

VANTAGE 3.0

Workflow Portal User's Guide

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Preface

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CHAPTER 1

Using Workflow Portal

This guide is intended for operators who are using Workflow Portal for media processing activities.

Note: *Administrators who are setting up a Workflow Portal configuration should refer to the topic Application Configuration in the Vantage Management Console guide.*

Topics

- [About Vantage Workflow Portal](#)
- [Starting and Stopping Vantage Workflow Portal](#)
- [Selecting the Vantage Domain Database and Configuration](#)
- [Workflow Portal – Three Modes](#)
- [Browsing and Submitting Assets in Vantage Catalogs](#)
- [Stitching Assets in Vantage Catalogs](#)
- [Editing Metadata in the Submit Jobs Window](#)
- [Browsing Windows Folders and Shares for Files](#)
- [Troubleshooting Workflow Portal](#)



ABOUT VANTAGE WORKFLOW PORTAL

Workflow Portal is a configurable client application, that is well-suited to the following types of tasks:

- Browsing and searching media assets that are in process in a Vantage workflow
- Enter or modify metadata attached to those assets
- Select assets to forward to another Vantage workflow (or workflows)
- Create an EDL (a list of assets) to stitch together
- Mark in/out points on an asset's timeline
- Review and approve assets
- Browse the Windows file system, submitting one or more files to a Vantage workflow

Which functions you can perform depend upon how your administrator has configured Workflow Portal.

STARTING AND STOPPING VANTAGE WORKFLOW PORTAL

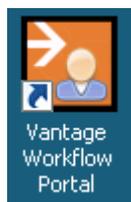
Workflow Portal connects directly to the Vantage database, and can only be used on a computer that has access to the database.

User authentication is used to control user access to Workflow Portal configurations. Administrators can choose which users see a Workflow Portal. Administrators can also make Portals available to everyone. By default Portals are visible to everyone.

Starting Vantage Workflow Portal

To start Vantage Workflow Portal, double-click the Vantage Workflow Portal shortcut on your desktop.

Figure 1. Vantage Workflow Portal desktop shortcut



Or, select start > Programs > Telestream > Vantage > Vantage Workflow Portal.

Note: If you are launching Workflow Portal for the first time, you may be prompted to connect to the Vantage database and choose a Portal configuration. See [Selecting the Vantage Domain Database and Configuration](#) for details.

Note: If you encounter an error when launching the Workflow Portal, please see [Troubleshooting Workflow Portal](#) for assistance.



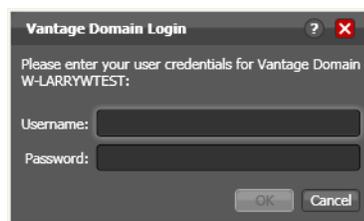
Logging In

If you are accessing a Vantage domain, you may be prompted for your Vantage user name and password. If Team Management is installed, login is required.

Note: *Your Vantage username and password are maintained in the Vantage Management Console. All user passwords are encrypted in the Vantage database. If you don't have a Vantage user account, ask your Vantage administrator to create one for you. All users have the option of changing their password.*

When you start Workflow Portal, it displays the Vantage Domain Login window:

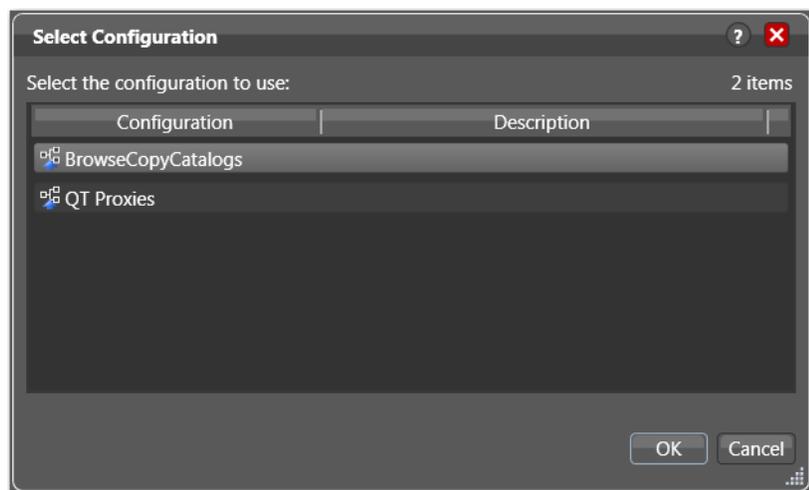
Figure 2. Logging in to Workflow Portal



Enter your Vantage username, and password if required, and click OK to connect.

Enter your Vantage username, and password if required, and click OK to connect. If a configuration has been previously selected, it will be used automatically. Otherwise the Select Configuration window displays, enabling you to select a configuration. Click a configuration on the list and click OK:

Figure 3. Select Configuration Window



Configurations can be configured at any time (see [Changing Configurations](#)).



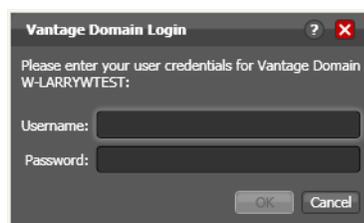
The Workflow Portal configurations that Workflow Portal displays are those that your Vantage user account is authorized to access. User access to Workflow Portal configurations is controlled in the Vantage Domain Console.

Changing Users

If Workflow Portal is in Team Management mode, when you are logged in you can change Vantage users. Changing users enables you to view and use workflows portal configurations assigned to specific users.

To change users, select File > Change Vantage User. Workflow Portal displays the Vantage Domain Login window:

Figure 4. Changing Users in Workflow Portal



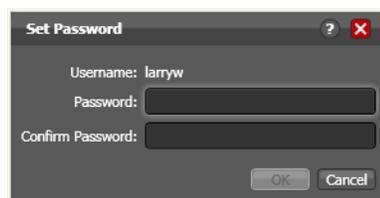
Enter your Vantage username, and password (if required), and click OK to connect.

The Workflow Portal configurations that Workflow Portal displays are those that your Vantage user account is authorized to access. User access to Workflow Portal configurations is controlled in the Vantage Domain Console.

Changing Passwords

If Workflow Portal is in Team Management mode, you can change the password of your current Vantage user account. To do this, select File > Change Password. Workflow Portal displays the Set Password window:

Figure 5. Changing your password in Workflow Portal



Enter your new Vantage password, confirm the password, and click OK to connect. The next time you log in to Workflow Portal, you must use your new password.

Stopping Vantage Workflow Portal

To stop Vantage Workflow Portal, select File > Exit. You don't need to save work you've accomplished, because all information is stored in the Vantage database, and updated automatically as you make changes.



SELECTING THE VANTAGE DOMAIN DATABASE AND CONFIGURATION

As a client application, Workflow Portal can be installed and used on any supported platform in your network. Likewise, Workflow Portal can access any Vantage domain (database) in the network, and use any configuration files stored in the domain.

The first time you launch Workflow Portal, you must select a domain and select a configuration, as described immediately following.

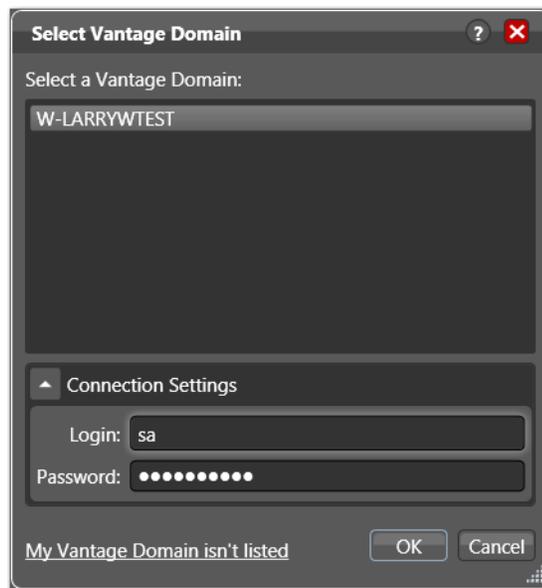
After you have selected a domain and configuration, Workflow Portal remembers the settings. From now on, each time you launch Workflow Portal, it will access the same domain and configuration that was used in the previous session.

Changing a Domain

To change the Vantage domain and select a configuration, follow these steps:

- Step 1** Select File > Change Vantage Domain.
Workflow Portal displays a list of domains on your network.

Figure 6. Changing Vantage Domain



- Step 2** Select the domain you want to log on to, click Connection Settings, enter login name and password, and click OK.

Note: You only need to go into Connection Settings if the Vantage database does not have the default password. Connection settings identify the Microsoft SQL Server VANTAGE database instance login

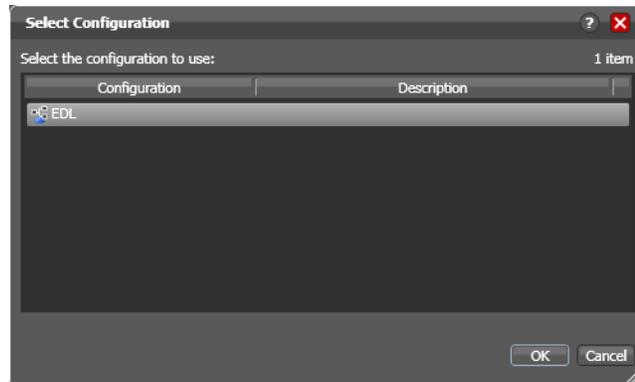


and password, and should not be changed unless directed by your Vantage system administrator.

Workflow Portal logs onto the selected domain, and asks for your Vantage Domain login information (see [Logging In](#) for details).

Once logged in, a list of configurations for Workflow Portal in this domain is displayed:

Figure 7. Available configurations for Workflow Portal.



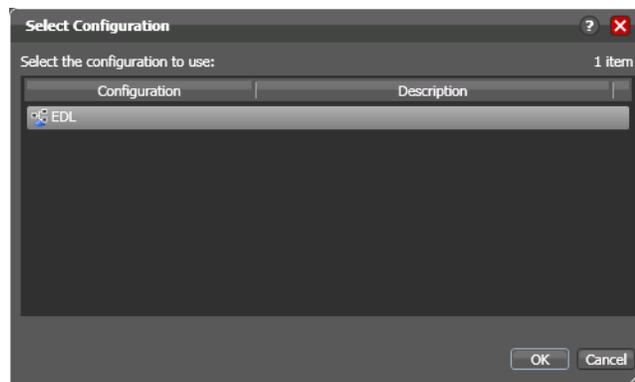
- Step 3** Select the Workflow Portal configuration you want to use for the media you're processing, and click OK.
- Workflow Portal opens the configuration, and displays the appropriate user interface (along with workflows, variables, catalogs, and metadata) for this configuration.

Changing Configurations

To change the configuration you're using when you need to perform other tasks in the same domain, follow these steps:

- Step 1** Select File > Change Application Configuration.
- Workflow Portal a list of configurations for Workflow Portal in this domain:

Figure 8. Available configurations for Workflow Portal



- Step 2** Select the Workflow Portal configuration you want to use for the media you're processing, and click OK.
- Workflow Portal opens the configuration, and displays the appropriate user interface (along with workflows, variables, catalogs, and metadata) for this configuration.



WORKFLOW PORTAL – THREE MODES

When you launch Workflow Portal (and choose a domain and/or configuration), the application operates in one of three modes – and displays a specific window, as shown below – depending on the task that was designed by the administrator:

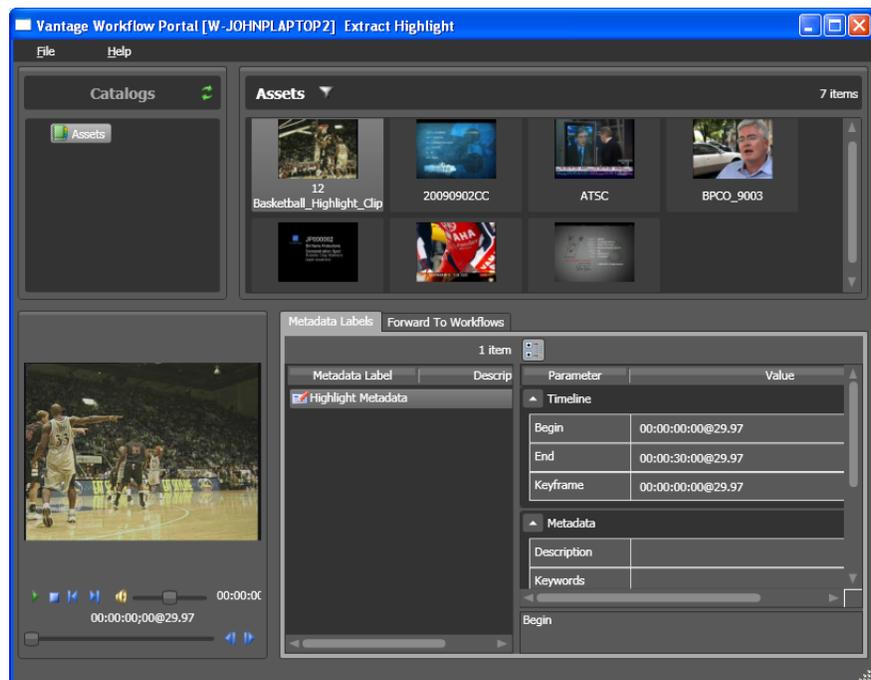
- [Browsing Catalog Assets Mode](#)
- [Stitching Assets Mode](#)
- [Browsing Windows Assets Mode](#)

For details about using Workflow Portal in a given mode, proceed to the appropriate topic.

Browsing Catalog Assets Mode

In [Browsing Catalog Assets Mode](#), a user can select a Catalog Binder as the content to submit to a workflow. Copy Binder makes a copy and submits that copy and the original binder is not modified. Forward Binder does not make a copy of the file, but instead submits the original binder itself, optionally removing it from the catalog.

Figure 9. Workflow Portal in Browse Catalog mode.



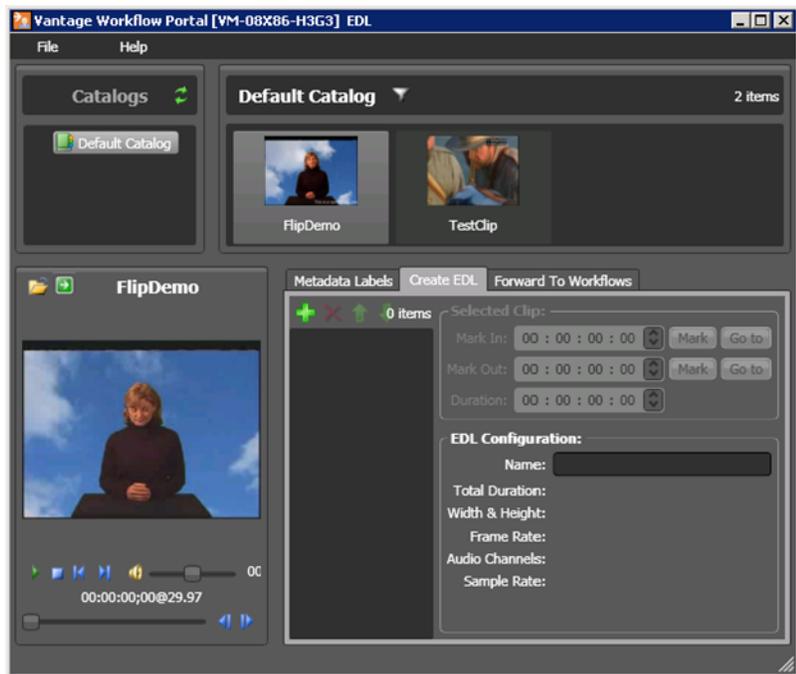
Stitching Assets Mode

In [Stitching Assets Mode](#), you can browse and select multiple media files, mark in and out points, and submit them for clipping and merging into a single file.



You can create an Edit Decision List (EDL) using the content from the specified Catalogs and submit it to workflows. You can specify Mark In and Mark Out points for each clip so that only the specified portion of the clip is used. All clips in an EDL must have the same width & height, frame rate, and sample rate.

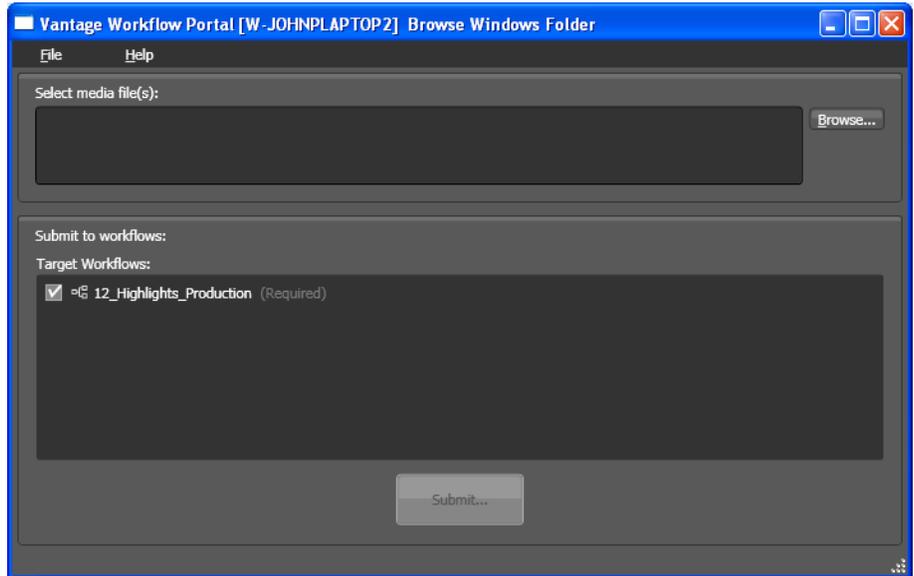
Figure 10. Workflow Portal in Stitch Assets mode.



Browsing Windows Assets Mode

In **Browsing Windows Assets Mode**, enables a user to select a media files from a location on the windows network and submit them to a workflow. This is essentially the same as manually submitting a job in the Workflow Designer.

Figure 11. Workflow Portal in Browse Windows mode.

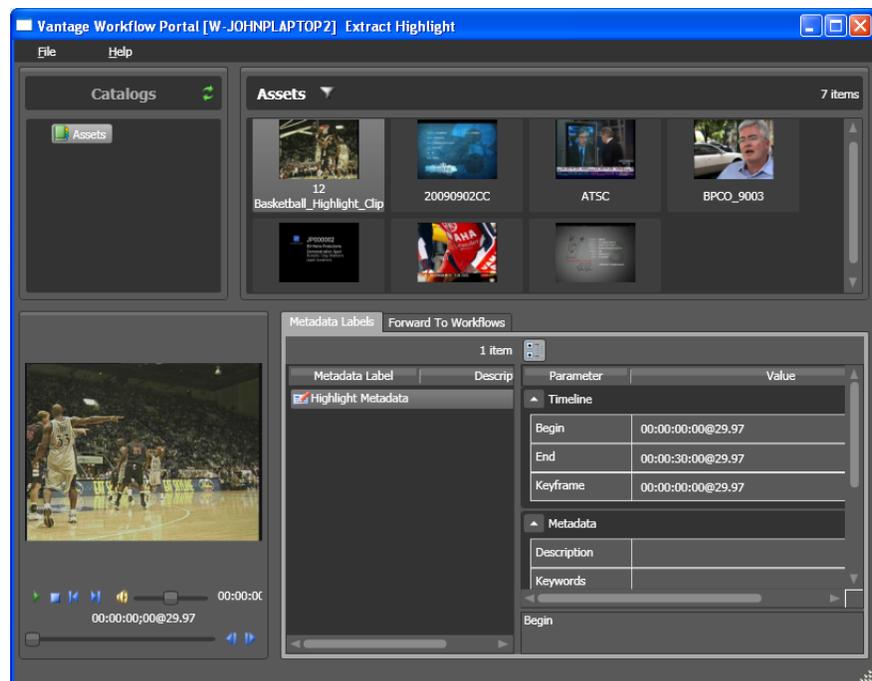


BROWSING AND SUBMITTING ASSETS IN VANTAGE CATALOGS

When your configuration is set to Binder Mode/Copy or Binder Mode/Forward, you can browse for an asset and submit it for processing. You may optionally be allowed to enter metadata depending upon how the administrator has configured your Portal.

The Workflow Portal user interface enables you to navigate through all the interface fields by repeatedly pressing the Tab key. The Shift + Tab key combination moves through the fields in reverse order.

Figure 12. Selecting Assets.



Selecting a Catalog

Vantage organizes registered media in catalogs. Each catalog is further organized by folders. In the top-left pane, you may have access to one or more of these catalogs, which you can browse to find assets. (The catalogs you can browse are those assigned to the configuration you're using.)

Note: *Workflow Portal does not automatically update the assets list as new assets arrive in catalogs. Depending upon your task, you may need to periodically use the refresh button to view new assets as they arrive. You will only have the ability to select the catalog if the administrator gives you permission. However, you can always select assets.*

To view a catalog's assets, select it. The selected catalog displays its folders as well, so you can drill down into catalog folders to narrow your browsing and searching.



Searching and Selecting Assets

Workflow Portal displays thumbnails of its assets in the preview window. Click on an asset to select it and the preview will update automatically.

Note: *Workflow Portal does not automatically update the assets list as new assets arrive in catalogs. Depending upon your task, you may need to periodically use the refresh button to view new assets as they arrive.*

You can also search for assets by name. Click the Filter button to display a text field. Enter the text (or text substring) to only display media whose name contains the text you entered. Workflow Portal remembers these text strings, and you can select them to restrict your searches.

Previewing Assets

In the bottom of the window, you can view a preview of the asset.

For supported files, you can use the preview controls to play, pause, rewind, and jump to points in the video timeline (using the slider). If your computer has speakers, you can also hear the audio in the media, and you can adjust volume using the volume slider.

You can use the player controls to play, pause, rewind, and jump to points in the video timeline (using the slider). If your computer has speakers, you can also hear the audio in the media, and you can adjust volume using the volume slider.

The following keyboard hotkey assignments support player control:

- Ctrl+P or Ctrl+SPACE: toggle the Play/Pause button
- Ctrl+S: Stop button
- Ctrl+F: Forward Frame button
- Ctrl+R: Reverse Frame button
- Ctrl+HOME: go to start
- Ctrl+END: go to end

The following mouse wheel assignments support player control:

- Mouse Wheel + Ctrl key: one frame per wheel click
- Mouse Wheel (no modifier keys): one second per wheel click
- Mouse Wheel + Shift key: one minute per wheel click
- Mouse Wheel + Ctrl +Shift keys: one hour per wheel click

Reviewing and Editing Metadata

If your administrator has enabled Metadata Labels in this configuration, Workflow Portal displays a Metadata Labels tab, which displays each of the metadata labels in the asset, and their values.

Click on the Metadata Labels tab to review – and depending on your configuration, even add and edit – the metadata associated with assets in place. When you edit metadata and save it, the changes are saved with the asset in the domain database.

Forwarding Assets to Workflows

Select Submit to forward the asset for processing. If enabled, you may also select the Forward to Workflows tab to choose which workflows you want to send this media to for processing. Some choices may be optional. You can check each workflow's checkbox to specify which workflows



should process the asset. Click Submit to send media to the specified workflows for processing. Vantage creates jobs for each workflow.

Depending upon your configuration, after you submit the media, you may be allowed to add and edit variables or metadata in the Submit Jobs window. Please see [Editing Metadata in the Submit Jobs Window](#) for more information.



STITCHING ASSETS IN VANTAGE CATALOGS

When you are using a configuration that enables asset stitching workflows, then you will be able to see them visually as indicated in the following figure:

Figure 13. Configuring EDLs to stitch assets into a single file.



Selecting a Catalog

Vantage organizes registered media in catalogs. Each catalog is further organized by folders. In the top-left pane, you may have access to one or more of these catalogs, which you can browse to find assets. (The catalogs you can browse are those assigned to the configuration you're using.)

Note: *Workflow Portal does not automatically update the assets list as new assets arrive in catalogs. Depending upon your task, you may need to periodically use the refresh button to view new assets as they arrive.*

To view a catalog's assets, select it. The selected catalog displays its folders as well, so you can drill down into catalog folders to narrow your browsing and searching.



Searching and Selecting Assets

When you select a catalog (and optionally, folder), Workflow Portal displays thumbnails of its assets in the preview window to the right of the Catalogs list. Click on an asset to select it.

You can also search within the selected catalog or folder for assets by name. Click the Filter button to display a text field. Enter the text (or text substring) to only display media whose name contains the text you entered. Workflow Portal remembers these text strings, and you can select them to restrict your searches.

Adding Assets to the EDL

When you select an asset, you can click the Plus (+) button to add it to the EDL (Edit Decision List). This list contains the list of files that are to be clipped and merged together into a single output file when you submit them to a Vantage Workflow.

Note: *An EDL must be comprised of assets that have the same frame size and frame rate.*

When you select the first asset in the EDL, the frame size and rate of the EDL is determined from the metrics of this file. All assets in the catalog are automatically filtered to only display those that match the frame size and rate of the first selected file.

Modifying the EDL

Select any asset in the EDL to perform these tasks:

- Specify the mark in/out points for the asset
- Remove the asset from the EDL
- Change the order of the asset in the EDL – moving them up or down the list – by clicking the Move Selected Clip... buttons.

Setting Mark In/Out Points

Each entry (asset) in the EDL has a mark-in and mark-out point. You can specify these manually, or you can use Preview (bottom left) to select a point on the slider and use the Mark button to set the mark in and mark out point.

You can also enter a duration timecode, which adjusts the Mark Out point relative to the Mark In point. This field only indicates the duration of the media between the mark in/out points of the currently selected asset in the EDL.

If you specify a duration that moves the Mark Out point beyond the end of the asset timeline, both the Duration and Mark Out fields display in red to indicate the error.

All Mark and Duration times can be changed by selecting a field (hour, minute, second, frame) and clicking the up or down arrow on the right

There are a two keyboard hotkey assignments for the Mark and Goto buttons. Once selected, these buttons can be activated by:

- Ctrl + M: activates selected Mark button
- Ctrl + G: activates selected Goto button

Previewing Assets

In the bottom of the window, you can view a preview of the asset.



Click the *Open Containing Folder* icon to open the folder containing the asset. Click the *Open With Default Program* icon to open the asset with the media viewer chosen as the default by the Windows OS.

You can preview assets by selecting them in the catalog, or by selecting them in the EDL.

You can use the player controls to play, pause, rewind, and jump to points in the video timeline (using the slider). If your computer has speakers, you can also hear the audio in the media, and you can adjust volume using the volume slider.

The following keyboard hotkey assignments support player control:

- Ctrl+P or Ctrl+SPACE: toggle the Play/Pause button
- Ctrl+S: Stop button
- Ctrl+F: Forward Frame button
- Ctrl+R: Reverse Frame button
- Ctrl+HOME: go to start
- Ctrl+END: go to end

The following mouse wheel assignments support player control:

- Mouse Wheel + Ctrl key: one frame per wheel click
- Mouse Wheel (no modifier keys): one second per wheel click
- Mouse Wheel + Shift key: one minute per wheel click
- Mouse Wheel + Ctrl +Shift keys: one hour per wheel click

Reviewing and Editing Metadata

If your administrator has enabled Metadata Labels in this configuration, Workflow Portal displays a Metadata Labels” tab, which displays each of the metadata labels in the asset, and their values.

Click on the Metadata Labels tab to review – and depending on your configuration, even add and edit – the metadata associated with assets in place. When you edit metadata and save it, the changes are saved with the asset in the domain database.

Note: *When submitting an EDL for processing, the metadata from the first asset in the EDL is used in the job.*

Forwarding Assets to Workflows

After you have built and configured your EDL, select the Forward to Workflows tab to choose which workflows you want to send this media to for processing. Some choices may be optional – you can check each workflow’s checkbox to specify which workflows should process the asset. Click Submit to send media to the specified workflows for processing. Vantage creates jobs for each workflow.

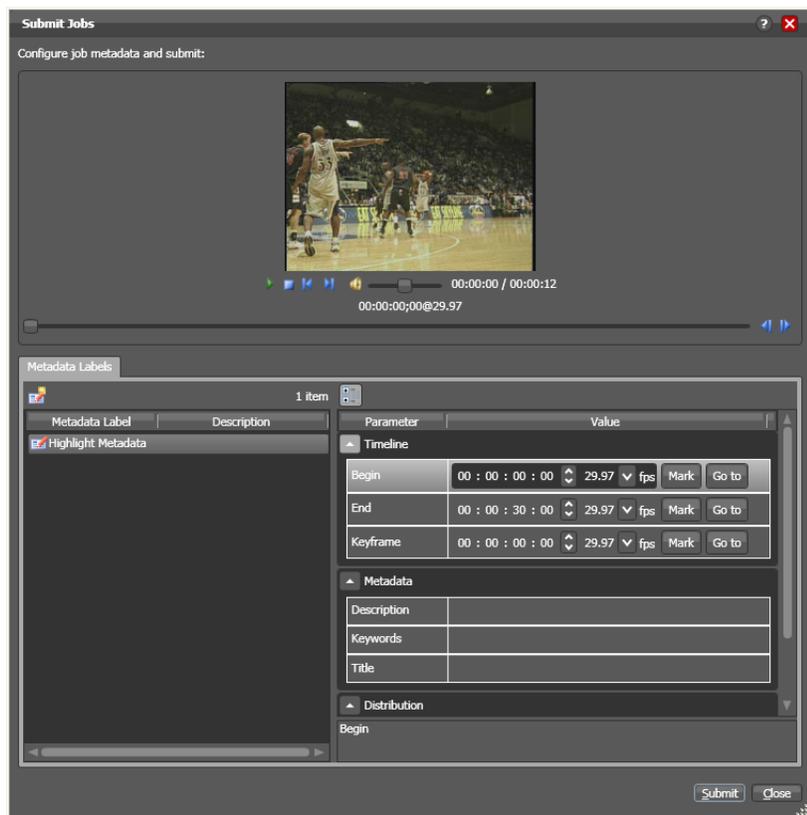
Depending upon your configuration, after you submit the media, you may be allowed to add and edit variables or metadata in the Submit Jobs window. Please see [Editing Metadata in the Submit Jobs Window](#) for more information.



EDITING METADATA IN THE SUBMIT JOBS WINDOW

Depending upon the configuration you're using, you may be entering metadata in the Submit Jobs window depicted below, or you may be entering metadata for the selected asset directly in the main window during your browse activities.

Figure 14. Editing metadata in the Submit Jobs window.



In either case, if a preview is available you can use it to review the media. If your metadata includes time code values, you can also use Preview with the metadata as follows:

- The Mark button sets the metadata timecode to the current point on the preview timeline
- The Go To button moves the preview slider to the time code indicated by the metadata value

Depending upon the configuration, in the Submit Jobs window, you may be able to submit the same clip multiple times. For example, if you are extracting multiple highlights from a single media asset, you can mark a highlight, select Submit, and then mark a new highlight without affecting the first one.



You can use the player controls to play, pause, rewind, and jump to points in the video timeline (using the slider). If your computer has speakers, you can also hear the audio in the media, and you can adjust volume using the volume slider.

The following keyboard hotkey assignments support player control:

- Ctrl+P or Ctrl+SPACE: toggle the Play/Pause button
- Ctrl+S: Stop button
- Ctrl+F: Forward Frame button
- Ctrl+R: Reverse Frame button
- Ctrl+HOME: go to start
- Ctrl+END: go to end

The following mouse wheel assignments support player control:

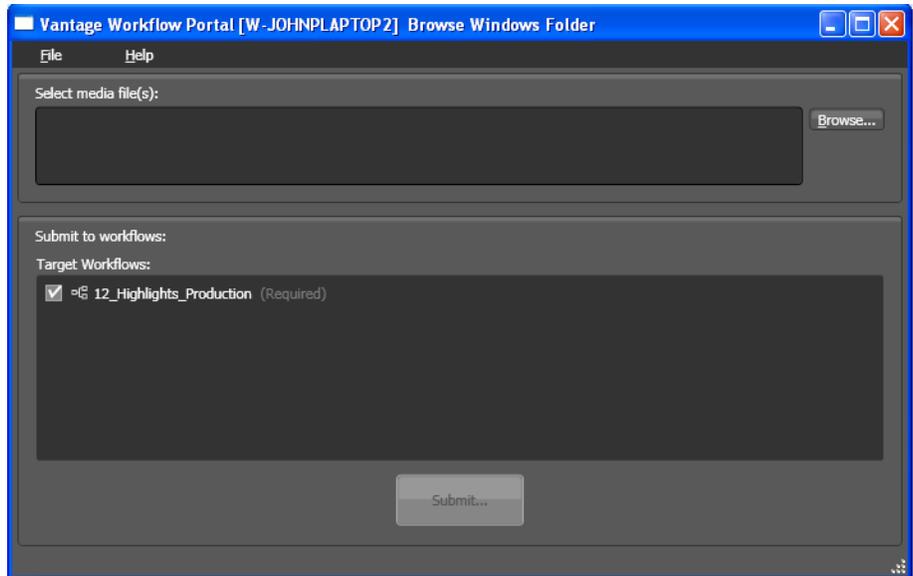
- Mouse Wheel + Ctrl key: one frame per wheel click
- Mouse Wheel (no modifier keys): one second per wheel click
- Mouse Wheel + Shift key: one minute per wheel click
- Mouse Wheel + Ctrl +Shift keys: one hour per wheel click



BROWSING WINDOWS FOLDERS AND SHARES FOR FILES

If you are browsing the Windows Directory for files, you will be presented with an interface similar to this:

Figure 15. Browsing Windows and selecting workflows.



Browsing for Files

Click the Browse button to browse and choose which media file(s) to submit. You can multi-select files to submit more than one.

Selecting Workflows

In the Submit to Workflows panel, check which workflows you want to send the media to for processing. Some choices may be optional – you can check each workflow's checkbox to specify which workflows should process the asset. Click Submit to send media to the specified workflows for processing. Vantage creates jobs for each workflow.

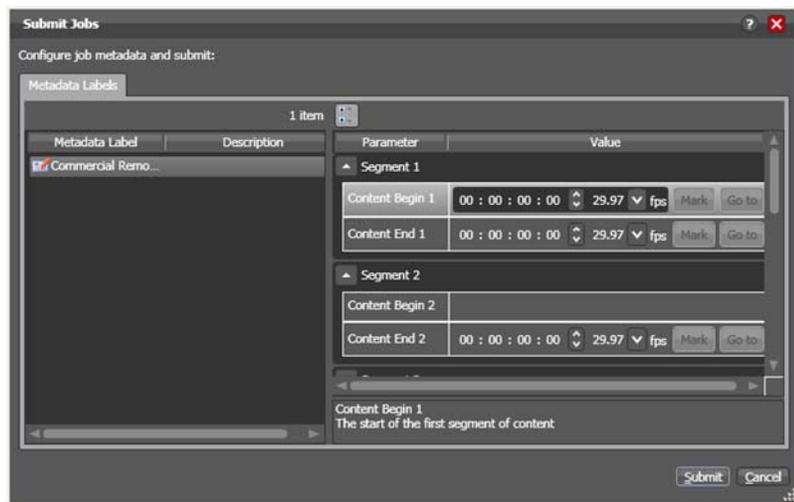
Entering Metadata

Depending upon your configuration, after you submit the media, you may be allowed to add and edit metadata in the Submit Jobs window.



This metadata is applied to all media files that are being submitted.

Figure 16. Entering metadata in the Submit Jobs window.



To edit metadata, scroll through the labels, and select and modify the values as appropriate.

Note: If you are submitting files directly from a Windows directory, the *Submit Jobs* window does not include a preview.

Please see [Editing Metadata in the Submit Jobs Window](#) for more information.

Click Submit when you're done reviewing and editing metadata.



TROUBLESHOOTING WORKFLOW PORTAL

When you are changing domains or configurations, you may encounter the following errors:

- No Configurations Available...

Workflow Portal displays this error when you log onto a domain where no Workflow Portal configurations are stored. Workflow Portal can't display a user interface without use of a configuration, so the domain must have at least one configuration for Workflow Portal to use.

Create or import one or more configurations in this domain, using the Vantage Management Console. Then, log on and select one.

- No session licenses available for this application...

The domain you logged on to is not licensed for running Workflow Portal or you have exceeded the maximum number of simultaneous copies of Workflow Portal. Therefore, you are operating in unlicensed/demo mode, and you won't be able to submit jobs or edit metadata labels.

Obtain a Workflow Portal license from Telestream Customer Service, wait until another Workflow Portal has exited, or increase the number of licenses for Workflow Portal, and retry.

Note: *An administrator may release a license in the Vantage Management Console.*

- Problem communicating with database - could not find stored procedure SelectSessionsByExecution...

This error displays when Workflow Portal is attempting to display a list of configurations from the selected domain, but the version of the domain is not compatible with your client. Contact your Vantage Administrator to upgrade your Workflow Portal software.

- The requested workflows are either not running or no longer exist...

This error displays when you submit an asset or media file to a workflow that is not activated. Contact your administrator, who can active the Vantage workflow.





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