2.13 Spartan Access User and Admin Guide

INTRODUCTION

The Reach Engine software platform allows companies to create and curate video content on new era tools and enable smart, secure and elastic cloud services in sync with media workflow and supply chain automation. Reach Engine is an evolvable and customizable system that goes far beyond a standard digital asset management (DAM) system, and is compatible with all major digital content creation hardware and software.

Access is Reach Engine's application that provides content management for media organizations of all sizes. The Reach Engine software platform allows companies to create and curate video content on new era tools and enable smart, secure and elastic cloud services in sync with media workflow and supply chain automation. It's the only platform on the market that single-handedly supports the entire asset lifecycle from planning to development, management to approval, packaging to distribution, and analytics back to planning. High-value assets are easy to find, view, tag and automate under management of Reach Engine.

Reach Engine is built for your entire content lifecycle so you can plan, manage, and distribute your content to anyone, anywhere all from one platform that consolidates deep services into one powerful, integrated solution.

In addition to its standard functionality, Access allows users with an Administrator role to create and manage tasks around workflows, workflow groups., facets, metadata forms and groups, users, roles, and categories.

RELEASE NOTES

2.13 Release (January 2021)

- Aspera Connect and the Aspera FASP protocol can be used to upload and download content. When a user tries to download an asset that is on the Aspera mount location or if a user selects Aspera when ingesting an asset, Reach Engine verifies that Aspera Connect is installed. If not, the user is prompted to install it.
- For Administrators, the Metadata management experience has been redesigned to consolidate multiple pages and tabs from the old user interface into one consistent experience, thus decreasing the time it takes to manage metadata. This redesign increases reliability of results when searching across fields, provides easier sorting across multiple field properties (field name, field key, field type, and Inspector panel usage), provides contextual Actions menu for editing fields and downloading picklist values, and adds a full page column view for picklists, which makes it easier to manage large picklists.
    - Picklist fields can be edited in single page view by selecting the link in the Name column from the Fields list. You can also edit fields by selecting the pencil icon in the Action column to open the right side curtain.
    - Administrators can import and export picklist values from the either the single page view or the right side curtain.
    - On the Metadata Fields page, the *Searchable* toggle has been renamed *Boost*, and *Search Priority* has been renamed *Boost Priority*. These values display in columns on the Metadata Fields page for Administrators.
- You can define different logos for the login logo and the banner logo.
- Tags have been added to quickly identify the status of some assets. These tags display before the asset name in list view, in the upper left corner of the tile in tile view, or in the upper left corner of the window in single asset view.
    - Placeholder assets are identified by the gray map ( ) tag.
    - Live event assets are identified by the radio tower ( ) tag. The video icon for a live event is colored grey when inactive (when the even has not yet started) and becomes the normal asset color once the event begins.
    - Private collections are identified by the eye slash ( ) tag.
    - Locked projects are identified by the padlock ( ) tag. Projects have a locked status when they are checked out by another user.
    - Archived assets are identified by the storage box ( ) tag.

2.12 Release

- With this release, the Administration information has been added to this guide so that users have all Access information in one guide.
- For video assets, more information has been added to the Asset Info tab, such as duration, file name, and number of clips.
- For video assets, users can specify a thumbnail image.
- Administrators can manage watch folders through the user interface. Additionally, Reach Engine will automatically migrate existing watch folders. With this update, Reach Engine does not need to be restarted when adding new watch folders or modifying existing.
- Administrators can create new and modify scheduled workflows through the user interface. Context data can be assigned to scheduled workflows using the +Data Def fields. Reach Engine will automatically migrate existing scheduled workflows. With this update, Reach Engine does not need to be restarted when adding new schedules or modifying existing schedules.
- Administrators can archive metadata fields. Archived fields are not shown to users in the user interface but assets with values set on that field are not removed.
- To view the global workflow steps that are configured and the activities within them in Spartan, navigate to /alpha/#/workflow-step-queues.
- Within workflows, you can specify a default metadata form.

2.11 Release

- Administrators can view and manage watch folders by selecting the **Workflow** menu then **Watch Folders**.
- Administrators can view and manage scheduled workflows by selecting the **Workflow** menu then **Schedules**.
- When viewing a Workflow's Context Data, you can view the data as JSON by selecting the JSON slider in the right curtain. Whichever view you use for Context Data, you have the ability to copy the content by selecting the **Copy** icon in the upper right of the panel.
- Single sign on is supported through SAML providers (such as Okta, Google, ping, and other IDPs) and Amazon Cognito for AWS customers.

2.10 Release

- When a workflow is selected, in-depth information about the workflow displays in the right curtain's Details, Children, and Context Data tabs.
- Double-click a workflow row to open it in Single Workflow View, where you can dive into child workflow details.
- The Workflow SDK version displays in the About screen.
- All unnecessary workflow_context_data_value table reads have been removed from workflow execution start. Workflows with large numbers of subflows should see significant improvement.

2.9 Release (June 2020)

- When you select **Confirm** in the Collection modal and when resetting your password, the button displays the text *Working on it*, so that you know that an action is occurring. This feedback helps prevent duplicate submissions.
- A **Feedback** ( ) icon lets you provide feedback, request features, vote on feature requests, see what is in progress, and see which features were recently released. The Feedback icon is configured per installation. If you do not see the Feedback icon, your company elected to hide the Feedback icon. By providing user feedback, you can help us prioritize the features that will bring you the most value.
- You can display thumbnails in asset List view by adjusting the View Settings. Thumbnails are hidden by default in List view.
- Administrators can enable the **Feedback** ( ) icon for their company by adding the Dynamic Property *feedbackEnabled=true*. This icon lets users provide feedback, request features, vote on feature requests, see what is in progress, and see which features were recently released.

- In the 2.9.0 Spartan Access Admin User Guide#Users menu, the option **Access Users** was renamed to **Reach Engine Users**.

2.8 Release (March 2020)

- View and search for workflow status. You can also download content directly from a workflow status for batch download.
- When tile view selected in Assets, move slider to set tile size.
- Make changes to multiple assets using Batch Update.
- Export video assets.
- Move assets from one collection to another in a single action.
- Use Advanced Search to search on categories.
- Drag and drop assets into a collection on the Collection Palette.
- Administrators can create, view, update, and delete options for dynamic properties.

2.7 Release (August 2019)

- Videos, video clips, and images can be exported.
- Search results can be downloaded as a CSV file.
- Videos and audio can be played directly from the Inspector panel (right panel).
- The Inspector panel's Usage tab lists where a particular asset is used. For example, if an asset is part of multiple collections, those collections to which you have permissions display. Select a collection link to open that collection.
- You can export all images in a collection.
- The Collection Palette is available on the left panel while in Unified Collection View and Single Asset View.
- If a project is locked by another user, a padlock icon displays in the upper left corner of the project tile (in tile view), before the name (in list view), or in unified/single asset view.
- You can request assets from an external user. If the user isn't a Collaborate user, you can enter the user's email address in the request asset form.
- The workflow SDK version number displays in the Spartan Access About modal.
- Administrators can edit and view storage options options for file systems, directories, libraries, and path mappings.
- Administrators can set default clip categories on videos.
- Administrators can create and edit live servers.
- Administrators can view metadata mappings, media profiles, and linked accounts.

SYSTEM REQUIREMENTS

The following browsers and operating systems are supported for Access.

Supported Browsers

Chrome

- 70.0.3538

Firefox

- 63.0
- **63.0.1**

Safari

- 12.0.1

Note: Internet Explorer and Edge are not currently supported.

Supported Operating Systems

Mac OS

- 10.12 - Sierra
- 10.13 - High Sierra
- 10.14 - Mojave

Windows

- Windows 7
- Windows 8
- Windows 10

Note: Access Desktop drag and drop out of app is not supported in any Windows version.

LOGIN

To log into Access, open a browser and enter the IP address or DNS name assigned to your copy of Reach Engine. The login screen displays.

- When SAML is enabled, select the **Log In** button then enter the necessary credentials for your account. When SSO systems are enabled, password reset is disabled. Passwords must be managed through your provider.
- If SAML is not enabled, enter your username and password and select enter your username and password, then select the **Log In** button.
  - Cognito is available for AWS customers. Cognito users must enter their Cognito credentials to login. The first login of a new Cognito user requires the user to reset their password using the temporary password sent to them by the Cognito Service.
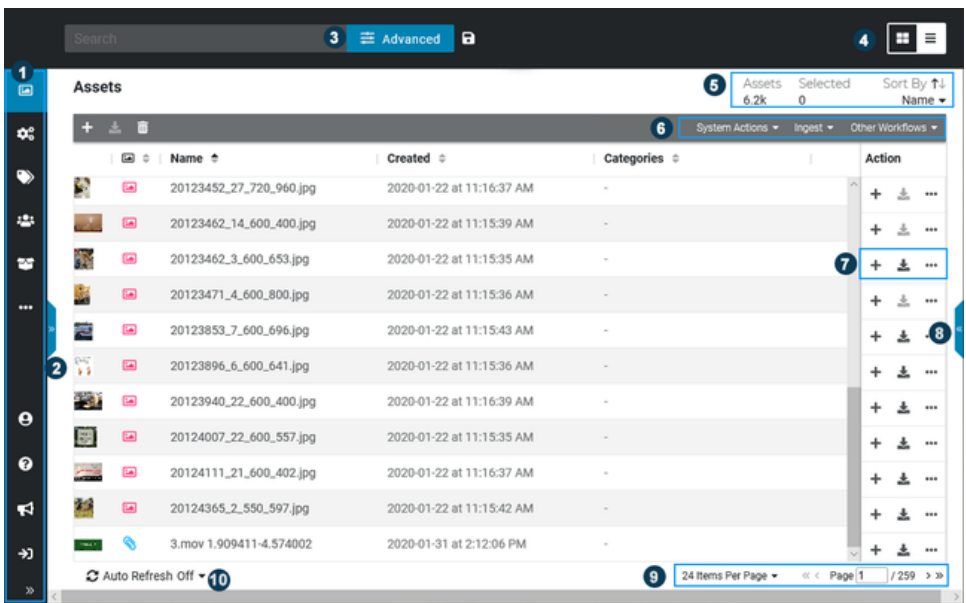
Note: The default username and password for a base installation of Reach Engine are:

username: system

password: (ask Levels Beyond support team)

ASSET DASHBOARD VIEW

Once you log in, the Asset Dashboard displays.

1. The left panel displays icons that expand to menus when selected.

Icon	Menu
	Asset provides access to assets.
	Workflow provides access to workflows, schedules, watch folders, and workflow groups.
	Metadata menu lets Admins manage categories, facets, fields, forms, groups, and hierarchies.
	Users (Admin function)
	Storage provides access to file systems, directories, libraries, and path mappings.
	More provides access to exec servers, live servers and feeds, linked accounts, and media profiles.
	Displays the username and provides access to settings and password reset.
	The About modal displays the Platform version and Workflow SDK version information, as well as links to user guides, product information, and Levels Beyond information. The Keyboard Shortcuts link opens the left panel to display shortcuts.
	The Feedback ( ) icon lets you provide feedback, request features, vote on feature requests, see what is in progress, and see which features were recently released. The Feedback icon is configured per installation. Your company's installation may have the Feedback icon turned off.
	Log Out
	View Menu Text

2. Select the double arrow on the left to open a panel where you choose to view keyboard shortcuts, advanced search options, view settings or the Collections Palette. Select the down arrow at the top of the panel to choose between panel viewing options.
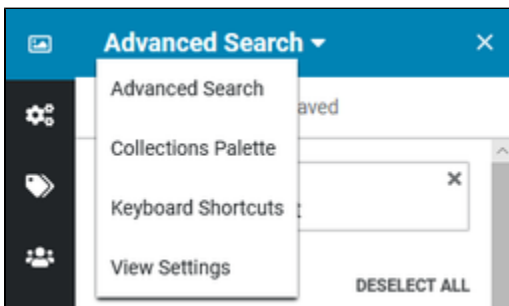
- **Advanced Search** gives you an easy way to filter on specific asset types and search on facet picklist metadata fields.
- **Collection Palette** provides quick access to Collections. Collections allow you to group one or more assets together and are also used to perform automated actions on collection contents as a whole. Assets can belong to multiple Collections and Collections can be private or accessible to all users based on their roles and permissions. Collections can show up in search results. Think of Collections like putting an app on your computer dock or toolbar. You can also drag and drop multiple assets directly into a collection on the Collection Palette.
- **Keyboard Shortcuts** displays a list of keyboard shortcuts that can be used to quickly interact with Access.
- **View Settings** gives you an easy way to configure visible metadata fields in list or tile view per user. You can also choose to display thumbnails in List view.

3. **Search** lets you filter assets based on a keyword. Once you execute your search, the facets also update to only display those facets that match your search. Advanced Search options are available by selecting the **Advanced Search** button or left panel arrow and then

selecting **Advanced Search** from the drop down menu if the Advanced Search panel was not the last option viewed. Save searches for quick access to the information you need regularly.

4. Choose to display assets in Tile view (⊞) or List view (☰).
   - When in List view, select a column heading (for example, **Name** ⬍) to sort on that column value; select the column heading again to reverse the sort order. By default, thumbnails are hidden in List view. Enable thumbnails in List view by adjusting the Vi ew Settings.
   - When in Tile view, use the slider to resize tiles; your tile size preference is saved on logout.

5. This section displays the total assets available and the number of assets selected. You can also choose to sort files by type, name, status, or date created. Select the **Sort By** arrow to reverse the sort order.

6. This section provides quick access to menu options that were previously in the Actions menu. The menu options change depending on the type of asset selected.

7. When viewing assets in List view, the icons in the right column display options specific to the selected asset. When viewing assets in Thumbnail view, hover over the thumbnail to display these icons.

Icon	Menu
➕	Add to Collection, Create Collection
⬇	Download Source, Mezzanine, or Proxy
⚫⚫⚫	Provides access to other workflows

8. Select the double right arrow to open the right panel. When an asset is selected, this panel displays asset information, such as ID, associated categories, created and last updated date and time, status, metadata groups, and metadata fields. The Usage tab lists where the asset is used. For example, if an asset is used in multiple collections, the collections to which you have access are listed. You can then select a collection name to open the collection view.

9. The bottom right of the page lets you choose how many assets to display per page and lets you move through asset results.

10. To automatically refresh the asset view from Reach Engine, turn on **Auto Refresh** and select how often the asset list should be refreshed.

ASSETS

Reach Engine Access contains asset types, each with unique properties. Asset actions and workflows are dependent on the asset type selected.

Asset-specific Information

- When an *Image* asset is opened, image details, the proxy version of the image, and source content display. Proxies are created for all images ingested into Reach Engine to enable quick viewing of high resolution image files.
- Through default and custom workflows, *Documents* assets can be ingested into Reach Engine. For example, marketing collateral, schematic diagrams, and project reports can be added to collections.
- Imported assets are recognized as Documents if their MIME type has an *application* or *text* prefix, i.e., "application/pdf" or "text/plain". A thumbnail and proxy image of the first page of the document will be created as long as the local ImageMagick installation supports conversion of the source document types (depends on installation).
- Assets ingested as Documents are included in search results when selecting the Document types as a search type.
- *Other* is used to manage, organize, and automate all types of files (.pdf, .log, and others). Files ingested as *Other* assets can be added to collections and used with workflows.
- *Placeholder* assets are assets that are planned but haven't yet been produced. They are identified by the gray map ( ) tag.

- *Live event* assets are identified by the radio tower ( ) tag. The video icon for a live event is colored grey when inactive (when the even has not yet started) and becomes the normal asset color once the event begins.

View Assets

The Asset Dashboard view displays all asset types (video, video clips, audio, images, timelines, timeline clips, projects, markers, documents, other, and collections).
You can view assets as tiles or in a list. To change the asset view, select the appropriate icon in the upper right of the page.

- To view assets as thumbnails, select the **Thumbnail** icon ( ).
- To view assets in a list, select the **List** icon ( ). You can order by name or asset type using the Sort By option at the top right or by selecting column headings (for example **Name**).

Select the double right arrows to open the right panel, which displays asset and metadata information. For video, video clips, and audio, you can play these assets directly from the Inspector panel (right panel).
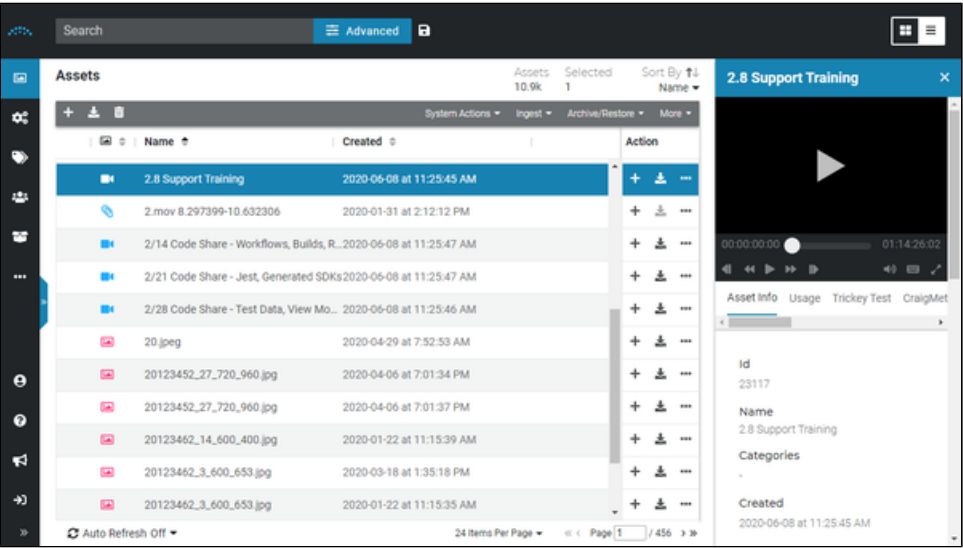
Select the **Edit** button at the bottom of the right panel to modify metadata information for the selected asset.

When viewing assets in List view, the icons in the right column display options specific to the selected asset. When viewing assets in Thumbnail view, hover over the thumbnail to access these icons.

Icon	Menu
+	Add to Collection, Add to Collection Palette
⬇	Download Source, Mezzanine, or Proxy
•••	Provides access to other workflows based on the asset type

To view an asset in Single Asset View, double select the asset.

Search for or Filter Assets

When viewing the Asset Dashboard, you can filter assets by search term, asset type, or collection.
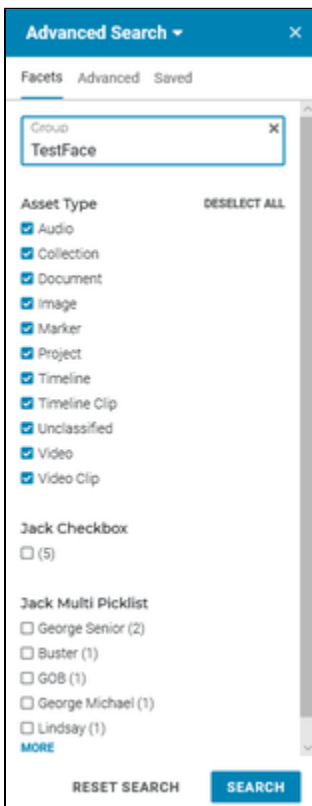
To filter assets by search term, enter the term(s) in the *Search* bar at the top of the page and press **E nter**.

Search results are returned in order of relevance, with asset names that match the search term returning first followed by assets with metadata keywords matching the search term. If no search term or advanced fields are selected, assets are sorted in descending order by date updated.

Facet Search

Use **Advanced Search Facets** to filter the assets by content type and facet pick-list metadata matches. As you make selections in the Advanced Search panel, the Asset Dashboard is updated to display your results.

1. Select the **Advanced Search** button near the Search input field to open the Advanced Search panel. You can also select the left arrow icon (») to view the left panel and select **Advanced Search** from the drop down menu.
2. To return results within a particular group, select a Group.
3. Choose which asset types you want returned in results.
4. If you have the option to filter on picklists or categories, select picklist values or categories to filter on. If a picklist or category has more than five options, select **More** to see all values. The number of assets in each category displays after the category name.

To remove all search selections, select **Reset Search**.

Search on Metadata

Use the Advanced option to search on metadata criteria.

1. Select the **Advanced Search** button near the Search input field to open the Advanced Search panel. You can also select the left arrow icon (») to view the left panel and select **Advanced Search** from the drop down menu.
2. Select the **Advanced** tab.

3. Select the field on which to search.
4. Select the operator. To search by an empty value, select *Is Blank*.
5. Enter the value or select the value (if it is a picklist).
6. To add a condition, select the **+ CONDITION** link.
7. Enter the second condition's criteria.
8. When more than one condition is being searched, select whether to search on *All* or *Any* condition.
9. Select **Search**.

Save a Search

If you have a search that you use often, implement the search then save your search so that you can quickly access it in the future. Admins can save searches and distribute them to users.

1. Implement a search.
2. Select the **Save Search (🖫)** icon next to the Advanced Search button.
3. If this search is a new search, *Save as new* should be selected. To replace an existing search, turn *Save as new* off.
4. Enter the Search name. If you are replacing an existing search, enter that search name.
5. If you are an admin, enter the Roles to which this search will be assigned.
6. Select **Confirm**.

Download Search Results as CSV

1. Once a search is run, ensure no assets are selected.
2. From the **System Actions** menu in the upper right, select **Download Search Results as CSV**.
3. A message displays indicating that large results may take time to download. Select **OK** to begin the download.

Saved Searches

1. Select the **Advanced Search** button near the Search input field to open the Advanced Search panel. You can also select the left arrow icon ( ) to view the left panel and select **A dvanced Search** from the drop down menu.
2. Select the **Saved** tab to view saved searches.
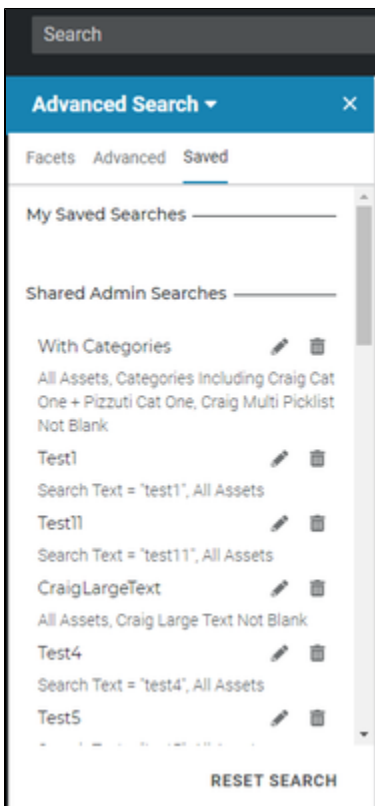
3. Your saved searches display in the My Saved Searches area. Admins can create searches and share with users. Admin searches display in the Shared Admin Searches area.
   - To display search results, select a search.

   - To delete a saved search, select the **Delete** (🗑) icon.

   - To edit a saved search, select the **Edit** (✏) icon. Modify as needed, then select **Co nfirm**.

Collection Palette

Use the Collection Palette to filter assets by a particular collection.

1. If the left panel is not open, select the left arrow ( ) icon to open it. The panel opens with the view you had when you closed it.
2. If the Collection Palette is not displayed, select the drop-down menu at the top of the left panel and choose **Collections Palette**. The number of assets in each collection displays after the collection name.
3. Select the collection name to open the collection in Single Asset View.

To remove a collection from the palette, select the **X** to the right of the collection name.

Add Assets by Dragging and Dropping

When the Collection Palette is open, you can drag and drop one or more assets directly into a collection listed in the Collection Palette. Select the assets you want to add to the collection, then click and drag onto the collection in the Collection Palette.

Select Assets

To select assets:

- Select on an asset to select it.
- Press **Shift** to select a range of assets.
- Press **Cmd** (Mac) or **Ctrl** (Windows) to select multiple assets that are not in a range.
- Press **Alt** and **-** to deselect assets.

Asset Workflows

The menu options in the Asset view include **System Actions** and **More**. Other menus and options within each menu may change depending on the asset type selected.
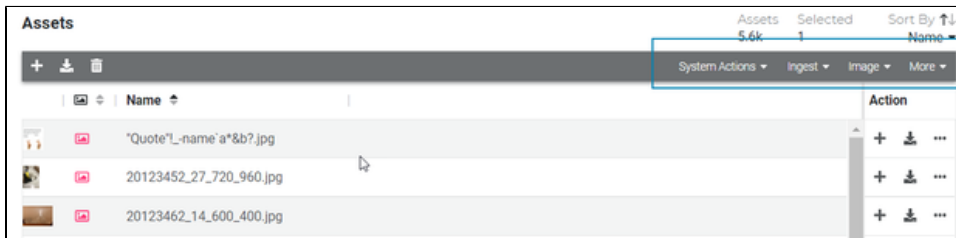
Batch Update

Batch Update lets you make changes to multiple assets at once. You must have appropriate permissions to access this feature.

1. Select one or more assets.
2. From the **System Actions** menu, select **Batch Update**. The right curtain displays.

3. Select whether you want to make changes to the selected asset(s) or all assets.
4. Select which field you want to update.
5. Depending on the field you are updating, you may need to choose what happens to the existing value (replace, append, prepend, remove).
6. Enter the new value.

7. Select the **Batch Update** button.

Add Assets to Reach Engine

You can add assets to Reach Engine using the **More** menu on the Asset Dashboard.

1. Select the **More** menu.
2. Select a type of ingest:
   - **Any Asset Ingest** lets you ingest one or multiple assets from your computer or from a shared storage location.
   - **Any Directory Ingest** lets you ingest an entire directory from a shared storage location.
3. Select the location of the asset(s): **My Computer** or **Shared Storage**.
4. Navigate to and select the asset(s).
5. Select **Select** or **Open** to choose the selected asset(s).
6. Choose a metadata form, if you want metadata applied to the asset(s). Complete the required fields.
7. Select **Run Workflow**.

Aspera Connect

Customers can use Aspera Connect and the Aspera FASP protocol to upload content and directories of content in Reach Engine Workflow modals. Aspera Connect provides value by:

- Increasing the ease in which content and data can be contributed to Reach Engine.
- Providing a more reliable, secure, and performant uploads using Aspera's FASP technology, especially for geographically distributed teams.
- Extracting additional value and utilization of the Aspera infrastructure investment that is designed for this type of workload.
- Providing faster uploads.
- Enabling high volume in a shorter period of time.

Share Assets with External Users

This action works in conjunction with the Collaborate application and allows you to share assets with a user outside of your organization. The external user receives these assets in Collaborate.

1. Select the assets you want to share.
2. From the **System Actions** menu, select **Share Assets with External User**.
3. Enter the email addresses of the external users to whom you are sending the asset.
4. Select whether to send the assets via Collaborate or email.
   - To send via Collaborate, select Collaborate users from the list.
   - To send via email, select the slider bar and enter email addresses in the Email Addresses field.
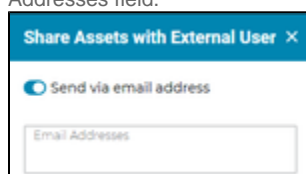
5. Enter a task description.
6. Select an expiration date. If the asset is not downloaded through Collaborate by this date, the task is removed from the user's Collaborate task list and the external user can no longer access the shared asset.
7. Optionally, select a metadata form. When the external user views this asset in Collaborate, they will also be able to view the metadata information associated with that asset.
8. Select **Confirm**.

Request Assets from External Users

If you are working with another company or group who does not use Reach Engine but whom you are relying upon to provide assets, you can request these assets directly from Access.

1. From the **System Actions** menu, select **Request Assets from External User**.
2. If the other company or group uses Collaborate to supply assets, select the Collaborate Users from the list. If the company or group does not use Collaborate, select the *Send via email address* option and enter the user's email address.
   Note: If you share assets with a user via the email address option, the user receives an email to join Collaborate; however, this user is not added to the Reach Engine database. The user has Collaborate access but does not display in the list of Collaborate users (that is, those users added by an Admin).
3. Enter a task description.
4. Select an expiration date.
5. You can also select a metadata form, which will require certain information be submitted.
6. If the requested asset should be added to a new collection, select *Ingest to a new Collection.* Then, provide a name for the new collection and select the appropriate categories.
7. If the requested asset should be added to an existing collection, select the collection.
8. Select **Confirm**.

Export Assets

If you have the appropriate permission, you can export videos, video clips, and images.

1. Select one or more images or one or more videos or video clips. Export options are not available if you select a mixture of images and videos.
   - If videos are selected, select the **System Actions** menu then **Export Video**.
   - If images are selected, select the **Image** menu then **Export Image**.
2. Select the export destination.
3. For a video or video clip, select an export template.
4. For an image, you can enter the export width and/or height in pixels. If you enter only one value, the other value remains the original image size. If no width or height value is entered, the image is exported at its original size.
5. Select **Confirm**.

Download an Asset

If you have the appropriate permission, you can download assets. In order to download, you must have a user role that allows downloading of high res source, proxy, or both.

1. Select the asset or assets that you want to download.
2. Select the **Download** icon () on the right then choose whether to download Source, Mezzanine, or Proxy.
3. Select **Confirm**.

Download via Aspera Connect

Customers that have custom workflows that produce a downloadable file can now use Aspera Connect and the Aspera FASP protocol to download the data from block-based on-premises or S3 storage. Using Aspera Connect provides value by:

- Increasing the ease in which content and data can be extracted from Reach Engine.
- Providing more reliable, secure, and performant downloads using Aspera's FASP technology, especially for geographically distributed teams.
- Extracting additional value and utilization of the Aspera infrastructure investment that is designed for this type of workload.
- Providing a business value for customers managing hybrid environments (cloud/on-premises or multiple sites).

When a user tries to download an asset that is on the Aspera mount location or if a user selects Aspera when ingesting an asset, Reach Engine verifies that Aspera Connect is installed. If not, the user is prompted to install it.

When you download assets, a download asset workflow begins. You can download assets that are part of a batch download directly from the Workflow Status page.

1. Select the **Workflow** menu then **Workflow Status**.
2. Find a batch download entry in the workflow list.
3. Select the **Download** icon (![download icon]).

SINGLE ASSET VIEW

When you double-click an asset from the Dashboard, it opens in the Single Asset View. You can preview your content and metadata. Other options are available, depending on the asset type.

- For videos, images, documents, audio, you can preview your content. You cannot preview source files of type PSD, AI, or EPS.
  - To change the size of the preview window, drag the bottom tab (highlighted by the blue box below) up or down.
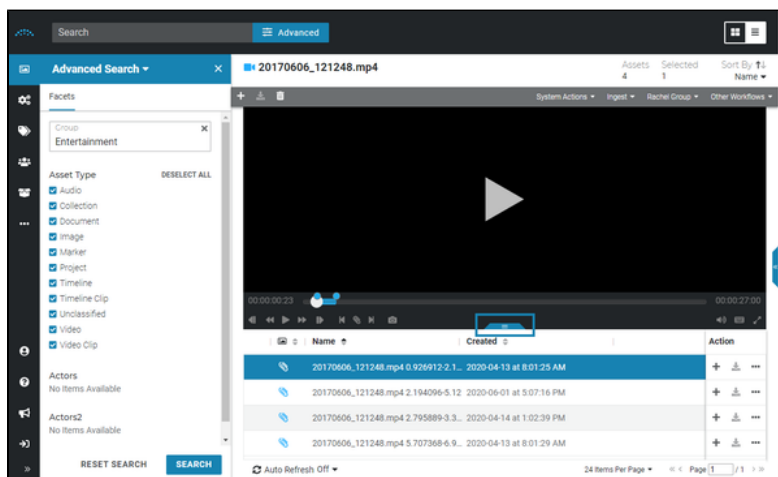
- Expand the left panel to filter the assets using facets.

- Use the video icons to step backward by frame (![icon]), rewind (![icon]), play/pause (![icon] / ![icon]), fast forward (![icon]), step forward by frame (![icon]), mark in point (![icon]), create a clip (![icon]), mark out point (![icon]), and set a thumbnail (![icon]) for a video. Refer to the Keyboard Shortcuts option in the left panel for keyboard video options.

- To view a video or video clip full screen, select the full screen (![icon]) icon on the far right of the video icon bar. Press **Esc** key to exit the full screen view.

- Video clips indicate the clip start and end point in relation to the entire video.
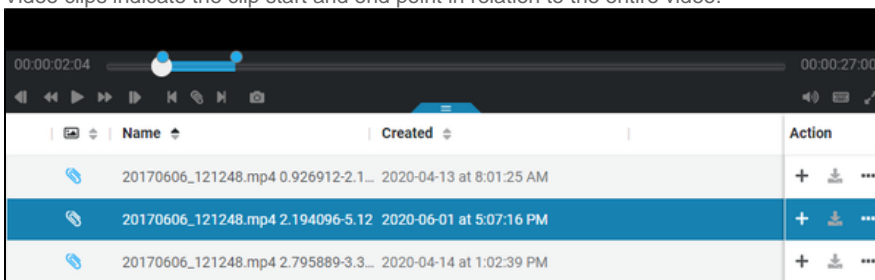
- Audio assets allow you to play the audio file.
- A collection displays its individual assets. The actions available are dependent on the asset selected.
  - Expand the right panel to view asset details.
  - Expand the left panel to filter the assets using facets.

- Drag the bottom tab down or up to increase or decrease the preview area.
- You can also modify the preview size by selecting a percentage from the drop down menu on the right (e.g., *Fit to Screen*).
- Users can switch image assets to view proxy or source file.
- To view the preview full screen, select the **Full Screen** ( ) icon in the lower right of the preview area. Press **Esc** key to exit the full screen view.

Within Single Asset View,

- Select the double arrows to open the right panel to display asset and metadata information.
- Select the **+** icon to the right of the asset creation date to display actions available to that asset.
- Select the **Download** icon ( ) located to the right of the **+** icon or in the upper left to download the asset.
- Menu options specific to the asset display in the upper right.

Set Video Thumbnail

You can specify which thumbnail image you want to display in list and tile view for a video.

1. Open a video asset in single asset view.
2. Use the scrubber to find the image in the video that you want to use as a thumbnail.
3. Select the camera icon to set the thumbnail image to the current image.

COLLECTIONS

Collections let you organize and group assets together. Assets can belong to multiple collections. Collections can be private or accessible to all users based on their roles and permissions. Collections can show up in search results. Think of collections like putting an app on your computer dock or toolbar.

Collections can be used to perform automated actions on all assets within the collection. You can Press **Esc** key to exit the full screen view. a collection to see the assets that are part of that collection.

View a Collection

Collections are identified by the **Collection** ( ) icon in the Asset Dashboard. You can search for collection by name or you can filter the Asset Dashboard to display only collections using Advanced Search. Private collections are identified by the eye slash ( ) tag before the file name in list view or in the upper left corner of a tile in tile view.

If a collection has been added to the Collection Palette, you can display the collection by Press **Esc** key to exit the full screen view.ing the collection name in the Collection Palette.

To view all assets associated with a collection, double click a collection name to open it in single asset view.

- From within a collection view, you can export all images within the collection by selecting the **Image** menu then **Export Collection Images**.
- From within a collection view, you can modify the privacy settings of a collection by selecting **Edit** in the Inspector panel (right panel) and changing the *Private Collection* setting.
- From within a collection view, you can move assets to another collection. To move multiple assets, select assets, select the **+** icon above the preview window, then select **Move to Another Collection**. To move a single asset, click the **+** icon for that asset.

Note: Collections that are marked as *Private* do not display in Search results. You can only mark collections that *you* create as Private.

Choose Collection Thumbnail

You can select which image asset you want to use as the collection thumbnail.

1. View the collection in single asset view.
2. Select the image or video asset from within the collection that you want to use as the collection's thumbnail.
3. From the **System Actions** menu, select **Set as Collection Thumbnail**.
4. Refresh your browser to see the new collection thumbnail. The image or video displays as the thumbnail in tile view on the Assets page and as the thumbnail on the single asset view / unified view preview for a collection.

Collection Permissions

Two types of permissions apply to collections:

- Create collections.
- Modify collection contents.

If a user has only the Create Collections permission, the user:

- Can create new collections (public and private).
- Cannot add assets to public collections.
- Can add assets to private collections.

If a user has only the Modify Collection Contents permissions, the user:

- Cannot create public collections.
- Can create private collections.
- Can add assets to both public and private collections.

If a user has both permissions, the user:

- Can create public and private collections.
- Can add assets to public and private collections.

If a user has neither permission, the user:

- Cannot create public collections.
- Can create private collections.
- Cannot add assets to public collections.
- Can add assets to private collections.

Create an Empty Collection

When you create a collection with no assets selected, an empty collection is created.

1. In the Asset Dashboard, select the **+** icon in the upper left.
2. Select **Create Collection**.
3. Enter a collection name.
4. Select categories, if needed.
5. Select whether the collection is public or private.
6. Select **Confirm**. The button text changes to *Working on it*, so that you know the collection is being created.
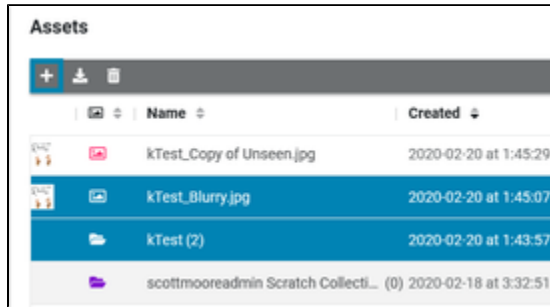
Add Assets to an Existing or a New Collection

All asset types except collections can be added to a collection.

1. From the Asset Dashboard, select one or more assets.
2. Select **Add to Collection** from one of the following locations.
   - If one asset is selected and you are in List view, select the **+** icon to the right of the asset name.

- If multiple assets are selected, select the **+** icon in the upper left of the asset list.

3. Select whether to add the selected asset or all assets to the collection.
     - To add the asset to an existing collection, select in the Collections box and select the collection(s) to which the asset will be added.
     - To add the asset to a new collection:
         a. Select **New Collection**.
         b. Enter a collection name.
         c. Select any associated categories.
         d. To create a collection that only you can see, select **Private Collection**.
         e. To add the newly created collection to the Collection Palette, select **Add to Palette**.
4. Select **Confirm**. The button text changes to *Working on it*, so that you know the action is happening.

The date is updated for a collection when assets are added to or removed from the collection.

Add an Existing Collection to the Palette

Add an existing collection to the Collection Palette:

1. If the left panel is not open, select the left arrow (≫) icon to open it. The panel opens with the view you had when you closed it.
2. Select the drop down menu at the top of the left panel and choose **Collections Palette**.
3. Select **+ Collection** in the upper right of the panel.
4. Select which collection you want to add.
5. Select **Confirm**.

The **Status** screen displays workflow information, including status. The workflow list is updated automatically.

WORKFLOWS

From the Workflow Status page, you can view workflow status, search workflows, pause or resume workflows, and download content from workflows.

Filter and Search Workflows

1. Select the **Workflows** (⚙) menu then **Workflow Status**.
2. Select the arrow to expand the right curtain.
     - Enter a search term to narrow the results.

- Filter the list of statuses by selecting which statuses to display.

Advanced Search ▾   ✕

Status   DESELECT ALL

☑ Abandoned (4)

☑ Completed (4.7k)

☑ Created (1)

☑ Executing (0)

☑ Failed (9)

☑ Paused (2k)

☑ Queued (0)

☑ Stalled (20)

  - To return only those workflows that contain downloads, select *Downloads* in the Tags section.

3. Administrators have additional search options listed below the *Status* checkboxes.

Types   SELECT ALL

☐ Dev Step

☐ Dev Workflow

Tags

☐ Downloads

Started By   ▾

Started After ─────────────────

Date

mm/dd/yyyy

Time

hh:mm --

───────────────────────

Started Before ─────────────────

Date

mm/dd/yyyy

Time

hh:mm --

  - To return workflows that contain Dev Step and/or Dev Workflow, select the appropriate *Types*.
  - To return workflows started by a particular person, in the *Started By* field, choose one or more names from the list or begin typing the name to filter results.
  - To return workflows started before or after a date and time, enter your search criteria in *Started After* and/or *Started Before*. If only the time value is entered, the current date is used. If only a date is entered, 12:00am is used as the time.

4. Select **Search** once you have defined your search criteria.

Resume / Abandon a Workflow

If a workflow stalled, failed, or paused/abandoned, you can choose to abandon or resume the

workflow. Select the failed workflow, then choose either **Abandon** (⊘) or **Resume** (▶) icon in the Action list to the right of the workflow name. Workflows can be resumed if the workflow was stalled or paused/abandoned.

To abandon or resume multiple workflows, press and hold the Shift key while selecting workflows then select the **Abandon/Resume** icon at the top right of the workflow status list. When multiple workflows are chosen and resumed, if some workflows cannot be resumed, they are skipped but all others are resumed.
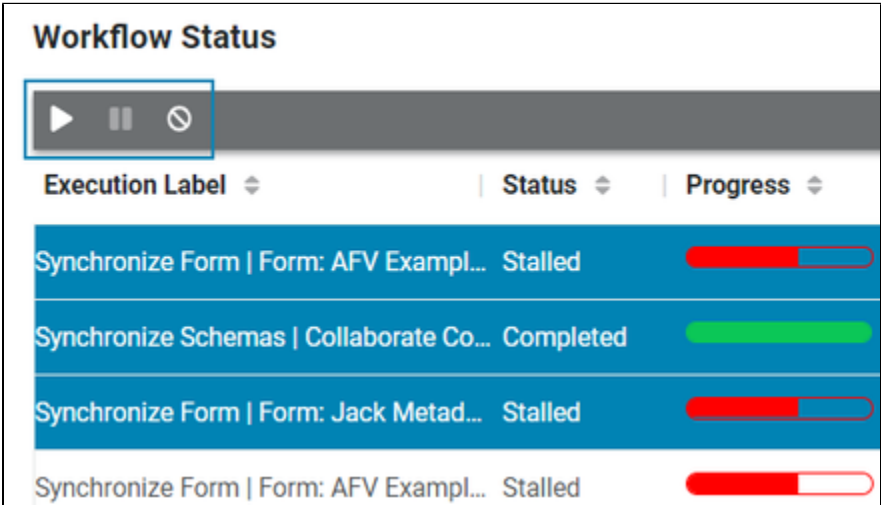
By choosing to abandon paused, stalled, or failed workflows that you don't need to track, your workflow dashboard stays clean.

Workflow Information

The right curtain on the Workflow page allows admin and workflow authors to view in-depth information about workflows. To view these details, select a workflow row by clicking somewhere in the row other than the Name. When you select the Name, it opens the Single Workflow View.
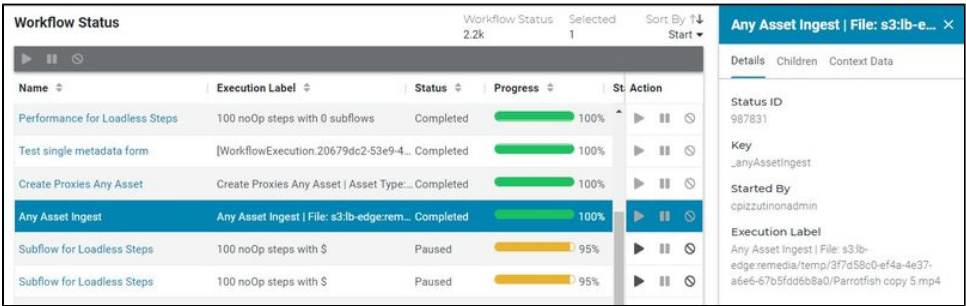
- The **Details** tab includes status ID, type, key, started by, and a link to download files (if applicable).
- The **Children** tab includes status ID, parent status ID, type, name, started by, download files (if applicable), and class.
- The **Context Data** tab displays information produced by the workflow or subflow selected. You can view this data as Key Value pairs (default), or select the JSON slider to display as JSON. In either view, select the **Copy** (⧉) icon to copy the Content Data to the clipboard.

Single Workflow View

Click the workflow **Name** link or double-click a workflow row to open it in Single Workflow View. From this view, child workflows are listed. Select a row to display the child's information in the right curtain. To dive further into a child's details, click the **Name** or **Children** link or double-click a row.

Use the buttons in the upper left to resume, pause, or abandon a step or subflow.

Download Content

Some workflows produce downloadable content. From the Workflow Status page, any workflow with downloadable content displays a download icon, which allows you to download the content directly from the Workflow Status page. Click the download icon on any row that contains downloadable content.

USER SETTINGS

The User ( ) icon provides access to view settings and password reset.

View Settings

1. Select the **User** ( ) icon then **View Settings**.
2. To view thumbnails in List view, turn on the *Display thumbnails in List View* option.
3. To select different settings for Tile view, turn off the *Use same metadata* slider. When off, you have an area for List and Tile Metadata.
4. Select in the Available Metadata field to find metadata that you want displayed.
5. Select and drag the **Reorder** ( ) icon to move metadata placement.
6. Select **Save** to save your settings and modify your asset display.

Reset Password

If single sign-on is enabled by your administrators, Reset Password is disabled. You must manage your password through your provider.

1. Select the **User** ( ) icon then **Reset Password**.
2. Enter your current password.
3. Enter your new password twice.
4. Select **Confirm**. The button text changes to *Working on it*, so that you know the action is happening.

Provide Feedback

A **Feedback** ( ) icon lets you provide feedback, request features, vote on feature requests, see what is in progress, and see which features were recently released. The Feedback icon is configured per installation by your administrator using the Dynamic Property of *feedbackEnabled* (refer to the Admin User Guide for more information). If you do not see the Feedback icon, your company elected to hide the Feedback icon.

1. Select the **Feedback** ( ) icon.
2. Select an option:
   - Select **Give Feedback** to complete a feedback questionnaire.
   - Select **Request a Feature** to submit an idea, view and vote on existing ideas, view and vote on candidates, view in progress features, and view features recently launched.

Request a Feature

- Select the **New Ideas** tab to explore new ideas submitted by other users.
- Select **Candidates** to explore ideas that are in the pipeline for development.
- Select **In Progress** to view features under development.
- Select **Launched** to view features that were recently launched.

For any features on one of the tabs, select the feature card to view the full description. You can also vote by indicating how important the feature is to you and why.

ADMINISTRATORS

As an administrator, you can:

- Import and export workflows, assign roles, and define their visibility.
- Add, edit, and delete schedules, watch folders, and workflow groups.
- Add, edit, and delete facets.
- Add, edit, and delete metadata forms and groups. The metadata forms and groups you create are available throughout the Reach Engine ecosystem, based on a user's role(s).
- Create Access and Collaborate users who can be assigned roles that define the types of actions they can perform.
- Create roles, set Reach Engine access, and manage the permissions assigned to a group of users.
- Add, edit, and delete categories that can be used for organizational purposes and permissions restrictions.
- Set up Execution servers, separate from Reach Engine servers.

Workflows

As an administrator, you can view and download all workflows currently available in Reach Engine and ascertain which workflow groups contain a specific workflow.

Display and Search Workflows

1. Click **Workflows** in the left menu, then click **Workflows** to display a list of existing workflows.

2. Select a workflow, and click the **Edit** icon ( ) in the Action column to edit the workflow. Th e Edit Workflow panel displays at the right, where a workflow can be renamed, enabled or disabled, made visible, set to run with a right-click, or set as Admin Only.

3. A workflow's "Subject Qualifier Expression" can be modified. A Subject Qualifier further refines the attributes on an asset that must be true for the workflow to be displayed to an end user. Subject Qualifiers are written in Spring Expression Language (SPeL) **Important Note:** Subject Qualifier Expression text field is only available if subjectDOClassName is not empty in the workflow.

4. If *Keep these Display Preferences* is turned on, when a workflow is reimported, the values are not overwritten with the API values. If turned off, when a workflow is reimported, the values are overwritten.

5. Click **Save**.

Import a workflow using the Upload icon ( ) at the top right of the Workflows screen. As an admin, when you import a workflow, you have the option to override its flags:

- Enabled
- Visible
- Admin Only
- Right-click

To ensure an import is always correctly flagged in the Access (Admin) UI, any reset will revert on workflow re-import and flags will remain the way they were set by the Admin, regardless of what's in the workflow.

Workflow Step Queues

To view the global workflow steps that are configured and the activities within them in Spartan, navigate to /alpha/#/workflow-step-queues.

Workflow Groups

Administrators can create groups to manage workflows.

Display and Search Workflow Groups

1. Click **Workflows** in the left menu, then click **Workflow Groups** to display a list of existing workflow groups.
2. Select a group. You can:

- Click the **Edit** icon (✎) in the Action column to edit workflow groups.
- Click the **Add** icon (➕) at the top left to add new workflow groups.
- Click the **Delete** icon (🗑) in the Action column to remove a workflow group. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple workflow groups.

To search for workflow groups, click in the **Search** box and enter your search term.

To promote or demote workflow groups, click the Reorder icon (☰) to open the Order Workflow Groups panel. Drag and drop workflow groups to the desired position in the list of groups and click **Save**.

Metadata Forms in a Workflow

When a default metadata form is specified for a workflow, the form is rendered for user input. To specify a default metadata form in a workflow, use the following XML.

```
<contextDataDef name="singleMetadataForm" dataType="MetadataForm"

label="Metadata Form" userInput="true" defaultDataExpression="
{'metadataFormId': 200}"/>
```

Create a Workflow Group

1. Click **Workflows** in the left menu, then click **Workflow Groups** to display a list of existing workflow groups.
2. Click the Add icon (➕) at the top left to open the Add Workflow Group panel.
3. Enter a workflow group **name**.
4. Click the **Workflows** field and choose a workflow from the drop-down list. Repeat to add multiple workflows.
5. Click **Save**. The new workflow group displays in the list.

You can re-sort the groups in the list by dragging and dropping them into the order you want.

Workflow Groups display in the Actions (•••) menu for related assets.

Watch Folders

Reach Engine watch folders are used to trigger workflows against files placed in the folder. Watch folders include a default set of properties, but can also contain custom properties that are unique to the Reach Engine workflow executed against the watch folder.

Click **Workflows** in the left menu, then click **Watch Folders** to display a list of existing watch folders.

Important: When watch folders are added or modified, they are updated immediately and Reach Engine does not need to be restarted.

From this page, you can:

- Click the **Edit** icon (✏) in the Action column to edit a watch folder.
- Click the **Delete** icon (🗑) in the Action column to remove a watch folder.
- Toggle the **Enabled** slider to turn on/off a watch folder.
- Select a column name to reorder the list.
- Enter a search term in the **Search** box to filter the watch folders.

Create a watch folder

1. Click the **Add** icon (➕) at the top left.
2. Enter a watch folder name.
3. Enter the watch folder path.
4. Select which workflow to run.
5. In File Data Def, select which data definition to assign to an incoming file. Data Defs are variables that are used in Workflows. Use the Data Def inputs to define the value of a data def to populate on any execution of a Watch Folder / Schedule.
6. For Polling Interval, select how often the watch folder (in seconds) should be checked for new files. After finding a new file in the folder, Reach Engine checks the size of the file and waits until it remains the same size for the number of seconds set as the polling interval. After checking the file twice and verifying the size is unchanged, the workflow is then initiated.
7. If your watch folder as subfolders, turn on **Process Folders** to also process subfolders within the specified path.
8. To have the system wait until it can validate that no other systems or users are accessing or modifying a file to decrease the likelihood that a file will be processed prematurely, turn on **Require a File Lock**. This option is used in conjunction with Polling Interval.
9. To delete a file from the watch folder after successfully executing the workflow, turn on **Delete on Success**.
10. You can add context data using name/value pairs in Data Def 1. Select **+ Data Def** to add additional pairs.
11. Select **Add**. Newly added watch folders are enabled by default.

Schedules

You may want certain workflows to run at a scheduled interval. To display the list of recurring workflow schedules, click **Workflows** in the left menu, then click **Schedules**.

Note: With the release of the Workflow Schedules feature, Reach Engine will automatically migrate any existing scheduled workflows (CRONS). All intervals will be created as *Custom*. Once imported, Local Properties entries for CRON configurations will be ignored and Reach Engine will not need to be restarted to add new schedules or modify existing ones.

Create a workflow schedule

1. Click the **Add** icon (➕) at the top left to add new workflow schedule.
2. Enter the schedule name.
3. Select the workflow to run.
4. Select an Interval Time. To use a CRON expression, select **Custom** then enter the CRON expression.
5. Select **Add**. Schedules are not enabled by default.

Modify existing workflow schedules

1. Select a schedule. The right curtain displays schedule information.
2. Modify the schedule as needed.
3. To disable a schedule, toggle the **Enable Schedule** slider.

Note: If you delete a schedule, this action cannot be undone.

Metadata

Metadata levels can be used to build a metadata schema:

- "Facets" can be used to group pick-list metadata fields and make those fields available to specific user role(s).
- "Fields" are the lowest level of a hierarchy. For example, every drop-down in the football search is an individual picklist (season, team, player). Fields can be combined to create a hierarchy that defines the order in which the fields can be searched or added to an asset as metadata.
- "Forms" create a structure of fields when users ingest content into Reach Engine.
- "Groups" contain metadata fields that can be used to organize fields for visual representation, as well as for regulating visibility of fields.
- "Hierarchies" allows you to order fields in a dependent order for tagging and searching content.
- "Categories" are applied to metadata groups. They are primarily used for organizational purposes and permissions restrictions.

Fields and hierarchies can be combined to create forms and/or groups.

Metadata Facets

Facets help users search and filter data within Reach Engine to more quickly get to the asset(s) they want. Admins can create facets for metadata pick-list fields and then assign that facet to a role(s). When a user logs into Reach Engine, the user is presented with the metadata fields for the facets that their role(s) have visibility to see.
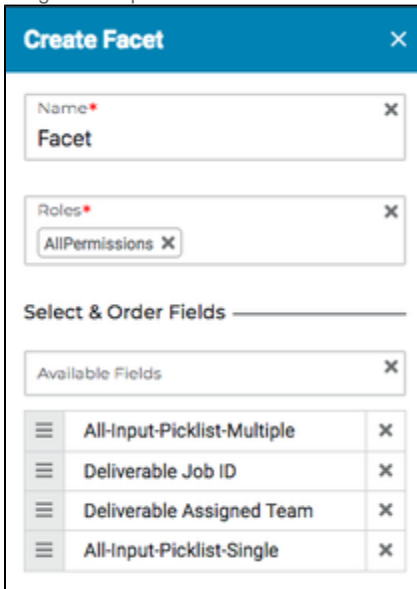
Display and Search Facets

1. Click **Metadata** in the left menu, then click **Facets** to display a list of existing facets.
2. Select a facet. You can:

- Click the **Edit** icon ( ) in the Action column to edit facets.
- Click the **Add** icon ( ) at the top left to add new facets.
- Click the **Delete** icon ( ) in the Action column to remove a facet. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple facets.

Facets are sorted alphabetically by display name.

Create a Facet

1. Click **Metadata** in the left menu, then click **Facets**.
2. Click the Add icon ( ) at the top left to open the Create Facet panel.
3. Enter a **Facet Name**.
4. Choose the **Roles** for which the Facet is applicable. You can choose more than one role.
5. Choose the **Fields** for which the Facet is applicable. You can choose multiple pick-list fields.

6. Drag-and-drop the fields to define the order of the visible properties.

Note: Properties within a Facet that are greyed out are not visible to all selected roles because of the role permissions.

7. Click **Add**. The new Facet displays in the list.

Metadata Fields

Fields are the lowest level of a hierarchy. To view the existing metadata fields, select **Metadata** from the left menu then **Fields**.

- If a field is archived, the Boost and Boost Priority fields are disabled. Archived fields are not shown to users in the user interface but assets with values set on that field are not removed.
- If a Boost is not active, the Boost Priority field is disabled.

Create a metadata field

1. Click the **Add** icon (➕) at the top left.
2. Enter the field name.
3. Select the field data type. See Picklist fields below for information specific to picklists.
4. Turn on the **Boost** toggle if the field is searchable.
5. Specify the Boost Priority. This value indicates how much to weight the field for its relevance when doing a basic search in Reach Engine.
6. Select **Add**.

Picklist fields

From the list of fields, you can edit a picklist field in single asset view by selecting the picklist name link in the Name column. This option makes editing a large picklist easier.

When Picklist is selected as the field type, enter the possible values in the Value section.

1. Click the **Add Item** button.
2. Enter a name.
3. You can enter a Custom ID. If this field is left blank, a unique ID is created. The ID cannot be modified once set.
4. Click **Confirm**.

Other picklist actions:

- Use the Search field to filter long picklists so you can find what you need.
- Click the pencil icon to edit an existing picklist item.
- Click the **X** to remove an item from a picklist. Removing the item only removes it from the picklist. Existing instances of this value remain on assets.

- You can import values from a CSV file for a picklist field by selecting the import (⬇) icon from the picklist field row from the main field screen. You can also select the import icon from the action buttons at the top of single asset view. If you are editing an existing field, choose whether to replace existing values or append values to the existing list.

- You can export picklist items to a CSV by selecting the export (⬆) icon from the picklist field row from the main field screen. You can also select the export icon from the action buttons at the top of single asset view. The file will contain the name and ID of each picklist item.

Categories

Categories are applied to collections, videos, clips, audio assets, images, projects, other assets and metadata groups. They are primarily used for organizational purposes and permissions restrictions.

Note: A user's Role must have association to all categories listed on an asset to view that asset.

Common examples of categories include:

- Business Process Uses: Ready for review, accepted, rejected, ready for editing, raw materials, completed projects.
- Departmental Uses: Post-production, public relations, producers, client.
- Multi-Company Uses: Accelerated Entertainment, Levels Beyond, External Company.

Display and Search Categories

1. Click **Metadata** in the left menu, then click **Categories** to display a list of existing categories.
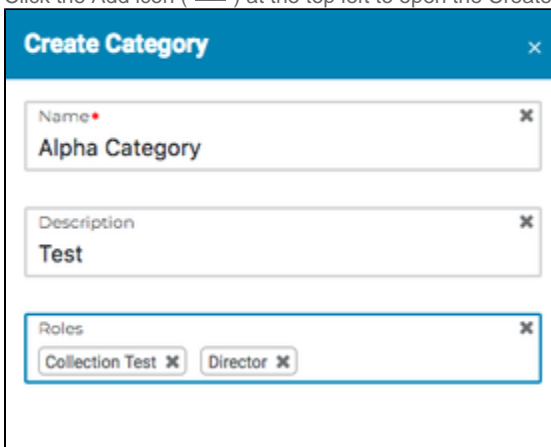2. Select a category. You can:

- Click the **Edit** icon (🖊) in the Action column to edit categories.
- Click the **Add** icon (➕) at the top left to add new categories.
- Click the **Delete** icon (🗑) in the Action column to remove a category. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple categories.

Categories are sorted alphabetically by display name.

To search for categories, click in the **Search** box and enter your search term. The search looks at the Display Name, Description, and ID fields.

Create a Category

1. Click **Metadata** in the left menu, then click **Categories**.
2. Click the Add icon (➕) at the top left to open the Create Category panel.

3. Enter a display name and description for the new category.
4. Choose the roles associated to the category.
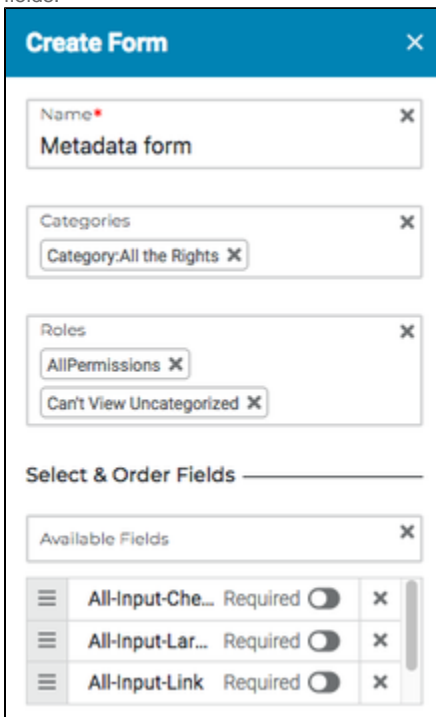5. Click **Add**. The category displays in the list.

Display and Search Metadata Forms

1. Click **Metadata** in the left menu, then click **Forms** to display a list of existing metadata forms.
2. Select a form. You can:

- Click the **Edit** icon (✎) in the Action column to edit metadata forms.
- Click the **Add** icon (➕) at the top left to add new metadata forms.
- Click the **Delete** icon (🗑) in the Action column to remove a metadata form. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple metadata forms.

To search for metadata forms, click in the **Search** box and enter your search term. For example, there are four forms: Test, Another Test, Test This, and Form. If the text "test" is typed in the box, the first three forms with the word "test" in their names display. If "this" is typed in the box, only the form "Test This" would display.

Create a Metadata Form

1. Click **Metadata** in the left menu, then click **Forms** to display a list of existing metadata forms.
2. Click the **Add** icon (➕) at the top left to open the Create Form panel.
3. Enter a **Name** for the new Metadata Form.
4. Choose the **Categories** for the form. You may choose multiple categories. Anytime a metadata form is used for a Reach Engine ingest, the assets will be tagged with the category assigned from the metadata form. Additional categories can also be assigned based on a user's role from the Prelude and Premiere panels.
5. Choose the **Roles** for the form. You may choose multiple roles.
6. Choose the **Fields** you want to associate with the Metadata form. You can choose multiple fields.

7. Drag-and-drop the fields to define the order of the visible properties.
8. Move the slider beside a Metadata Field to make it a required field when the Metadata form is displayed.
9. Click **Add**. The new form displays in the list.
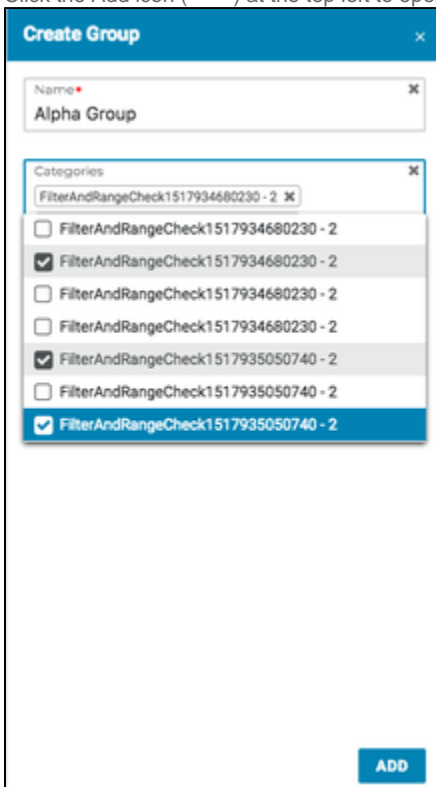
Display and Search Metadata Groups

Metadata groups contain metadata fields. Metadata groups are used to organize fields for visual representation inside Reach Engine, as well as for regulating visibility of fields. Through the use of categories and roles, administrators determine metadata groups visible to and editable by users.

1. Click **Metadata** in the left menu, then click **Groups** to display a list of existing metadata groups.
2. Select a group. You can:

- Click the **Edit** icon (✏) in the Action column to edit metadata groups.
- Click the **Add** icon (➕) at the top left to add new metadata groups.
- Click the **Delete** icon (🗑) in the Action column to remove a metadata group. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple metadata groups.

To search for metadata groups, click in the **Search** box and enter your search term.

Create a Metadata Group

1. Click Metadata in the left menu, then click **Groups.**
2. Click the Add icon (➕) at the top left to open the Create Group panel.

3. Enter a **name**. The name you enter becomes the group's header throughout Reach Engine's applications.
4. Select **category/categories** to associate the group to the category in the user interface.
5. Click **Add**.

Metadata Mappings

Metadata mappings provide templates that Access users can use to map EXIF fields to metadata fields in Reach Engine. To view the metadata mappings available in Reach Engine, click **Metadata** in the left menu, then click **Mappings**. Currently, this information is read only and cannot be modified through Spartan.

Create and Manage Users

Administrators can create Reach Engine Access and Collaborate users who can be assigned roles that define the types of actions they can perform.
Note: Reach Engine can be configured to map roles to users based on OAuth groups. Please contact your Levels Beyond representative for details.

Reach Engine Users

Display and Search Reach Engine Users

1. Click **Users** in the left menu, then click **Reach Engine Users**.
2. Select a user. You can:

- Click the **Edit** icon ( ) in the Action column to edit users.
- Click the **Add** icon ( ) at the top left to add new users.
- Click the **Archive** icon ( ) at the top left to archive a user. You can multi-select (CTRL+Click or Command+Click) and click the Archive icon at the top left to archive multiple users.
- Click the **Key** icon ( ) to reset a user's password.

Note: This option is only available if your organization does not use Okta, Ping, LDAP, or SAML for identity management and single-sign on (SSO) security. In organizations that use the preceding tools, the Reach Engine password is linked with the SSO and must be reset at an organization level.
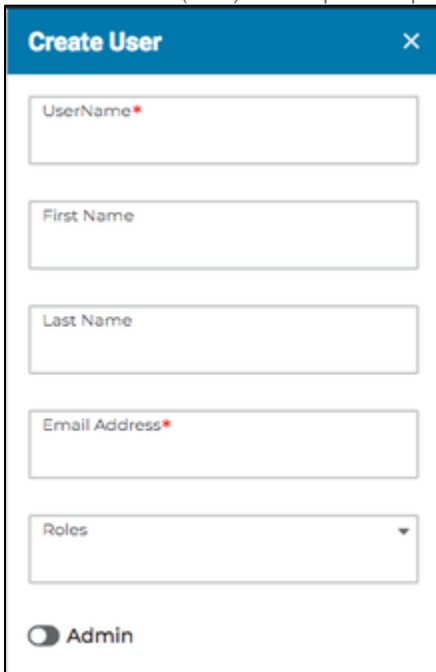
To disable a user, but not archive the user, select a user, click the **Edit** icon to display the Edit User panel, and then deselect the **Enabled** slider.

To display archived users in the list of users, move the **Archived** slider, at the top right above the list of users, to the right.

To search for users, click in the **Search** box and enter your search term.

Create a Reach Engine User

1. Click **Users** in the left menu, then click **Reach Engine Users**.
2. Click the Add icon ( ) at the top left to open the Create User panel.

3. Enter a unique **User Name**.

4. Enter the user's **first** and **last** name.

5. Enter a unique **Email Address**.

6. Assign one or more roles to the user in the **Role** field. Roles assigned to the user determine the assets the user can view, as well as Reach Engine features that are accessible to the user. **Note:** A user's role must have association to all categories listed on an asset to view that asset.

7. Move the **Admin** slider to the right to give the user administrative access to Reach Engine.

8. Click **Add**. The new user displays in the list.

The new user receives an email welcome to Reach Engine. The email contains the user's User ID and a system-generated default password and prompts the user to change the password when they first log into Reach Engine.

Note: Access uses BCrypt encryption to store passwords.

Collaborate Users

Display and Search Collaborate Users

1. Click **Users** in the left menu, then click **Collaborate Users**.

2. Select a user. You can:

- Click the **Edit** icon (✏) in the Action column to edit users.

- Click the **Add** icon (➕) at the top left to add new users.

- Click the **Delete** icon (🗑) in the Action column to remove a user. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple users.

Create a Collaborate User

1. Click **Users** in the left menu, then click **Collaborate Users**.

2. Click the Add icon (➕) at the top left to open the Create Collaborate User panel.

3. Enter the user's **first** and **last** name.

4. Enter a unique **Email Address**.

5. Click **Add**. The new user displays in the list.

The new user receives an email welcome to Collaborate. The email contains the user's User ID and a system-generated default password and prompts the user to change the password when they first log into Reach Engine.
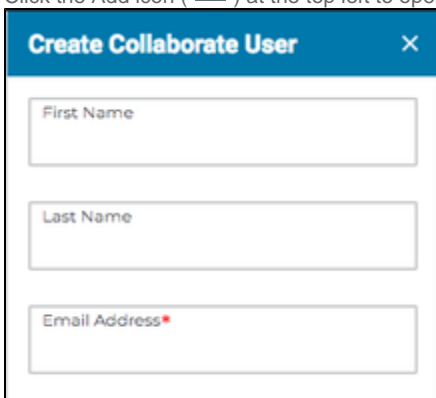
Categories

Categories are applied to collections, videos, clips, audio assets, images, projects, other assets and metadata groups. They are primarily used for organizational purposes and permissions restrictions. **Note:** A user's Role must have association to all categories listed on an asset to view that asset. Common examples of categories include:

- Business Process Uses: Ready for review, accepted, rejected, ready for editing, raw materials, completed projects.
- Departmental Uses: Post-production, public relations, producers, client.
- Multi-Company Uses: Accelerated Entertainment, Levels Beyond, External Company.

Display and Search Categories

1. Click **Users** in the left menu, then click **Categories** to display a list of existing categories.
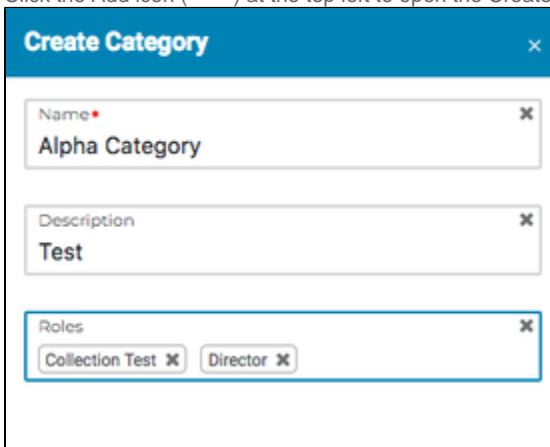2. Select a category. You can:

- Click the **Edit** icon (　✏　) in the Action column to edit categories.
- Click the **Add** icon (　＋　) at the top left to add new categories.
- Click the **Delete** icon (　🗑　) in the Action column to remove a category. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple categories.

Categories are sorted alphabetically by display name.
To search for categories, click in the **Search** box and enter your search term. The search looks at the Display Name, Description, and ID fields.

Create a Category

1. Click **Users** in the left menu, then click **Categories**.
2. Click the Add icon (　＋　) at the top left to open the Create Category panel.

3. Enter a display name and description for the new category.
4. Choose the roles associated to the category.
5. Click **Add**. The category displays in the list.

Roles

Administrators can create roles, set Reach Engine access, and manage the permissions assigned to a group of users. For example, an editor may be assigned create, modify, view and delete permissions; a reviewer may be assigned only modify and view permissions; and a producer may be assigned only create, modify and view permissions.
Each role can be associated with one or more categories. Roles can also be associated with one or more metadata groups.
Note: When modifying Roles, a Modify Asset Categories checkbox allows Administrators to control which Roles can modify asset categories.

Display and Search Roles

1. Click **Users** in the left menu, then click **Roles**.
2. Select a role. You can:

- Click the **Edit** icon (　✏　) in the Action column to edit roles.

- Click the **Add** icon (＋) at the top left to add new roles.

- Click the **Delete** icon (🗑) in the Action column to remove a role. You can multi-select (CTRL+Click or Command+Click) and click the Delete icon at the top left to delete multiple roles.

To search for roles, click in the **Search** box and enter your search term.

Create a Role

1. Click **Users** in the left menu, then click **Roles**.
2. Click the **Add** icon (＋) at the top left to open the Add Role panel.
3. Enter a **name** for the role.
4. Choose **metadata groups and permissions**.
5. Choose the **category permissions**:
     - Choose **View Uncategorized Assets** to give non-admin users access to view assets that do not have categories. The following scenarios occur if a user's role does not have "View Uncategorized Assets" set:
         - When a clip is created, the clip inherits the parent video's categories.
         - When a new collection is created, setting a category is mandatory.
         - When a new project is imported, setting a category is mandatory.
     - Choose **Edit Asset Categories** to allow users in the role to modify asset categories.
6. Choose the **Role(s)** for which the categories are visible.
7. Choose the default categories applied when a clip is created. The list of default clip categories can only be populated from the list of defined categories on the role. If a default clip category has not been created on the role, then the default Reach Engine operation of parent asset category inheritance still occurs. Categories on parent asset are pre-populated in the metadata panel on the right for both timeline and video clips. For users that have multiple roles, default categories are set on all roles and all default categories are applied to the timeline and video clips. For users that have multiple roles, but only one role has default categories and the others do not, parent asset category inheritance still occurs.
8. Choose the **asset permissions**.
     - Choose **Edit Assets** to allow users in the role to edit asset details, including:
         - Asset name.
         - Asset metadata.
         - Clip mark in/out points.
         - This option does not include editing asset categories.
     - Choose **Delete Assets** to allow the user in the role to delete assets.
     - Choose **Create Collections** to allow users in the role to create collections.
     - Choose **Add/Remove from Collections** to allow users in the role to add and remove from the contents in a collection.
9. Choose the **download & export permissions**.
     - Choose **Download Proxy** to allow the user to download proxies. If a user has multiple roles, the user can download proxies if at least one role permits it.
     - Choose **Download Source & Mezzanine** to allow the user to download high-resolution source files. This option is useful if the user wants to work on the files when not connected to a network. This option is not for Clips or Collections.
10. Choose the **Collaborate tasks & permissions**.
     - Choose **Share Assets Externally** if the role can download assets (Shared tasks) in Collaborate.
     - Choose **Request Assets Externally** to define if the role can create tasks in Collaborate to request assets (Request tasks).
11. Choose the **workflows started by these roles** to allow a role to view additional workflows.

Notes:

- Users that are assigned one or more roles will have access to all workflows run by any users assigned to those role(s) on the workflow status screen, not just their own workflows.
- Archived roles do not display in the list.

By default, the roles are allows to *Take Action on Workflows Started by the Above Roles.* Move the slider to change this option.

1. Choose **Use RQL to refine permissions** to allow the user to use RQL search queries. Note that a role with RQL permission that grants access to content:
   - Allows users with that role to see thumbnails of those assets.
   - Allows users with that role to see metadata if their Role also grants view metadata access and/or edit metadata if their Role also grants edit metadata access.
2. Enter the **RQL Permissions**.
3. Click **Add**. The new role displays in the list.

Notes:

- When a user has multiple roles, the user can perform an action if at least one role permits it.
- The Roles panel allows an administrator to define read-only (view) permissions for specific metadata groups within the Role.
- Users assigned multiple roles should have optimistic viewing/editing permissions:
- If one user's Role has view and another Role does not, the user can view.
- If one user's Role has edit and another Role has view, the user can edit.
- A metadata group cannot be both view and edit at the same time.
- If a user has access to an Asset and that Asset has a metadata group, then if one of the user's Roles has either view or edit access, the user can see the metadata group's fields.
- If Edit is selected for a metadata group, it is assumed that the user has view as well.

Storage

With release 2.7, you can define file systems, directories, libraries, and path mappings for storage. In the past, storage was defined using a *.properties* file, which required customers to contact Levels Beyond to make changes and to restart the system in order for the changes to take effect. With release 2.7, storage options can be added and changed by your organization's administrator and changes take effect immediately with no down time.

The storage structure is hierarchical. A file system is the top level of your storage. An example of a storage structure might be:

- **File system:** AWS
- **Directory:** levelsbeyond:reachengine/proxies/
- **Library:** s3proxies

File Systems

A file system is the top level of your storage. To create or edit file systems:

1. Click **Storage** in the left menu, then click **File Systems**.
2. Add support for KMS Encrypted Buckets by setting the kms.arn parameter.
3. To edit an existing file system, click the **Edit** icon ( ) in the Action column. Make the necessary changes and click **Save**.

Directories

You can configure directories for the types of storage you have defined on the File Systems page. Directories are a level below the file system storage level. User permissions are tied to directories. Currently, you can view and update existing directories.

1. Click **Storage** in the left menu, then click **Directories**.
2. To edit an existing directory, click the **Edit** icon ( ) in the Action column. Make the necessary changes and click **Save**.
   Note: The File System picklist is populated with file systems defined on the File Systems page.

Libraries

Libraries are used for managed storage or repositories, such as the default locations for mezzanine and proxy files or other supported content types. Currently, you can view and update existing libraries.

1. Click **Storage** in the left menu, then click **Libraries**.

2. To edit an existing library, click the **Edit** icon ( ) in the Action column. Make the necessary changes and click **Save**.

Path Mappings

Path mappings provide a translator between two different storage systems. For example, if one storage uses Linux and another storage uses Windows, the path mappings translate the syntax so both storage locations can be used and understand each other. Currently, you can view and delete existing path mappings.

1. Click **Storage** in the left menu, then click **Path Mappings**.

2. To edit an existing path mapping, click the **Edit** icon ( ) in the Action column. Make the necessary changes and click **Save**.

3. To delete an existing path mapping, click the **Delete** icon ( ) in the Action column.

Dynamic Properties

Dynamic properties can be used for system configurations and workflow variables that need to be updated. Dynamic properties can be modified without restarting Reach Engine.

Display and Search Dynamic Properties

1. Click **More** in the left menu, then click **Dynamic Properties**.
2. Select a Dynamic Property. You can:

- Click the **Edit** icon ( ) in the Action column to edit the dynamic property.
- Click the **Add** icon ( ) at the top left to add a new dynamic property.

Create a Dynamic Property

1. Click **More** in the left menu, then click **Dynamic Properties**.
2. Click the **Add** icon ( ) at the top left to add a new Dynamic Property. The Create Dynamic Property panel displays.
3. Enter the key and value.
4. Click **Add**.

Enable Feedback Icon

Administrators can enable the **Feedback** ( ) icon, which lets users providefeedback, request features, vote on feature requests, see what is in progress, and see which features were recently released. The Feedback icon is configured per installation. To configure the Feedback icon for your company, add a dynamic property with the following values:

- Key = feedbackEnabled
- Value = true

Search for a Dynamic Property

To search for a dynamic property, enter the property name in the search field. As you enter text, the list shortens to include only those items that match the entered text.

Exec Servers

Execution servers are separate from the Reach Engine server. They can be used to run processes and communicate with other servers including the Reach Engine server. Execution servers accept command line parameters to run transcoders, delivery services, etc.
For more information, please contact your Levels Beyond representative.

Display and Search Exec Servers

1. Click **More** in the left menu, then click **Exec Servers**.
2. Select an Exec Server. You can:

- Click the **Edit** icon (✎) in the Action column to edit an Exec Server.
- Click the **Add** icon (➕) at the top left to add a new Exec Server.

Create an Exec Server

1. Click **More** in the left menu, then click **Exec Servers**.
2. Click the **Add** icon (➕) at the top left to add a new Exec Server. The Create Exec Server panel displays.

3. Enter the server name, host, and port.
4. Select the server's operating system from the list.
5. To activate the server so that it can be used, move the **Enabled** slider to the right. If you choose not to enable the server during server creation, you can enable it later from the server list by moving the Enabled slider.
6. To allow commands to the server, check **Online**.
7. The Commands area is read only through the Admin tab. The information in the Commands area is populated by a TXT file that is installed when the exec server is installed. This command file specifies commands that can be run on this exec server, such as a transcoding command. For more information about commands, please contact your Reach Engine support team.
8. Click **Add**. An ID is automatically assigned to the exec server.

Enable/Disable Exec Server

To enable or disable an Exec Server, select the server from the list and move the **Enabled** slider.

Search for an Exec Server

To search for an exec server, enter the server name or host name in the search field. As you enter text, the exec server list shortens to include only those servers that match the entered text.

Live Servers & Feeds

Live servers allow you to stream and ingest live events into Reach Engine. Dynamic Clipping allows an organization to take in a live event video via an HLS stream, take clips off that live HLS stream, and post those clips onto the social media sites Facebook, Twitter, and YouTube. Most other assets from within Reach Engine can also be posted to social media sites, but each site dictates the assets it will accept. For example, YouTube does not accept documents.

Administrators must configure both the live servers and feeds as well as the linked social media accounts. When these connections are set up, users with permission can get content in front of digital viewers within minutes of real-time. Users can watch events as they unfold with full control of the playhead. They can create clips in the same fashion as library content, tagging them as they go. Clips are posted to social media via a seamless user action, resulting in expanding your audience in near real-time.

To view existing live servers, click the **More** menu, then click **Live Servers & Feeds**.

Create Live Servers & Feeds

1. From the **More** menu, click **Live Servers & Feeds**.
2. Click the **+** icon in the upper left (above the ID column). The right panel opens.
3. Enter a **Name** for the new linked account.
4. Enter the **Address**(URL) for the server.
5. Select the server **Type**.
   Note: Currently, Elemental Live is the only Type option.
6. Click **Add**.

Edit Live Servers & Feeds

1. From the **More** menu, click **Live Servers & Feeds**.
2. Click the **Edit** icon for the live server you want to edit.
3. Edit the live server details as needed, then click **Save**.

Edit a Directory

1. From the **Storage** menu, select **Directories**.
2. Click the **Edit** icon (✎) in the Action column.
3. Make the necessary changes and click **Save**.

Linked Accounts

Linked accounts allow users with permission to post any asset within Reach Engine to the social media account. The data that is associated to the asset is included in the post. To view which linked accounts are set up within Reach Engine, click **More** in the left menu, then click **Linked Accounts**. Accounts with a check mark are active and assets can be posted to it. Currently, this information is read only and cannot be modified through Spartan.

Media Profiles

Media Profiles are used by Reach Engine to validate specifications against assets to ensure media requirements are upheld and properly formatted. To view the media profiles available in Reach Engine, click **More** in the left menu, then click **Media Profiles**. Currently, this information is read only and cannot be modified through Spartan.

Logos

You can define a login logo and a banner logo by adding different images in *reachengine/tomcat /webapps/ClientConfig* on the app server.

- Upload **logo.png** for the login logo.
- Upload **app_logo.png** for the banner logo.