2.14.0 Panel Extension User Guide

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Introduction

Levels Beyond introduced a Reach Engine Panel Extension for several Adobe Creative Cloud® software applications to assist with the production process, allowing users to access the Levels Beyond repository to work with assets. As of May 2018, the following software can have the Levels Beyond extension installed:

- Adobe Photoshop®
- Adobe Illustrator®
- Adobe InDesign®
- Adobe AfterEffects®
- Adobe Premiere Pro®

Benefits

The benefit of having the Panel Extension allows access to all your production within the Levels Beyond repository. All assets become integrated into the move-to-production process. For additional information: {+}https://www.reachengine.com/+

What's New?

2.14.0 Release

The 2.14.0 release of Panel Extension officially promotes it out of Beta and into General Availability. The overhauled Reach Engine Panel Extension offers:

1. Support for more Adobe applications! With one installer you'll be able to natively interact with Reach Engine in Adobe Premiere, AfterEffects, Photoshop, Illustrator, InDesign with more coming soon!2
2. Significantly improved User Interface and User Experience
    1. Overhauled layout with a consistent experience with Reach Engine's latest UI
    2. Powerful advanced search and Faceted search
    3. Overhauled status activity screen with far greater detail and context for end users
3. Hundreds of stability, performance and quality of life improvements compared to older panels
    1. More secure interaction with S3
    2. Less configuration for Administrators

3. Significant improvements to asset import and project tracking performance and stability

This release:

- Execute Custom Workflows in Panel

2.12.0 Release

- Support for Adobe Premiere Pro
    - Video Clip Assets are imported to Premiere Pro as Video Sub-Clips
    - Easily render and ingest your Premiere Pro Sequences into Reach Engine
    - Generate Metadata Schema Automatically
    - Support for multiple Open Projects
- Download proxies to attach in open/place/checkout
- Overhauled Import and Upload for Hybrid Storage / S3
- Updated Local Repository Data Handling
- Upload Project Files via HTTP
- Standardize picklist inputs with type-ahead
- Import files with Asset Name
- Select Actions on Click not Hover
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- Adobe NodeID and AssetID Tracking
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2.7.26 Release

- Panel Extension applies a metadata form to the assets that are about to be ingested into Reach Engine from Adobe Applications, and can then save the asset.
- The Login panel remembers the username of the last user to login.
- Metadata can be viewed in either Tile or List.
- Unified Collection View lets you view assets within a collection, and take action on selected asset.
- Ping Authentication
- Signing Panel Installers for MacOS Gatekeeper
- All .pkg installers are notarized by Apple using the Levels Beyond Apple Developer ID during the build process
- Apply a metadata form to the Assets that are about to be ingested into Reach Engine from Adobe Applications
- Updated Panel look and feel to quickly navigate and view assets in a consistent and streamlined manner, including the ability to view Metadata in Tiles.
- S3 download and upload credentials via API

2.7.25 Release

- Panel Extension checks to see if a folder exists in temp the directory on the **Status** tab.
- Panel Extension version displays in **Preferences** panel.

2.7.0 Release

- Additional Action Menu Options Based On Application
- Ingest a Selected Composition to Reach Engine from After Effects
- See asset icons in list view
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- Ingest Adobe project files
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- Use OAuth when logging in

0.5.0 Release

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Installing Reach Engine Panel Extension

The Reach Engine Panel Extension is available for both Mac and Windows users. To download the installation package, obtain the associated link from your Levels Beyond representative.
To install the Reach Engine Panel Extension:

1. Download the .pkg or .exe from the associated link.
2. Double-click the package.
   - To support the increased Security requirements of the latest MacOS versions and "Gatekeeper" all Panel installers are now Signedwith the Levels Beyond Apple Developer ID and officially validated and Notarized by Apple Inc.
3. Click **Continue** on the Introduction panel.
4. Navigate to the disk where to install the package and click **Continue**.
5. Click **Install** to install the Reach Engine Panel Extension

6. If required, enter the Administrator User Name and Password and click Install Software.
7. Click **Close**.

Using Reach Engine Panel Extension

The Reach Engine Panel Extension from Levels Beyond lets you access assets that previously were not as easily accessible for Adobe products other than Adobe Premiere and Adobe Prelude. Having an extension that can be loaded into other Adobe applications makes it easier to use and modify assets during the workflow process.

Accessing the Levels Beyond Extension Panel

After the extension has been installed on for your Adobe products, the extension panel can be accessed similarly regardless of which software product you are using. To access the extension panel:

1. In your application, navigate to **Window** > **Extensions** > **Reach Engine Panel Extensions**.
2. Click the the selection to display the **Preferences** screen.
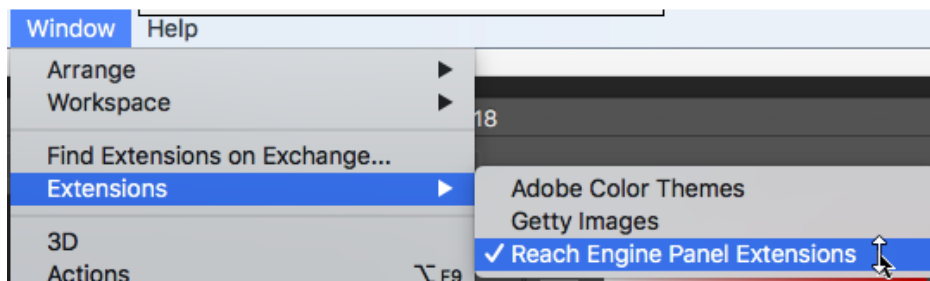

Setting initial Preferences

The **Preferences** dialog box displays the first time accessing the Reach Engine Panel extension. To set up the preferences for accessing your assets:

1. Enter the Reach Engine URL. This address can be an http or https URL.
2. (Optional) Enter the **Local Repository** path where you want your assets to download to.
   o (Required) if Reach Engine is configured with cloud storage.
   o (Not Required) if Reach Engine is configured with local storage.
3. Enter the Source settings:
   o Source
   o Mezzanine
   o Proxy

4. Enter the Proxy setting:
   - o Proxy
   - o Mezzanine
5. Click **Show Advanced Settings** to set additional preferences for the level of detail required for error logs:
   - o Error
   - o Warning
   - o Info
   - o Verbose
   - o Debug
6. Click **Save**.
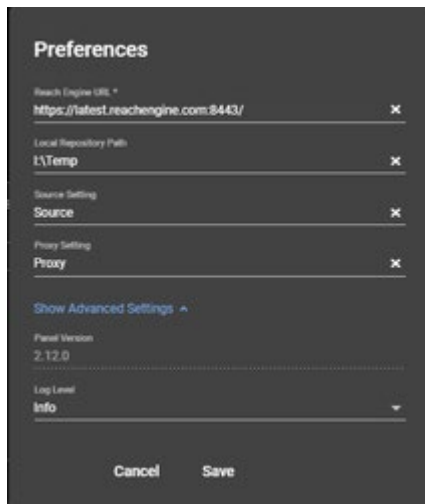
Notes:

- Preferences can be changed by clicking the **Settings** icon .
- As of Panel Release 2.12.0, The software always checks to see if a Proxy exists in the Local Repository Path before attempting to download again. If it already exists then that file will be opened.
- When there is no access to storage, the following error message displays:
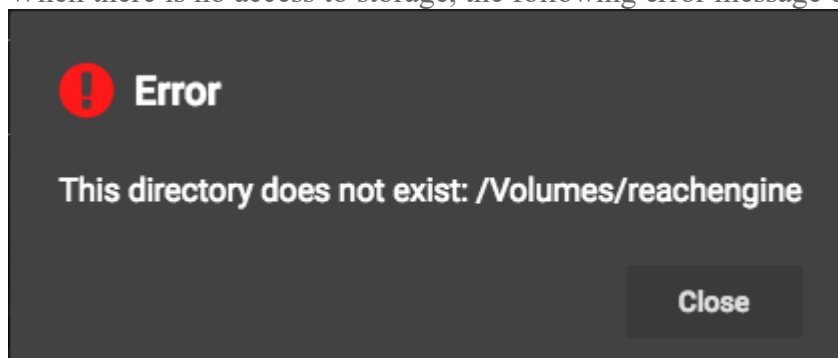
Logging in to Reach Engine Panel Extensions

The Login dialog panel displays after setting your initial preferences, and every time afterwards when accessing the extension. Your username and password are assigned to you via Reach Engine To login:

1. Enter your user name in the **User** field.
2. Enter your associated password in the **Password** field.
3. Click **LOG IN.**
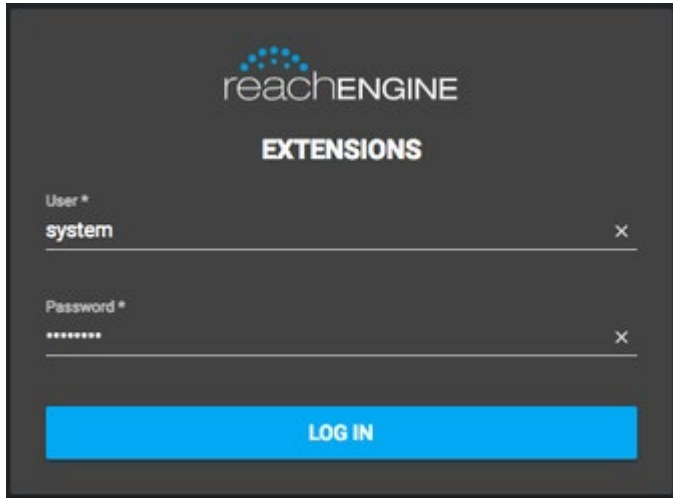
Notes:
- o The login screen varies based on your individual setup, including logo and other branding information.
- o If using OAuth:
    - ▪ OAuth detects a valid session
    - ▪ OAuth allows two-factor authentication
    - ▪ Specific code is needed for:
        - ▪ Okta
        - ▪ SAML
        - ▪ Ping: Users are able to login and interact with Reach Engine per standard Panel supported capabilities when Reach Engine is configured for Ping authentication

- o Reach Engine will automatically log you out, and display a Keep Alive warning to continue your session.
    - ▪ The time before the "Keep Alive" warning displays is dependent on the Reach Engine server logout settings.
    - ▪ The Server logout setting is customizable by the client.

- o Based on the server you are connecting to, the panels stores the last user login. The panel also stores a list of recently connected servers. This is unique across the Adobe applications.

Working with assets

The Extension Panel is divided into two tabs: Dashboard and Status. When the panel is opened, all assets within your repository are accessible to work with in the desired application. You can use the panel to search for an asset, sort assets, open the asset within the application, or view the status of an asset.

Notes:

When working with projects in Premiere Pro:

- The OnePanel is aware of the Active Premiere Project when multiple are open.
- The OnePanel tracks the Active Project when Opening or Ingest assets in and out of Projects and saves the Reach Engine Asset IDs to the correct project file.
- To decrease mistakes, when running actions in the panel the action menus will display information from the selected Project (like showing the project name when saving) or the sequence within a project.

Viewing assets (Dashboard tab)

To view assets on the Dashboard:

1. Select 24 or 60 from the **Items per page** list menu to select the number of asset thumbnails to view per page.
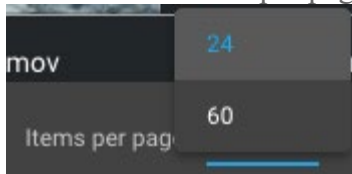
2. Scroll through the assets using the scroll bar on the side, or sort the assets using the panel's sorting functions.

3. Select whether to view assets by List or Tile.

4. If Tile view, choose the tile size with the slider.

Sorting assets

Assets can be sorted by several options, and listed according to preferences in the Sort By selection switch. To sort the assets on the Dashboard,

1. Select **Date Created**, **Date Updated**, **Name**, or **Relevance** from the sort menu:
   - **Date Created** and **Date Updated**:
     - sorts the dates by newest to oldest
     - sorts the dates by oldest to newest

- **Name**:
  - `Sort By` sorts the names from A-Z
  - `Sort By` sorts the names from Z-A
- **Relevance:**
  - `Sort By` sorts the title from most to least relevant
  - `Sort By` sorts the title from least to most relevant

2. Review the assets by using the scroll bar on the right side of the panel.

The table indicates the asset type by icon:

Review by Asset Type

You can review the asset grid and asset list by asset type:

Asset Type and Display Icon

- Timelines
- Videos
- Audio
- Images
- Documents
- Other File Types
- Collection
- Projects
- Markers
- Timeline Clips
- Video Clips

Controlled Value Fields

Across One Panel, all controlled value fields (like pick lists) are updated to use type-ahead functionality reducing the time it takes to fill out information.

[x] The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

Searching for assets

To search for one or more assets with your Reach Engine repository:

1. Enter the characters (alphanumeric, or special character) in the Search Term field. The asset list updates based on the characters entered. The basic search field is extended and sizes dynamically to increase the number of characters that are visible and decrease the cognitive load when searching.

2. (Optional) click **Advanced Search**.
3. In the Facets tab, optionally, select a Group from the **Group** drop-down, and/or select or more asset types:
   o Audio
   o Documents
   o Images
   o Collections
   o Markers
   o Others
   o Projects
   o Timelines
   o Timeline Clips
   o Videos
   o Video Clips
4. (Optional) Select **Date Created**, **Date Updated**, **Name**, or **Relevance** from the Sort By drop-down list in which to search.
5. Click Sort By to view the assets by Ascending or Descending order,
6. (Optional) Click the **Advanced** tab.
   1. Search for or select a collection from the Collection drop-down
   2. Enter conditions for the search in the Field and Operator drop-downs.
   3. Click +**Condition** to add an additional condition for your search.
7. (Optional) Click the **Saved** tab to run a saved search.
8. Click **Search**. The results display in the panel, and can be sorted as needed. Sort by
   o Type
   o Name
   o Updated
   o Created
   o Fields in "view settings"
9. Click **X** in the search field to **Cancel** the search.
10. Click **Reset.** The search results are reset.

**Note**: The View Settings can be set to display metadata in Tiles.
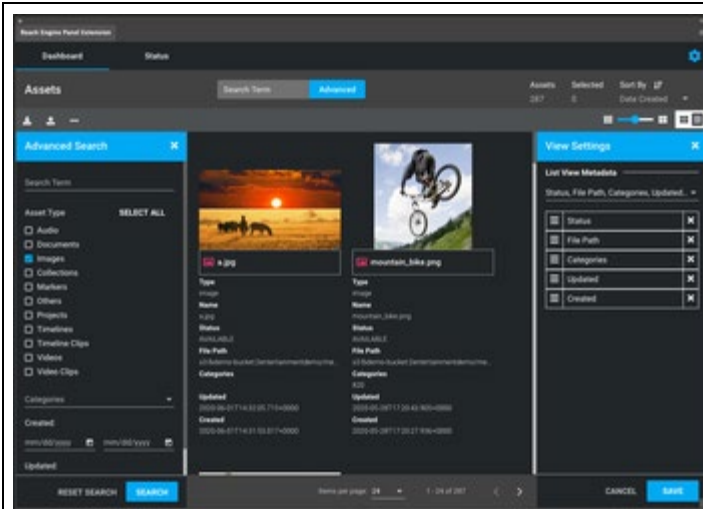
Working with assets

Selecting assets for use

One or more assets can be selected for use. To select one or more assets:

1. Click an asset in the panel. A check mark displays to indicate it's been selected.
   Users can shift-select assets in the panel tile view and list view to import more than one.
2. Continue to select as many assets as needed.
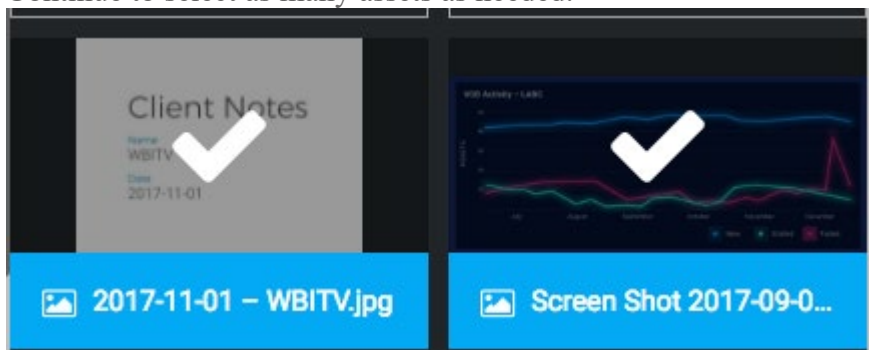
3. Click the download button ![download] to store the asset in your local folder if configured with cloud storage. The asset will be imported to the application and remain in the Reach Engine repository if configured with local storage.

Creating a Collection

A Collection can be created to work with ingested assets. To create a Collection:

1. Click the **Action** menu ![action menu]

2. Select **Create Collection**.
3. Type the Collection name.
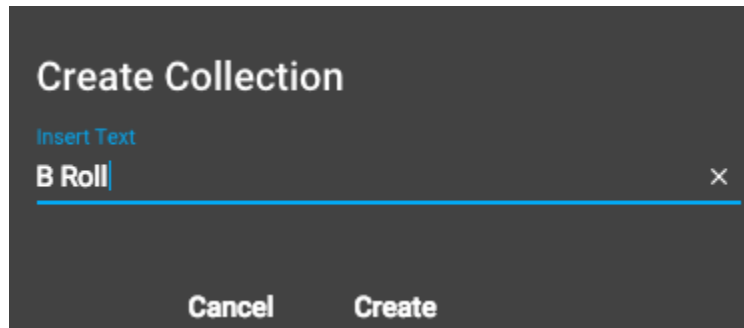4. Click **Create**.

Note: Collections can be created by also selecting an asset to ingest and clicking the Create Collection button (+).

Ingesting assets

To ingest assets into an existing collection:

1. Select the asset or assets to ingest.

2. Click the **Action** menu [...]
3. Select **Ingest Selected Asset**. The Ingest Assets panel displays.
4. Select a collection from the drop-down arrow.
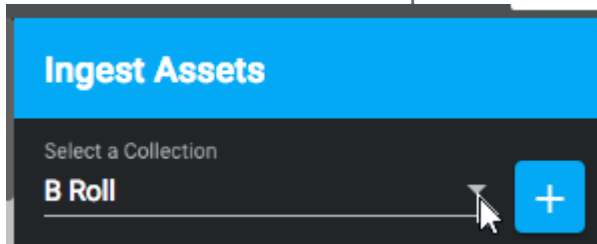
5. Click **Ingest**. The Status tab indicates the progress of the asset ingestion.

Ingesting assets from application to collection

The Extensions panel allows you to ingest an asset from the application in which you're working into a collection. For example, in Photoshop, you can ingest an asset from Photoshop into a collection. To use this feature:

1. Select a collection.
2. Click the **Action** menu ⋯
3. Click Ingest asset from (application)

4. Select the asset from the panel.
5. Click **Ingest**. The **Status** tab displays the progress of the ingest.

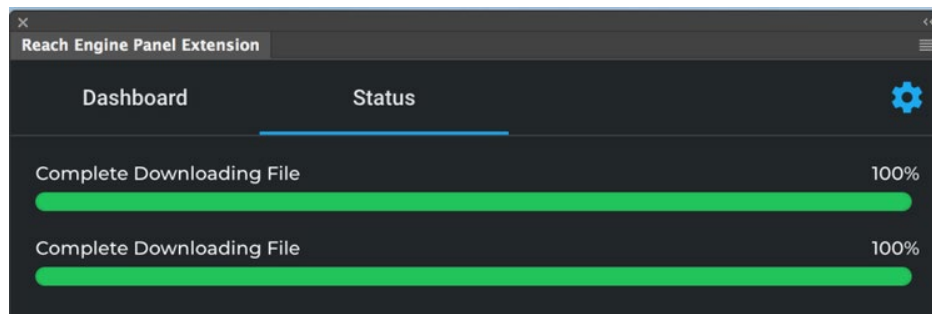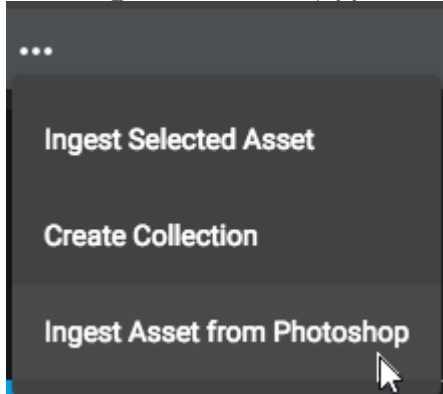## Ingest single assets with metadata

Any files used in Adobe applications can ingest into Reach Engine with metadata using forms. This allows you to ingest, with metadata, any unmanaged asset in your project, render composition in After Effects, and the source project. To ingest and save single assets with metadata:

1. Click the **Upload** button to perform an ingest.
2. Choose a collection and metadata form in the right panel.
3. Click **Save** to save the assets.

Ingesting assets using Metadata Forms

With release 2.7.26, any files used in Adobe applications can be ingested into Reach Engine with metadata using forms. This allows you to ingest, with metadata, any unmanaged asset in your project, composition renders in After Effects, and the source project. To ingest assets using Metadata Forms:

1. Click the Upload button in the panel to perform an ingest.
2. Use the right panel to choose a collection and metadata form to save to the assets.
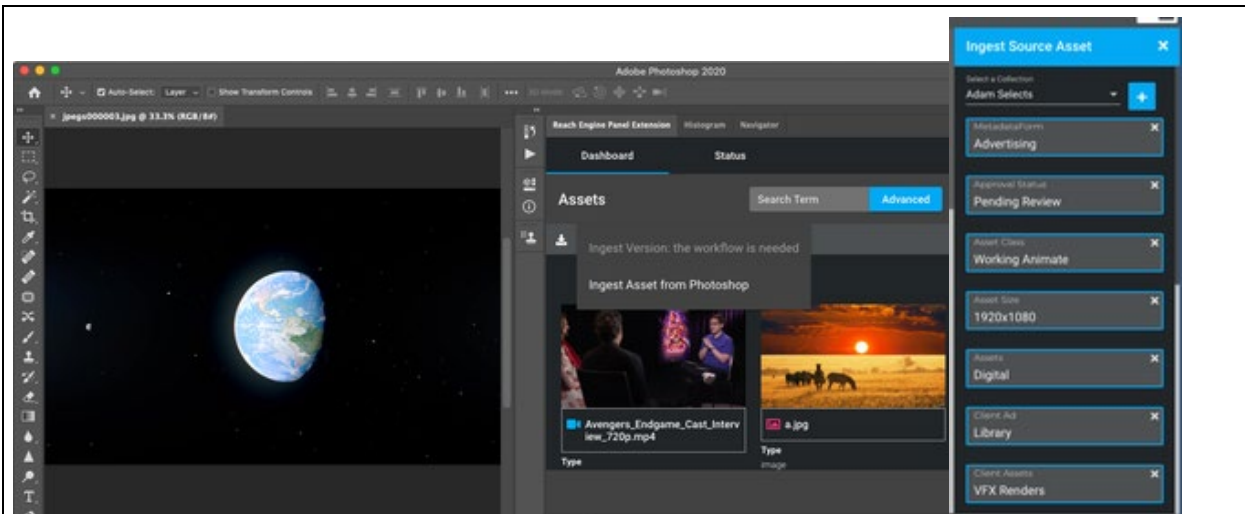
Notes:

- One Panel does not requires the Premiere Pro paths be updated to the managed Reach Engine repository paths on unmanaged ingest but rather prompts the user.
- When desired, the panel will move the unmanaged asset into the Users Local Repository path as needed and as reported by the managed location from Reach Engine.

Ingest Premiere Pro Sequences into Reach Engine

With Release 2.12.0, you can render and ingest Premiere Pro Sequences into Reach Engine.

1. Select the Sequence to ingest.
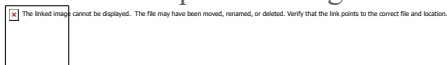
2. Select the **Upload** action button in the Panel.
3. Select **Export Sequence and Ingest**.

4. Select your Output Preset, Collection, and Metadata Form in the associated dialog box.

Viewing assets in a unified collection

Assets can be viewed in a unified collection.

- If you perform an advanced search and open a collection, the associated assets display. You can then double-click the asset to review the metadata.
- The breadcrumb trail in the top left corner lets you navigate within the collection.
- The assets within the collection can be viewed in either List or Tile view.
- Back arrows return to previous navigation.

- Any asset selected or displayed lets you take action on them.
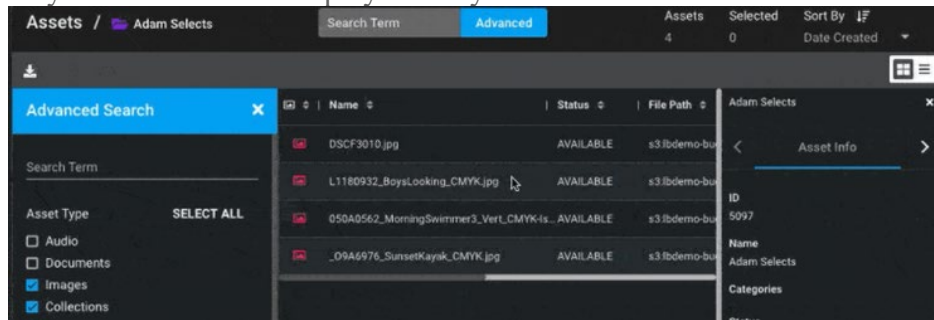
Import Files

Any asset imported via One Panel uses the Asset name as is stored in Reach Engine rather than the default Adobe behavior of using the filename. This increases the relevance of Reach Engine's data and decreases confusion for creatives.

When an asset is imported into Adobe from Reach Engine the Reach Engine Asset information (asset type, id, path) is added to the relevant Adobe project asset and associated with the Adobe "NodeID" to significantly reduce duplicate file imports and decrease the amount of incorrectly identified "unmanaged assets".

Import Premiere Pro Video Clip Assets

Reach Engine Video Clip Assets import to Premiere Pro as Video Sub-Clips.

- Upon import of a Video Clip, the Parent Video asset must be downloaded and imported into Premiere as a normal video.
- Any pre-existing XMP clips that reside on the source video asset is added to the project.

Ingesting Projects

Adobe project files can be ingested into Reach Engine.

- Photoshop
  - .PSD
- Illustrator
  - .AI
- InDesign
  - .INDD
- AfterEffects
  - .AEP
- Premiere Pro
  - .PRPROJ

Note: Ingesting with After Effects

- Previously, the Panel Extension could only ingest Video files
- With release 2.7.0, users can ingest compositions into Reach Engine

Opening assets

To open an asset in the associated application (for example, opening a .jpg in Adobe Photoshop):

1. Select the asset or assets to ingest.
2. Click the **Action** menu ⋯
3. Click **Open Selected Asset**. The **Status** tab displays the download progress of the asset. The asset opens when upon successful download.
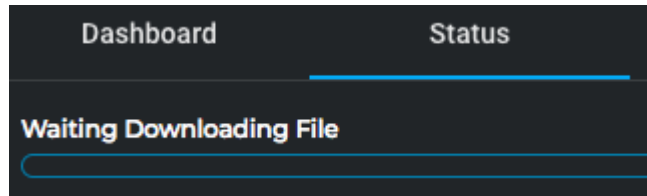
Showing versions

The **Show Versions** option allows you to review the version changes of a selected asset. This option only displays when a single asset is selected. To review the versions of an asset.

1. Select the associated asset.
2. Click the **Action** menu ⋯
3. Select **Show Version**. The Versions panel displays with all versions of the asset, with associated data.
4. Select a version of the asset to save and click **Save Current Version**.
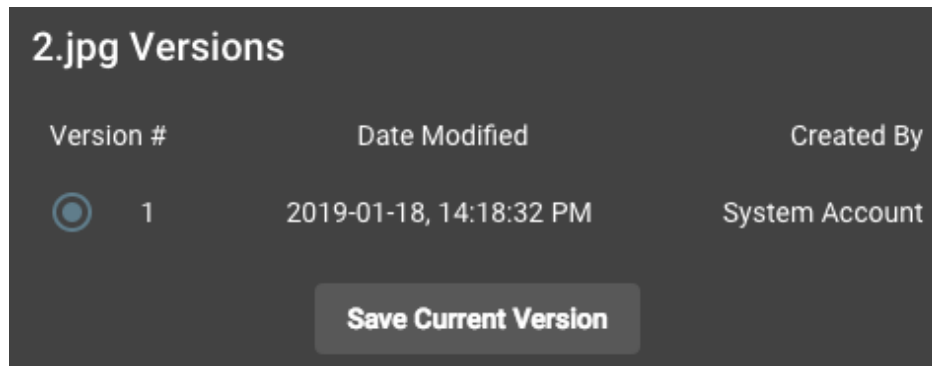
Additional Action Menu Items

The Action Menu options display based on the application in use. For example, Photoshop will have different action items from After Effects. Following is a breakdown of actions based on application:

Photoshop

- PSD selected
    - Save Project
    - Hide Ingest Asset from Photoshop
- Other image types (TIFF, JPEG, PNG, PDF, etc.)
    - Hide Save Project
    - Ingest Asset from Photoshop

Illustrator

- AI selected
    - Save Project
    - Hide Ingest Asset from Photoshop
- Other Image Types (TIFF, PDF, JPEG, etc.)
    - Hide Save Project
    - Ingest Asset from Illustrator

InDesign

- INDD selected
    - Save Project
    - Hide Ingest Asset from InDesign (You can only have INDD in InDesign)

After Effects

- AEP selected
    - Save Project
    - Hide Ingest Asset from After Effects
- Created Composition selected
    - Hide Save Project
    - Render Composition and Ingest (Update: Ingest Asset from After Effects)
- Other Video Types (MOV, MXF, MP4, etc)
    - Hide Save Project
    - Ingest Source Asset from After Effects
    - Render Video and Ingest

Reviewing Asset Metadata

Each asset has metadata that can be reviewed. When the asset is selected, the Extensions panel applies any configuration from the local file, similar to Premiere and Prelude. To see the asset metadata detail:

1. Double-click the asset. The asset detail screen displays.
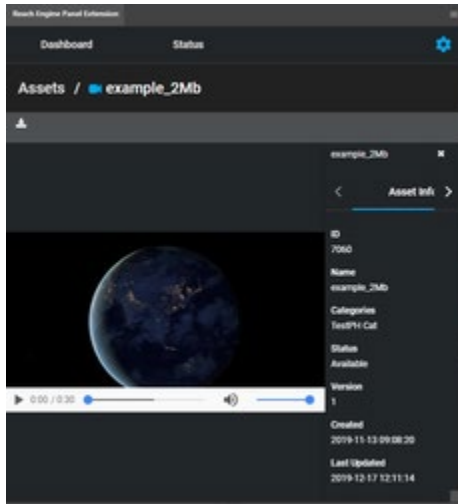
2. Click the < or > arrows to review additional metadata information for the selected asset.
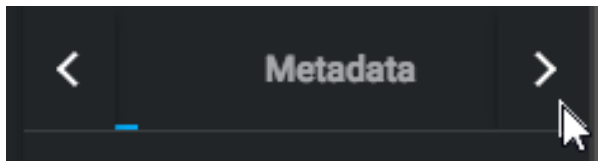
Metadata Tile and List view

From View Settings, users can search on and select the metadata fields to view on their assets in Tile and List view. The panels columns and tile sizes will update accordingly after the view settings are saved. To chance views, use the selector on the left of each metadata field to change the display order.

Tile View

List View

Generate Metadata Schema (Premiere Pro)

Upon first launch of Premiere Pro, the Panel identifies if the metadata schema has been generated to map Reach Engine metadata to Premiere Pro metadata. If the schema does not exist, the Panel generates it automatically. A notification displays at the bottom of the Panel to restart Premiere Pro take advantage of the schema and metadata mapping capabilities.

To manually create metadata schema

1. Click the **Action** menu.
2. Select **Generate Metadata Schema**,

Reviewing asset status (Status tab)

To review the action status of an asset, click the **Status** tab. The current status of the selected asset displays with a color bar indicator:

- Completed workflows = Green (100%)
- Executing workflows = Blue (.01 - 99.99%)
- Failed workflows = Red (any %)

Note: If a temporary directory has not been selected or created on the server, an error message displays: **Unable to Ingest Unmanaged Asset.** Shared storage in some client environments are latent enough, between the Reach Engine server and the Client system running the Panel, that temporary directories created by Reach Engine wouldn't be seen for several seconds. With release 2.8.0, the panel no longer assumes the temp directory is created instantaneously. Instead the panel waits several seconds, and retries several times, for the existence of the temp ingest directory. Should the directory still not be accessible, the panel produces more detailed errors for improved troubleshooting. Two separate sub-error messages may display below the initial error:

1.
   o **Unable to get unique destination directory from server**.
      ▪ Panel Extension will retry the request 3 times to get the temporary directory from server.
      ▪ Each attempt is performed 500 milliseconds apart.
      ▪ Upon successful access to the temporary directory, the error message is removed.

   o **Unable to access into the unique destination directory. Path does not exist.**
      ▪ Panel Extension will retry the request twice to create a temporary directory.
      ▪ Each attempt is performed 500 milliseconds apart.
      ▪ Upon successful access to the temporary directory, the error message is removed.

Unmanaged Asset Check In

When checking in a project the Save Project curtain allows the user to optionally find and add Unmanaged Assets to their project check-in.

1. Choose **File** > **Save Project**

2. Click **Add Unmanaged Assets**. Upon clicking the button, the Panel will identify any unmanaged assets in the project. If there are none, the user will be notified:

3. If there are one or more unmanaged assets, you can choose each individually, or use either **Select All / Deselect All** button to choose all or none of the unmanaged assets.

All unmanaged assets will receive the same metadata as the project and will be added to the same Collection.

IMPORTANT NOTE: The status screen may not accurately display the ingest progress of unmanaged asset ingests.
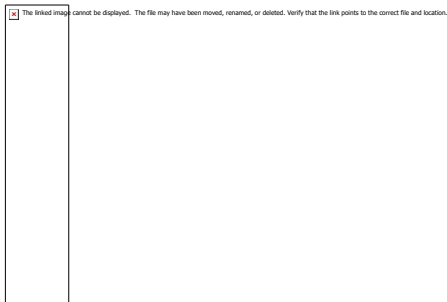
You can still ingest unmanaged assets directly from the Adobe application at any time by selecting the asset in their project / bin and selecting **Ingest Source Asset from ...** action.

Logging out of Reach Engine Panel Extension

To log out of the Reach Engine Panel Extension

1. Select the **Settings** icon ⚙.
2. Choose **Logout**.

Appendix

Upload Project Files via HTTP

Checking in Adobe Project files can be performed especially when working remotely from Reach Engine.

- Shared storage is not required to check-in Projects as of One Panel release 2.12.0.
- One Panel will always check and see if a user has access to Reach Engine's configured Project check-in path.
    - If the user does have access to the check-in path, One Panel copies the project file to that location.
    - If the user does not have access, One Panel uploads the project file to Reach Engine directly over HTTP.

S3 download and upload credentials via API

Release 2.7.26

One Panel's interaction with S3 has been significantly updated with the 2.7.26 release for increased security, maintainability and to be more inline with the methods in place in the core Reach Engine UI.

- One Panels uses signed URLs provided by the Reach Engine platform for all S3 Object interaction.
- Local properties entries for the panel's S3 connectivity should be removed so AWS credentials are not stored in plain text.
- The Panels automatically support any compatible S3 storage systems as configured in Reach Engine.
- As of Reach Engine 2.9.0, this means the panels can support buckets in multiple regions, different buckets for source or proxy or temp, and non AWS S3 compatible storage systems like ECS and SwiftStack.

Release 2.12.0

With One Panel 2.12.0 release, there are significant improvements to the file location and download logic in an environment where Reach Engine is installed "on-premise" on a customer site with local shared-storage for the source / mezzanine content but Proxies in S3. These include:

- Improved messaging to end users when files cannot be located with additional prompts to the user to reduce repetitive tasks and increase the probability they'll be able to access the necessary content without assistance.
- Improved handling of Local Repository data for reduced download overhead
- Improved Unmanaged Asset ingest experience with more communication to users when an updated managed path is available and improved efficiency relinking updated paths.

Without remote storage mounted and asset proxies in S3 creatives can:

- Checkout a project
- Import assets from s3 with Proxy/Proxy preferences
- Check-in and version a project
- Check-in AND ingest unmanaged
- Ingest individual unmanaged asset
- Render and ingest a new sequence

SAML Configured Server Side

SAML works on the Reach Engine Server with the One Panel extension, similar to Prelude and Premier.

Pathmapping

The **local.reach-engine.properties** have updated options or pathmapping. For example the **localContext.xml** example can be uploaded with the following optional beans:

```
## Panels
panels.pathmapping.panel_extension.mac=panel_extension_mac
panels.pathmapping.panel_extension.windows=panel_extension_windows
```