workflows By Category.</p> |
| Refresh  | <p>Click the Refresh button to update the list of categories.</p>   |

## Managing Media Nicknames

The following topics describe media nickname management concepts and tasks:

- [Understanding Media Nicknames](#)
- [Managing Media Nicknames](#)
- [Creating and Saving Media Nicknames](#)
- [Deleting Media Nicknames](#)
- [Searching for Media Nicknames in Workflows](#)
- [Exporting and Importing Media Nicknames](#)
- [Selecting All Unused Media Nicknames](#)

---

**Note:** Workflow designers can only define new media nicknames in Vantage Workflow Designer. Vantage administrators must perform all other nickname management tasks.

---

### Understanding Media Nicknames

A media nickname serves as an alias for a media file within a workflow. Without media nicknames, workflow designers would need to refer to the full path and name of each file in every workflow action that uses a file. When a media nickname is assigned to a file, the workflow designer can simply refer to the nickname; Vantage associates the full path and file name of the actual file with the nickname.

Vantage requires that a workflow designer associate a media nickname with every unique media file that is processed by a workflow. This means that each input media file must be assigned a nickname, and every unique output media file must have a nickname.

Vantage provides the default media nicknames described in this table.

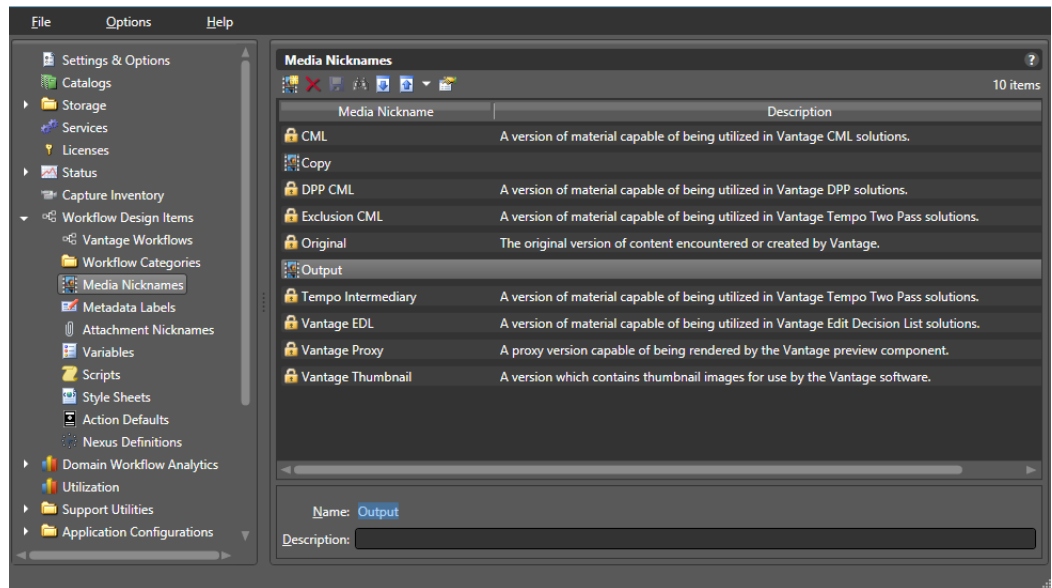
| <b>Media Nickname</b> | <b>Description</b>   |
|-----------------------|--|
| DPP CML               | This media nickname is used by the DPP portal and identifies the CML created that will render a valid DPP time line using Post Producer.   |
| Original              | This media nickname can be used to specify an input media file.  |
| Vantage EDL           | This media nickname identifies media than contains an Edit Decision List (EDL).  |
| Vantage Proxy         | The Vantage Proxy nickname identifies a file that is suitable for viewing in the preview panel in Vantage Workflow Portal, Vantage Workflow Designer, or Vantage Management Console.   |
| Vantage Thumbnail     | The Vantage Thumbnail nickname identifies a file that contains an image that can be used to visually represent the contents of a media file. Thumbnail images typically represent content when the media file appears in Windows Explorer or in the binder view in Vantage programs. |

The media nicknames make it easier to manage files in a workflow. Consider the following:


- When a media file is input to a workflow, either manually or automatically from a watch folder, the workflow origin action immediately assigns a nickname (typically *Original*) to the file. The workflow designer does not need to know the name of the input file, so the same workflow can be used with any suitable media file, regardless of the media file name.
- When the workflow designer configures a Flip action to transcode the input file, the designer specifies the input file nickname (typically *Original*) and a different output file nickname. Selecting nicknames is as easy as selecting them from a dropdown list or entering a new nickname.
- Actions displayed in Vantage Workflow Designer display media nicknames on the action, which makes it easier to visualize how the workflow processes a file.


## Managing Media Nicknames

To manage media nicknames, select Workflow Design Items > Media Nicknames. Vantage displays the Media Nicknames details panel, which includes a media nicknames toolbar.




## Creating and Saving Media Nicknames

To create a new nickname, click the Create Nickname button  in the toolbar. The Vantage Management Console displays a Create Media Nickname dialog. Enter the name of this nickname and click OK.

The Vantage Management Console adds this nickname to the table. Optionally, add a description and click the Save button .

Note that you can't rename media nicknames after you create them. To rename, create a new nickname and delete the old one, being sure to update all affected workflows.

## Deleting Media Nicknames


To permanently remove a media nickname from the domain, select the nickname and click the Delete button  in the toolbar (or right-click and select Delete). Click OK to confirm the deletion.

## Searching for Media Nicknames in Workflows

Vantage allows you to search all workflows in a domain for a media nickname. This is very useful when you need to change or delete a nickname, and you want to know which workflows might be affected by the change.

To search for media nicknames, do the following:


1. Select the media nickname for which you want to search.

2. Click the Search button  in the toolbar (or right-click and select Find Workflows).  
If the media nickname is used in any workflows, Vantage displays a list of workflows that use the nickname. Double-click any workflow in the list to open that list in Vantage Workflow Designer. Click Done to dismiss the list.  
If the media nickname is *not* used in any workflows, Vantage displays a message to that effect. Click OK to dismiss the message.

## Exporting and Importing Media Nicknames

Vantage allows you to export media nicknames to XML files, which you can then use to import the same media nicknames into another Vantage domain.

To export a media nickname, do the following:


1. Select the media nickname to export.
2. Click the Export button  (or drop-down menu, or right-click and select Export).
3. Use the file system dialog to save the exported media nickname.  
The default file name is the media nickname, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the media nickname in the XML file.

---

To import a media nickname, do the following:


1. Click the Import button .
2. Locate and select the media nickname to import, and click Open.

---

**Note:** If you try to import a media nickname that is already in this Vantage domain, Vantage warns you that it will overwrite the existing media nickname.

---

## Selecting All Unused Media Nicknames

To locate all unused media nicknames, click the Select All Unused icon . If any unused items are found, they are highlighted. This is useful if you have deleted workflows and want to find and delete associated items that are no longer needed.

## Managing Metadata Labels

The following topics describe Vantage metadata label concepts and management tasks:

- [Understanding Metadata Labels](#)
- [Vantage Metadata Label Applications](#)
- [Managing Metadata Labels with the Vantage Management Console](#)
- [Creating and Saving Metadata Labels](#)
- [Adding and Saving Metadata Label Parameters](#)

- [Duplicating a Parameter within a Metadata Label](#)
- [Adding a Copy of a Metadata Label Parameter to Another Metadata Label](#)
- [Deleting a Metadata Label Parameter](#)
- [Modifying Metadata Labels and Parameters](#)
- [Previewing Metadata Labels and Values](#)
- [Sorting Metadata Label Parameters](#)
- [Exporting and Importing Metadata Labels](#)
- [Searching for Metadata Labels in Workflows](#)
- [Selecting All Unused Metadata Labels](#)

---

**Note:** Workflow designers can use Vantage Workflow Designer to perform some metadata label management tasks. Operators can also edit metadata in Vantage Workflow Portal. Only Vantage administrators can use Vantage Management Console, where you can create, export, import, and delete metadata labels.

---

## Understanding Metadata Labels

Vantage supports metadata attachments and metadata labels. Metadata attachments are separate files that contain data about associated media. Metadata labels are stored in the Vantage database and can be designed by an administrator to carry whatever metadata is needed in the workflow. In Vantage, metadata labels are defined using the Vantage Management Console and can be used to manage data within and between workflows.

Each metadata label has a name and is comprised of one or more parameters. Each parameter has a name and holds a data value that conforms to a data type, such as text, date, timecode, or integer.

Vantage provides a comprehensive list of metadata labels with parameters for use in Vantage workflows. You can also define custom labels with custom parameters.

During workflow processing, metadata labels can be populated with the following types of data:

- Data imported from metadata attachments
- Data from workflow analysis (Analysis, Examine, and Identify actions)
- Data from workflow variables (Metadata Populate action)
- Data from work orders
- Data from commercial providers (from catch servers)
- Data entered by Vantage Workflow Portal operators

During workflow processing, metadata label content can be used to do the following:

- Provide media information in the Workflow Portal to operators, who use the information to make media processing decisions
- Provide media information to workflow processes for automated decision processing
- Output media information to metadata attachments for use after workflow processing
- Add metadata labels to the output media (embedded in the media file)

## Vantage Metadata Label Applications

The following are some examples of how metadata labels can be used with workflows:

- *Operator selection of distribution channels*—An ingest workflow can be used to collect data and populate metadata labels. When the ingest workflow completes, an operator examines the asset in the Workflow Portal, and sets where media should be sent within a metadata label that is used by a target workflow to choose a distribution channel.
- *Easier operator selection of trim points and thumbnails*—An ingest workflow can be used to generate a proxy media file, which the operator can use to review media. During review, the operator can use *hotkeys* to instantly transfer timecodes for the trim points and thumbnail to metadata labels, and the label timecode values can be used in the target workflow to trim the media and generate a thumbnail. Also, three timecode metadata parameters can be grouped together as a *Trim Group*, which automatically calculates and displays the difference between a *Mark In* and *Mark Out* point to show a duration. Once a trim group has been set in a label, the operator can submit the job, and the trim information can be applied during a transcode.
- *Metadata addition to media output files*—For media formats that support metadata, a workflow can be configured to collect metadata from operators or populate the metadata with default values.
- *Quicker location and evaluation of macroblocking*—An ingest workflow can be configured to detect the worst macroblocking in input media and store the frame timecode in a metadata label. An operator can then use the label timecode value to quickly locate the issue and evaluate the severity.
- *Flexible graphics and title insertion*—With the addition of a template for Post Producer, the same workflow and template can be reused for multiple applications by using metadata labels to define a graphic file to insert, title text to insert, and timecodes for placement.
- *Operator specification for automatic commercial insertion*—As with trim points and thumbnail selection, proxy media from an ingest workflow can be used with hotkeys and metadata labels to simplify operator specification for commercial insertion. After the metadata labels are populated, a target workflow can automatically insert commercial media at the point specified by the metadata labels.



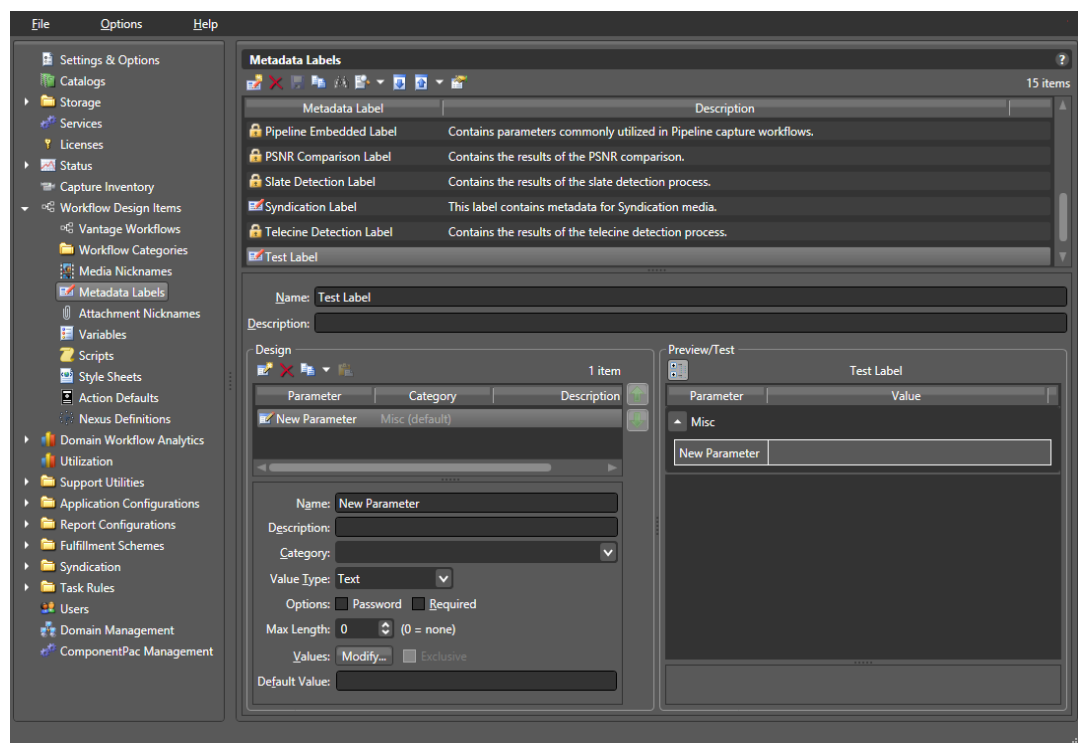
## Managing Metadata Labels with the Vantage Management Console

To start managing metadata labels with the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Workflow Design Items > Metadata Labels.


Vantage displays the Metadata Labels details panel shown in the following figure.


On the left of the panel, the Design area allows label designers to create, edit, sort and remove parameters. On the right, the Preview area shows the label designer what the label will look like within the Workflow Portal during data entry.



## Creating and Saving Metadata Labels


To create a new metadata label, do the following:

1. Click the New Label button  to create a new metadata label (far left) in the toolbar.
2. In the dialog that appears, enter a name for the new metadata label, and click OK. Metadata label names are case-sensitive. For example, *FrameHeight* and *frame-height* are different labels.
3. If desired, enter a description for the metadata label.

4. Add metadata label parameters as described in [Adding and Saving Metadata Label Parameters](#).
5. Click the Save button .

## Adding and Saving Metadata Label Parameters

To add a metadata label parameter, do the following:

1. Click an existing metadata label name, or create a new metadata label as described in [Creating and Saving Metadata Labels](#).
2. Click the Create Parameter button  in the design toolbar.
3. Enter a name for the new parameter.
4. If desired, do the following to configure the parameter:
  - a. Enter a description for the new parameter.
  - b. Enter a category name.

Categories can be used to group logically related parameters. Parameters with the same category name are grouped together in the parameter list. If no category is specified, the parameter displays in the Misc category.

- c. Select a parameter value type from the dropdown list of values.
- d. Click the password option if you want the parameter value to be obscured by asterisk (\*) characters. This option is only available for Text parameters.
- e. Click the Required option if a value for this parameter must be supplied.
- f. Optionally enter or select a Max Length to indicate the maximum length of a string for a label parameter whose type is text. Zero (0) = no length limit.
- g. To define a list of optional values for the parameter, click the Modify button, enter one value per line, and click OK. This option is only available for Text, Path, and Mail Address parameters.



This feature can be used to create a dropdown list to reduce the chance of data entry errors. For example, you might create a Ratings parameter and specify the terms *G*, *PG*, *PG-1*, *TV-14*, and *R*. Operators can then use a dropdown list in the Vantage Workflow Portal to select one of these values, instead of typing the value.

- h. To limit the parameter value to one of the values defined with the Modify button, check the Exclusive checkbox.

In the above example for a Ratings parameter, checking the Exclusive checkbox limits operators to selecting one of the specified ratings. Operators are not allowed to type in a rating.


- i. To define a default value for the parameter, enter the default value in the Default Value text box, or select a default value from the dropdown list.

The entry options depend on the other parameter value option settings.

- j. To change the displayed order of parameters, select a parameter in the parameter list and use the green up  and down arrow  buttons to move the

variable in the list. You can also Ctrl-click or Shift-click to select multiple parameters.

The parameter list order that you define configures the order of parameters displayed in Vantage Workflow Portal.

- k. To view parameters organized by category or as a flat list without categories, toggle the Categorize button .

---



**Note:** The Categorize button affects only the display of label categories in this Preview/Test area and does not change the way label categories appear in any other Vantage display.

---

5. Click the Save button .




## Duplicating a Parameter within a Metadata Label

To add a parameter that is a copy of another parameter in the same metadata label, do the following:

1. Select the parameter to copy. (Ctrl-click or Shift-click to select multiple parameters.)
2. Open the Copy button  drop down list in the Design toolbar and select Duplicate selected (or right-click and select Duplicate).
3. Modify the parameter options and values as needed.
4. Click the Save button .



## Adding a Copy of a Metadata Label Parameter to Another Metadata Label

To add a copy of one parameter to a different metadata label, do the following:

1. Select the parameter to copy. (Ctrl-click or Shift-click to select multiple parameters.)
2. Open the Copy button  dropdown list in the Design toolbar and select Copy selected (or right-click and select Copy).
3. Select the metadata label to which you want to copy the parameter.
4. Click the Paste button  in the Design toolbar.
5. Modify the new parameter options and values as needed.
6. Click the Save button .


## Deleting a Metadata Label Parameter

To delete a parameter from a metadata label, do the following:

1. Select the parameter to delete. (Ctrl-click or Shift-click to select multiple parameters.)
2. Click the Delete button  in the design toolbar (or right-click and select Delete).
3. Click the Save button .

## Modifying Metadata Labels and Parameters


To modify a metadata label, do the following:

1. Click an existing metadata label name.
2. Make changes to the metadata label description as needed.
3. To modify a parameter, select the parameter and change the parameter settings.
4. Click the Save button .



Note that to rename labels, you must create a new label or duplicate and rename an existing label and delete the old one, being sure to update all affected workflows.

## Previewing Metadata Labels and Values


To preview a metadata label and its values, select the label. All parameters for that label appear in the Preview/Test panel.

To toggle the display or to include or exclude category names, click the Categorize button . One display state displays parameters with the category headings, and the other display state displays parameters without the category headings.

## Sorting Metadata Label Parameters

To change the order of the label parameters in the list, select a parameter (Ctrl-click or Shift-click to select multiple parameters) and click the green up  and down arrow  buttons on the right side of the label list. Categories will display according to the order of the first parameter in each category as seen in the Preview area.

## Deleting Metadata Labels

To permanently remove a metadata label from the domain, select the label and click the Delete button  in the toolbar (or right-click and select Delete). Click OK to confirm.



---

**Note:** When you delete a metadata label, the deletion can render services and workflows inoperable. Be sure to update all actions and services that used the deleted label. For information on locating workflows that contain a specific metadata label, see [Searching for Metadata Labels in Workflows](#).

---

## Duplicating a Metadata Label

It can be easier to duplicate and rename a metadata label than it is to make a new one. To duplicate a metadata label, do the following:


1. Select the metadata label.
2. Click the Duplicate button  in the toolbar (or right-click and select Duplicate).
3. Enter a new metadata label name.
4. Change additional metadata label settings as needed.
5. Click the Save button .

## Exporting and Importing Metadata Labels

Vantage allows you to export metadata labels to XML files, which you can then use to import the same labels into another Vantage domain.

To export all metadata labels, click the Export drop down menu and select Export All.

To export one or selected metadata labels, do the following:

1. Select the metadata label to export. Ctrl-click or Shift-click to select multiple labels.
2. Click the Export button  to export labels (or right-click and select Export, or select Export Selected from the Export button drop down menu).
3. Use the file system dialog to save the exported metadata labels.


The default file name is the metadata label name, or you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the metadata label in the XML file.

---

To import a metadata label, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the metadata label to import, then click Open.

---


**Note:** If you try to import a metadata label that is already in this Vantage domain, Vantage prompts you to either overwrite the existing label (click Yes) or cancel the import (click No).

---

## Searching for Metadata Labels in Workflows

Vantage allows you to search all workflows in a domain for a metadata label. This is very useful when you need to change or delete a metadata label, and you want to know which workflows might be affected by the change.


To search for metadata labels, do the following:

1. Select the metadata label for which you want to search.
2. Click the Search button  in the toolbar (or right-click and select Find Workflows).

If the metadata label name is used in any workflows, Vantage displays a list of workflows that use the label. Double-click any workflow in the list to open that workflow in Vantage Workflow Designer. Click Done to dismiss the list.

If the metadata label name is *not* used in any workflows, Vantage displays a message to that effect. Click OK to dismiss the message.

## Selecting All Unused Metadata Labels

To locate all unused metadata labels, click the Select All Unused icon . If any unused items are found, they are highlighted. This is useful if you have deleted workflows and want to find and delete associated items that are no longer needed.

## Managing Attachment Nicknames

Like media nicknames, an attachment nickname serves as an alias for an attachment file within a workflow. An attachment file might be an XML file, an SCC caption file, an STL subtitle file, a PDF, or any other type of file which does not contain video or audio media. Without attachment nicknames, workflow designers would need to refer to the full path and name of each file in every workflow action that uses a file. When an attachment nickname is assigned to a file, the workflow designer can simply refer to the nickname; Vantage associates the full path and file name of the actual file with the nickname.

Vantage administrators can use the Vantage Management Console to manage attachment nicknames. The following topics describe nickname management concepts and tasks:

- [Understanding Attachment Nicknames](#)
- [Managing Attachment Nicknames](#)
- [Creating and Saving Attachment Nicknames](#)
- [Deleting Attachment Nicknames](#)
- [Exporting and Importing Attachment Nicknames](#)
- [Searching for Attachment Nicknames in Workflows](#)
- [Selecting All Unused Attachment Nicknames](#)

---

**Note:** Workflow designers can only define new attachment nicknames in Vantage Workflow Designer. Vantage administrators must perform all other nickname management tasks.

---

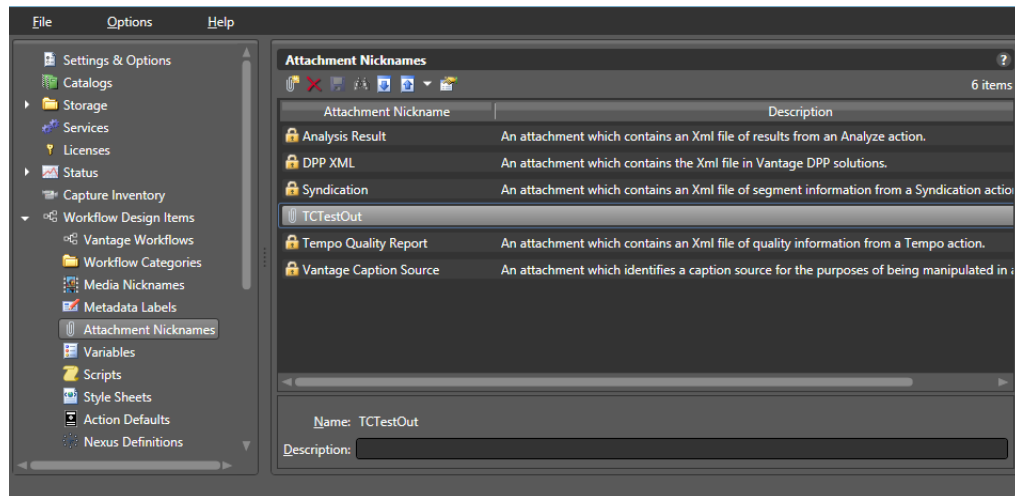
### Understanding Attachment Nicknames

Vantage requires that a workflow designer associate an attachment nickname with every unique attachment file that is processed by a workflow. This means that each input attachment file must be assigned a nickname, and every unique output attachment file must have a nickname. When a media nickname is assigned to an Attachment, the workflow designer can simply refer to the nickname. As an Alias the Nickname contains the file name and the file path to the original file.


## Managing Attachment Nicknames


To start managing attachment nicknames with the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
  2. In the components panel, select Workflow Design Items > Attachment Nicknames.
- Vantage displays the Attachment Nicknames details panel shown in this figure.




## Creating and Saving Attachment Nicknames

To create a new nickname, click the Create Nickname button  in the toolbar. The Vantage Management Console displays a Create Attachment Nickname dialog. Enter the name of this nickname and click OK.

The Vantage Management Console adds this nickname to the table. Optionally, add a description and click the Save button .

Note that you can't rename media nicknames after you create them. To rename, create a new nickname and delete the old one, being sure to update all affected workflows.

## Deleting Attachment Nicknames

To permanently delete a nickname from the domain, click the Delete button  in the toolbar (or right-click and select Delete). Click Yes in the warning to confirm.

---

**Note:** When you delete a nickname, it will render services and workflows inoperable if the nickname was used in it. Be sure to modify all actions and services that used the nickname you just deleted.

---


## Exporting and Importing Attachment Nicknames

Vantage allows you to export attachment nicknames to XML files, which you can then use to import the same nicknames into another Vantage domain.



To export all attachment nicknames, select Export all from the Export button drop down menu.

To export one or selected attachment nicknames, do the following:

1. Select the attachment nickname to export. Ctrl-click or Shift-click to select multiple nicknames.
2. Click the Export button  (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported attachment nicknames.


The default file name is the attachment nickname, or you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the attachment nickname in the XML file.

---

To import an attachment nickname, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the attachment nickname file to import, then click Open.


---

**Note:** If you try to import an attachment nickname that is already in this Vantage domain, Vantage prompts you to either overwrite the existing attachment nickname (click Yes) or cancel the import (click No).

---


## Searching for Attachment Nicknames in Workflows

Vantage allows you to search all workflows in a domain for an attachment nickname. This is very useful when you need to change or delete a nickname, and you want to know which workflows might be affected by the change.

To search workflows for an attachment nickname, select the attachment nickname, and click the Search button  in the toolbar (or right-click and select Find Workflows).

Vantage displays a message that it is unused or presents a list of workflows using the nickname. Double-click any workflow in the list to open that workflow in Vantage Workflow Designer. Click Done to dismiss the list or OK to dismiss the message.

## Selecting All Unused Attachment Nicknames

To locate all unused attachment nicknames, click the Select All Unused icon . If any unused items are found, they are highlighted. This is useful if you have deleted workflows and want to find and delete associated items that are no longer needed.

## Managing Variables

The following topics describe variable management concepts and tasks:

- [Understanding Variables](#)
- [Managing Variables](#)
- [Creating and Saving Variables](#)
- [Modifying Variables](#)
- [Deleting Variables](#)
- [Duplicating a Variable](#)
- [Exporting and Importing Variables](#)
- [Searching for Variables in Workflows](#)
- [Selecting All Unused Variables](#)

---

**Note:** Workflow designers can create new variables and change variable values in Vantage Workflow Designer. With the proper permissions, operators can use Vantage Workflow Portal to change variable values. Vantage administrators must perform all other variable management tasks using the Vantage Management Console.

---

### Understanding Variables

Variables in Vantage are similar to variables in programming languages. You can create a variable, name it, assign and change its value, and use the variable in workflow actions and services to automate decisions.

Each variable can be configured with a name, description, value type, and default value. The name and type are required, and the description and default value are optional.

The variable type describes what type of value the variable represents. Some supported types include text, date, integer number, and timecode.

The default value is only used by a workflow action when the variable has not been assigned a value earlier in the workflow.

For example, suppose you want a variable named *Email* that you can use to specify an email address for use in a Message action within a workflow. Also suppose that you want to send the email to a single address most of the time, but you want the option to override the email address in a workflow. To do this, create an Email variable in Vantage Workflow Designer or the Management Console, and set the default value to the email address you want to use most of the time.

During workflow execution, the Message action operates as follows:

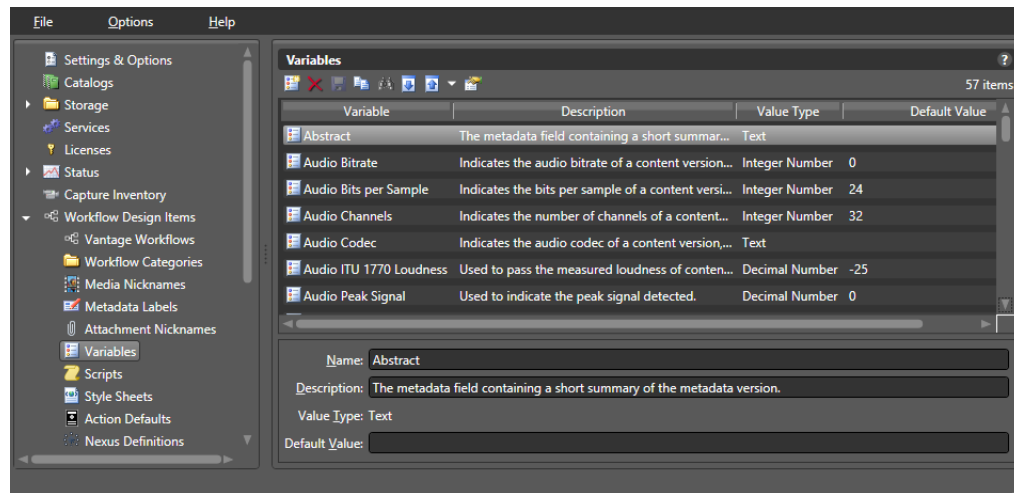
- If no other instance of the Email variable is created earlier in the workflow, the email is sent to the address specified by the default value in the email variable.
- If the Email variable is set earlier in the workflow, before the Message action, the email is sent to the address specified by the earlier workflow action.

## Managing Variables

To start managing variables with the Vantage Management Console, do the following:


1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Workflow Design Items > Variables.

Vantage displays the Variables details panel shown in this figure.



## Creating and Saving Variables


Variables are typically created in Vantage Workflow Designer, but you can create variables in Vantage Management Console as follows:

1. Click the Create Variable button  in the toolbar.
2. Provide a name for the variable.  
 Variable names are case-sensitive. For example, *FrameHeight* and *frameheight* are different variables.
3. Select a variable type from the Value Type dropdown menu.

---


**Note:** You cannot change a variable type after you save the variable configuration.

---

4. Enter a default value for the variable.
5. If needed, enter a description for the variable.
6. Click the Save button .

## Modifying Variables

Exercise caution when modifying a variable that is already being used by a workflow. If you change the default value of a variable, existing workflows continue to use the older default value until you unbind and rebind the variables in the workflows.


To modify a variable, select the variable, make changes, and click the Save button .

---

**Note:** When you modify a variable, the change can render a service or workflow inoperable. Be sure to review all services/actions that use the modified variable. For information on locating workflows that contain a specific variable, see [Searching for Variables in Workflows](#).

---

## Deleting Variables

To permanently remove a variable from the domain, select the variable and click the Delete button  in the toolbar (or right-click and select Delete). Click OK to confirm.



---

**Note:** When you delete a variable, the deletion can render services and workflows inoperable. Be sure to update all actions and services that used the deleted variable. For information on locating workflows that contain a specific variable, see [Searching for Variables in Workflows](#).

---

## Duplicating a Variable

It can be easier to duplicate and rename a variable than it is to make a new one. To duplicate a variable, do the following:


1. Select the variable.
2. Click the Duplicate button  in the toolbar (or right-click and select Duplicate).
3. Enter a new variable name.
4. Change additional variable settings as needed.
5. Click the Save button .

## Exporting and Importing Variables

Vantage allows you to export variables to XML files, which you can then use to import the same variables into another Vantage domain.

To export all variables, click the Export drop down menu and select Export All.

To export one or selected variables, do the following:


1. Select the variable to export. Ctrl-click or Shift-click to select multiple variables.
2. Click the Export button  (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported variable. The default file name is the variable name, or you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the variable in the XML file.

---

To import a variable, do the following:

1. Click the Import button .
2. Use the file system to locate and select the variable to import, then click Open.

---


**Note:** If you try to import a variable that already exists in the Vantage domain, Vantage prompts you to cancel or confirm replacement of the existing variable with the newly imported variable.

---

## Searching for Variables in Workflows

Vantage allows you to search all workflows in a domain for a variable. This is very useful when you need to change or delete a variable, and you want to know which workflows might be affected by the change.

To search for variables, do the following:


1. Select the variable for which you want to search.
2. Click the Search button  in the toolbar (or right-click and select Find Workflows).  
If the variable is used in any workflows, Vantage displays a list of workflows that use the variable. Double-click any workflow in the list to open that list in Vantage Workflow Designer. Click Done to dismiss the list.  
If the variable is *not* used in any workflows, Vantage displays a message to that effect. Click OK to dismiss the message.

---

**Note:** It is possible to have multiple variables with the same name if a variable already exists and a workflow is imported having a different variable with the same name. This does not pose any problem for Vantage (which uses a GUID number behind the scenes to tell the variables apart), but you may have to search using both variable instances to find all workflows using that variable name. You may also want to change the name of one of the duplicates and update your workflows to prevent confusion.

---

## Selecting All Unused Variables

To locate all unused variables, click the Select All Unused icon . If any unused items are found, they are highlighted. This is useful if you have deleted workflows and want to find and delete associated items that are no longer needed.

## Managing Scripts

The following topics describe scripting concepts and tasks:

- [Understanding Scripts](#)
- [Managing Scripts](#)
- [Adding and Saving a Script](#)
- [Adding Inputs and Outputs](#)
- [Renaming a Script](#)
- [Deleting Scripts](#)
- [Duplicating Scripts](#)
- [Finding Affected Workflows](#)
- [Exporting and Importing Scripts](#)

### Understanding Scripts

---

**Note:** The script feature in Workflow Design Items is limited to use by Telestream authorized personnel only. The license file prevents adding, importing, or modifying scripts by unauthorized users.

---

This feature allows authorized users to load or write scripts to intake and produce variables for Vantage actions. Management options for scripts include Save, Find in workflows, Export (as XML), Import (as XML), Test, and Delete.

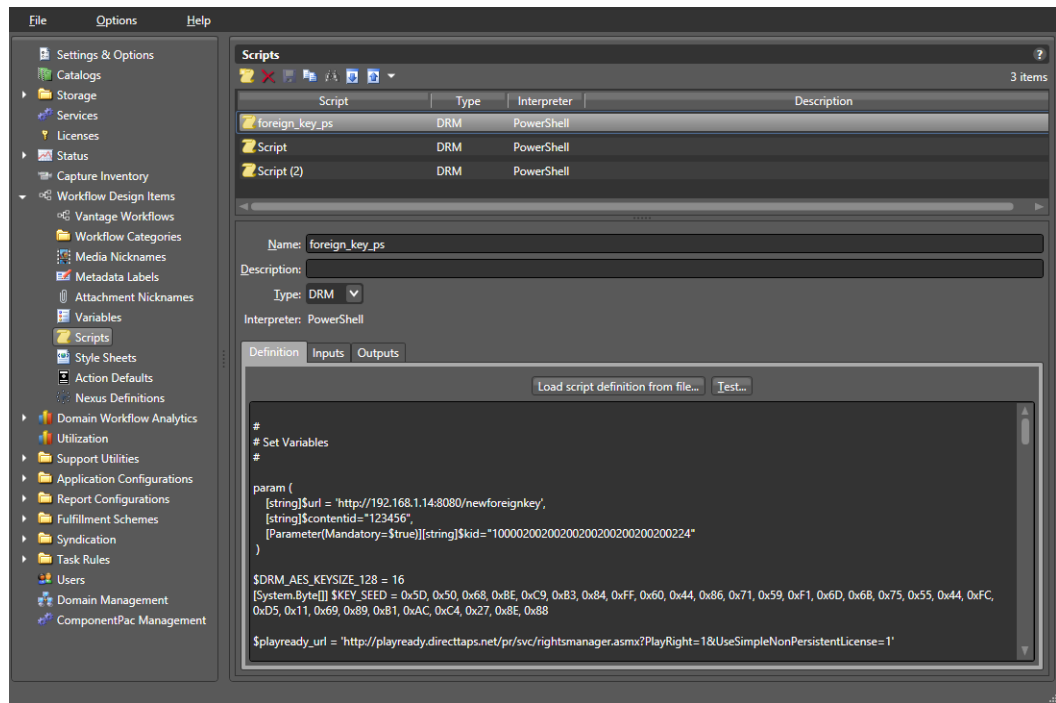
### Managing Scripts

To manage scripts,, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select *Workflow Design Items > Scripts*.

Vantage displays the Scripts panel shown below.



## Vantage Management Console Scripts Panel



## Adding and Saving a Script

**Note:** The license file limits adding or editing scripts to authorized users only. The *Add a new script* button is not available and the Definition panel is read only for unauthorized users.

To add a new script, follow these steps:

1. Click the *Definition* tab to select it, and click the *Add Script* button  in the toolbar. Vantage displays a file system dialog, so you can select a script definition file.
2. Name the script.
3. Browse to and select the script file you want to import. (Note that you can also load a script file later by selecting the script name in the list and using the *Load script definition from file...* button at the top of the *Definition* panel to browse for a script.) The Vantage Management Console adds the new script to the table.
4. Select an *Interpreter*, and click OK.
5. Click the *Save* button .


Note that you must also follow the procedure below to specify inputs and outputs to be used in a script.



## Adding Inputs and Outputs

Inputs and Outputs must be defined for each script and are used within scripts to specify values used by the Vantage actions.

To add inputs and outputs to a script, follow these steps:


1. Click the script to highlight it in the Scripts list.
2. Click the *Input* or *Output* tab to select it, and click the *Add New Input/Output* button  in the toolbar.

Vantage displays a file system dialog, so you can select a script definition file.


3. Enter the *Field Name* and *Description* of the input or output.
4. Select the *Value Type* from the drop down menu.
5. Select *Save* to save the Inputs and Outputs associated with the selected script.

To delete an input or output, select the input or output in the list, and click *Delete* (red X).

## Renaming a Script

To rename a script definition, select it in the table, edit the name to meet your requirements, and click the *Save* button .

## Deleting Scripts


To permanently remove a script from the domain, click the *Delete* button  in the toolbar (or right-click and select *Delete*). Click *OK* to confirm.

---

**Note:** Removing a script will render services and workflows inoperable if they used that script. Be sure to update all actions and services accordingly. You can use the *Find workflows* button to find affected workflows.

---

## Duplicating Scripts

To duplicate a script, select it in the list, click *Duplicate* , rename the copy, make any other desired changes, and click *Save* to save the duplicated script.

## Finding Affected Workflows

If you plan to delete a script, you may want to find any affected workflows first.

To do so, click the script in the list, and click *Find workflows using this script* . A list of affected workflows is displayed (or a message saying no workflows use the script).


## Exporting and Importing Scripts

Vantage allows you to export scripts to XML files, which you can then use to import the same scripts into another Vantage domain.

### Exporting

To export all scripts, click the Export drop down menu and select Export All.

To export selected scripts, do the following:

1. Select the script to export. Ctrl-click or Shift-click to select multiple scripts.
2. Click the *Export* button  to export a single script (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported script.

The default file name is the script name, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the script in the XML file.

---


### Importing

---

**Note:** The license file limits imports to authorized users only. The Import buttons are not available to unauthorized users.

---

To import a script, do the following:

1. Click the Import button  to import a previously exported script in XML format.  
To import a script directly in Powershell format, click *Load script definition from file...*
2. Browse to locate and select the script to import, then click Open.

---

**Note:** If you try to import a script that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---

## Managing Style Sheets

The following topics describe style sheet management concepts and tasks:

- [Understanding Style Sheets](#)
- [Managing Style Sheets](#)
- [Adding and Saving a Style Sheet](#)
- [Renaming a Style Sheet](#)
- [Deleting Style Sheets](#)
- [Duplicating Style Sheets](#)
- [Finding Affected Workflows](#)
- [Exporting and Importing Style Sheets](#)

### Understanding Style Sheets

A style sheet defines how an input metadata format is converted to an output metadata format. A style sheet does not change the metadata values; it changes the presentation of the metadata. The Transform action requires a style sheet, and style sheets can only be managed using the Vantage Management Console.

Style sheets (XSL files) are the keystone of the Transform action. Style sheets enable you to convert one attachment file (XML) into a different attachment (XML file) or to convert the contents of an attachment into a custom label schema and vice-versa. Each style sheet has a nickname to make it easy to assign style sheets in a workflow.

When you are processing media with metadata in a specific XML format and you are creating a workflow to convert the XML file into a different format or into a specific contextual metadata structure (for example, a label); you will need to provide a style sheet to perform the transformation.

When you add a new style sheet to your Vantage domain, the style sheet itself is wrapped in an XML file, providing a structure for the Vantage metadata: the name, description and identifying GUID.

Style sheets selected in the Vantage Management console can be edited directly in the console user interface. Changes affect all actions using that style sheet.

When you export style sheets, the entire XML file (the wrapper and the actual style sheet inside it) is saved. When you import a previously exported style sheet, you are importing an entire wrapper back into the domain.

---

**Note:** Style sheets and metadata transformation are advanced concepts. If you require assistance in implementing specific metadata transformations, please contact your customer service representative at Telestream.

---

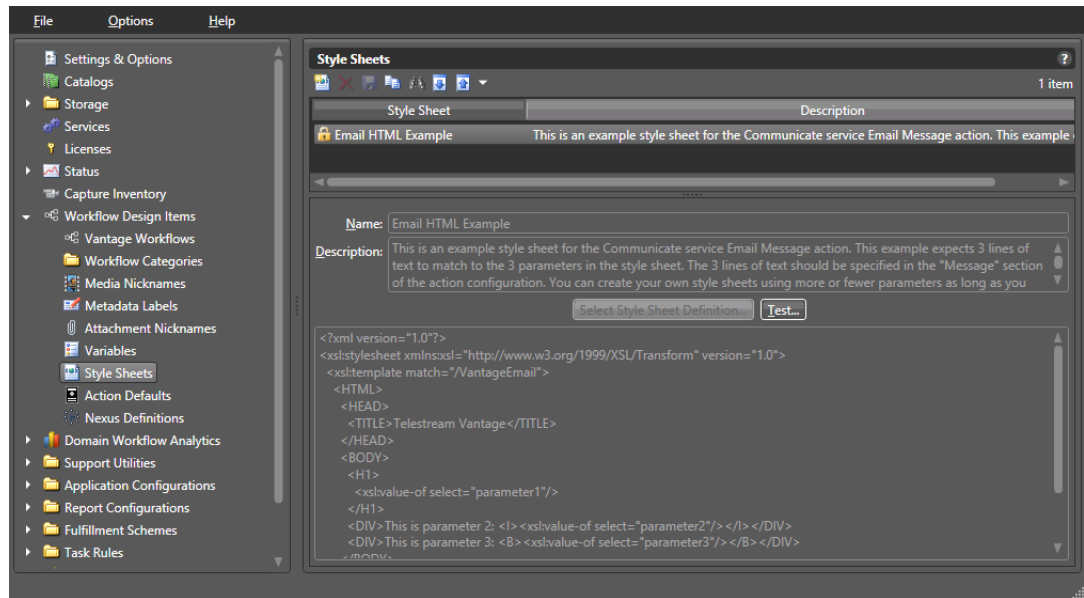
## Managing Style Sheets

To start style sheet management with the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select *Workflow Design Items > Style Sheets*.

Vantage displays the Style Sheets details panel shown in the figure shown here.



The Management Console displays the Style Sheets details panel:



## Adding and Saving a Style Sheet


You can create a new style sheet from an existing template, as explained below. Alternatively, you can duplicate the Email HTML Example shown in the figure by right-clicking and selecting *Duplicate* to make the example available for editing.

To add a new style sheet to the domain, do the following:


1. Click the *Add Style Sheet* button  in the toolbar.  
Vantage displays a file system dialog, so you can select a style sheet (XSL) file.
2. Navigate to the directory where the style sheet file is stored, select the file you want to import, and click OK.  
The Vantage Management Console adds the new style sheet to the table.
3. Name the style sheet and enter a description.
4. Click the *Save* button .

You can select the new or edited style sheet within a workflow action (such as Notify) in the Workflow Designer, to apply formatting to the action's metadata. Note that if you edit an existing style sheet, the changes affect all actions using that style sheet.

## Renaming a Style Sheet

To rename a style sheet definition, select it in the table, edit the name to meet your requirements, and click the Save button .

## Deleting Style Sheets


To permanently remove a style sheet from the domain, click the Delete button  in the toolbar (or right-click and select Delete). Click Yes in the warning to confirm.

---

**Note:** When you remove a style sheet from the domain, the XSL file is not erased—its reference is removed from the Vantage domain database. Removing a style sheet will render services and workflows inoperable if the style sheet was used in them. Be sure to update all actions and services that used the style sheet you just deleted.


---

## Duplicating Style Sheets

To duplicate a style sheet, select it in the list, click *Duplicate* , rename the copy, make any other desired changes, and click Save to save the duplicated style sheet.

## Finding Affected Workflows

If you plan to delete a style sheet, you may want to find any affected workflows first.


To do so, click the style sheet in the list, and click *Find workflows using this style sheet* . A list of affected workflows is displayed (or a message saying no workflows use the style sheet).

## Exporting and Importing Style Sheets

Vantage allows you to export style sheets to XML files, which you can then use to import the same style sheets into another Vantage domain.

To export all style sheets, click the Export drop down menu and select Export All.

To export selected style sheets, do the following:

1. Select the style sheet to export. Ctrl-click or Shift-click to select multiple style sheets.
2. Click the *Export* button  to export a single style sheet (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported style sheet.


The default file name is the style sheet name, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the style sheet in the XML file.

---

To import a style sheet, do the following:

1. Click the Import button  to import a previously exported XML style sheet. Alternatively, to import an XSL file, use *Select Style Sheet Definition...*
2. Browse to locate and select the style sheet to import, then click Open.

---

**Note:** If you try to import a style sheet that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---

## Managing Actions

The following topics describe action management tasks:

- [Understanding Actions](#)
- [Managing Action Default Settings](#)
- [Configuring the Resource Cost](#)
- [Configuring Task Scheduling](#)
- [Configuring Retry Settings](#)
- [Exporting and Importing Action Default Settings](#)
- [Exporting and Importing Workflow Action Configurations](#)
- [Related Action Management Topics](#)

### Understanding Actions

An *action* is the smallest unit of work that can be specified in a Vantage workflow. Actions are connected together in a workflow to perform a useful task. Each action must be configured to perform its subtask in the context of the workflow task.

Vantage services execute the actions within a workflow. Each service executes a specific set of actions, so the actions are often sorted by service in Vantage programs. For example, workflow designers select individual actions from action groups that are usually named for the service that executes the action.

---

**Note:** The Common group displayed in Vantage Workflow designer is an exception because it lists actions that can be executed by any service.

---

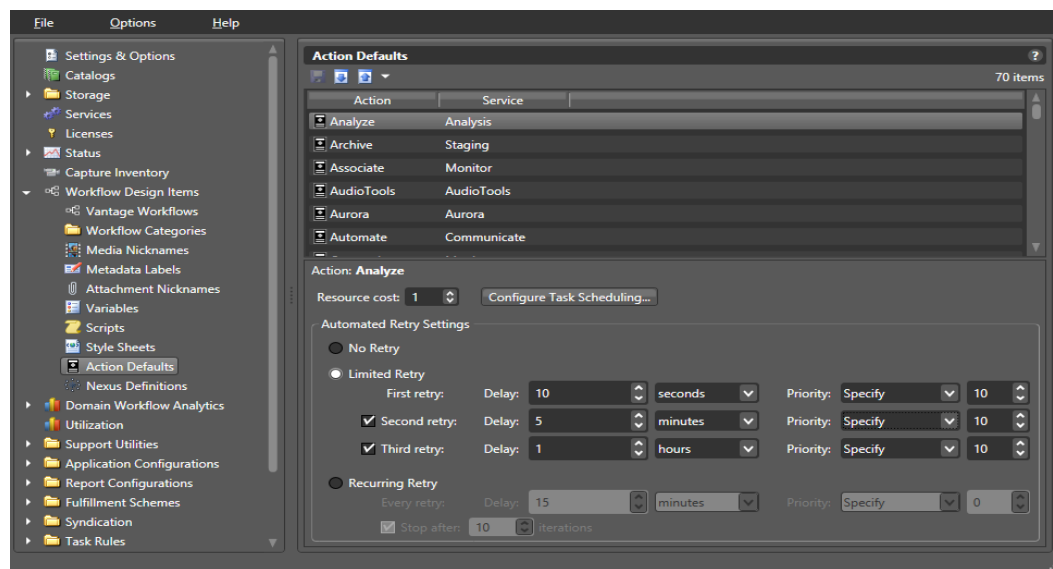
## Managing Action Default Settings

The action default settings define the default resource cost and retry settings for Vantage workflow actions. You can export these settings for use in other domains, and you can import settings from exported files.

To start action default setting management with the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Workflow Design Items > Action Defaults.

Vantage displays the Action Defaults details panel, as shown in this figure.



## Configuring the Resource Cost

When cost based load balancing is enabled, the resource cost establishes a default cost for an action. A higher resource cost means that fewer actions can run at the same time, which reduces demand on server resources. A lower resource cost allows more actions to run simultaneously. For information on enabling cost based load balancing, see *Managing Load Balancing* in the *Domain Management Guide*.


---

**Note:** When cost based load balancing is disabled (which is the default setting), the resource cost for every action is 1 and any other setting is ignored.

---

## Configuring Task Scheduling

The Configure Task Scheduling button opens a panel where you can select default Task Based Load Balancing rules that you created using the Vantage Management Console > Task Rules > Task Scheduling Rules panel. To add default task scheduling rules to actions, follow these steps:

1. Click an action to highlight it.
2. Click Configure Task Scheduling.
3. In the Action Default Task Scheduling Rules dialog, click *Add rules* .
4. Select the rule you wish to apply to the action from the Rule list.
5. Click OK and Done to close the rule lists.

For details about Task Based Load Balancing, see the *Domain Management Guide* or the *System Administration Guide* and search for the *Task Scheduling* topic.

## Configuring Retry Settings

For some actions, Vantage allows you to configure a retry rule that defines how and when Vantage tries to execute an action that failed. Default retry rules can be configured for an action type in the Vantage Management Console, and rules can be configured for specific actions in a workflow using Vantage Workflow Designer. When a retry rule is defined in a workflow for an action, that rule overrides any rule for that action type that is defined in Vantage Management Console.

The default retry rule for all action types defined in Vantage Management Console is No Retry. When an action type supports retry rules, you can specify a limited retry rule or a recurring retry rule. You can also specify a custom priority value or use the existing default priority. Your priority choice in the Management Console becomes the default value for that action unless you override it in the Workflow Designer.

A Limited Retry rule can specify up to 3 retries, each with a defined delay period and a priority. For example, you can specify (in the Vantage Management Console) that all Flip actions retry the first time after five minutes at priority 10, and that Flip actions retry a second time after 10 minutes at priority 20.

A Recurring Retry rule allows unlimited retries of failed actions of the specified type until the action executes. You can specify a retry interval (in seconds, minutes, hours, or days) and specify a relative priority. For example, you can set Vantage to retry failed Copy actions every 2 minutes (a 2-minute Delay) at Priority 30 until the Copy action executes successfully. You can also specify a Stop after a maximum number of iterations or leave Stop unchecked for unlimited retries.

It is important to keep in mind that individual action retry rules specified in Vantage Workflow Designer override the default retry rules specified in the Vantage Management Console. For example, if a workflow is configured to retry a Message action twice after failure and the Vantage Management console is configured for No Retry for Message actions, Vantage will retry the failed Message action twice, as specified in the workflow.



The following topics describe retry rule management:

- [Viewing Action Retry Rules](#)
- [Configuring Action Retry Rules](#)

### Viewing Action Retry Rules

To view the retry configuration for any action, do the following:

1. In the Vantage Management Console components panel, open Workflow Design Items > Action Defaults.
2. Select an action in the Action Defaults details panel.
3. View the configuration in the Action panel.


---

**Note:** Not all actions support action retry rules.

---

### Configuring Action Retry Rules

To configure a retry rule for any action, do the following:

1. In the Vantage Management Console components panel, open Workflow Design Items > Action Defaults.
2. Select an action in the Action Defaults details panel.
3. To disable retries, click No Retry.
4. To define a limited retry rule, click Limited Retry and complete the rule as follows:
  - a. For the first retry, specify the delay period number and units and execution priority (select the existing default priority or specify a custom priority value).
  - b. For a second or third retry, check the appropriate checkbox and complete the rule configuration.
5. To define a recurring retry rule, click Recurring Retry and complete the rule as follows:
  - a. Specify the delay period number and units and execution priority (select the existing default priority or specify a custom priority value).
  - b. Clear the *Stop after* checkbox to enable unlimited retries, or check the checkbox and specify a maximum number of retry iterations.
6. Click the Save button .


### Exporting and Importing Action Default Settings

Vantage allows you to export action default settings to XML files, which you can then use to import the same default settings into another Vantage domain.

To export default settings for all actions, select Export All from the Export button drop down menu.

To export default settings for selected actions, do the following:

1. Select the action. Ctrl-click or Shift-click to select multiple actions.


2. Click the Export button  to export settings (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported settings.  
The default file name is the action name, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the action in the XML file.

---

To import settings for an action, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the file to import, then click Open.

---

**Note:** When you import settings for an action that is already in this Vantage domain, Vantage prompts you to confirm replacement of the current settings or cancel the import.

---

## Exporting and Importing Workflow Action Configurations

Every workflow action and action template is stored in the Vantage domain database, and you can use the Vantage Management Console to view these actions and action templates. With the Vantage Management Console, you can view when an action was created, which workflow uses the action, and whether the action is a template or not. You can also export and import actions and action templates.

You might want to export an action so that you can import it to another domain, or you might want to export an action so that you can email it to Telestream for evaluation. When you import an exported action or action template from another domain, Vantage automatically makes the imported action a template in the new domain. Imported action templates make the imported action available to all workflow designers in the Vantage domain.

Actions are saved as XML files—one action per file. The following topics describe export and import tasks:

- [Displaying Actions for Export and Import](#)
- [Exporting Actions](#)
- [Importing Actions](#)

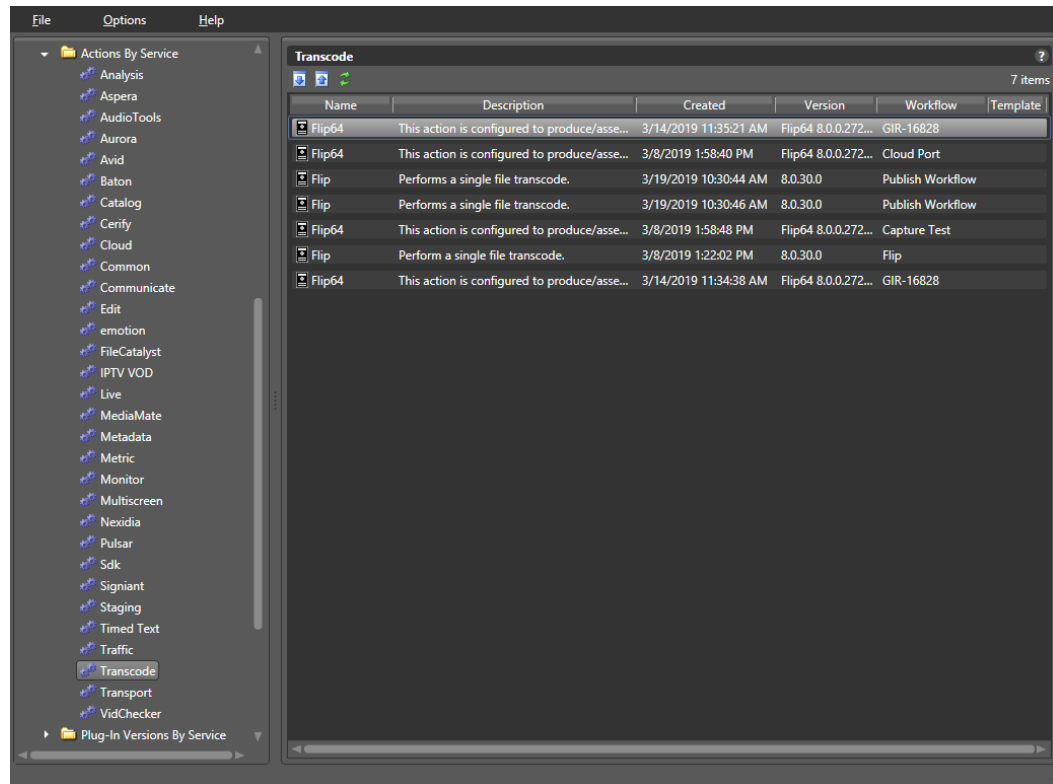
### Displaying Actions for Export and Import

To display actions for export and import, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Support Utilities > Actions > By Service.


3. Select the service for which you want to display actions.

Vantage displays a service details panel that lists actions, similar to the Transport details panel shown here.



### Exporting Actions

To export one or more actions, do the following:

1. Select the actions to export. (Ctrl-click to select multiple actions.)
2. Click the Export button  (or right-click and select Export).
3. Use the file system dialog to save the exported actions.

The default file name is the action name, but you can change the file name.

---

**Note:** Changing the XML file name does not change the action name in the XML file.

---

### Importing Actions

When you import an action into a domain, Vantage imports the action as a template, and the action template becomes available to all workflow designers in the Vantage domain. If a workflow designer creates a new action using the imported template, the new action uses all of the settings of the original action.

To import an action, do the following:

1. Click the Import button .
2. Browse the file system to locate and select the action file to import, and click Open.

## Related Action Management Topics

For additional information on action management using Vantage Management Console, refer to the following topics:

- [Viewing Active Actions](#)
- [Exporting Workflow and Action Analytics](#)

For information on action management using Vantage Dashboard, refer to the Dashboard chapter of the Domain Management Guide.

## Managing Nexus Definitions

The following topics describe how to use Nexus Definitions:

- [Understanding a Nexus](#)
- [Managing Nexus Definitions](#)
- [Creating Nexus Definitions](#)
- [Modifying a Nexus Definition](#)
- [Deleting a Nexus Definition](#)
- [Duplicating a Nexus Definition](#)
- [Exporting and Importing Nexus Definitions](#)
- [Searching for Nexus Definitions in Workflows](#)
- [Refreshing the Nexus Definitions List](#)

### Understanding a Nexus

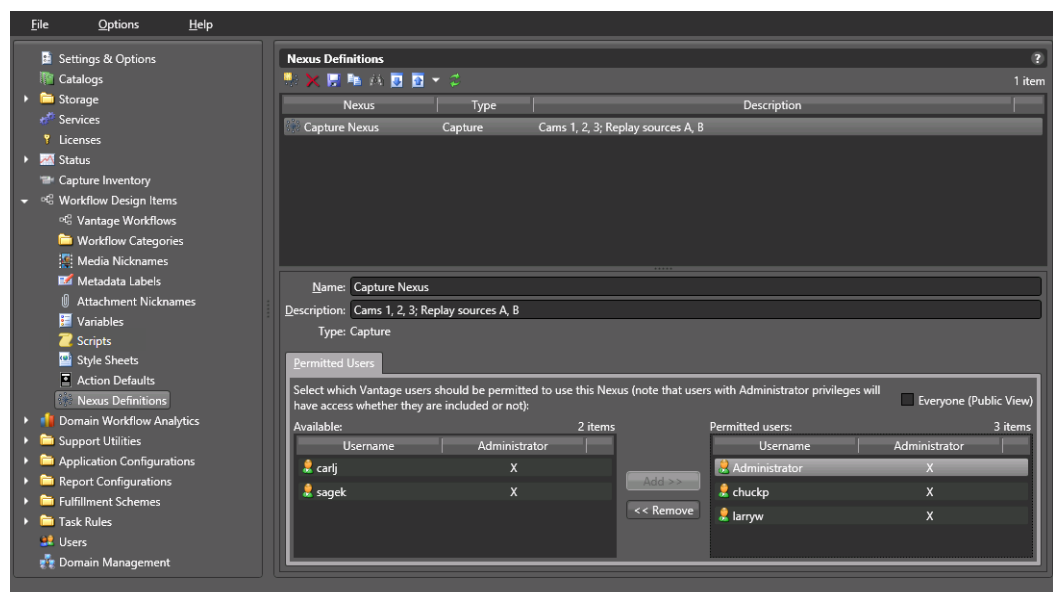
A nexus is a group of video and audio channels associated with each other for convenience. The group can then be named using a Nexus Definition for quick and easy recognition and access. Nexus channel groups can be selected in the action inspectors (such as the Capture action) for use in Vantage workflows.

### Managing Nexus Definitions

To start managing nexus definitions with the Vantage Management Console, follow these steps:


1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Workflow Design Items > Nexus Definitions.

Vantage displays the Nexus Definitions details panel shown in this figure.



## Creating Nexus Definitions

You can create nexus definitions in Vantage Management Console as follows:


1. Click the *Create a New Nexus* button  in the toolbar.
2. Select the nexus type in the dialog that opens and click OK.
3. Enter a name for the nexus.
4. Enter a description of the nexus.
5. Assign Permitted Users (visible only if user admin is enabled) by clicking on a user in the left list, and clicking Add to move them to the right list.

You can check *Everyone* to allow all users access to the Nexus Definitions feature.


Use *Remove* to move a selected user on the right to the non-permitted list on the left. This disables that user's access.

6. Click the Save button .

## Modifying a Nexus Definition

To modify a nexus, select it in the list, make changes, and click the Save button .

## Deleting a Nexus Definition

To permanently remove a nexus definition from the domain, select it in the list and click the Delete button  in the toolbar (or right-click and select Delete). Click OK to confirm.



---

**Note:** When you delete a nexus definition, affected workflows may no longer operate as expected. Be sure to update the affected workflows.

---

## Duplicating a Nexus Definition

It can be easier to duplicate and rename a definition than it is to make a new one. To duplicate a definition, do the following:


1. Select the nexus definition.
2. Click the Duplicate button  in the toolbar (or right-click and select Duplicate).
3. Enter a new name.
4. Change the description, if desired.
5. Click the Save button .

## Exporting and Importing Nexus Definitions

Vantage allows you to export nexus definitions to XML files, which you can then use to import the same definitions into another Vantage domain.

To export all nexus definitions, click the Export drop down menu and select Export All.

To export one or selected definitions, do the following:

1. Select the definition to export. Ctrl-click or Shift-click to select multiple definitions.
2. Click the Export button  (or right-click and select Export, or click the Export drop down menu and select Export Selected).
3. Use the file system dialog to save the exported definition. The default file name is the definition name, or you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the nexus definition in the XML file.

---


To import a nexus definition, do the following:

1. Click the Import button .
2. Use the file system to locate and select the definition to import, then click Open.

## Searching for Nexus Definitions in Workflows

Vantage allows you to search all workflows in a domain for a nexus definition. This is very useful when you need to change or delete a definition, and you want to know which workflows might be affected by the change.

To search for nexus definitions, do the following:

1. Select the definition for which you want to search.
2. Click the Search button  in the toolbar (or right-click and select Find Workflows).

If the definition is used in any workflows, Vantage displays a list of workflows that use the definition. Double-click any workflow in the list to open that list in Vantage Workflow Designer. Click Done to dismiss the list.

If the definition is *not* used in any workflows, Vantage displays a message to that effect. Click OK to dismiss the message.

## Refreshing the Nexus Definitions List

Click the Refresh button to update the list of nexus definitions.




## Viewing Workflow and Action Analytics

Workflow and Action Analytics is a licensed optional feature that calculates and displays key statistics and performance data about your Vantage domain. You can use analytics information to identify problems and improve overall system performance.

You can use Vantage Management Console to view analytics as described in the following topics:

- [Viewing Action Analytics](#)
- [Viewing Workflow Analytics](#)
- [Exporting Workflow and Action Analytics](#)

---

**Note:** Analytics features in Vantage Workflow Designer display information on the actions in a workflow. For details about how to use Workflow Analytics in the Workflow Designer, click the Help button  in the toolbar to display the Designer help system.

---

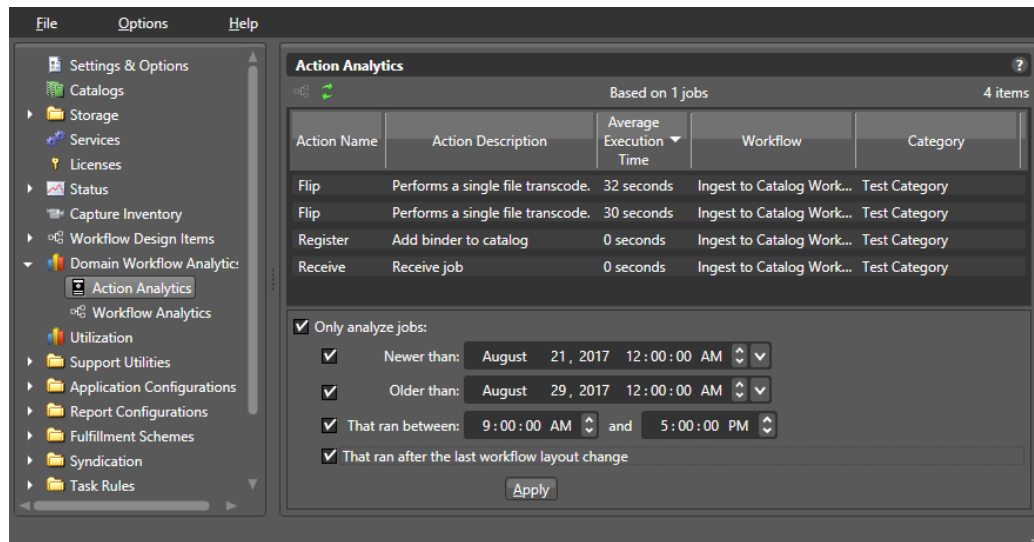
## Viewing Action Analytics

Action analytics displays the average execution time for each action in every workflow. The workflow analytics show the average execution time for all actions in a workflow and the bottleneck action execution time. Use workflow analytics to discover a workflow and bottleneck action that require a closer look; use the action analytics to display analytics for the other actions in workflows.

To view action analytics in the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Domain Workflow Analytics > Action Analytics.

Vantage displays the Action Analytics details panel shown here:



The following table describes the data and controls in the Action Analytics details panel.

| Button or Option         | Description  |
|--------------------------|--|
| Workflow Designer button | Click the Workflow Designer button to open the Workflow Designer.<br><br>Note: If Workflow Designer is already open and positioned behind the Vantage Management Console, the Vantage Management Console remains in front of the Workflow Designer and the Workflow Designer button flashes in the task bar. Click the Workflow Designer button in the task bar to display the Workflow Designer in front of the Vantage Management Console. |
| Refresh button           | Click the Refresh button to update the list of actions.  |
| Action Name              | This column displays all of the actions in the workflows.  |

| Button or Option                               | Description  |
|--|--|
| Action Description                             | This column displays the descriptions that are associated with each action.  |
| Average Execution Time                         | This is the average execution time of the named action for all workflows.  |
| Workflow                                       | The name of the workflow that contains the named action.<br><br>The set of workflows to be analyzed can be selected by checking the <i>Only analyze jobs</i> checkbox, checking other checkboxes that apply, and changing dates and times. |
| Category                                       | The Category in which the workflow resides.  |
| Newer than and Older than                      | Workflows within a range of dates and times can be selected by checking <i>Newer than</i> and <i>Older than</i> checkboxes and setting the dates and times accordingly.  |
| That ran between                               | Workflows between a beginning and end time can be selected by checking the <i>That ran between</i> checkbox and setting the times.   |
| That ran after the last workflow layout change | Check the <i>That ran after the last workflow layout change</i> check box to select all workflows that ran after the last workflow layout change.  |

## Viewing Workflow Analytics

You can use workflow analytics to collect information that will help you improve Vantage workflow design and domain performance and efficiency.

In the Vantage Management Console, the workflow analytics feature displays columns for the workflow data listed in the following table. Note that not all jobs are accounted for in the *Successful Jobs* and *Failed Jobs* counts because some jobs are *In Progress* or *Waiting*. All jobs are accounted for in the *Total Jobs* count.

| Column          | Description  |
|-----------------|--|
| Workflow        | The name of the workflow as it was defined in Vantage Workflow Designer.               |
| Category        | The Category in which the workflow resides.  |
| Total Jobs      | The total number of jobs (in a selected group) that have run using the named workflow. |
| Successful Jobs | The total number of successful jobs completed.   |
| Successful %    | The percentage of successful jobs.   |

| <b>Column</b>                            | <b>Description</b>  |
|--|---|
| Failed Jobs                              | The total number of failed jobs.  |
| Failed %                                 | The percentage of failed jobs.  |
| Cumulative Workflow Processing Time      | The total execution time for all jobs that used the workflow.                                       |
| Average Completion Time                  | Total Completion Time divided by Total Jobs.  |
| Cumulative Action Execution Time         | The total execution time of all actions in a workflow.  |
| Average Action Execution Time            | Total Action Execution Time divided by the number of actions in the workflow.                       |
| Bottleneck Action Average Execution Time | The longest action execution time in the workflow.  |
| Bottleneck Action                        | The name of the bottleneck action. If there is no apparent bottleneck, no action is listed (blank). |
| Bottleneck Action Description            | Description associated with the bottleneck action.  |

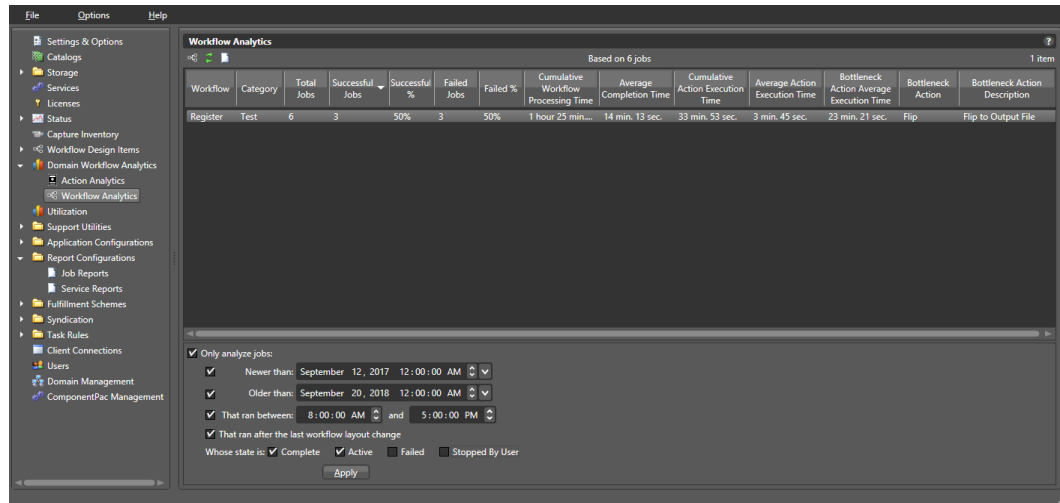
Each analytic provides key information about your Vantage domain performance. For example, you can click on the Cumulative Workflow Processing Time column head to sort all the times in that column and quickly identify which workflows require the most processing time.

The bottleneck identification feature identifies the action within each workflow that requires the most time to process, while the Bottleneck Action Average Execution Time column shows how much time the bottleneck action requires. If the Bottleneck Action Average Execution Time value is insignificant, there is likely no issue with that action. However, if you identify a workflow that is consuming significant resources, knowing the bottleneck action for that workflow gives you an indication of where to look for issues.

To view workflow analytics in the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.

2. In the components panel, select Domain Workflow Analytics > Workflow Analytics. Vantage displays the Workflow Analytics panel shown here:

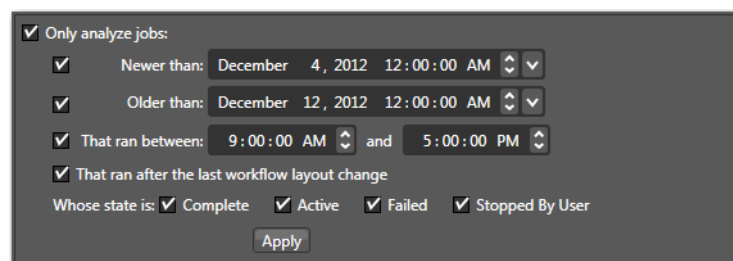


You can sort all entries in ascending or descending order by clicking a column label.

You can right-click on any workflow and select Open Workflow to launch (or display, if already running) Workflow Designer and display the selected workflow.

**Note:** If Workflow Designer is already running and is hidden behind another window when a workflow is requested, the Windows task bar button will flash, indicating that the Workflow Designer has something new to display.


The set of workflows to be analyzed can be selected by checking the *Only analyze jobs* checkbox, checking other checkboxes that apply, and changing dates and times.

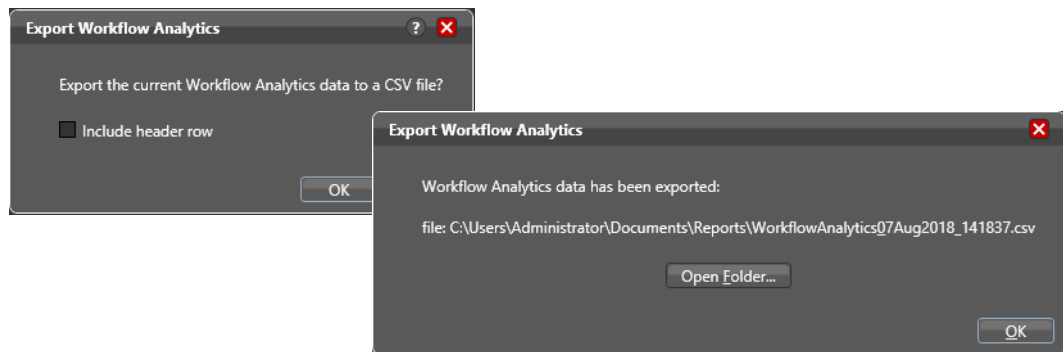


The options that you can use to filter workflows are described in this table:

| Option   | Description  |
|--|--|
| Only analyze jobs                              | Enables filtering of the job list based on the other options specified.  |
| Newer than and Older than                      | Workflows within a range of dates and times can be selected by checking <i>Newer than</i> and <i>Older than</i> checkboxes and setting the dates and times accordingly.              |
| That ran between                               | Workflows between a beginning and end time can be selected by checking the <i>That ran between</i> checkbox and setting the times.   |
| That ran after the last workflow layout change | Check the <i>That ran after the last workflow layout change</i> check box to select all workflows that ran after the last workflow layout change.                                    |
| Whose state is                                 | Check any combination of the four provided state checkboxes to select a set of workflows. (See the <i>Vantage Workflow Designer User Guide</i> for the definitions of these states). |

## Exporting Workflow and Action Analytics

You can export the workflow and action analytics contents to a .csv comma separated file, readable by a spreadsheet application. To do so, click the workflow or action, and click the Export to file icon . The dialogs let you browse for a location to save the file.



|   | A                 | B          | C         | D         | E          | F        | G         | H         | I         | J         | K         | L         | M          | N      | O           | P |
|---|-------------------|------------|-----------|-----------|------------|----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|--------|-------------|---|
| 1 | Workflow Category | Total Jobs | Successfu | Successfu | Failed Job | Failed % | Cumulativ | Average C | Cumulativ | Average A | Bottlene  | Bottlene  | Bottleneck | Action | Description |   |
| 2 | Register          | Test       | 4         | 2         | 50%        | 2        | 50%       | 0 seconds | 0 seconds | 0 seconds | 0 seconds | 0 seconds |            |        |             |   |
| 3 | Flip              | Test       | 4         | 2         | 50%        | 2        | 50%       | 0 seconds | 0 seconds | 0 seconds | 0 seconds | 0 seconds |            |        |             |   |

## Using Application Configurations

The Application Configurations folder contains the following configurators for use in monitoring job status and setting up operator applications:

- [Configuring the Job Status Views](#)
- [Configuring the Workflow Portal](#)
- [Configuring the Dublist Portal](#)

### Configuring the Job Status Views

Job Status View configuration is covered in its own dedicated chapter, [Configuring Job Status Views](#), in the *Vantage Domain Management Guide*.

Job Status Views is a Web application that provides operators and managers with information about the status of jobs in the domain. Using the Vantage Management Console, you can configure *views*, which define what information an operator sees when opening a view.

The default view is the All Workflows view, which displays information on all workflows. You can create additional views that represent a single workflow, and those views can be configured as *public* or *private*. Public views are available to all Vantage users, and private views are available only to approved users.

For details about operating the Job Status Views Web application, see the *Vantage User Guide*.

### Configuring the Workflow Portal

Workflow Portal configuration is covered in its own dedicated chapter, [Setting up Workflow Portal](#), in the *Vantage Domain Management Guide*.

The Workflow Portal is a Vantage client (implemented as a Windows program and a web application) which provides a customizable user interface allowing operators to process media using Vantage workflows and specialized portal controls.

The interface is configurable in the Vantage Management Console to set up panels according to the options you have bought and the media processing functions you need. Several Workflow Portal configurations can be selected to create multiple configurations and each configuration further refined by selecting check boxes to display desired functions and unchecking those functions that will not be displayed. Pull down menus and data entry fields allow you to select variables, labels, and other parameters to customize the operator's view.

Once the configurations have been created, the portal operator can select the configuration needed for a specific task and use the portal view presented by that configuration.

For details about operating the Workflow Portal, see the *Vantage User Guide*.

## Configuring the Dublist Portal

Dublist Portal configuration is covered in its own dedicated chapter, [Creating Dublist Portal Configurations and Dublist Schemes](#), in the *Vantage Domain Management Guide*.

The Dublist Portal provides operators and managers with the ability to view and manage Vantage TrafficManager dublists. Using the Vantage Management Console's Dublist Portal configuration panel, you create *configurations*, which define the features and information an operator uses and sees when operating the Dublist Portal. You can create as many configurations as needed to implement your dublist processing.

Once the configurations have been created, the portal operator can select the configuration needed for a specific task and use the portal view presented by that configuration.

For details about operating the Dublist Portal, see the *Vantage User Guide*.



# Creating Report Configurations

Report configurations (optional) define which data Vantage exports when a workflow designer uses Vantage Workflow Designer to export data. In the current release, Vantage supports custom report formats as described in these topics:

- [Job Reports](#)
- [Service Reports](#)

## Job Reports

The job report configurations created in the Vantage Management Console are used in the Workflow Designer to generate either manual or automatic reports for specific workflow jobs. Report configurations define which job status and metadata label data is exported when reports are produced. Exported data is saved to files using the comma separated value (CSV) format, which can be read by many programs, including word processor and spreadsheet programs.

---

**Note:** Reports are set up in the Workflow Designer Workflow Details panel using the Automatic Reports: Modify button, or in the Job Status or Domain Job Status panel using the *Create Report...* right-click context menu. When checked, the *Include completed jobs in Domain Job Status* selection in the Vantage Management Console Settings & Options General panel enables visibility of completed jobs in the Domain Job Status tab; when unchecked, only current jobs are shown.

---

The following topics describe how to view and manage job report formats:

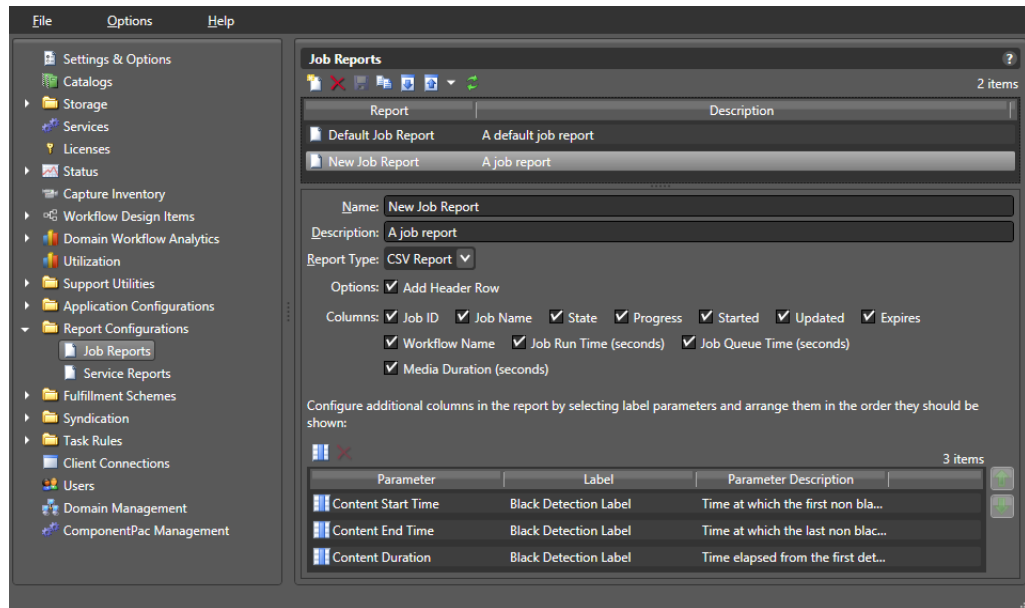
- [Managing Job Reports](#)
- [Creating and Saving a New Job Report Format](#)
- [Including and Excluding the Header Row](#)
- [Choosing the Report Format Columns](#)
- [Duplicating a Job Report Format](#)
- [Deleting a Job Report Format](#)
- [Refreshing the Format List](#)
- [Exporting and Importing Job Report Formats](#)

## Managing Job Reports

To view and manage job reports using the Vantage Management Console, do the following:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Report Configurations > Job Reports.



Vantage displays the Job Reports panel:



## Creating and Saving a New Job Report Format


You can create job report formats in the Vantage Management Console and in Workflow Designer.

To create a new report format in the Vantage Management Console, do the following:

1. Display the Job Reports details panel (see the [Vantage displays the Job Reports panel](#): figure).
2. Click the Create button , (or right-click the empty area of the Job Reports panel and select New Configuration).  
The Vantage Management Console adds a new report format to the list.
3. Select the new report format in the list.
4. Enter a new name in the Name text box.
5. If you want, enter a report format description in the Description text box (the description is optional).
6. Click the Save button .

## Including and Excluding the Header Row

To include or exclude a header row in the report format, do the following:

1. Display the Job Reports details panel (see the [Vantage displays the Job Reports panel](#): figure).
2. Select the report format to modify.
3. Check the Add Header Row check box to include the header row, or clear the checkbox to exclude the header row.
4. Click the Save button .





## Choosing the Report Format Columns


You can configure report formats to include or exclude the following columns:

- Job ID
- Job Name
- State
- Progress
- Started
- Updated
- Expires
- Workflow Name
- Job Run Time (seconds)
- Job Queue Time (seconds)
- Media Duration (seconds)
- Additional columns for metadata label parameters

When you choose to display a column for a metadata label, the column displays the label value.

To define which columns appear in a report, do the following:

1. Display the Job Reports details panel.
2. Select the report format to modify.
3. In the Columns row (see the [Vantage displays the Job Reports panel](#): figure), check (display) or clear (hide) the checkboxes for the columns you want to display.
4. To add or delete columns for metadata labels, do the following:
  - a. Click the Column button .
  - b. In the *Labels* panel, select a label for which you want to display parameters.
  - c. In the *Parameters* panel, check the checkbox for any parameter you want to display, and clear the checkbox for any parameter you do not want to display.
  - d. To toggle the display to include or exclude category names, click the Categorize button . One display state displays parameters with the category headings, and the other display state displays parameters without the category headings.
  - e. Repeat parameter label selection until all labels are properly selected.
  - f. Click OK.
5. To change the displayed order of parameter labels, select a label in the list (Ctrl-click or Shift-click to select multiple labels) and use the green up  and down arrow  buttons to move the label in the list.

The top item in the list appears to the right of the columns listed in the Columns row, and to the left of all the other label columns. The last item in the list becomes the last column on the right.
6. Click the Save button .

## Duplicating a Job Report Format

When you duplicate a job report format, a new format is created with a modified name. All other configuration settings in the duplicate format match those in the original format.



To duplicate a job report format, do the following:

1. Display the Job Reports details view.
2. Select the report format to duplicate. (Ctrl-click or Shift-click to select multiple formats.)

---


**Note:** You duplicate one report at a time.

---


3. Click the Duplicate button , (or right-click and select Duplicate).
4. In the Name text box, enter a name for the duplicate format.
5. In the Description text box, enter a description for the duplicate format.
6. Click the Save button .

## Deleting a Job Report Format

To delete a job report format, do the following:

1. Display the Job Reports details view.
2. Select the format or formats to delete. (Ctrl-click or Shift-click to select multiple formats.)
3. Click the Delete button , (or right-click and select Delete).
4. When the confirmation dialog appears, click OK.


## Refreshing the Format List

When you open the Job Reports detail panel, the Vantage Management Console displays the current list of job report formats. If another administrator adds or changes formats, you must refresh the display to see those changes. To refresh the display, click the Refresh button .

## Exporting and Importing Job Report Formats

Vantage allows you to export report formats to XML files, which you can then use to import the same reports into another Vantage domain.

To export one or all job report formats, do the following:

1. If you are exporting a single format, select the format to export.
2. Click the Export button  to export a single format, or select *Export all* from the Export button drop down menu. You can also right-click and select Export.
3. Use the file system dialog to save the exported formats.


The default file name is the format name, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the report format in the XML file.

---

To import a report format, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the format file to import, then click Open.

---

**Note:** If you try to import a report format that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---

## Service Reports

The Service Reports feature in the Vantage Management Console Report Configurations folder allows you to define configurations (formats) for reports showing wait times for selected services and servers (nodes). You can create reports from time-of-day or historical data. Exported data is saved to files using the comma separated value (CSV) format, which can be read by many programs, including word processor and spreadsheet programs.

Generating reports from the report configurations you've created is done using the Generate Report button in the Vantage Management Console Services detail panel. See *Generating Reports* for more information.

Retention of historical data is controlled by the *Settings & Options > General Settings > Report Retention Time* setting. This setting determines how many days of historical logging to retain for use in historical Service Reports.

The following topics describe how to view and manage service report configurations:

- [Managing Service Reports](#)
- [Creating and Saving a New Service Report](#)
- [Choosing the Report Type, Organization, and Options](#)
- [Choosing the Report Mode](#)
- [Duplicating a Service Report Configuration](#)
- [Deleting a Service Report Configuration](#)
- [Refreshing the Service Reports Configuration List](#)
- [Exporting and Importing Service Report Configurations](#)

## Managing Service Reports

Service reports are useful for revealing server and service overloads based on a historical average of loading and wait times or based on 24-hour peaks.

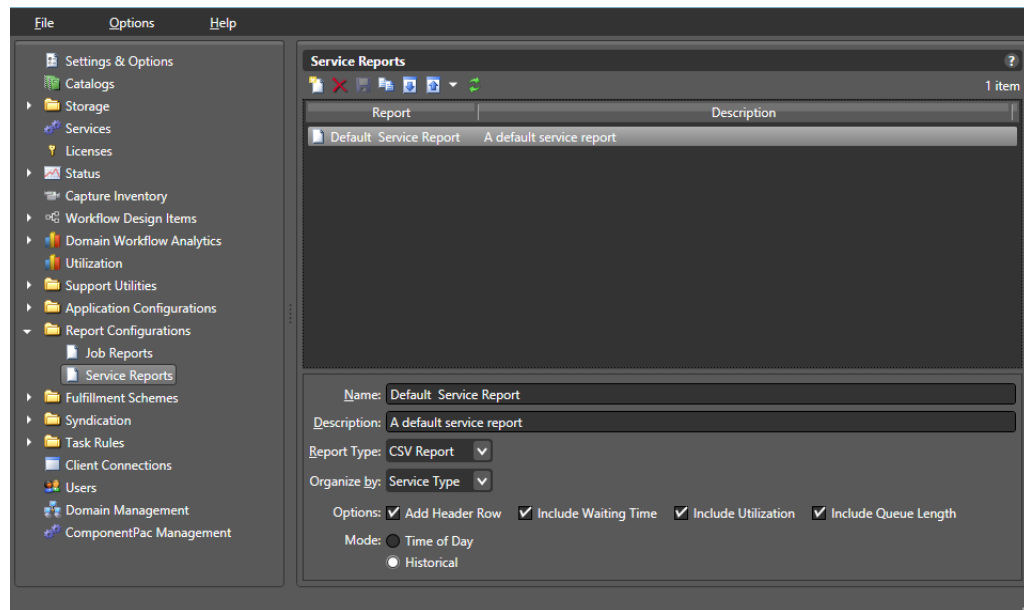
To view and manage service reports using the Vantage Management Console, follow these steps:

1. Start the Vantage Management Console by double-clicking the desktop icon.
2. In the components panel, select Report Configurations > Service Reports.

Vantage displays the Service Reports panel shown below, which lists Service Reports that have already been created and provides tools for creating and modifying reports.



See the following topics for details about creating and managing reports.

For instructions about generating reports using Service Reports configurations, please see *Generating Reports* in the *Vantage Domain Management Guide*.




## Creating and Saving a New Service Report

To create a new report format in the Vantage Management Console, do the following:

1. Display the Service Reports details panel (see the preceding figure).
2. Click the Create button , (or right-click the empty area of the Service Reports panel and select New Configuration).  
 The Vantage Management Console adds a new report format to the list.
3. Enter a new name in the Name text box.
4. If you want, enter a report format description in the Description text box (the description is optional).
5. Click the Save button .

## Choosing the Report Type, Organization, and Options


To configure the type, organization, and options, follow these steps:

1. Display the Service Reports panel (see the preceding figure).
2. Select the Report Type from the drop-down menu; currently comma-separated (CSV is the only choice).
3. Choose to Organize by:
  - Service: lists raw metrics individually for each selected service; use this option to get information about a specific service.
  - Node: lists average metrics for each selected service on the specified server; use this option when multiple services from multiple nodes are selected and you want to view data on a per-node basis.
  - Service Type: lists aggregated metrics for each service type; for example, if five transcode services are selected, their metrics are averaged to produce a single data set for the Transcode service as a whole.
4. Check the Options:
  - Add Header Row—Adds heading information at the top of the document
  - Include Waiting Time—Lists how long in seconds sessions wait for processing
  - Include Utilization—Shows the percentage of utilization (active sessions divided by maximum possible sessions)
  - Include Queue Length—Shows length of the session processing queue
5. Click the Save button .

## Choosing the Report Mode

You can configure report formats for the following modes:

- Time of Day—Shows processing over a 24-hour period, including which hours during a day are the peak processing time. This report averages the metric history and presents each hour's average over 24 hours.
- Historical—Shows hourly information for the time range selected.

1. Select the Mode.
2. Click the Save button .

Once you save the report configurations you want to use, you can go to the Services panel and generate reports using the Generate Report button. See *Generating Reports* report generation instructions and examples.



## Duplicating a Service Report Configuration

When you duplicate a service report configuration, a new format is created with a modified name. All other configuration settings in the duplicate format match those in the original format.



To duplicate a report format, do the following:

1. Display the Service Reports details view.
2. Select the report format to duplicate.

---


**Note:** You duplicate only one report at a time.

---

3. Click the Duplicate button , (or right-click and select Duplicate).
4. In the Name text box, enter a name for the duplicate format.
5. In the Description text box, enter a description for the duplicate format.
6. Select a Report Type (CSV is the default).
7. Select or de-select Options (Add Header Row) as you prefer.
8. Select a Mode.
9. Click the Save button .

## Deleting a Service Report Configuration

To delete a service report configuration, do the following:

1. Display the Service Reports details view.
2. Select the configurations to delete. (Ctrl-click or Shift-click to select multiples.)
3. Click the Delete button , (or right-click and select Delete).
4. When the confirmation dialog appears, click OK.

## Refreshing the Service Reports Configuration List


When you open the Service Reports detail panel, the Vantage Management Console displays the current list of service report configurations. If another administrator adds or changes configurations, you need to refresh the display to see those changes.

To refresh the display, click the Refresh button .

## Exporting and Importing Service Report Configurations

Vantage allows you to export report configurations to XML files, which you can then use to import the same reports into another Vantage domain.

To export one or all service report configurations, do the following:

1. If you are exporting a single format, select the format to export.
2. Click the Export button  to export a single format, or select *Export all* from the Export button drop down menu. You can also right-click and select Export.
3. Use the file system dialog to save the exported formats.


The default file name is the format name, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the report format in the XML file.

---

To import a report format, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the format file to import, then click Open.

---

**Note:** If you try to import a report format that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---


# Managing Fulfillment Schemes

The Fulfillment Schemes folder of the Vantage Management Console contains templates or interfaces that pre-process information used by Vantage actions. These schemes are present in the folder:

- [Workorder Schemes](#)
- [Dublist Schemes](#)
- [Catch Schemes](#)

## Workorder Schemes

Workorder schemes are configured in the Vantage Management Console within the Fulfillment Schemes folder. You configure workorder schemes to specify how each job in a workorder file will be formatted, and to enable the Workorder origin action to correctly parse incoming workorders and start corresponding jobs.

You can specify fields for workorder schemes using the Add Field button . Use the button to add fields, and then click on each field to specify its parameters. The Workorder Index assigned to each field lets you specify the order of the fields, which will appear in workorder files as values separated by commas (CSV format).

The Skip Lines selector lets you specify how many header rows, if any, to include.

Each field can be named, described, specified as a variable or UNC path value, and tagged with a qualifier to specify whether it consists of media, an attachment, or a variable.

The following topics explain Workorder Schemes:

- [Displaying the Workorder Schemes Panel](#)
- [Creating and Saving a New Workorder Scheme](#)
- [Renaming a Scheme](#)
- [Duplicating a Scheme](#)
- [Deleting a Scheme](#)
- [Creating Workorder Scheme Fields](#)

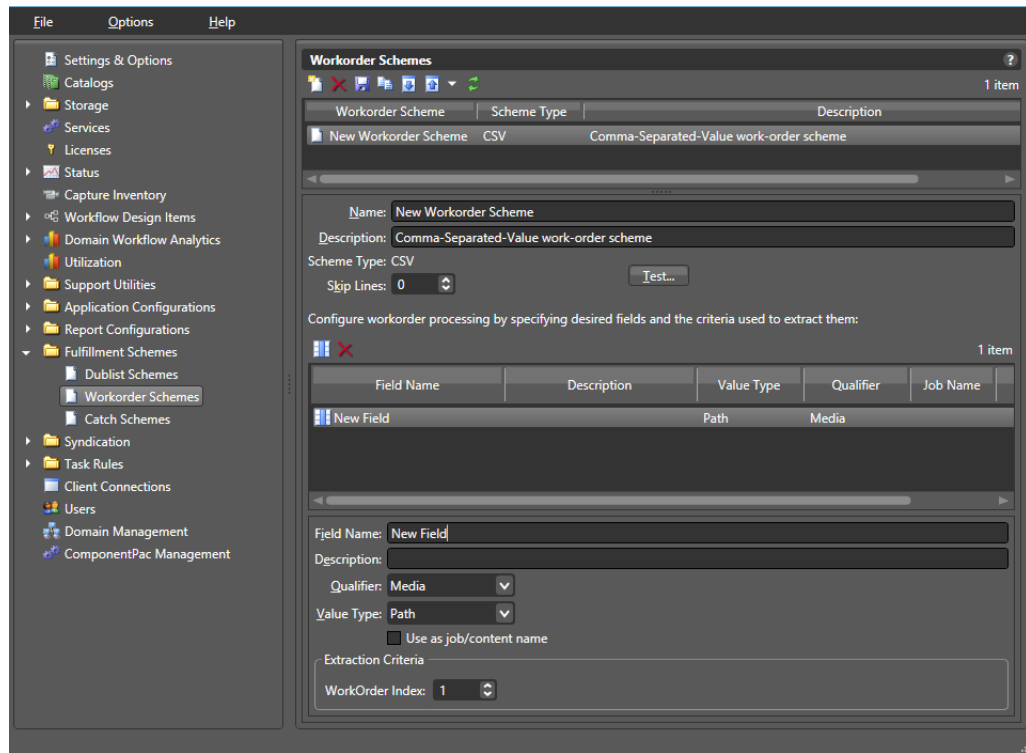
---

**Note:** Workorder Schemes topics are also explained in the Workorder action inspector Help pages in the Vantage Workflow Designer.

---

## Displaying the Workorder Schemes Panel



To view the Workorder Schemes panel, open Fulfillment Schemes in the side panel and select Workorder Schemes. The Vantage Management Console displays the panel shown below.




The panel includes a default scheme named Simple Media Workorder, which is selected by default in the Workorder action inspector.

## Creating and Saving a New Workorder Scheme


To create a new Workorder scheme, do the following:

1. Display the Workorder Scheme window.
2. Click the *Create a new Workorder scheme* button  (or right-click in the empty schemes list space and select New Workorder Scheme).
3. Choose CSV in the dialog that appears to specify a Workorder scheme formatted in comma separated values (CSV).
4. Enter a scheme name in the Name field.
5. Enter a description of the scheme in the Description text box (this is optional).
6. Select Skip Lines to specify the number of lines to skip in parsing a workorder if you want to allow header text at the top of the workorder.
7. Click the Add Field button  above the left corner of the Field Name. A New Field is created that you can modify later as explained in [Creating Workorder Scheme Fields](#)

8. Click the Save button .



## Renaming a Scheme

To rename a scheme, do the following:

1. Display the Workorder Schemes window.
2. Select the scheme to rename in the scheme list.
3. In the Name text box, enter a new name for the scheme.
4. Click the Save button .


## Duplicating a Scheme

To duplicate a Workorder scheme, do the following:

1. Display the Workorder Schemes window.
2. Select the scheme to duplicate.
3. Click the Duplicate button  (or right-click and select Duplicate).
4. In the Name text box, enter a name for the duplicate scheme.
5. In the Description field, enter a description for the scheme (optional).
6. Click the Save button .

## Deleting a Scheme

To delete a Workorder scheme, do the following:

1. Display the Workorder Schemes window.
2. Select the configuration to delete. (Ctrl-click or Shift-click to select multiples.)
3. Click the Delete button  (or right-click and select Delete).
4. When the confirmation dialog appears, click OK.

## Creating Workorder Scheme Fields

You can set up Workorder Scheme field options below the field Name and Description. These options determine which data rows and fields in a particular type of Workorder are extracted and forwarded to the workflow and which are ignored. The following figure shows a typical Workorder with data arranged in columns, each of which will be described and extracted by a field in your Workorder scheme.

### Example CSV Workorder

Title, File, Text, SCC file, CML File


Riddick, \\machine\riddick.mov, Riddick, \\machine\riddick.scc, \\machine\promo.cml

Poppins, \\machine\poppins.mov, Poppins, \\machine\poppins.scc,  
\\machine\promo.cml

### Field List

The field list shows the fields you create as part of a scheme. You can add fields as needed. Each field in a scheme is created and configured to extract data from a particular column in the Workorder when a Workorder is parsed.

*Skip Lines*—Enter the number of header lines to skip at the top of a file before Workorder parsing starts.

*Add New Field*—Click Add Field  to add a new data field to extract from Workorders.

*Delete Field*—Click Delete Field  to delete the highlighted field from the field list.


*Field Name*—Enter or change the name of the field.

*Description*—Enter or change the description of the field.

*Value Type*—Select the type of value to search for and extract from the field. Available values are listed in the following table.

*Qualifier*—Set to the type of field being extracted: Media, Attachment, or Variable. If Media or Attachment, the field is a pointer to a media or attachment file name or location path. If Variable, the field contains a value to be used in the variable.

*Extraction Criteria, Workorder Index*—Set this to the number of the field in relation to the other fields. Counting from the left, the first field is 1, followed by a comma, and the next field is 2, followed by a comma, and the next field is 3, and so on.

After entering your selections for each item described previously, click the Save button  to save the field and scheme.

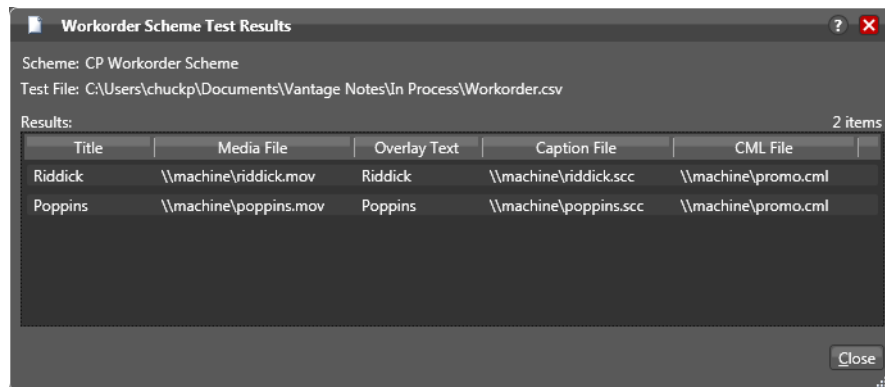
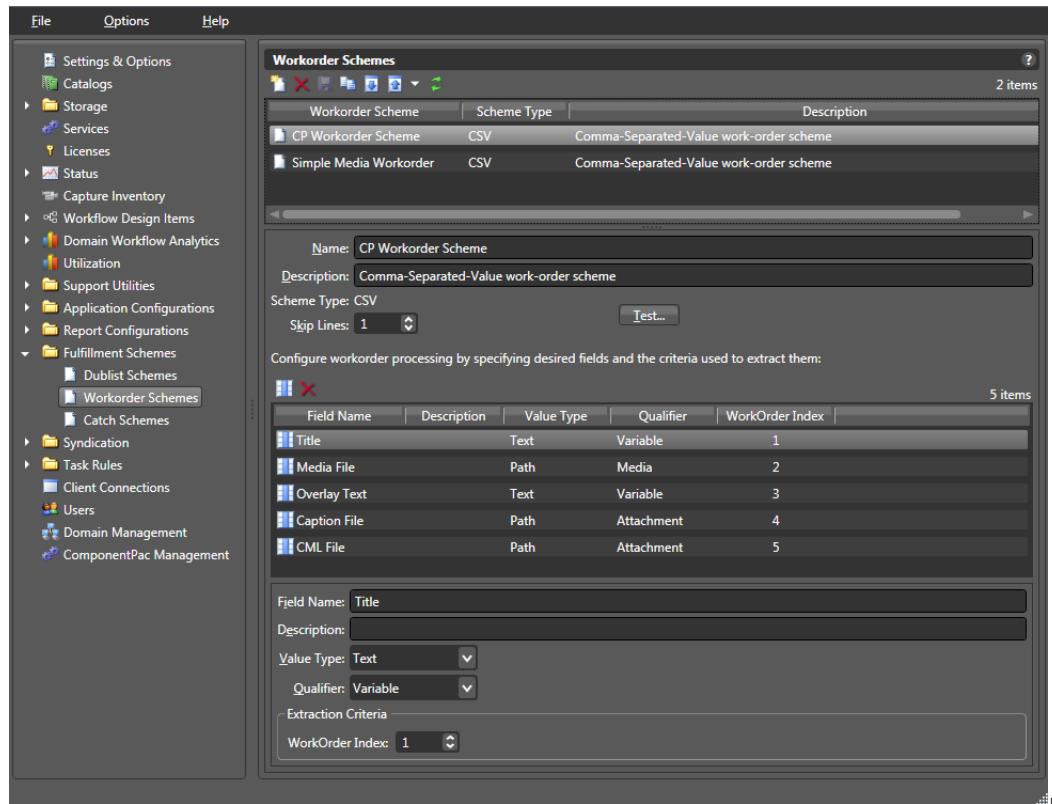
The following table presents Value Type descriptions.

| Value Type     | Description   |
|----------------|---|
| True/False     | A true or false value   |
| Integer Number | A signed 32-bit integer (decimals are rounded)  |
| Size           | A signed 64-bit integer (decimals are rounded)  |
| Decimal Number | A double precision floating point decimal number  |
| Date           | A date specified according to local standards:<br>MM/DD/YYYY or DD/MM/YYYY  |
| Text           | Any text string; use this when your data does not fit any other value type  |
| Path           | A valid Windows or UNC path.<br>Must follow this pattern: <i>[Drive Letter]:\</i><br>Or this pattern: <i>\\Device\path</i>  |
| Timecode       | A video timecode value in this pattern: HH:MM:SS:FF@FR<br>HH is hours, MM is minutes, SS is seconds, FF is the frame number, and @FR is the frame rate. Examples:<br>00:00:30:04 or 01:00:30:00@29.97 or 00:02:30:00@25. A frame rate of 29.97 is assumed if not specified. |
| Mail Address   | A valid email address consisting of an @ sign with a string before and after—email@domain. Example:<br>name@telestream.net  |

## Testing Schemes

The Test button in the center of the Workorder Schemes window lets you test your schemes on actual Workorders to verify that the scheme works correctly. To test a scheme, do these steps:

1. Select a Workorder scheme in the scheme list. For this example, the Workorder shown in the [Example CSV Workorder](#) figure above, was used.
2. Press the Test button.
3. Examine the Test Results for a clean output. The following figures show an example.
4. Adjust each field of the scheme until a test produces a satisfactory output.





## Duplicating a Workorder Scheme

When you duplicate a workorder scheme, a new scheme is created with a modified name. All other configuration settings in the duplicate scheme match those in the original format.



To duplicate a workorder scheme, do the following:

1. Display the Workorder Schemes window.
2. Select the workorder scheme to duplicate.

---

**Note:** You can duplicate only one scheme at a time.

---

3. Click the Duplicate button , (or right-click and select Duplicate).
4. In the Name text box, enter a name for the duplicate scheme.
5. In the Description text box, enter a description for the duplicate scheme.
6. Make any other desired changes to the workorder scheme.
7. Click the Save button .

## Refreshing the Workorder Schemes List


In the Workorder Schemes window, the Vantage Management Console displays the current list of workorder schemes. If another administrator adds or changes schemes, you need to refresh the display to see those changes.

To refresh the display, click the Refresh button .

## Exporting and Importing Workorder Schemes

Vantage allows you to export workorder schemes to XML files, which you can then use to import again into the same or another Vantage domain.

To export one or all workorder schemes, do the following:

1. In the Workorder Schemes window, select the workorder scheme to export.
2. Click the Export button  to export a single scheme, or select *Export all* from the Export button drop down menu. You can also right-click and select Export.
3. Use the file system dialog to save the exported schemes in the desired location.


The default file name is the scheme name, but you can change the file name.

---

**Note:** Changing the XML file name does not change the scheme name in the XML file.

---

To import a workorder scheme, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the workorder scheme file to import, and then click Open.

---

**Note:** If you try to import a workorder scheme that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---

## Dublist Schemes

Dublist Schemes are covered in their own chapter of the *Domain Management Guide, Creating Dublist Portal Configurations and Dublist Schemes*:

- [Creating Dublist Schemes](#)

This topic is also covered in the *Vantage TrafficManager Guide* and the *Vantage Dublist Portal Guide*.

## Catch Schemes

Catch Schemes are described in the *Configuring Catch Server Schemes* chapter of the *Vantage Domain Management Guide*:

- [Configuring Catch Server Schemes](#)

This topic is also covered in the *Vantage TrafficManager Guide*.

## Managing Syndication

Syndication is a feature of Vantage TrafficManager described in the TrafficManager User Guide. Using TrafficManager, you can ingest syndicated content with timing sidecar files from a source or catch server, display and adjust the segments described by the sidecar file, and output the transformed syndicated content with timing file to a broadcast or playout server.

In the Vantage Management Console, the Syndication folder in the left panel contains the Templates selection. This function allows you to turn syndicated sidecar timing files into reusable templates for reformatting syndicated shows that follow consistent formatting patterns. The topics that follow explain how to create and modify templates.

- [Creating Syndication Templates](#)

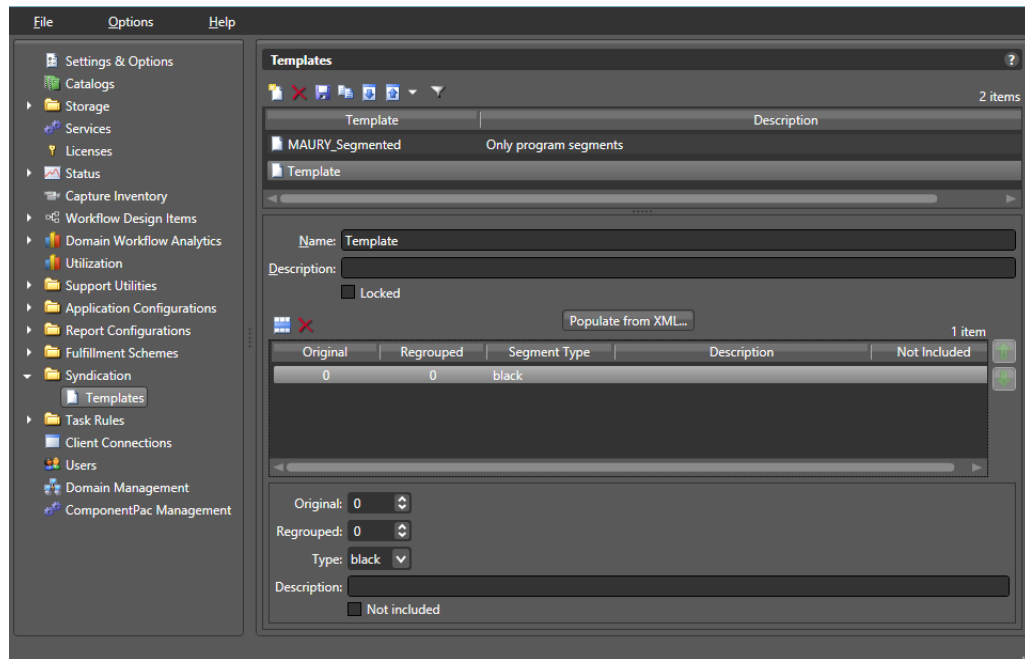
## Creating Syndication Templates

Syndication templates are used to transform the syndication timing sidecar files into reusable templates for formatting syndicated content. After syndicated content and associated timing sidecar files are ingested, you may want to modify them to trim or delete program, black, or commercial segments. Since most episodic shows follow a nearly identical organizational pattern, you can modify one show in the Syndication Portal and use it to create a template for future shows to speed up the modification process.

The following topics explain how to create and modify syndication templates:


## Displaying the Syndication Templates Panel

To view the Syndication Templates panel, open the Syndication folder in the side panel and select Templates. The Vantage Management Console displays the panel below. The panel includes a default template, aptly named Template.

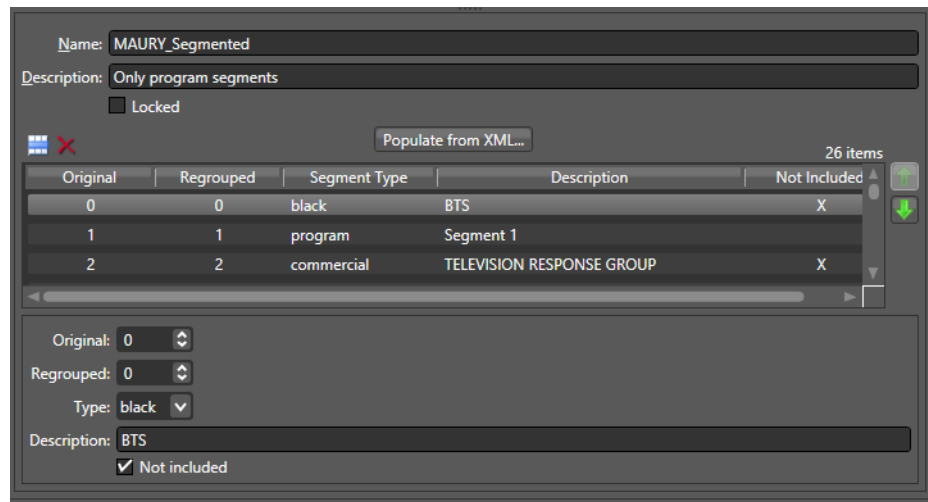


## Creating and Modifying a Syndication Template

To create a new syndication template, do the following:

1. Display the Syndication Templates panel.
2. Click the *Add a new Syndication template* button  (or right-click in the empty schemes list space and select *New Syndication Template*).
3. Change the template name in the *Name* field.
4. Enter a description in the *Description* text box (this is optional).
5. Check the *Locked* box if you want to prevent changes by other applications, such as the Syndication Portal.

6. Click *Populate from XML* and browse for an XML sidecar file to use as your template. Use Syndication type to select the type of syndication system. When you click OK, the template is populated and a segment list is displayed (below). You can scroll the segment list using the green arrows on the right.




7. Modify the template as needed by highlighting a segment line in the segment list and using the following controls:
  - a. Click Add Segment or Delete to add or delete a show segment.
  - b. Use Original to modify the numbering that was supplied in the original file. (Vantage retains both the original numbering and regrouped numbering after you have modified a file to add, remove, or change segments.)
  - c. Use Regrouped to modify the numbering of the altered template file.
  - d. Select a type for each segment (such as black, program, commercial, promo, etc.).
  - e. Add a description of the segment (optional).
  - f. Click the Not included box if you want a segment excluded from program. For example, you may want to keep black segments, but you may not want them included in the final output, so you check Not included.
8. Click the Save button to save the template.

Note that when you view a show and modify its segments in the Syndication Portal, you can save the changes as a new template (or overwrite an existing one) using the *Create new template...* button in the Portal. This allows you to refine the templates made in the Console.



## Renaming a Syndication Template

To rename a template, do the following:

1. Display the Syndication Templates window.
2. Select the template to rename in the templates list.
3. In the Name text box, enter a new name for the scheme.
4. Click the Save button .


## Duplicating a Syndication Template

To duplicate a template, do the following:

1. Display the Syndication Templates window.
2. Select the template to duplicate.
3. Click the Duplicate button  (or right-click and select Duplicate).
4. In the Name text box, enter a name for the duplicate scheme.
5. In the Description field, enter a description for the scheme (optional).
6. Make changes to the segments as you prefer.
7. Click the Save button .

## Deleting a Syndication Template


To delete a template, do the following:

1. Display the Syndication Templates window.
2. Select the template to delete. (Ctrl-click or Shift-click to select multiples.)
3. Click the Delete button  (or right-click and select Delete).
4. When the confirmation dialog appears, click OK.

## Exporting and Importing Syndication Templates

Vantage allows you to export templates to XML files, which you can then use to import the same templates into another Vantage domain.

To export one or all templates, do the following:


1. If you are exporting a single template, select the template to export from the list.
2. Click the Export button  to export a single template, or select *Export all* from the Export button drop down menu. You can also right-click.
3. Use the file system dialog to save the exported templates in the desired location.  
The default file name is the template name, or you can change the template name.

---

**Note:** Changing the name of the XML file does not change the name of the template contained in the XML file.

---

To import a template, do the following:


1. Click the Import button .
2. Use the file system dialog to locate and select the template XML file to import, then click Open.

---

**Note:** If you try to import a template that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---

## Filtering the Templates list

If you have many templates and would like to hide the ones you're not using in the list, use the filter feature . Enter the first few characters of the template you want to use in the filter blank, and only matching templates will show up in the list.

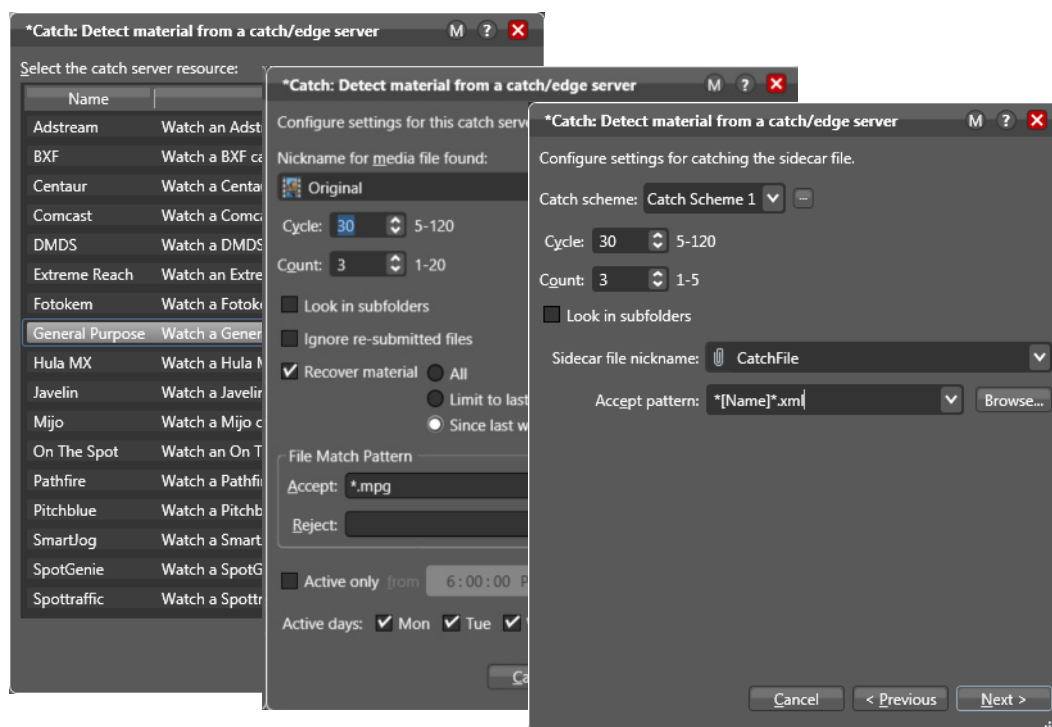




# Configuring Catch Server Schemes

This chapter explains how to use the Vantage Management Console Catch Schemes feature. The Catch Schemes feature gives you the flexibility to create your own custom catch server definitions from a general purpose scheme type. Additionally, the Vantage Catch action includes many common catch server definitions, as shown in the figure below.

You implement a scheme in a Catch action (in Workflow Designer) by selecting a specific type (or general purpose) catch server and then selecting the scheme that you want to use.



A catch scheme allows Vantage to parse XML sidecar files accompanying ad media coming into a watched catch server and pass the sidecar metadata along with the media to other actions for processing in a Vantage workflow.

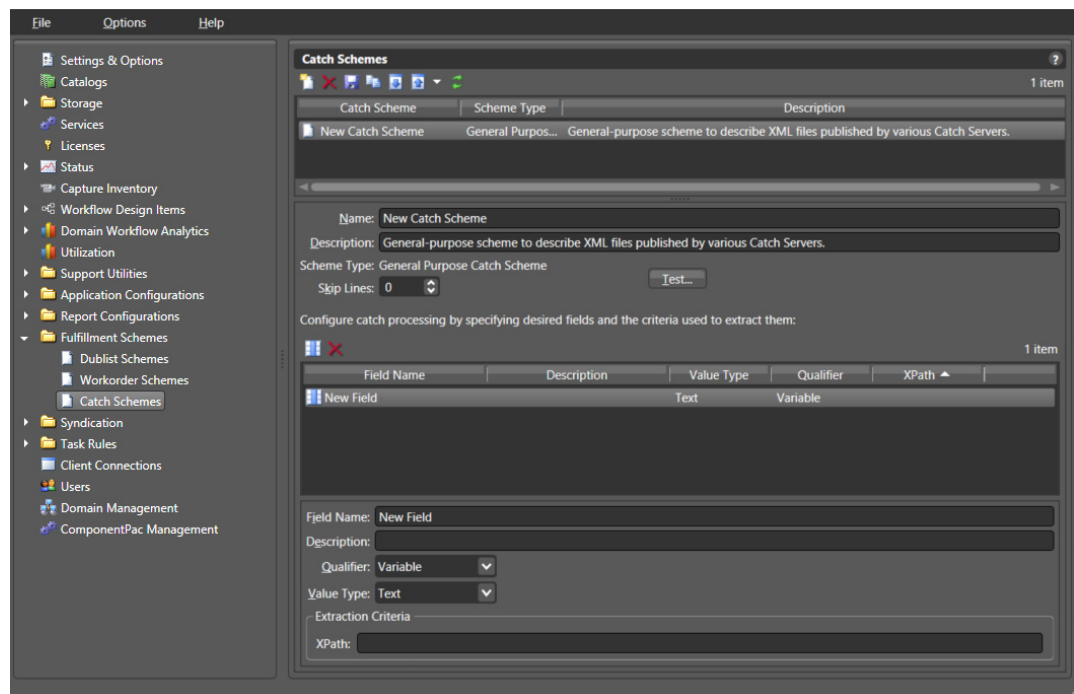
**Note:** Sidecar XML files must be valid, properly-formatted XML (for example, an embedded ampersand or other reserved/escape sequence characters in a value), otherwise it can not be interpreted and no job will be submitted.

Using the Vantage Management Console Catch Schemes configuration window, you can create *configurations*, which define the information users see when configuring a General Purpose Catch action.

- [Displaying the Catch Schemes Configuration Panel](#)
- [Creating a New Configuration](#)
- [Renaming a Configuration](#)
- [Duplicating a Configuration](#)
- [Deleting a Configuration](#)
- [Setting Options and Defining Fields](#)
- [Exporting and Importing Configurations](#)



## Displaying the Catch Schemes Configuration Panel

To view the Catch Schemes configuration window in Vantage Management Console, open Fulfillment Schemes in the side panel and select Catch Schemes. The Vantage Management Console displays the Catch Schemes configuration window shown here.




## Creating a New Configuration

To create a new configuration, do the following:

1. Display the Catch Schemes configuration window.
2. Click the Create a New Configuration button  (or right-click in the empty configuration list space and select New Configuration).
3. Enter a name in the Name field after the new configuration appears.
4. Enter a description of the configuration in the Description text box (this is optional).
5. Click the Save button .
6. After you create a new configuration, configure it by proceeding to [Setting Options and Defining Fields](#).



## Renaming a Configuration

To rename a configuration, do the following:

1. Display the Catch Schemes configuration window.
2. Select the configuration to rename in the Configuration list.
3. In the Name text box, enter a new name for the configuration.
4. Click the Save button .


## Duplicating a Configuration

To duplicate a configuration, do the following:

1. Display the Catch Schemes configuration window.
2. Select the configuration to duplicate.
3. Click the Duplicate button  (or right-click and select Duplicate).
4. In the Name text box, enter a name for the duplicate configuration.
5. In the Description field, enter a description for the configuration (optional).
6. Click the Save button .

## Deleting a Configuration



To delete a configuration, do the following:

1. Display the Catch Schemes configuration window.
2. Select the configuration to delete. (Ctrl-click or Shift-click to select multiple configurations.)
3. Click the Delete button  (or right-click and select Delete).
4. When the confirmation dialog appears, click OK.

## Setting Options and Defining Fields

You can set Catch Schemes configuration options and define fields for catch processing below the Name and Description. The fields area lets you add a new field for each node in the XML catch server configuration file that you want to include. The XML file and your catch server definition can include any fields you prefer, but these three fields are required for each catch scheme: Ad-ID/ISCI, Start Time, and Play Length.

To define fields in a configuration, do the following:

1. Display the Catch Schemes configuration window.
2. Select the configuration you want to modify from the Configuration list.
3. In the fields table toolbar, click the New Field button  to add a field.
4. Enter a field name and description, usually the name of a node in the XML file. (A node is text surrounded by pointed brackets, such as <ISCI\_CODE>.)
5. Select a Qualifier from the drop-down menu to define the function of the field/node. At a minimum, you must include one Ad-ID/ISCI, one Start Time, and one Play Length field.
6. Select a Value Type for the field. This specifies what kind of data the field will contain, such as text, timecode, numbers, paths, etc.
7. Enter an XPath, which indicates the field/node's position in the hierarchy of the XML file. The XPath begins with the root node, followed by any additional nodes in the hierarchy, leading to the node being defined.  
For example: /ROOT/Node\_Level\_1/Node\_Level\_2.
8. Click the Save button .
9. Click the Test button above the field area, and browse for the XML file you are using to define your catch server. If you successfully defined the fields, the Test Results window opens and shows the fields as headings with the correct data from the XML file.

### Field Options

Each field in a scheme is created and configured to extract data from a particular node in the catch server definition XML file when the file is parsed. The following options are available for defining a field:

*Skip Lines*—Enter the number of header lines to skip at the top of a file before parsing starts.

*Add New Field*—Click Add Field  to add a new data field.

*Delete Field*—Click Delete Field  to delete the highlighted field from the field list.


*Field Name*—Enter a name for the field.

*Description*—Enter a description of the field.

*Qualifier*—Set to the type of field being extracted: an Ad-ID/ISCI identifier, Start Time, Play Length, or a Variable.

**Value Type**—Enter the type of value to search for and extract from the field. Available values are True/False, Integer Number, Size, Decimal Number, Date, Text, Path, Timecode, and Mail Address. See the table below for descriptions of these values.

**Extraction Criteria, XPath**—Set this to the path leading to the node defined by the field. Start at the root level and descend to desired node: /ROOT/Node1/Node2.

After entering your selections for each item described previously, click the Save button  to save the field and scheme.

Use the Test button to view the Test Results window, showing your catch server definition.

The following table presents Value Type descriptions.

| Value Type     | Description   |
|----------------|---|
| True/False     | A true or false value   |
| Integer Number | A signed 32-bit integer (decimals are rounded)  |
| Size           | A signed 64-bit integer (decimals are rounded)  |
| Decimal Number | A double precision floating point decimal number  |
| Date           | A date specified according to local standards:<br>MM/DD/YYYY or DD/MM/YYYY  |
| Text           | Any text string; use this when your data does not fit any other value type  |
| Path           | A valid Windows or UNC path.<br>Must follow this pattern: <i>[Drive Letter]:\</i><br>Or this pattern: <i>\\Device\path</i>  |
| Timecode       | A video timecode value in this pattern: HH:MM:SS:FF@FR<br>HH is hours, MM is minutes, SS is seconds, FF is the frame number, and @FR is the frame rate. Examples:<br>00:00:30:04 or 01:00:30:00@29.97 or 00:02:30:00@25. A frame rate of 29.97 is assumed if not specified. |
| Mail Address   | A valid email address consisting of an @ sign with a string before and after—email@domain. Example:<br>name@telestream.net  |

## Testing Schemes

The Test button in the center of the Catch Schemes window lets you test your schemes on actual catch server definition files to verify that the scheme works correctly.

To test a scheme, follow these steps:

1. When you finish defining a catch scheme, press the Test button.
2. Examine the Test Results display for a clean output as shown in the figure below. The figure shows the defined catch scheme, the XML data to be parsed, and the test results.
3. Adjust each field of the scheme until a test produces a satisfactory output.

The screenshot shows the 'Catch Schemes' window in a software application. The left sidebar contains a tree view with 'Catch Schemes' selected. The main window displays the configuration for 'Catch Scheme 1'. Below the configuration is a table of fields to be extracted from XML data.

| Field Name  | Description | Value Type | Qualifier   | XPath         |
|-------------|-------------|------------|-------------|---------------|
| ISCI_CODE   |             | Text       | Ad-ID/ISCI  | /SPOT_MONITOR |
| PLAY_LENGTH |             | TimeCode   | Play Length | /SPOT_MONITOR |
| START_TIME  |             | TimeCode   | Start Time  | /SPOT_MONITOR |

Below the table, the 'Field Name' is set to 'ISCI\_CODE', 'Qualifier' is 'Ad-ID/ISCI', 'Value Type' is 'Text', and 'XPath' is '/SPOT\_MONITOR/ISCI\_CODE'. A 'Test...' button is visible above the table.

Overlaid on the bottom right is the 'Catch Scheme Test Results' window. It shows the test file path and a table of results:

| TITLEDESC      | ISCI_CODE    | STARTTIME | PLAYLENGTH  |
|----------------|--------------|-----------|-------------|
| MEMORIAL DA... | STTV1228022H | 00:00:00  | 00:00:10:00 |

Below the screenshot, the XML data used for testing is shown:

```
<?xml version="1.0" encoding="utf-8"?>
<SPOT_MONITOR>
<TITLE_DESC>MEMORIAL DAY CC</TITLE_DESC>
<ISCI_CODE>STTV1228022H</ISCI_CODE>
<PRODUCT_DESC></PRODUCT_DESC>
<PLAY_LENGTH>00:00:10:00</PLAY_LENGTH>
<START_TIME>00:00:00</START_TIME>
<COMPRESSION_LEVEL_CODE></COMPRESSION_LEVEL_CODE>
<ENCODER_TYPE_DESC>SPOTTRAFFIC</ENCODER_TYPE_DESC>
<OUTPUT_RATE></OUTPUT_RATE>
<FILE_NAME>STTV1228022H_1xf</FILE_NAME>
<FILE_SIZE>4141799</FILE_SIZE>
<COPY_DATE></COPY_DATE>
<ADVERTISER>SLEEP TRAIN</ADVERTISER>
<AGENCY_VENDOR>ON TRACK ADVERTISING</AGENCY_VENDOR>
<SPOT_TYPE></SPOT_TYPE>
<MEDIA_DESCRIPTION></MEDIA_DESCRIPTION>
<SUPPORT_EMAIL>operations@spottraffic.com</SUPPORT_EMAIL>
</SPOT_MONITOR>
```

## Refreshing the Catch Schemes List


In the Catch Schemes window, the Vantage Management Console displays the current list of catch schemes. If another administrator adds or changes schemes, you need to refresh the display to see those changes.

To refresh the display, click the Refresh button.

## Exporting and Importing Configurations

Vantage allows you to export catch scheme configurations to XML files, which you can then use to import the same configurations into another Vantage domain.

To export configurations, do the following:

1. Select the configurations to export. (Ctrl-click or Shift-click to select multiple views.)
2. Click the Export button  to export selected configurations (or right-click and select *Export*, or select *Export all* from the Export button drop down menu).
3. Use the file system dialog to save the exported configurations.


The default file name is the configuration name, but you can change the file name.

---

**Note:** Changing the name of the XML file does not change the name of the configuration in the XML file.

---

To import configurations, do the following:

1. Click the Import button .
2. Use the file system dialog to locate and select the configuration file to import, then click Open.

---

**Note:** If you try to import a configuration that is already in this Vantage domain, Vantage prompts you to cancel or confirm replacement.

---

