TechSmith®

TechSmith Relay® (Self-Hosted)

Administrator Help

Version 5.0

February 2015

Table of Contents

Introduction

This document introduces you to TechSmith Relay, walks you through configuring the system, and provides you with administration information to help you to keep TechSmith Relay running smoothly.

TechSmith Relay Administration Help Topics

TechSmith Relay Overview

With TechSmith Relay, you can capture and publish your lecture or presentation anytime, anywhere -- in the classroom, in the conference room, at your desk, or at home. TechSmith Relay supports video and image file formats, allowing any lecture or presentation to be viewed by your audience on multiple playback devices including mobile devices.

There are two parts to TechSmith Relay—the recorder, which runs on a presenter’s computer, and the server which processes and publishes all presentations.

Important TechSmith Relay Concepts

Before you configure TechSmith Relay, there are several concepts you should be familiar with. Please review the following topics. You can find additional information in the **TechSmith Relay Administration Reference** part of this help.

Profiles

Profiles are the backbone of TechSmith Relay. They allow presenters to record or upload media without having to make any decisions about how the content is processed or where it is placed for viewing.

Profiles are created by the administrator and include settings that define how the content is captured, processed, and published. Careful consideration of how you want to set up your organization’s profiles helps simplify maintenance of the profiles over time.

Things to consider:

- You may want to first create a test profile to make sure that you understand the parts of the profile and some of the options available to ease day to day maintenance, such as **variables**.
- The profile title is the only thing presenters can see in the TechSmith Relay Recorder. The profile description is only visible on the website. Consider carefully how you choose profile titles so that they convey their intended use to presenters.
  - **Good title examples:** BIO-101, Sales Dept Meetings, Weekly Status Reports, Personal Recordings
  - **Poor title examples:** MP4 Output, Presenter, 10142
- The **Upload and Decide Later Profile** uploads media to the TechSmith Relay server, but does not process it. The uploaded content stays in the **Needs Attention** state on the server until an administrator or the presenter selects a profile to use or deletes it.

For more information, see **Profiles**

Variables

Variables can help simplify the management of profiles, publish destinations, publish accounts, and notifications. These “placeholders” have a value applied to them at the time a presentation processes.

There are administrator-defined and system-defined variables available:

- **Administrator-defined variables**

  Create a variable, use the variable in multiple places, and manage the value in central location.

  For example, you can create a global variable for Semester, add it to a file system publish destination path and use the publish destination for multiple profiles. When the semester is over, you change the value once, and the publish destinations paths are automatically adjusted to reflect the change.
- **System-defined variables**

  These variables are included in the TechSmith Relay system and change based on the information for the presentation that is being processed.

  For example, you can use the system variable for the presenter’s username in a publish destination file path such as **\\media.company.com\presentations\\`{s:PresenterUserName}`**. When the presentation is published, the presenter's username is substituted in the file path and places the presentation in that presenter's network folder.

For more information, see **Variables**.

Administrators Cannot Record Presentations

Administrators cannot make recordings or log in to the TechSmith Relay Recorder.

To record or upload media using the TechSmith Relay Recorder, you must create a presenter account. The presenter account cannot have the same email address as the administrator account.

If you are using LDAP, instead of creating a new user in LDAP, create a new user on the TechSmith Relay website. See **Manually Add Users to TechSmith Relay** for more information about how to create a new user.

TechSmith Relay Recorder

There are a few ways to access the recorder:

- Administrators and presenters can download the TechSmith Relay Recorder from the TechSmith Relay website.
- Administrators can also obtain the files at:

  `{base URL}/Relay/Downloads/WinTechSmithRelay.exe` (Windows)

  `{base URL}/Relay/Downloads/MacTechSmithRelay.zip` (Mac)

  `{base URL}/Relay/Downloads/PortableTechSmithRelay.zip` (Portable)

  > The server URL is hard coded into the recorder. If you have multiple instances of TechSmith Relay in your organization and are distributing the files to presenters make sure presenters are installing recorders from the correct server instances.

- In a locked-down or controlled environment, the administrator can choose to **deploy the TechSmith Relay Recorder** for Windows operating systems instead of having the users download it from the TechSmith Relay website.

Configuration of TechSmith Relay

> Before starting configuration, please review **Important TechSmith Relay Concepts**.

After installation, you need to configure TechSmith Relay before making it available to presenters. Use the following processes to configure your server properly.

1. Define Publish Destinations

2. Set Up Notifications

3. Create Profiles

4. Add Users to TechSmith Relay

Other things to do before you start using TechSmith Relay

- **Activate / Deactivate TechSmith Relay Server**
- **Roll-Out TechSmith Relay**
- **Deploy TechSmith Relay Recorder**

1. Define Publish Destinations

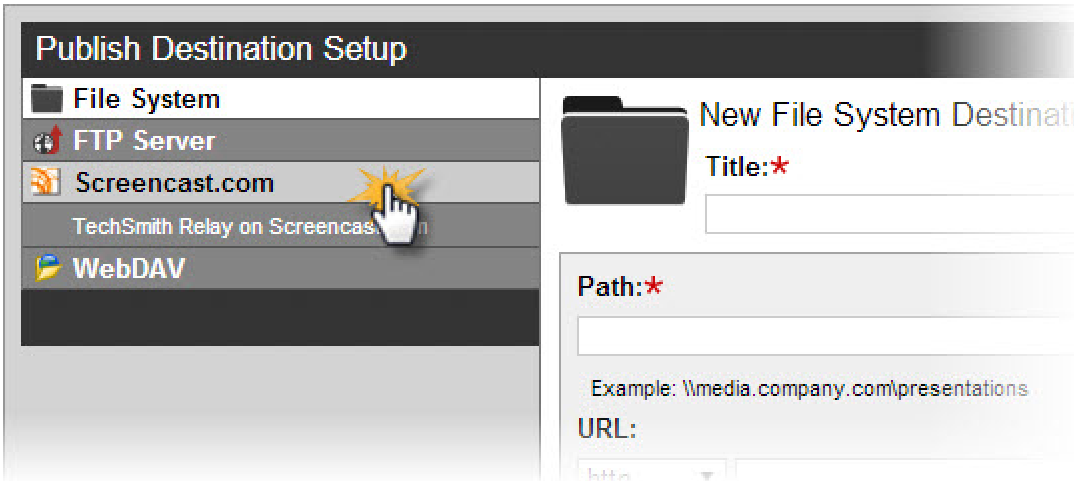
Publish Destinations are the locations that presentations are placed when processing is complete.

TechSmith Relay can publish presentations to many kinds of media servers. For more information on setting up a specific type of publish destination, see **Publish Destination Setup**.

> Completed presentations should not be published (hosted) on the TechSmith Relay server.

To Create a Publish Destination

1. Go to Profiles > Publish Destination Setup.
2. Click one of the publish destination types to create a new destination.



If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

3. Enter all required information. In many cases, you can use **variables** to help create multi-purpose publish destination paths and URLs.
4. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
5. Click the link to continue with **Publish Account Setup**.

Publish Account Setup

After you **create a publish destination**, you define the account for TechSmith Relay to use to access it.

Publish Accounts include the specific information used to place processed presentations in a publish destination, such as user authentication information, folder selection, etc.

To Create a Publish Account

1. On the Publish Account page (**Profiles > Publish Accounts Setup**), click one of the publish destinations you have set up.
2. Enter information for the new account.
3. Select if you want to make the account the **default account**. See the tips below for information about default accounts.
4. If not a default account, select if you want to **Use account information from default account**. This allows you to use the credentials from the default account and modify other account information, such as paths, folders, and URLs.
5. Click **Save**.

Things to Consider About Publish Accounts

The following information might help you in making some decisions when creating your publish accounts.

- You can let presenters enter their own information.

  If you would like to use this option, you do not have to set up a publish account. Instead, you will select to **Use presenter account** when configuring a profile.

- Each publish destination can have a **default account**.

  This can be helpful in several ways:

  - You can set up a default account to hold the credentials used to access a publish destination, and then use the other accounts to place presentations into various folders.
  - When you select a publish destination and encode setting in a profile, the default account is selected automatically for the publish account.
  - If the default account for a publish destination may change from time to time, you can select **Use default account** when configuring a profile. You can then change which account is the default account without having to change anything in the affected profiles. The profiles use the currently selected default account for a given publish destination.

- You can select different publish accounts for each publish destination/encode setting combination in a profile.

2. Set Up Notifications

Notifications are the various ways that people are informed when presentations are published. They are sent per profile and can include information about multiple processed presentations.

To set up notifications, you first configure the notification server and then create custom notifications. If you want to use the email server you set up during installation, you can skip ahead to **Notification Setup**.

You can configure three types of notification servers:

- **BlackBoard:** Posts notifications directly to BlackBoard

- **Email:** Sends notifications through the email server.

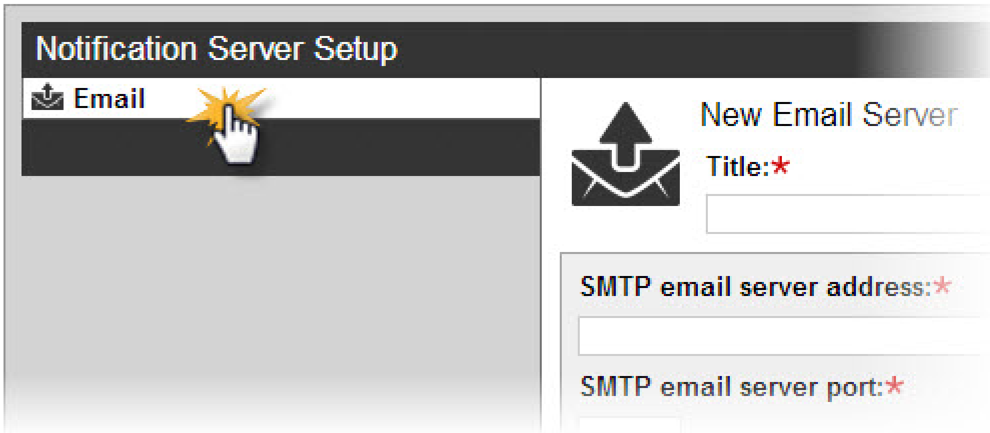
  > You can only configure one email server.

- **Moodle:** Posts notifications to Moodle.

For more information on setting up a specific type of notification server, see **Notification Server Setup**.

Configure a Notification Server

1. Go to **Profiles > Notification Server Setup**.
2. Click one of the server types to create a new notification server.



> If the notification server type you would like to use is not available in the list of notification servers, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

3. Enter all required information.
4. Click **Save**.
5. The notification server information is saved and you are presented with a link to the **Notification Setup** for this server.
6. Click the link to continue with **Notification Setup**.

Notification Setup

After you **configure a notification server**, you create notifications to use with that server.

You can select who receives notification and what kind of information they receive about published presentations.

Create a Notification

1. On the Notification Setup page (**Profiles > Notification Setup**), click one of the notification servers.
2. Enter information for the notification. Depending on which server type you select, you will enter different types of information.

   You can use variables to allow one notification to be used in multiple cases. For more information, see **Variables**.
3. Select a **Details Template** to use.

   Click **Samples** to preview what information each template includes.

   This template defines what information to include in the notification. A notification contains information for each encoding you select to include in this notification in the profile.

   Choose **Message only** if you only want to specify a message and not include additional details.
4. Enter a message to include in the notification. This can be a personalized greeting, additional presentation information, or left blank. You can use **variables** in this field.
5. Click **Save**.

Things to Consider About Notifications

The following information might help you in making some decisions when creating notifications.

- When you set up a profile, you can choose which encodings you want to include in each notification.

  For example, you could create a profile that contains both a Web video and a TREC file. You can include the Web video information in a notification that goes straight to viewers and include information on the TREC file in a notification that goes only to the presenter.
- You can preview the information included in each of the details templates by clicking the Samples link. For more information on the details templates, see **Details Templates**.
- You can use variables to allow for a single notification to be used for multiple uses.

  For example, use the system variable `{s:PresenterEmailAddress}` in the To field of an email notification. Any profile that uses that notification always sends an email to the email address of the presenter associated with the presentation.
- If you use variables in the message of a notification, some variables only receive information from the last processed encoding in a presentation.

  For example, if you use the system variable `{s:PublishFilePath}` in the message of a notification and have multiple encodings set up in the selected profile, only the file path of last published encoding is included in the message.
- TechSmith Relay does not send separate notifications for each encoding selected in a profile, but instead rolls information for each encoding into a single notification.

  For example, if in a profile you select to include three encoding types in a notification, the recipient receives one notification including information about all three encodings rather than three separate notifications.

3. Create Profiles

After you have defined the publish destination and set up notifications, you are ready to create profiles.

To start creating a new profile:

1. Go to **Profiles**.
2. Click the **New Profile** button.

   The Profile Setup page opens.
3. Work through, from top to bottom, the tabs at the left side of the page.

   These tabs are:

   - **Profile Settings**
   - **Publish Destinations**
   - **Encode Settings**

- Publish Accounts
- Notification Selection
- Notification Assignment
- Variable Definition
- Associated Users
- Overview
- Profile Test

Tab Status Icons

As you are working through the tabs, each tab shows its current status. The status icons are as follows:

	Everything on this tab is valid and in working order.
	Something on this tab is not quite right. You might want to verify that you are not missing anything. This does not make a profile invalid. Example: There are no notifications selected.
	There is an error on this tab. You will need to enter or correct information before this profile can be used. Example: There are publish destinations without encode settings selected.

Define Profiles Settings

In the Profile Settings tab of the Profile Setup, enter basic information about the profile.

1. Enter a title for the profile.

   Remember that the profile title is the only thing presenters can see in the recorder. The profile description is only visible on the website. Consider carefully how you choose profile titles so that they convey their intended use to presenters.
2. Enter a description.
3. Select the **Transcription Settings**.
4. Click **Save**.
5. Click the **Publish Destination** tab to continue.

Select Publish Destinations

In the Publish Destinations tab, you select the publish destinations you want to use for presentations processed with the profile.

1. Select one or more publish destinations from those available.

   To create additional publish destinations, go to **Profiles > Publish Destinations**.

2. Click **Save**.
3. Click the **Encode Settings** tab to continue.

Select Encode Settings

In the Encode Settings tab, you select what kinds of encodings you want going to each of the previously selected publish destinations.

1. Click to expand a publish destination, if needed.
2. Select the types of encodings you want to publish to that destination.

   For information on the available encoding types, see **Available Encoding Settings**.

   If an encoding type has an XML file available to include, an XML symbol shows up after you enable the encoding type.
3. Click **XML** to include an XML file with the processed presentation. For some publish destinations, XML is required and is enabled automatically.

   For more information about this XML file, see **Publish XML File with an Encoding**.
4. Repeat for each publish destination.
5. Click **Save**.
6. Click the **Publish Accounts** tab to continue.

Select Publish Accounts

In the Publish Accounts tab, you select the account to use for each publish destination/encoding combination.

1. Click to expand a publish destination, if needed.
2. Select an account to use for each of the encodings for the publish destination.

   The account currently set as the default account for the publish destination is automatically selected.

   You can:

   - Keep the selected account
   - Select another account
   - Select Use presenter account

     This option allows presenters to enter their own credentials. Presenters will need to log in to the TechSmith Relay website and enter their credentials.
   - Select Use default account

     This option allows the profile to access the default account information at the time of profile processing. You may want to use this option if the default account information changes from time to time.

   > If you want to use the same account for all encodings under a publish destination, you can use the top level dropdown box to select the account.
3. Repeat for each publish destination.

4. Click **Save**.
5. Click the **Notification Selection** tab to continue.

Select Notifications

In the Notification Selection tab, you select which notifications you want to use in the profile.

1. Select one or more notifications to use with the profile.

   All configured notifications are shown for you to choose from.

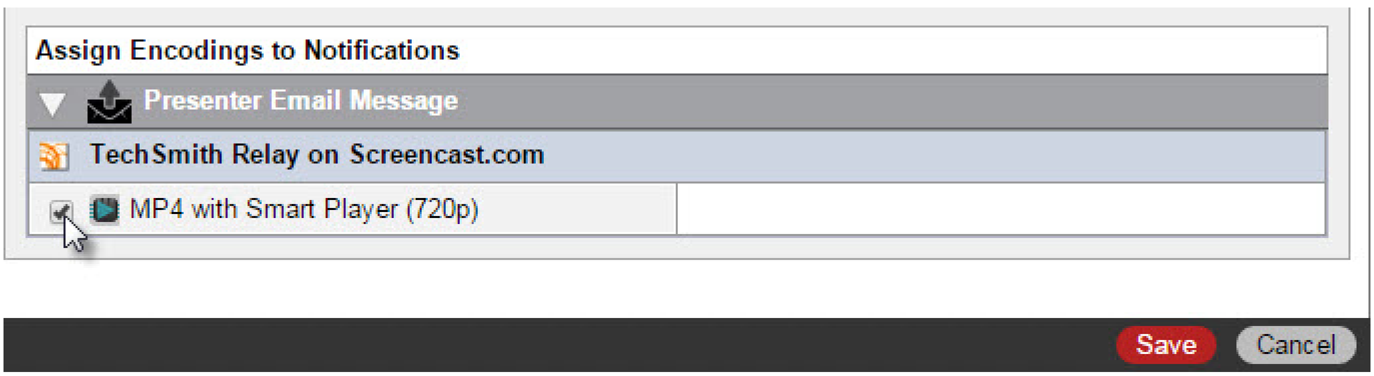
   > You do not have to select a notification for the profile to be valid. If you choose to not include notifications in the profile, the only way for a presenter or administrator to tell if a presentation has finished processing is to go to **Presentations** page, locate the presentation, and view the status.

2. Click **Save**.
3. Click the **Notification Assignment** tab to continue.

Assign Notifications

In the Notification Assignment tab, you select the encodings you want to associate with each previously selected notification. Each notification only includes information about the encodings associated with it.

1. Click to expand a notification, if needed.
2. Under each notification, all publish destination/encoding combinations for the profile are shown.
3. Select the encodings you want to assign to the notification.

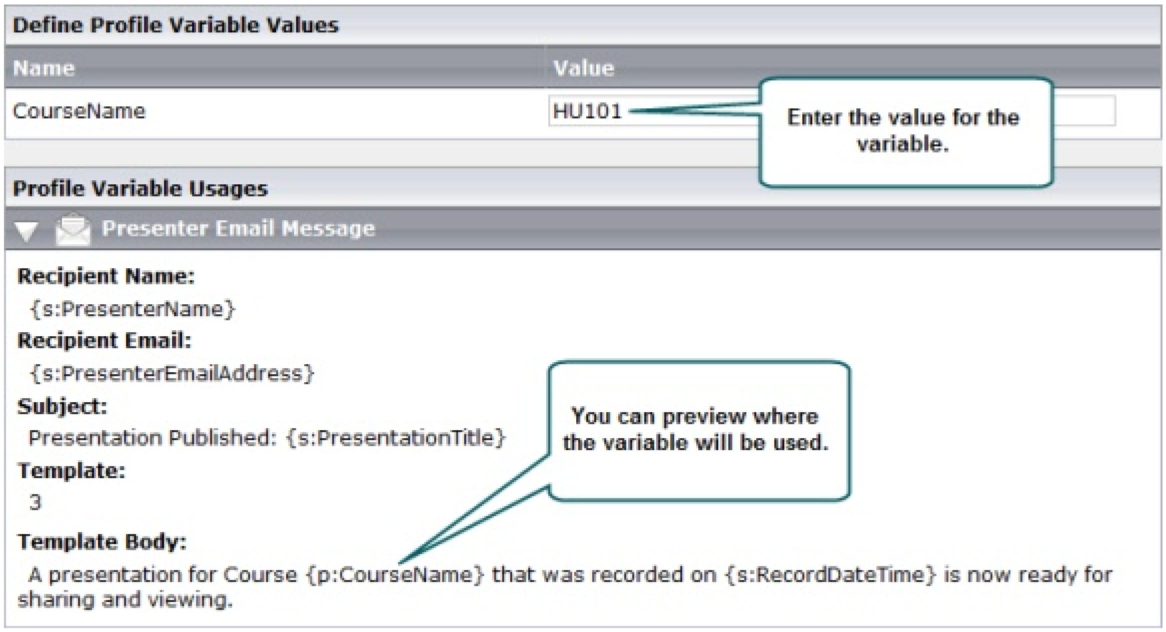


4. Repeat for each notification.
5. Click **Save**.
6. Click the **Variable Definition** tab to continue.

Define Profile Variables

From the Profiles dropdown, select Profile List, then choose a profile from the list. In the Profile Setup, click on the Variable Definition tab to define the value for any **profile variables** that are used in the profile. You only need to fill in values if you have previously created and used a profile variable in another part of the profile, such as a file path or notification.

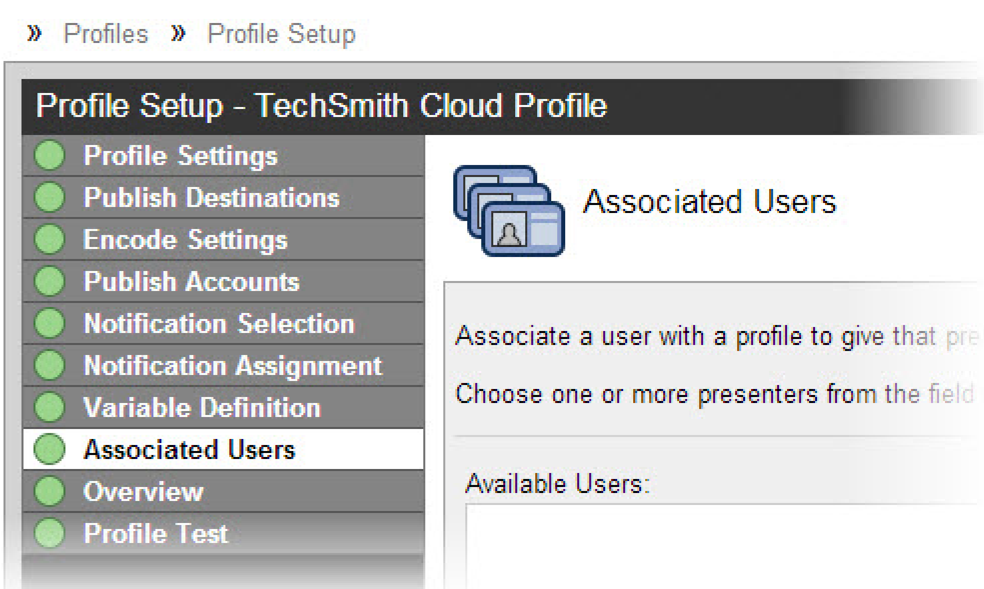
1. Enter a value for each profile variable used in this profile.



2. Click **Save**.
3. Click the Associated Users tab to continue.

Associated Users

In the Associated Users tab, you select users to associate with the profile. This gives the selected presenters access to the profile in TechSmith Relay Recorder.



1. In the Available Users list, click to select a presenter.

   Presenters are shown in the list in the following format: Display Name (username). For example: Mary Smith (m.smith)

> To select multiple presenters, hold down **SHIFT** or **CTRL** as you select users from the list.

2. Click **Add** to associate presenters with the profile.
3. If you would like to have this profile automatically associated with all new presenters as they are added to TechSmith Relay, enable the **Automatically associate this profile with new users** option.

> If you do not see this option, you need to turn on this functionality. Go to **System > System Options > Auto Associate Profiles** and enable the **Automatically associate selected profiles with new users** option. When you return to the Associated Users tab of a profile, you will see the option.

4. Click **Save**.
5. Click the **Overview** tab to continue.

Review the Profile

In the Overview tab, you can see and review the setup of a profile.

You can click the **Information** icon to access more information about one of the following:

- Publish destinations
- Publish accounts
- Encode settings
- Notifications

> Presenters that are associated with this profile are able to see this same overview when they log in to the website.

When you have reviewed the profile setup, click the **Profile Test** tab to continue.

Test the Profile

In the Profile Test tab, you can process a sample presentation to verify that the profile behaves as you expect.

TechSmith Relay provides a pre-recorded presentation so you can test the behavior of the profile without having to install the recorder and record a presentation.

1. Select a presenter to test the profile. This presenter's information is used, if needed, for variables, accounts, etc.

   You may want to make sure the presenter knows that you are going to test the profile, or use your own presenter account.

   > The presenters available in the list are the users associated with this profile.

2. Select whether or not you want to test the notifications associated with the profile.

3. Select whether or not you want to include the **Hold for caption editing** process in the profile test.
4. Click **Test Profile**.

   TechSmith Relay submits a sample presentation and processes it with the settings of the profile.
5. You are redirected to the **Presentations** page where you can follow the progress of the presentation's processing.

4. Add Users to TechSmith Relay

There are different ways to add users to TechSmith Relay.

If your organization:

- Uses LDAP, see **Configure TechSmith Relay to Use LDAP**.
- Does not use LDAP, see **Manually Add Users to TechSmith Relay**.

After adding presenters, global caption editors, and other administrators, you should **Set User Account Security Settings**.

Use More than One Kind of User

TechSmith Relay allows you to use both LDAP users and TechSmith Relay created users.

Some examples of why you may want to use both LDAP and TechSmith Relay managed users:

- You use LDAP and need a temporary account for a visiting presenter.
- You use LDAP and need a presenter account for someone already in the system as an administrator.

Configure TechSmith Relay to Use LDAP

To configure LDAP, you should first set up a RelayPresenter Service Account.

RelayPresenter Service Account

Prior to configuring TechSmith Relay to work with LDAP, we recommend creating a "RelayPresenter" service account in your LDAP directory and associate this account when you bind credentials in LDAP. Use this account to perform the initial step in authenticating users.

When a user tries to authenticate over LDAP, TechSmith Relay uses this "RelayPresenter" user to search the LDAP directory and retrieve the user's qualified domain name. The user's qualified domain name is given to the LDAP directory along with their password for authentication.

TechSmith Relay never stores LDAP passwords with the exception of the password of this service account.

> The service account should have a password that does not expire. TechSmith Relay ceases to function for all users if the password of the service account in LDAP is not the same as the password stored in the TechSmith Relay database.

Configure TechSmith Relay to Use LDAP

1. Go to **Users > LDAP Configuration**.
2. Click **Configure LDAP**.

3. Enter server information:
   - *Server address*
   - *Port*
     - *Use secure authentication:* Select if you want to connect to the LDAP server over SSL.
     - *Trust all certificates:* Enable if you cannot connect over SSL due to an invalid certificate. If you have a valid self-signed certificate, import the signing certificate into the Trusted Root Certificate Authority on the TechSmith Relay Server for better security.
   - *Authentication method* (Basic or Negotiate)
   - *Username & password* to authenticate
4. Click **Next**.
5. Select the returned base distinguished name or enter another.

   TechSmith Relay returns the root of the LDAP directory, and pre-fills the Base distinguished name field. Or, if you know exactly where your users reside in the LDAP directory, you can manually enter the Base DN.
6. Click **Next**.
7. Select the “RelayPresenter” service account as the representative user with the following attributes:
   - Full name
   - Username
   - Email address
8. Click **Next**.
9. Map the attributes from the selected user to the fields TechSmith Relay requires.

   You can choose from the dropdown list of attributes returned from LDAP or type in an attribute if it is not found in the dropdown list.
10. Click **Next**.
11. Review the configuration information.
12. Enter a valid username and password into the *Test Authentication* fields and click **Test**.
13. Click **Finish**.

    You can now configure TechSmith Relay to Automatically Import Users with LDAP or .

> If you disable LDAP, users remain in the TechSmith Relay database. However, since TechSmith Relay never stores LDAP-associated passwords, users cannot access the TechSmith Relay website or make recordings.
>
> To re-enable users, select a user then click the **Convert to Relay** link. The user is emailed a randomly generated password. The user must access the TechSmith Relay website and change their random password.

Automatically Import Users with LDAP

To ease administration of TechSmith Relay, you can enable a system option to import an LDAP user when they log into TechSmith Relay (website or recorder) with valid LDAP credentials.

> Use this option in conjunction with **automatically assigning profiles** for the easiest way to get TechSmith Relay set up when you use LDAP authentication.

Automatically Add Users with LDAP

1. Go to **System > System Options > Auto Import Users**.
2. Enable the option to **Automatically import users with valid LDAP credentials**.
3. Click **Save**.

As presenters successfully log in to either the TechSmith Relay website or the TechSmith Relay recorder with LDAP usernames and passwords, they are automatically added to TechSmith Relay. If you enabled **Auto Associate Profiles**, presenters can access the selected profiles immediately. This is a great way to reduce the amount of administration work for getting new users started with TechSmith Relay.

Manually Import Users with LDAP

TechSmith Relay can reference an LDAP directory to populate the user database. There are two ways to import users into the TechSmith Relay database.

- At the end of the LDAP setup wizard, click **Manually import users** to import users immediately.
- When LDAP is enabled you can also import users from the **Users > LDAP Import** page.

1. From the Import LDAP page, you can search for LDAP users or groups in the left pane, or you can use the upper-right pane to search by username, name, email, or LDAP attributes.
2. Once your search has returned results, check the box to the left of the users you want to add, or select all by checking the box in the top row.
3. Choose the role to assign the selected users with the "Add with" dropdown.
4. Click Add Users.

Once the users are added, you will find them on the Users > User List page.

To view a user's complete list of attributes, select a single user in the list, and click View Details in their Account Info section.

Manually Add Users to TechSmith Relay

If you do not use LDAP for authentication, you can create users manually in TechSmith Relay.

> You can have both LDAP and TechSmith Relay created users. See **More than One Kind of User**.

Create a New User

1. Go to the **User List** page.
2. Click the **New User** button.

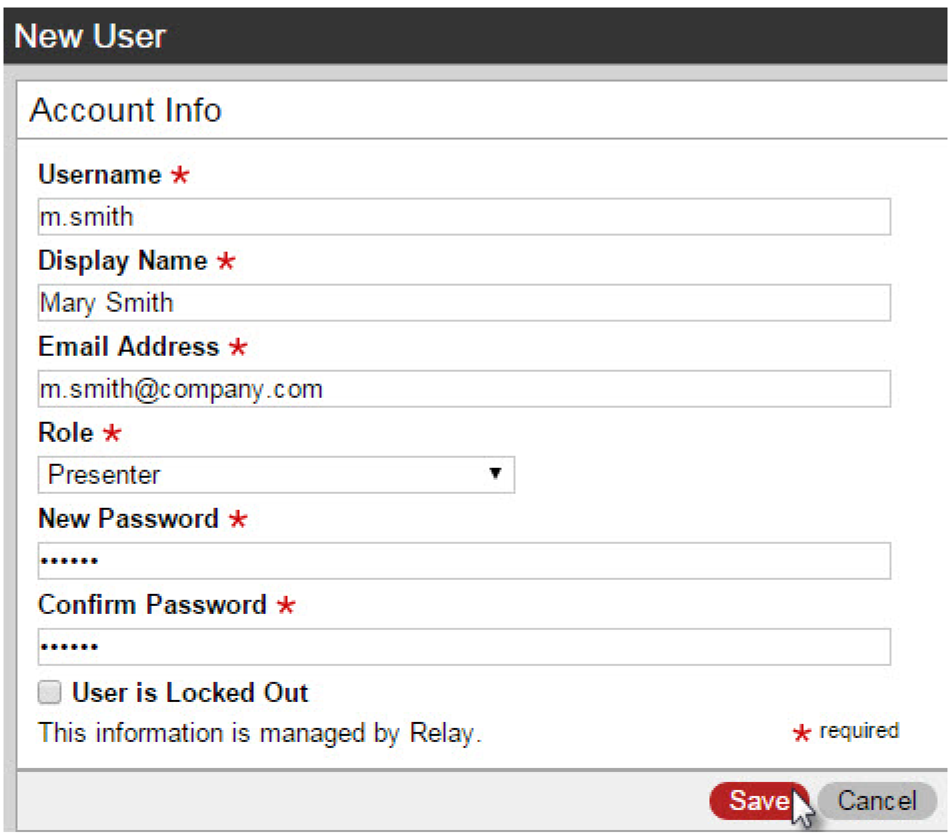
3. Enter a **username**.

   This is the username the presenter uses to log in to the TechSmith Relay website and recorder.

4. Enter the name (given name) of the user.
5. Select **Presenter** or **Global Caption Editor** from the Access Level dropdown list.

   > *No Access* restricts the user from logging into the website and Recorder. For example, you can use it to turn off a presenter's privileges at the end of a semester/term.

6. Enter the user's email address.
7. Enter and confirm a password.
8. Click **Save**, or you can click **Save & Add** to immediately add another user.



Set User Account Security Settings

To help secure TechSmith Relay, you can set the following:

- Recorder Security Settings
- Forgot Password Settings
- Account Lockout Settings
- Password Complexity

Activate / Deactivate TechSmith Relay Server

Activate TechSmith Relay server to remove the trial period and activate the correct number of encoding processors. It is important to deactivate TechSmith Relay server before you uninstall the server so you can install TechSmith Relay on another server.

> To communicate with the activation server through a firewall, port 80 must be open.

Activate the TechSmith Relay Server

1. Click **System > Activation**.
2. Enter your license code and click **Activate**.

Obtaining More Activations

If you find that you need additional activations for your server, please contact a sales associate at 1-800-517-3001 (US) or 1-517-381-2300 x636 (international) and we will walk you through the process of updating your license.

Offline Activation/Deactivation

If TechSmith Relay is installed on a private network, offline activation and deactivation allows you to deactivate without connecting to the Internet.

Activate when offline

1. Log in to the TechSmith Relay website as an administrator and go to **System > Activation**.
2. Click **Offline Activation**.
3. A window opens and contains an Installation ID number.
4. Contact a TechSmith sales associate at 1-800-517-3001 (US/Canada) or 1-517-381-2300 x636 (international).
5. Provide the Installation ID and License code to the sales associate. The sales associate gives you an Unlock Code.

   > Your license code was emailed in the TechSmith Relay purchase receipt.

6. Enter the code into the field provided. TechSmith Relay is now activated.

To deactivate when offline

1. Log in to the TechSmith Relay website as an admin and go to **System > Activation**.
2. Click **Offline Activation**.

3. A window opens. Click **Deactivate** to deactivate the server.
4. The window closes and you return to page. The server is now shown in an Expired state.
5. Contact a TechSmith sales associate at 1-800-517-3001 (US/Canada) or 1-517-381-2300 x636 (international).
6. Provide the Proof of Removal code and the Installation ID to the sales associate. This decrements the number of activations on your license code in the event that you want to activate a different server.

Problems with Activation/Deactivation

In the event of hardware failure or problems, please contact TechSmith.

US and Canada: +1-800-517-3001

International: +1-517-381-2300 x636

Please be ready with your **Installation ID**, **License code** or **Proof of removal** code (in the case of deactivation). Your license code was emailed in the TechSmith Relay purchase receipt.

Verify Setup

The purpose of this step is to ensure everything is set up properly. It also helps you better understand the "big picture" of TechSmith Relay and should help you make better decisions when implementing TechSmith Relay on a large scale.

Verify the Installation

1. **Add yourself as a user** with presenter access. (Administrators cannot make recordings.)
2. **Associate your presenter account** to a profile.
3. Download a recorder from **System > Download Recorders** and install. (It is recommended to not install the TechSmith Relay recorder on the server as a means of verifying your setup.)
4. Log in to the TechSmith Relay recorder. Enter the presenter account username and password created on the TechSmith Relay website (e.g. don't use the RelayAdmin username).
5. Select a profile.
6. Record your desktop activity for a minute or two. Stop the recording and click **Submit**.
7. Sign in to the TechSmith Relay website using the same username and password you entered into the recorder. You can view the status of your recording and experience the website from a presenter point of view.
8. Verify that the presentation processes and publishes correctly.

Roll-Out TechSmith Relay

Here's a checklist of suggested steps when introducing TechSmith Relay to presenters.

- Verify all presenters have valid profiles associated with their accounts.
- You might wish to roll-out TechSmith Relay in stages. For example, start with one department instead of the whole company or campus.
- What training do presenters require? You can direct presenters to the overview video launched from the help menu of the recorder and the videos located in the help section of the TechSmith Relay website. (Administrators see a different help page.)

- Decide if you will install the TechSmith Relay recorder on user computers, if you will direct users to obtain and install the recorder on their own, or if you will **Deploy TechSmith Relay Recorder**. The recorder has the TechSmith Relay server URL "baked-in" based on the server from which it was downloaded. If you put a copy of the TechSmith Relay recorder on a website or network drive make sure you got it from the server you want people to use.
- Establish a clear policy for how presenters should do things like request new profiles or profile changes or request a new password.
- Prepare an introduction email for presenters. We've created a few samples you can modify.

See also

- **What Presenters Need to Know Most**
- **Sample Emails Administrators Can Modify and Send to Presenters**

What Presenters Need to Know Most

You need to communicate the following to presenters. You can use this information in an email introducing TechSmith Relay to your presenters.

There are helpful videos

Get presenters to watch the overview accessible from the login screen of the recorder and in the Help section on the TechSmith Relay website. You may want to send presenters **directly to the video** so they can review TechSmith Relay before accessing the Recorder or having to sign in to the TechSmith Relay website.

Make a test recording

There's a blue **TEST** button in the TechSmith Relay recorder presenters can use to verify they are recording the correct screen and that audio is recording properly. Nothing is worse than recording an hour presentation with no audio.

How uploading works

As soon as the presenter clicks the **Submit** button in the recorder, the recording gets ready to upload in the background.

- There is no visual indication of progress.
- If the recorder is offline (or loses Internet access), the recording automatically uploads (or resumes uploading) as soon as the computer gains Internet access.
- Presenters receive an email when the presentation is published.
- Presenters can check the upload, encoding and publishing progress if they log in to the TechSmith Relay website.

Sample Emails Administrators Can Modify and Send to Presenters

Email examples for:

- Presenters Integrated with Your LDAP System
- Presenters Not Integrated with Your LDAP System
- Presenters That Must Supply Publish Destination Account Information

Presenters Integrated with Your LDAP System

Subject: Your TechSmith Relay Account and Getting Started Information

Body: Greetings! This email contains everything you need to know to start recording presentations with TechSmith Relay. Use TechSmith Relay on your computer to record whatever is on your screen—PowerPoint, Keynote, websites, etc. Once you submit the recording, our TechSmith Relay server will process the file and publish the presentation in a variety of formats in convenient locations.

Where to start?

- TechSmith Relay requires a username and password. Good news! You don't have to remember another password. Use the same username and password you use to access our *[work, school, university]* network.
- Install TechSmith Relay *[either direct users to the TechSmith Relay website or make the installer available in some other manner]*.

Questions? Problems?

Please direct all questions and feedback to your TechSmith Relay Administrator.

Presenters Not Integrated with Your LDAP System

Subject: Your TechSmith Relay Account and Getting Started Information

Body: Greetings! This email contains everything you need to know to start recording presentations with TechSmith Relay. Use TechSmith Relay on your computer to record whatever is on your screen—PowerPoint, Keynote, websites, etc. Once you submit the recording, our TechSmith Relay server will process the file and publish the presentation in a variety of formats in convenient locations.

Where to start?

- TechSmith Relay requires a username and password.
  - Your username is:
  - Your password is:
  - You can change your password by signing into the TechSmith Relay website *[URL here]* and clicking the **Accounts** menu.
- Install TechSmith Relay *[either direct users to the TechSmith Relay website or make the installer available in some other manner]*.

Questions? Problems?

Please direct all questions and feedback to the TechSmith Relay Administrator.

Name:

Email:

Phone:

Presenters That Must Supply Publish Destination Account Information

For example, presenters need to enter usernames and passwords to a network drive, personal FTP site or Screencast.com account.

Subject: Please supply account information for TechSmith Relay

Body: Your TechSmith Relay account is all set up and almost ready to go. There's just one last step. In order to publish your presentations, you need to enter your username and password for *[publish destination]*.

To enter your account information:

Sign in to the TechSmith Relay website *[URL]*.

You will immediately see a yellow "Action Required" banner with a link to the account with missing information. Click the link and enter your information.

Questions? Problems?

Please direct all questions and feedback to the TechSmith Relay Administrator.

Name:

Email:

Phone:

Deploy TechSmith Relay Recorder

In a locked-down or controlled environment, the administrator can choose to deploy the TechSmith Relay Recorder for Window operating systems, instead of having the users download it from the TechSmith Relay website.

The Windows Installer client can be found on the server at:

```
[INSTALLDIR]_installhelper\TechSmithRelayRecorder.msi
```

This MSI can be distributed via the usual methods; creating a Windows Installer Transform file or using the command line switches. The "Properties" that need to be assigned values are as follows.

Critical Properties

- `PRIMARYENDPOINT`: TechSmith Relay server URL.
- `TEAMID`: Teaming GUID. This property should be only used when teaming multiple servers together.

Optional Properties

- `INSTALLDIR`: Main destination folder.
- `TSC_PP_ADDIN`: Set to 0 to disable the TechSmith Relay Recorder Add-in for Microsoft PowerPoint.
- `TSC_START_NOW`: Set to 0 to keep TechSmith Relay Recorder from launching after installation.
- `TSC_DESKTOP_LINK`: Set to 0 to not create a shortcut to TechSmith Relay Recorder on the Desktop.

Example

```
msiexec.exe /i “\\Apps_server\TechSmithRelayRecorder.msi”
PRIMARYENDPOINT="https://relaydev01.techsmith.com/relay/rest.ashx"
TEAMID="FE47DE98-9E88-414b-A99F-C24F26951D7F" TSC_DESKTOP_LINK=0
/qb-!
```

TechSmith Relay Administration Reference

The following topics provide reference information for TechSmith Relay administrators. Use these topics to find out information about specific TechSmith Relay pages.

- **System Menu**
- **Presentations Menu**
- **Profiles Menu**
- **Users Menu**

System Menu

The System menu allows you to manage the TechSmith Relay system and view related options. The following pages are available in this menu:

- **System**
- **Servers**
- **System Options**
- **Plug-Ins**
- **Activation**
- **Client Machines**
- **Event Log**
- **Download Recorders**

System

The System page contains information to help you configure TechSmith Relay and a Dashboard to provide a quick overview of the system status at a glance.

Important Configuration Steps

This component of the System page contains the three most important steps for configuring the TechSmith Relay system:

- Define Publish Destinations
- Set Up Notifications
- Create Profiles

For more information on configuration, see **Configuration of TechSmith Relay**.

Dashboard

The Dashboard provides you with a quick look at what is going on with the TechSmith Relay system. On this page, you can find the following:

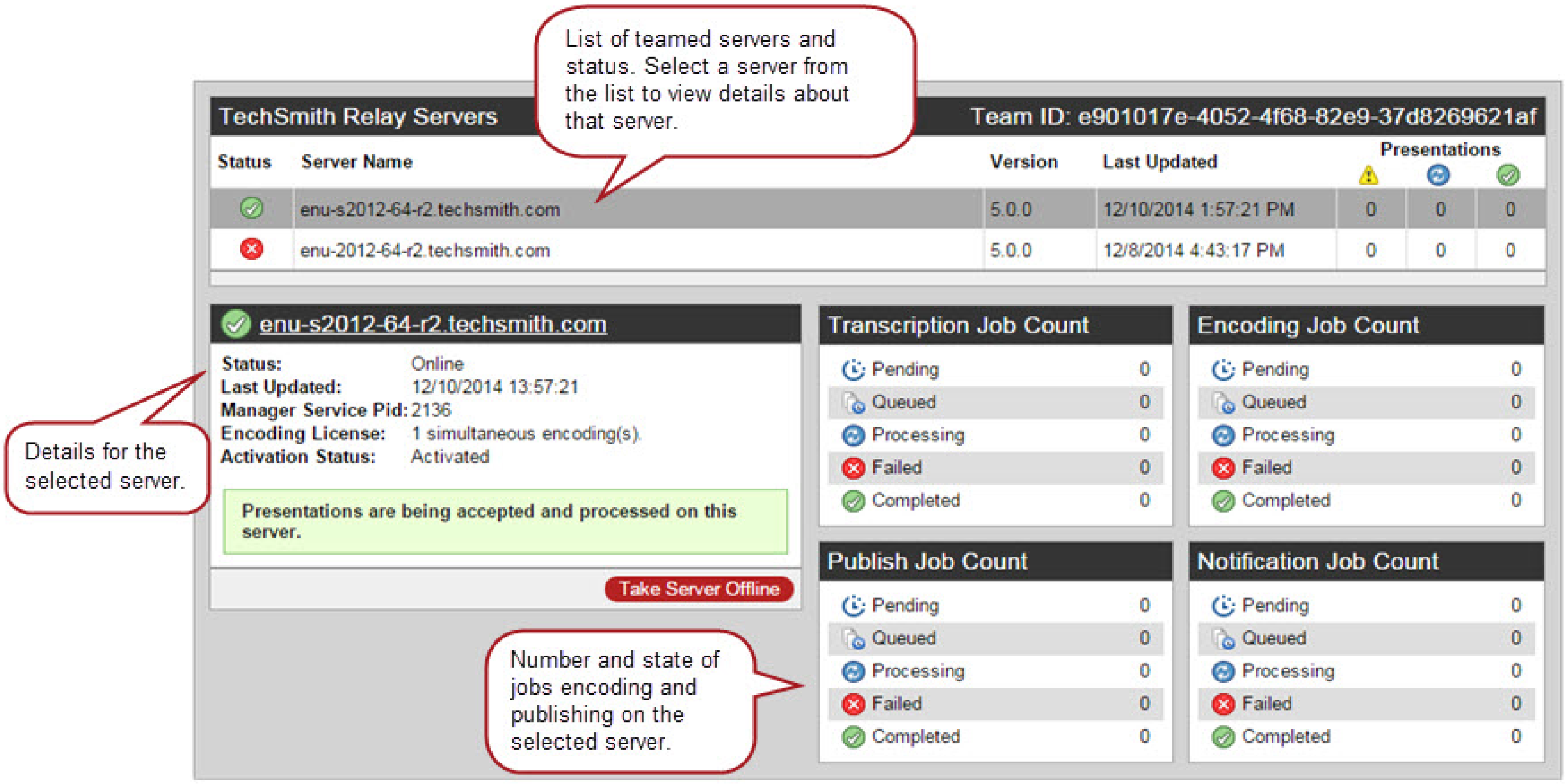
1	**Presentation Actions Necessary / Recent Presentations** If there are any actions you need to take to allow presentations to process, they show here. For example, a presentation is uploaded using the Upload and Decide Later profile. Click an item in the list to go to the page where you can take action for that item.

	If there are no presentations that need action, this area shows a list of the ten most recent presentations. Click a link to view information about the completed presentation, including links to the published presentations, when available.
2	**System Messages / Servers** This area alerts you of any important issues that you need to address in the TechSmith Relay system. If there are no alerts, the current count of various system components is displayed. If you have invalid profiles indicated in the list, go to the **Profiles** page where the invalid profiles are shown with an error status in the profile list.
3	**Encoder Usage** The Encoder Usage graph displays the peak encoder usage and average encode capacity of a TechSmith Relay server. Peak encoder usage is the maximum number of queued and processing encode jobs during that time period, while average encode capacity is how often the encoder was busy during the time period. If the time period is less than a week, the data is displayed by the hour. If the time period is more than a week, the graph displays peak and average usage by day. The average displayed for a day is the highest hour of that day. The entire time it takes to process an encoding is tracked (including any time the encoding job is waiting in the queue), but time spent uploading and captioning the presentation is not. Use this chart to track peak usage times, see when the encoding server is at its busiest, or to find out if the encoding server is overloaded and unable to process all the presentations it receives in a timely manner.
4	**Average File Size by Encoding** The Average File Size chart shows the average file size (in megabytes) per minute of video for each encoding type used during the time period. The graph shows averages across each group of encoding types, grouped by encode format. Clicking an encoding group shows the average of each specific encode type.
5	**Encode Speed / Recorded Minute** The Encode Speed graph shows the average time a presentation processed with a specific profile takes to encode, in minutes of encode time per minute of presentation video. The main view is the time from when the first encoding type begins until the last encode type ends. Click a specific profile to see a breakdown of the encode speed for each encoding type included in that profile. Only the 10 most used profiles appear on the Encode Speed graph.
6	**System Panel** This area shows the current number of presentations, servers, profiles, invalid profiles, presenters, administrators, as well as recent client machines. Click a link to visit the relevant page for more information.

Servers

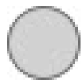
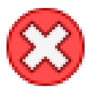
The Servers page contains information about and lets you interact with servers running TechSmith Relay.

> If you have multiple servers to handle processing presentations, you have a “teamed” server environment. On the Servers page of each teamed server, you can access the other servers in the team.



Server Status Icons

Icon	Status	Description
	Online	Currently accepting and processing presentations.
	Offline	Currently not accepting new presentations, but still processing existing presentations.

Icon	Status	Description
	Shutdown	Currently not accepting or processing presentations.
	Error	The Event Log in the System menu will have more information on a server error.

Change Server Status

- **Take a server offline**

  When you take a server offline, the server stops accepting new presentations, but continues to process presentations it has already received.

- **Shutdown a server**

  If you need to completely stop a TechSmith Relay server (to upgrade, for example) take the server offline and then wait until all jobs are Completed and click **Shutdown**.

  > Verify all presentations have completed prior to shutdown. Any presentations that are not completed will be canceled. When the server is brought back online, all canceled jobs are automatically retried.

- **Bring a server back online**

  When you are ready to bring the server back into service, select it from the server list and click **Bring Server Online**.

  - When you are ready to bring the server back into service, select it from the server list and click **Bring Server Online**.

System Options

System Options include:

- **Auto Associate Profiles**
- **Auto Import Users**
- **Portable Recorder Options**
- **Email Notifications**

Auto Associate Profiles

To ease administration of TechSmith Relay, you can choose specific profiles to automatically assign to new users. Use this option when you want all presenters to have a common profile or set of profiles.

> Profiles are only assigned to users when they are first added to TechSmith Relay. Changes

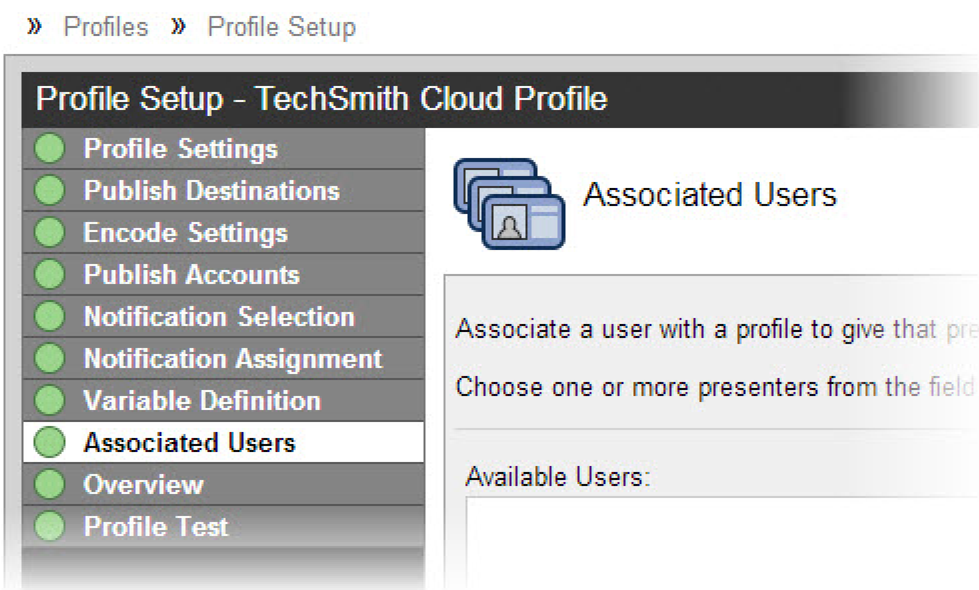
made to the automatically assigned profiles list <u>are not</u> reflected on existing TechSmith Relay users.

Automatically Associate Profiles

1. Go to **System > System Options > Auto Associate Profiles** tab.
2. If needed, enable the option to **Automatically associate selected profiles with new users**. (This option is enabled by default.)
3. Select a profile in the dropdown list and click **Add**. Repeat to add all required profiles to the list.
4. Click **Save**.

Manage Auto Associate Setting for Single Profile

1. Go to **Profiles**.
2. Click a profile.
3. Click the **Associated Users** tab.



4. At the bottom of the page, enable or disable the **Automatically associate this profile with new users option**.

If you do not see this option, you need to turn on this functionality. Go to **System > System Options > Auto Associate Profiles** and enable the **Automatically associate selected profiles with new users option**. When you return to the Associated Users tab of a profile, you will see the option.

Other System Options

- **Auto Import Users**
- **Portable Recorder Options**
- **Email Notifications**

Auto Import Users

To ease administration of TechSmith Relay, you can enable a system option to import an LDAP user when they log in to TechSmith Relay (website or recorder) with valid LDAP credentials.

> Use this option with automatically assigning profiles for the easiest way to get TechSmith Relay set up using LDAP authentication.

Automatically Add Users with LDAP

1. Go to **System > System Options >Auto Import Users**.
2. Enable the option to **Automatically import users with valid LDAP credentials**.
3. Click **Save**.

As presenters successfully log in to either the TechSmith Relay website or the TechSmith Relay Recorder with LDAP usernames and passwords, they are automatically added to TechSmith Relay. If you enabled **Automatically Assign Profiles**, the presenters can access the selected profiles immediately.

Other System Options

- **Auto Associate Profiles**
- **Portable Recorder Options**
- **Email Notifications**

Portable Recorder Options

Administrators can decide how they would like presenters to access the portable recorder. Choose from the following:

Option	Description
Available by download only	The portable recorder is available on the website. Presenters can log in to the website and download the portable recorder and transfer it to a mobile storage device, such as a USB drive. Use this option if presenters are reasonably “technical” and understand downloading and unzipping files.
Available by email request	There is a button available on the website to request a portable recorder. Presenters can log in to the website and click this link to send an email request to the administrator. The administrator receives an email with the request.

Option	Description
only	Use this option if presenters are "not technical" and may not understand downloading and unzipping files. You can put the portable recorder on a mobile storage device and give it to the presenter.
Not available	There is no way for a presenter to download or request a portable recorder. Use this option if you will handle distributing all portable recorders or do not want to use the portable recorder in your organization. Even if they do not have access to the portable recorder, presenters are still able to find information about it in the help and other locations.

For information about how to upload presentations from a portable recorder, see **Portable Recorder**.

Other System Options

- **Auto Associate Profiles**
- **Auto Import Users**
- **Email Notifications**

Email Notifications

With installation and initial configuration of TechSmith Relay, you are asked to provide email server information. You can also choose to enable or disable email notifications from TechSmith Relay.

These notifications include messages directly from the system:

- Password changes
- Trial expiration
- Server disk space warnings
- Presentations needing attention
- Presentations held for captioning

> This option does not affect any profile notifications.

To update your email notification setting:

1. Go to **System > System Options > Email Notification** tab.
2. Enable or disable the **Enable email notifications** option.
3. Click **Save**.

> To hide the Send Feedback link in emails, deselect the Hide feedback link in emails option.

The feedback is sent to TechSmith and won't impact administration of your TechSmith Relay server.

Other System Options

- **Auto Associate Profiles**
- **Auto Import Users**
- **Portable Recorder Options**

Send Usage Data

By default, the Send Usage Data option is enabled. This means that anonymous information about your hardware and the usage of TechSmith Relay is sent, securely, to TechSmith. No personal information about your organization or presenters is sent.

To disable this option, uncheck **Automatically sends usage data to TechSmith**.

To see the actual data being collected, use the Information Gathering Application. The Information Gathering Application is located here: `C:\Program Files\TechSmith\Relay Server\Manager\InfoGathering.exe`

For more on the type of information collected, see the help file included in the Information Gathering Application.

Plug-Ins

Plug-ins are modules that you can install to add additional publish destinations or notification options to TechSmith Relay. TechSmith Relay comes with various plug-ins available to install for both publish destinations and notification servers:

Name	Plug-In Type	Installed by Default?
Blackboard	Notification	No
Email	Notification	Yes
Moodle	Notification	No
Amazon S3	Publish Destination	No
Drupal	Publish Destination	No
File System	Publish Destination	Yes
FTP Server	Publish Destination	Yes
iTunes U	Publish Destination	No
Kaltura	Publish Destination	No

Name	Plug-In Type	Installed by Default?
Mediasite	Publish Destination	No
Screencast.com	Publish Destination	Yes
Microsoft Windows SharePoint	Publish Destination	No
WebDav	Publish Destination	No
YouTube	Publish Destination	No

> The list of plug-ins that are installed by default is for a new installation. When upgrading from a previous version of TechSmith Relay, any plug-ins that were installed prior to the upgrade are still available.

Additional plug-ins may periodically become available. Instructions to add a new plug-in to your server will be provided with the plug-in.

See also

- **Install a Plug-In**
- **Remove a Plug-In**

Install a Plug-In

Before a plug-in is available to use, you must first verify and install the plug-in.

1. Once a plug-in is available on your server, go to **System > Plug-Ins**.
2. Locate the plug-in in the list and click **Verify**.

   The TechSmith Relay server verifies that it can load the plug-in. Once the plug-in is verified, an **Install** button appears.
3. Click **Install**.

   If the plug in installs correctly, the button disappears.
4. Complete setup for the newly added plug-in:
   - Go to **Profiles > Publish Destination Setup** to access publish destinations.
   - Go to **Profiles > Notification Server Setup** to access notification servers.

See also

- **Remove a Plug-In**.

Remove a Plug-In

Before you can remove a plug-in, it cannot be in use.

1. Go to **System > Plug-Ins**.
2. Determine if the plug-in is in use.
   - If the plug-in is not in use, there is a **Remove** button available for the plug-in.
   - If the **Remove** button is not available, check the following pages to see where the plug-in is in use and delete any dependencies:
     - **Profiles > Publish Destination Setup**
     - **Profiles > Publish Account Setup**
     - **Profiles > Notification Server Setup**
     - **Profiles > Notification Setup**
3. Click **Remove**.

   The plug-in is removed from use but is not removed from the server. All files related to the plug-in are still available on the server. The plug-in stays in the list and can be installed again.

See also

- **Install a Plug-In**.

Activation

Activate TechSmith Relay server to remove the trial period and activate the correct number of encoding processors.

> When moving to a new server, it is important to deactivate TechSmith Relay server before you uninstall the server so you can install TechSmith Relay on another server.

Activate/Deactivate the TechSmith Relay Server

1. Go to System > Activation.
2. Enter your License code and click Activate (or Deactivate).

Offline Activation/Deactivation

If TechSmith Relay is installed on a private network, offline activation/deactivation allows you to do so without connecting to the Internet.

You can activate and deactivate TechSmith Relay server by contacting TechSmith by phone.

- US and Canada please call: +1-800-517-3001
- International please call: +1-517-381-2300 x636

Please be ready with your **Installation ID**, **License code** (or **Proof of removal** code in the case of deactivation). Your license code was emailed in the TechSmith Relay purchase receipt.

Assistance with Activation

In the event of hardware failure or problems, please contact TechSmith.

- US and Canada please call: +1-800-517-3001
- International please call: +1-517-381-2300 x636

Please be ready with your Installation ID, License code or (or Proof of removal code in the case of deactivation). Your license code was emailed in the TechSmith Relay purchase receipt.

Client Machines

On the Client Machines page, you can view information about the client machines for the server. Use this information to troubleshoot problems or verify that presenters download updated recorders, if needed.

You can view the following:

- Computer name
- IP address
- Client type (Windows or Mac)
- Version of the TechSmith Relay Recorder
- Last connection
- Last user to connect (with link to more information)
- Last presentation information (with link to more information)
- Diagnostic information (with link to download a log file)

Event Log

On the Event Log page, you can sort events to troubleshoot problems. Available information includes the following:

- Type
- Date/Time
- Server
- Source
- Details

You can also filter the list based on:

- Errors
- Warnings
- Messages
- Sources

Download Recorders

Access and download all the TechSmith Relay Recorders.

> If you want to record a presentation, you must have a presenter account. You cannot log in to any of the TechSmith Relay recorders as an administrator.

When presenters download the recorder, any available plug-ins and add-ins are also installed on the presenters' computers:

- Windows
  - Presenters are given the option in the TechSmith Relay recorder installer to install the **TechSmith Relay Add-In for Microsoft Office PowerPoint**. This add-in allows a presenter to easily record a PowerPoint slide show with TechSmith Relay from inside of PowerPoint. See the TechSmith Relay recorder help for more information.
  - Presenters that are also running Camtasia Studio 5.1 and above are provided with a plug-in that allows for sending a Camtasia Studio project to the TechSmith Relay server for production and publishing. An option to produce with TechSmith Relay is added to the production process in Camtasia Studio automatically when both programs are installed on the same computer.
- Mac

  Presenters that are also running Camtasia for Mac 1.2 and above are provided with a plug-in that allows for sending a Camtasia for Mac project to the TechSmith Relay server for production and publishing. An option to share with TechSmith Relay is added to Camtasia for Mac automatically when both programs are installed on the same computer.

For information on the portable recorder, see **Portable Recorder**.

Portable Recorder

Provide the portable recorder to presenters if there is any reason that presenters cannot (or should not) record and upload directly from the presentation computer. For example:

- Presenters record on computers where they do not have permission to install applications.
- Presenters record on computers that have limited or no network access.
- You want to collect the presentations and upload them collectively at a later time.
- You want to have presenters contact an administrator to receive a portable recorder.
- You want to install the TechSmith Relay portable recorder on a mobile storage device and distribute to presenters.

You can select how you want presenters to **access the portable recorder** on the **System Options** page.

Create a Portable Recorder

Use the following process to install the portable recorder on a mobile storage device, such as a USB flash drive.

1. Plug in a mobile storage device with a minimum of 4GB storage and format the device as FAT32.
2. Click **Download Portable Recorder** and save the ZIP file to your computer.
3. Locate and open PortableCamtasiaRelayRecorder.zip.
4. Copy all files from the ZIP file onto the mobile storage device.

All files from the ZIP file need to be copied to the root of the device for the TechSmith Relay portable recorder to autorun on Microsoft Windows operating systems.

Upload Presentations from a Portable Recorder

To upload presentations from a portable recorder:

1. Connect the portable recorder to a computer with the desktop version of the TechSmith Relay Recorder installed on it.
2. Make sure that the desktop TechSmith Relay recorder is <u>not running</u> and open the TechSmith Relay portable recorder.
3. Click the **View Saved Presentations** button.
4. The Saved Presentations dialog opens.
5. Click **Submit All** to submit all of the presentations for upload or click to submit individual presentations.

You can submit saved presentations at any time.

- If you are online and connected to the server, your presentations start to upload.
- If you are offline, your presentations are stored on the computer and automatically upload to the server once you are online and connected.

After you upload saved presentations, you cannot access or view your presentation or the status of the upload in the TechSmith Relay Recorder. You can check the status of the presentations on the **Presentations** page of the TechSmith Relay website.

Presentations Menu

The Presentations menu allows you to view and manage presentations. The following pages are available in this menu:

- **Presentations**
- **Job Status**
- **History**

Presentations

The Presentations page allows you to view presentations by state and take action to resolve issues.

Presentations in all states have the following information:

- User name and email of presenter that submitted the presentation
- Date and time the presentation was recorded

- Computer name, with link to diagnostic information on the **Client Machines** page
- Presentation description, if entered by the presenter
- Profile used, with link to view and edit profile
- Duration of presentation
- Resolution of presentation

You can view presentations on the server by the following states:

States	Description
Needs Attention	Use the information and options provided to resolve issues so the presentation can process. Includes a list of presenters and a list of profiles to select from. You can also delete presentations.
Processing	View the progress of a processing presentation. You can see the progress of each job associated with the presentation, including transcription, encoding, publishing, and notifications.
Uploading	View the upload progress and cancel upload, if needed.
Completed	View the status of presentations that have completed processing. For some publish destinations, links are included to view the published presentation. Select **Remove from List** to permanently remove a presentation from the Completed list.
Deleted	View information about any deleted presentations.
Failed	Use the information provided to figure out why a presentation failed. Includes status information to show you which part of processing failed.
Held for Captioning	View the presentations held for caption editing. When caption editing is complete or to skip caption editing, click **Release Hold** to continue processing the presentation. Only presenters can edit captions; administrators can only release a hold.

Job Status

The Job Status page allows you to view and sort jobs on the TechSmith Relay server or teamed servers. You can filter jobs by the following:

- Status
  - Queued
  - Processing
  - Failed

    > For failed jobs, expand the presentation information to resubmit or delete the presentation.

- Canceled
- Pending
- Type
  - Encoder
  - Publisher
- Server
  - All servers
  - Specific server

History

The History page allows you to view the history of TechSmith Relay presentations. You can do the following with the items on this page:

Item	Description/Action
Presentation Title	Click to expand and view more information on the presentation. Includes profile, client machine, processing progress, and more.
Presenter	The username of presenter that recorded the presentation. Click the username to view more information about the presenter.
Server	The name of the server processing the presentation. Click to view the status of the server.
Recording Date/Time	Date and time that the presentation was recorded
Presentation Status	Icons show the status of the presentation. Uploading Processing Complete Needs Attention Failed Deleted
Jobs Queued Jobs Processing	Icons show the status of jobs for the presentation.

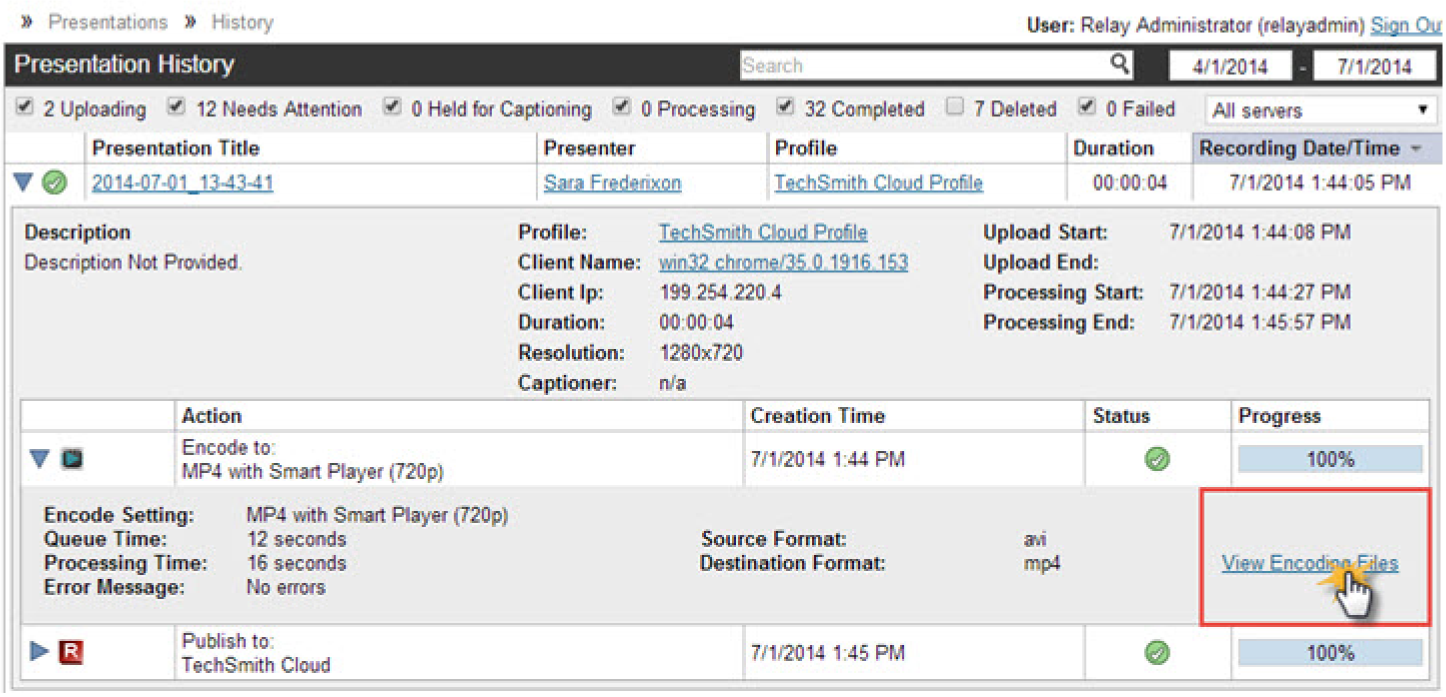
Item	Description/Action
Jobs Canceled	

Uncover More Information

You can drill down to find more information on the presentations by expanding the presentation information and clicking available links.

For example, if you'd like to see information about the source recording files for a presentation, you could:

1. Click a presentation to expand the available information.
2. Click the down arrow to expand an encoding action from the list.
3. Click **View Encoding Files**.



4. A new browser tab or page opens to show you information about the source files and the files produced during encoding. Use this information for testing or troubleshooting.

Profiles Menu

The Profiles menu allows you to create and maintain profiles and related items. The following pages are available in this menu:

- **Profiles**
- **Publish Destination Setup**
- **Publish Account Setup**
- **Notification Server Setup**

- **Notification Setup**
- **Variables**

Profiles

Profiles are the backbone of TechSmith Relay. They allow presenters to record without having to make any decisions about how the presentations are processed or where they are placed for viewing.

Profile setup involves settings and information found on the following tabs:

- **Profile Settings**
- **Publish Destinations**
- **Encode Settings**
- **Publish Accounts**
- **Notification Selection**
- **Notification Assignment**
- **Variable Definition**
- **Overview**
- **Profile Test**

Information about Profiles

- **Upload and Decide Later Profile**

  The Upload and Decide Later Profile uploads the recorded presentation to the TechSmith Relay server but the recording is not encoded or published. An authorized presenter or TechSmith Relay administrator must assign a different profile and submit the recording for publishing via the TechSmith Relay website.

  Why use the Upload and Decide Later Profile?

  - For guest presenters, it is the only profile available.
  - You make a presentation in advance, but do not want it published until later.
  - You are not satisfied with existing profile options and wish to hold the recording on the server until you can contact your TechSmith Relay administrator to create or modify a profile.

- **Tab Status Icons**

  Each tab shows its current status. The status icons are as follows:

	Everything on this tab is valid and in working order.
	Something on this tab is not quite right. You might want to verify that you are not missing anything. This does not make a profile invalid.

	Example: There are no notifications selected.
	There is an error on this tab. You will need to enter or correct information before this profile can be used. Example: There are publish destinations without encode settings selected.

Create a New Profile

To create a new profile:

1. Go to **Profiles**.
2. Click the **New Profile** button.

   The Profile Setup page opens.
3. Work through, from top to bottom, the tabs at the left side of the page.

Profile Settings

In the Profile Settings tab, you enter some basic information about the profile.

1. Enter a title for the profile.

   Remember that the profile title is the only thing presenters can see in the recorder. The profile description is only visible on the website. Consider carefully how you choose profile titles so that they convey their intended use to presenters.
2. Enter a description.
3. Select the **Transcription Settings**.
4. Click **Save**.

See also

- **Transcription Options**
- **Publish Destinations**
- **Encode Settings**
- **Publish Accounts**
- **Notification Selection**
- **Notification Assignment**
- **Variable Definition**
- **Overview**
- **Profile Test**

Transcription Options

TechSmith Relay provides an optional transcription process that allows you to include a full audio search, captions, or both in presentations. The available options are:

- **No transcription**

  Presentation audio is not transcribed.

- **Captions and full audio search**

  Presentation audio is transcribed for captions and full audio search in Flash and Silverlight encodings. Choose one of the web or Silverlight **encoding options** to make this available for viewers.

  When audio transcription is complete, the presentation is put into a Held for Captioning state on the Presentations page. There the presenter can review and edit the transcribed audio and release the hold to continue processing the presentation.

- **Full audio search only**

  Presentation audio is transcribed to provide a full audio search in Flash and Silverlight encodings, but no captions are shown in the presentation.

  If you want to publish a different encoding type, you can still gain some benefits from transcription. For example, enable the XML file (when available) to make the transcribed audio available as metadata in the file. You can use this metadata for other uses, such as searching within a media server.

  - **Can be captioned by Presenter only**

    Presentation captions can only be edited by the presenter who uploaded the presentation.

  - **Can be captioned by Presenter and Global Caption Editors**

    Presentation captions can be edited by the presenter who uploaded the presentations or any Global Caption Editor.

> The transcription process adds time to presentation processing.

See also

- **Profile Settings**
- **Publish Destinations**
- **Encode Settings**
- **Publish Accounts**
- **Notification Selection**
- **Notification Assignment**
- **Variable Definition**

- Overview
- Profile Test

Publish Destinations

On the Publish Destinations tab, you select the publish destinations you want to use for presentations processed with the profile.

1. Select one or more publish destinations from those available.

   To create additional publish destinations, go to **Profiles > Publish Destinations**.
2. Click **Save**.

See also

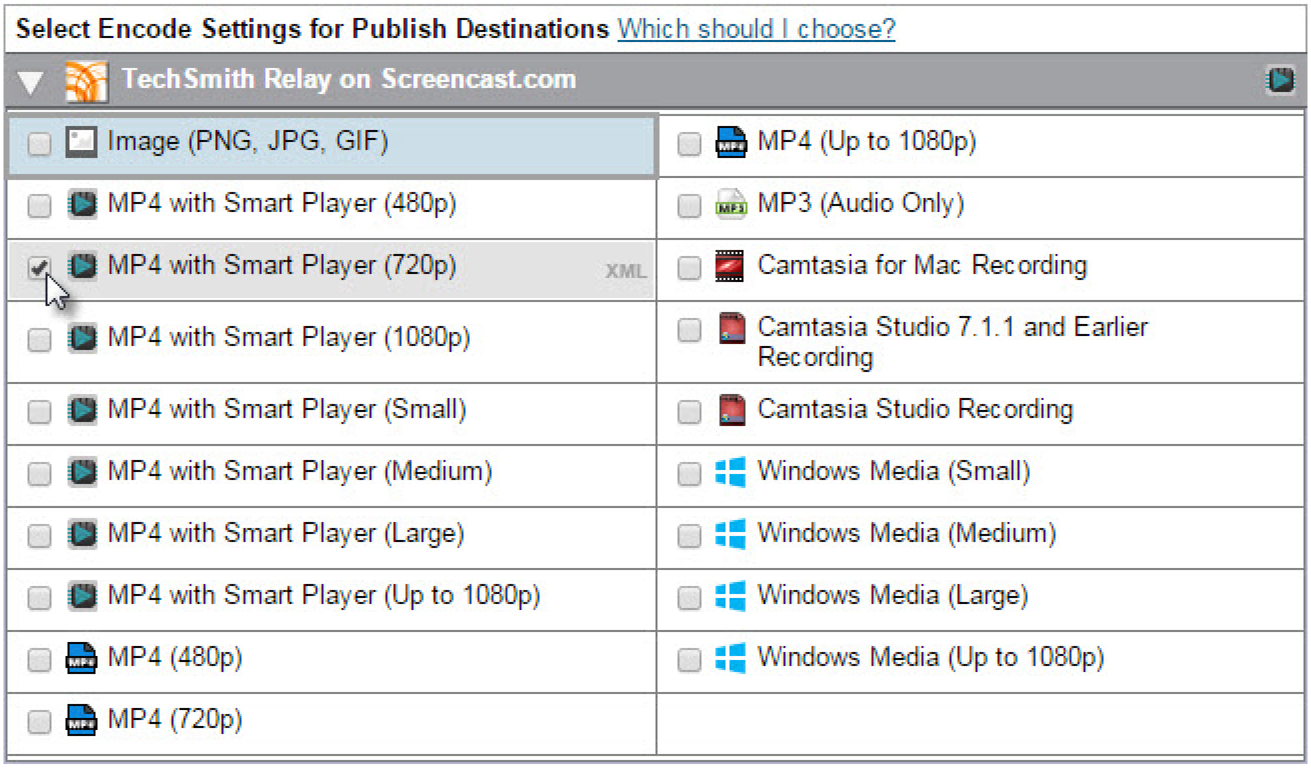
- Publish Destination Setup
- Publish Account Setup
- Profile Settings
- Encode Settings
- Publish Accounts
- Notification Selection
- Notification Assignment
- Variable Definition
- Overview
- Profile Test

Encode Settings

On the Encode Settings tab, you select what kinds of encodings you want going to each of the previously selected publish destinations.

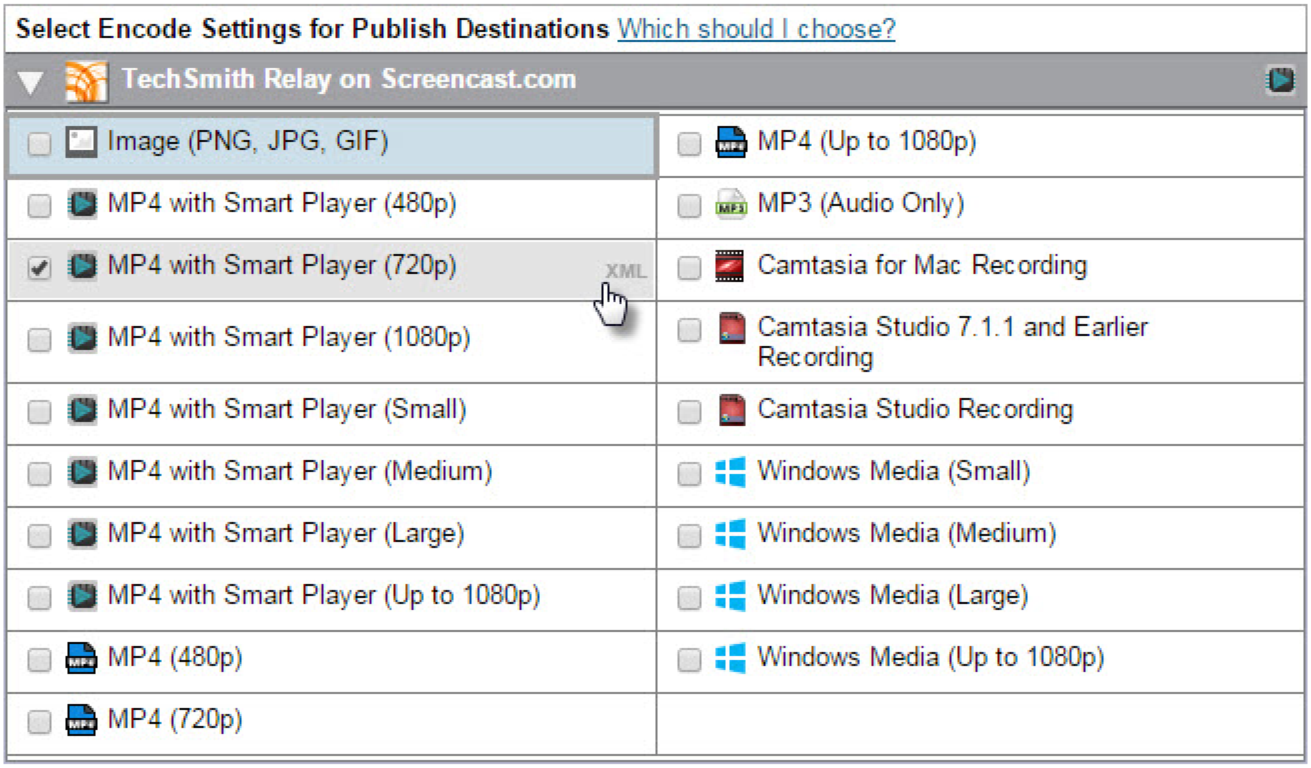
1. Click to expand a publish destination, if needed.
2. Select the types of encodings you want to publish to that destination.

   For information on the available encoding types, see **Available Encoding Formats**.



If an encoding type has an XML file available to include, an XML symbol shows up after you enable the encoding type.

3. Click **XML** to include an XML file with the processed presentation. For some publish destinations, XML is required and is enabled automatically.



For more information about this XML file, see **Publish XML File with an Encoding**.

4. Repeat for each publish destination.
5. Click **Save**.

Available Encoding Settings

The table below contains descriptions of the encoding formats available in TechSmith Relay. The *MP4 with Smart Player* encoding is recommended for use in most situations. This setting utilizes the TechSmith Smart Player to create an output with a video player that includes an HTML5 playback. The Smart Player plays great on desktop browsers, on iPhones and iPads, and on many other mobile devices that support MP4 video. It supports Table of Contents, Speech to Text, and Closed Captioning.

> If transcription is enabled on the Profile Settings tab, you must include a Flash or Silverlight encoding format or include an XML file with the encoding to utilize the transcribed audio.

Preset	Format	Includes Camera PIP?	Description
Image (PNG, JPG, GIF)	PNG, JPG, GIF	No	This encode setting produces a single image file with the same format as the original upload. Use this if you want to upload images.

Preset	Format	Includes Camera PIP?	Description
MP4 with Smart Player - 480p - 720p - 1080p - (Small) 640x480 - (Medium) 800x600 - (Large) 1024x768 - (Up to 1080p)	MP4	Yes	This encode setting creates an MP4 video file that is displayed in an HTML5 controller called the TechSmith Smart Player. Additional files are created to provide an Flash fallback player in cases where the HTML5 is not available. The Smart Player plays great on desktop browsers, on iPhones and iPads, and on many other mobile devices that support MP4 video. The Smart Player supports a table of contents based on the titles of slides in a PowerPoint or Keynote presentation, as well as slide text, full audio search, and captions (if enabled).
MP4 (480p)	MP4	Yes	This encode setting creates an MP4 video file with no additional files. The final resolution of the video is fixed at 480p.
MP4 (720p)	MP4	Yes	This encode setting creates an MP4 video file with no additional files. The final resolution of the video is fixed at 720p.
MP4 (Up to 1080p)	MP4	Yes	This encode setting creates an MP4 video file with no additional files. The file is the same dimensions as the original recording up to 1080p.
MP3	MP3	No	This is an audio-only encode setting. The server can process this encoding extremely fast, and the resulting file size is small. This is a good encode setting for those who may want an audio-only version of their presentation.
Camtasia for Mac Recording	ZIP > CMPROJ	No	This encode setting generates a lossless video file for editing

Preset	Format	Includes Camera PIP?	Description
			within Camtasia for Mac. This encoding should only be given to presenters with access to Camtasia for Mac. The resulting file is a ZIP file that, when opened on a Mac, automatically unzips into a directory. The user can double-click that directory to launch the CMPROJ in Camtasia for Mac.
Camtasia Studio 7.1.1 and Earlier Recording	CAMREC	Yes	This encode setting generates a .camrec file for use with Camtasia Studio versions 5.1 to 7.1. The CAMREC contains PowerPoint and Keynote slide and title clip markers. This encoding should only be given to presenters with access to Camtasia Studio. When publishing a .camrec file to a location with a valid web URL, the resulting notification includes a “View” link. Because web servers do not have a MIME type set up for .camrec files, the link leads to a 404 error page.
Camtasia Studio 8.0 and Later Recording (Original size)	CAMREC	Yes	This encode setting generates a .camrec file for use with Camtasia Studio version 8.0 and later. The .camrec file contains PowerPoint and Keynote slide and title clip markers. This encoding should only be given to presenters with access to Camtasia Studio. When publishing a TREC file to a location with a valid web URL, the resulting notification includes a “View” link. Because web servers do not have a MIME type set up for TREC files, the link leads to a 404 error page.
Windows Media	WMV	Yes	This encode setting creates

Preset	Format	Includes Camera PIP?	Description
(Small) 640x480 (Medium) 800x600 (Large) 1024x768 (Original Size)			video files that play in Windows Media Player. The video files tend to be larger than the Flash and Silverlight encodings, but may be preferred by Windows users with high speed internet access.
YouTube	MP4	Yes	This encoding is only available for the YouTube publish destination. This is used for publishing directly to YouTube using the YouTube publishing plug-in. The video is subject to YouTube's restrictions.
Unsupported Presets (as of version 5.0)	**Format**	**Includes Camera PIP?**	**Description**
AVI (Original Size)	AVI	Yes	This encode setting produced a single AVI file with the same resolution as the original recording. This file was used if you wanted to perform your own video processing and encoding. Note that AVI files usually have a larger file size than presentations encoded in other formats. The recommended encode setting is **MP4 (up to 1080p)**. Like the AVI (Original Size), this setting produces a single file and maintains the resolution of the original recording (up to 1080p).
Original Recording (Backup)	AVI (Windows) MOV (Macintosh)	Recording and camera video are two separate files	This encode setting did not modify the original recorded file in any way. The file size was enormous and usually not considered viewer-friendly. For those switching from the Original Recording (Backup), the **MP4 (Up to 1080p)** is recommended. Not only does the MP4 play nicely on both Windows and

Preset	Format	Includes Camera PIP?	Description
			Macintosh platforms, this setting will maintain the resolution of the original recording, which could be helpful for backup purposes or troubleshooting.
Silverlight - (Small) 640x480 - (Medium) 800x600 - (Large) 1024x768 - (Original Size)	XAP	Yes	This encode setting created video files that played in Microsoft Silverlight. The controller supported a table of contents based on the titles of slides in a PowerPoint or Keynote presentation, as well as searching slide text, full audio search, and captions, if enabled. The **MP4 with Smart Player** is recommended for those used to the Microsoft Silverlight controller. This setting will produce the video file with the TechSmith Smart Player, which supports a table of contents based on the titles of slides in a PowerPoint or Keynote presentation, as well as slide text, full audio search, and captions (if enabled).
Windows Portable Media Player	WMV	No	This encoding was designed to provide a solution for Windows Mobile Devices (Pocket PCs) and some Windows-based Smartphones.
iPad	MP4	Yes	This encode setting created video files with varied final resolutions to provide a good viewing experience for a given video on an iPad.
iPod and iPhone	MP4	Yes	This encode setting worked on all iPods and iPhones that support video. The final resolution of the video was fixed at 640 x 480. Th video looked good on all iPods and iPhones, but not if played in QuickTime on a desktop computer.

Publish XML File with an Encoding

TechSmith Relay provides administrators with the option to generate XML files for published presentations. For some publish destinations, XML is required and is enabled automatically.

The XML data contains information about the presentation such as the title, length, format, resolution, and more. When you enable the transcription process in **Profile Settings**, the XML also contains the transcription of the presentation audio.

Customers may use the XML file with existing media-hosting solutions, content delivery methods such as RSS feeders, etc. TechSmith provides the XML data as a service, but does not support how the institution uses the XML file.

XML data is available for all encode types and all supported publish destinations with the following exceptions:

- XML is not included with presentations published to iTunes U.
- XML data is parsed into fields (as opposed to a single XML file) for presentations published to Screencast.com. The metadata can be found under Details when viewing a presentation on Screencast.com.

Information Included in the XML File

- Presentation information: title, description, date, duration, and resolution
- Profile used to create presentation
- Presenter name
- Client (computer used to make the recording) IP address, and computer name
- Server name where recording was processed
- Encoding preset used
- Length of time the presentation was in the queue for processing
- Length of time it took to encode the presentation
- Destination URL of published presentation

See also

- **Profile Settings**
- **Publish Destinations**
- **Publish Accounts**
- **Notification Selection**
- **Notification Assignment**
- **Variable Definition**
- **Overview**
- **Profile Test**

Publish Accounts

In the Publish Accounts tab, you select the account to use for each publish destination/encoding combination.

1. Click to expand a publish destination, if needed.
2. Select an account to use for each of the encodings for the publish destination.

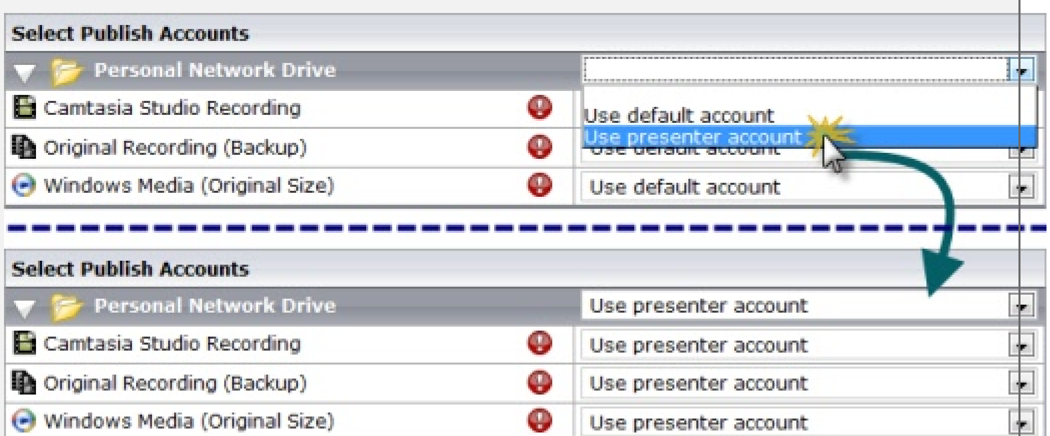
   The account currently set as the default account for the publish destination is automatically selected.

   You can:

   - Keep the selected account
   - Select another account
   - Select **Use presenter account**

     This option allows presenters to enter their own credentials. Presenters need to log in to the TechSmith Relay website and enter their credentials.
   - Select **Use default account**

     This option allows the profile to access the default account information at the time of profile processing. You may want to use this option if the default account information changes from time to time.

> If you want to use the same account for all encodings under a publish destination, you can use the top level dropdown box to select the account.
>
> 
>

3. Repeat for each publish destination.
4. Click **Save**.

See also

- Publish Account Setup
- Publish Destination Setup
- Profile Settings
- Publish Destinations

- Encode Settings
- Notification Selection
- Notification Assignment
- Variable Definition
- Overview
- Profile Test

Notification Selection

In the Notification Selection tab, you select which notifications you want to use in the profile.

1. Select one or notifications to use with the profile.

   All configured notifications are shown for you to choose from.

   > You do not have to select a notification for the profile to be valid. If you choose to not include notifications in the profile, the only way to tell if a presentation has finished processing is to go to Presentations page, locate the presentation, and view the status.

2. Click **Save**.

See also

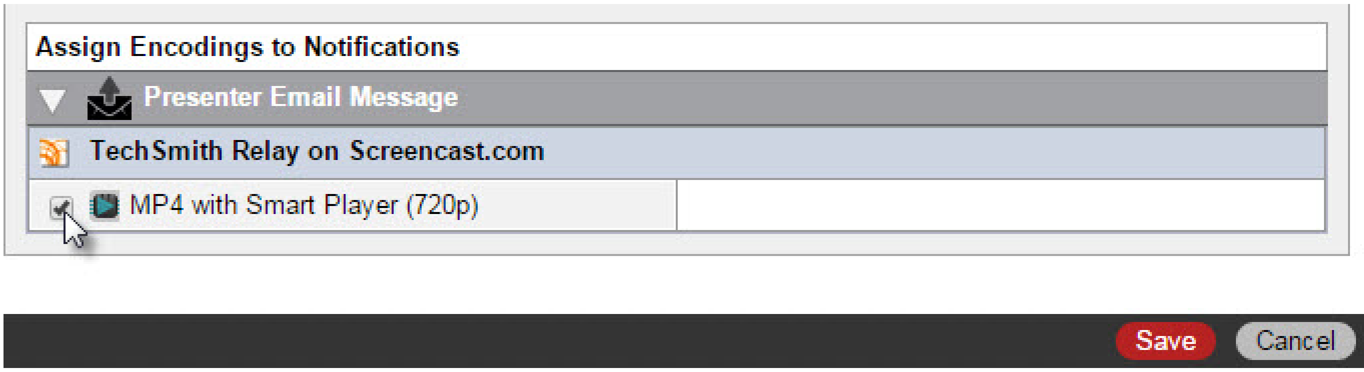
- Notification Setup
- Profile Settings
- Publish Destinations
- Encode Settings
- Publish Accounts
- Notification Assignment
- Variable Definition
- Overview
- Profile Test

Notification Assignment

In the Notification Assignment tab, you select the encodings you want to associate with each previously selected notification. Each notification only includes information about the encodings associated with it.

1. Click to expand a notification, if needed.
2. Under each notification, all publish destination/encoding combinations for the profile are shown.

3. Select the encodings you want to assign to the notification.



4. Repeat for each notification.
5. Click **Save**.

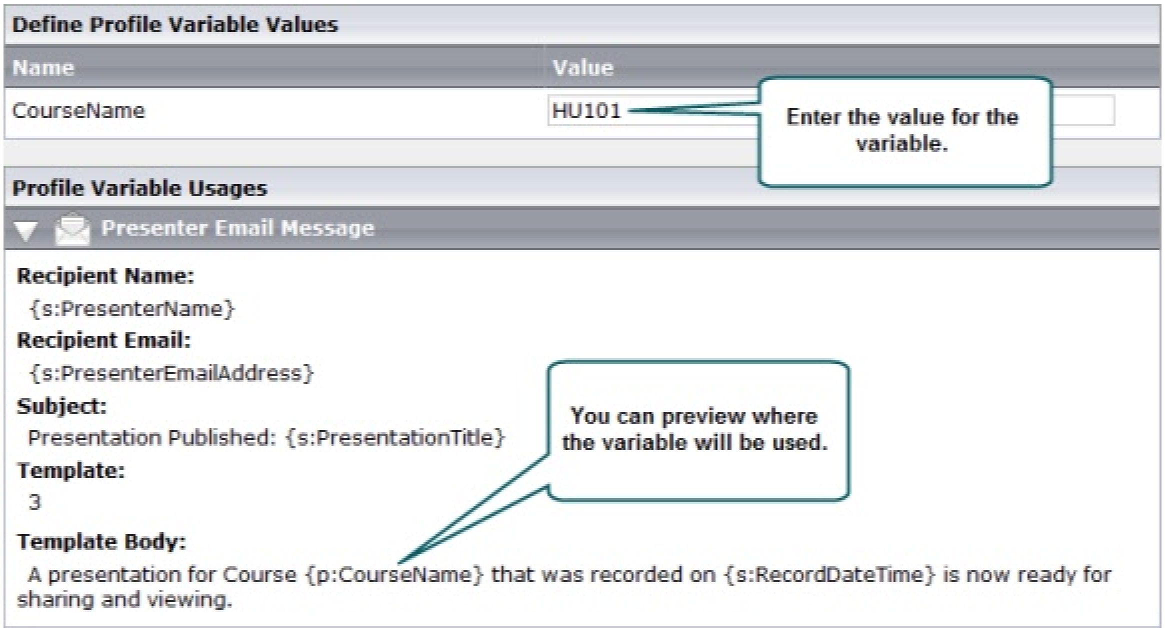
See also

- **Notification Setup**
- **Profile Settings**
- **Publish Destinations**
- **Encode Settings**
- **Publish Accounts**
- **Notification Selection**
- **Variable Definition**

Variable Definition

On the Variable Definition tab, you define the value for any **profile variables** that are used in the profile. You only need to fill in values if you have previously created and used a profile variable in another part of the profile, such as a file path or notification.

1. Enter a value for each profile variable used in this profile.



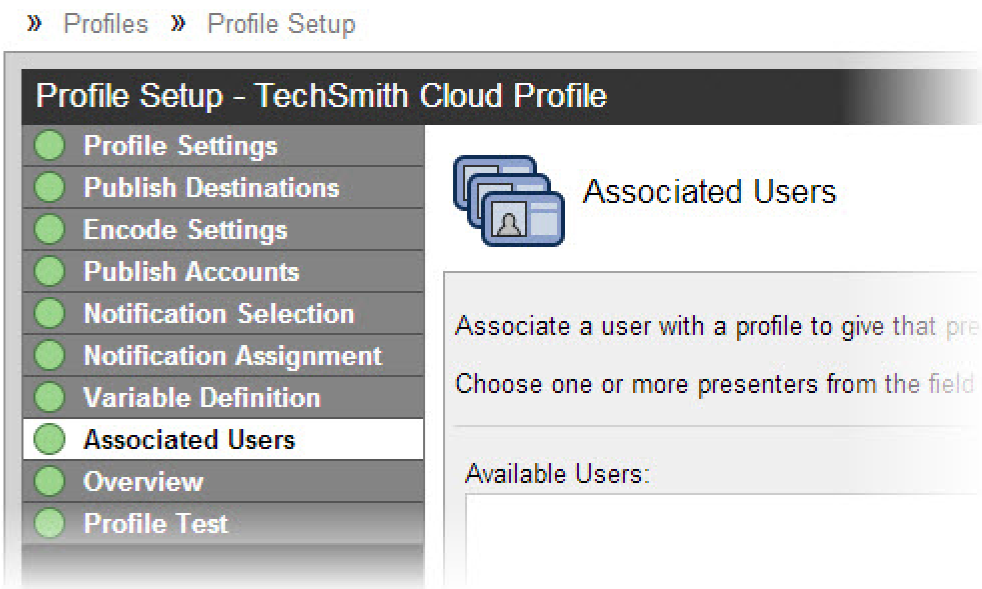
2. Click **Save**.

See also

- Variables
- Profile Settings
- Publish Destinations
- Encode Settings
- Publish Accounts
- Notification Selection
- Notification Assignment

Associated Users

In the Associated Users tab, you select users to associate with the profile. This gives the selected presenters access to the profile in TechSmith Relay Recorder.



1. In the Available Users list, click to select a presenter.

   Presenters are shown in the list in the following format: Display Name (username). For example: Mary Smith (m.smith)

   > To select multiple presenters, hold down **SHIFT** or **CTRL** as you select users from the list.

2. Click **Add** to associate presenters with the profile.
3. If you would like to have this profile automatically associated with all new presenters as they are added to TechSmith Relay, enable the **Automatically associate this profile with new users** option.

   > If you do not see this option, you need to turn on this functionality. Go to **System > System Options > Auto Associate Profiles** and enable the **Automatically associate selected profiles with new users** option. When you return to the Associated Users tab of a profile, you will see the option.

4. Click **Save**.
5. Click the **Overview** tab to continue.

Overview

On the Overview tab, you can see and review the setup of a profile.

You can click the **Information** icon to access more information about one of the following:

- Publish destinations
- Publish accounts
- Encode settings
- Notifications

> Presenters that are associated with this profile are able to see this same overview when they log in to the website.

See also

- **Profile Settings**
- **Publish Destinations**
- **Encode Settings**
- **Publish Accounts**
- **Notification Selection**
- **Notification Assignment**
- **Variable Definition**

Profile Test

On the Profile Test tab, you can process a sample presentation to verify that the profile behaves as you expect.

Basically, TechSmith Relay provides a pre-recorded presentation so you can test the behavior of the profile without having to install the recorder and record a presentation.

1. Select a presenter to test the profile. This presenter's information is used, if needed, for variables, accounts, etc.

   You may want to make sure the presenter knows that you are going to test the profile, or use your own presenter account.

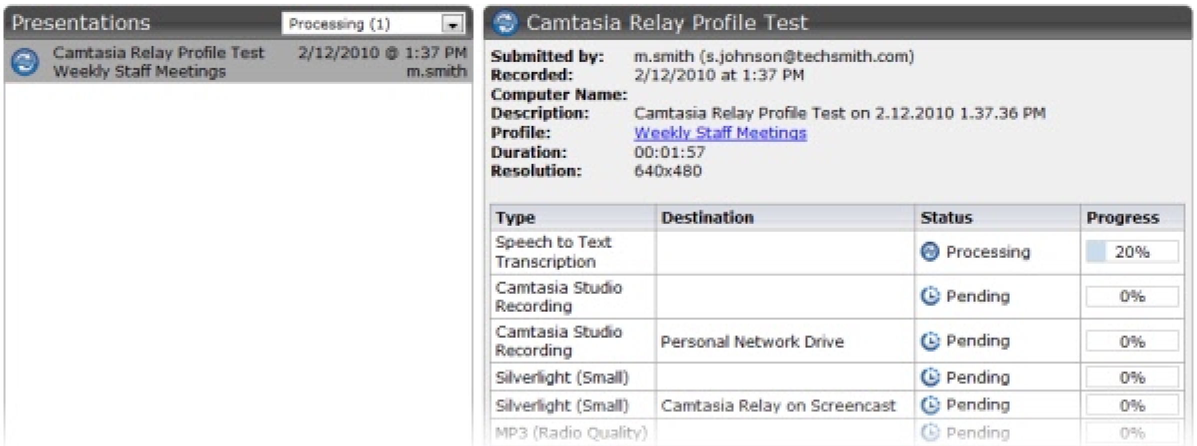
   > The presenters available in the list are the users associated with this profile.

2. Select whether or not you want to test the notifications associated with the profile.
3. Select whether or not you want to include the **Hold for caption editing** process in the profile test.
4. If you choose not to send notifications, you can view the status of the sample presentation on the **Presentations** page.
5. Click **Test Profile**.

   TechSmith Relay submits a sample presentation and processes it with the settings of the profile.

6. You are redirected to the **Presentations** page where you can follow the progress of the presentation's

processing.

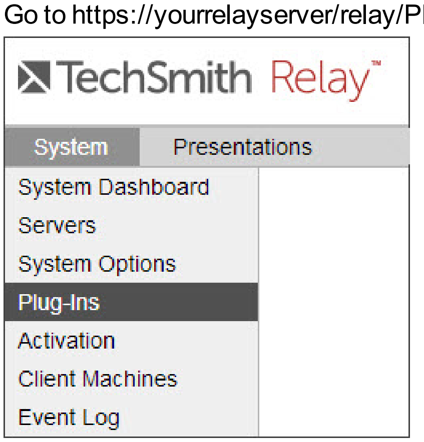


See also

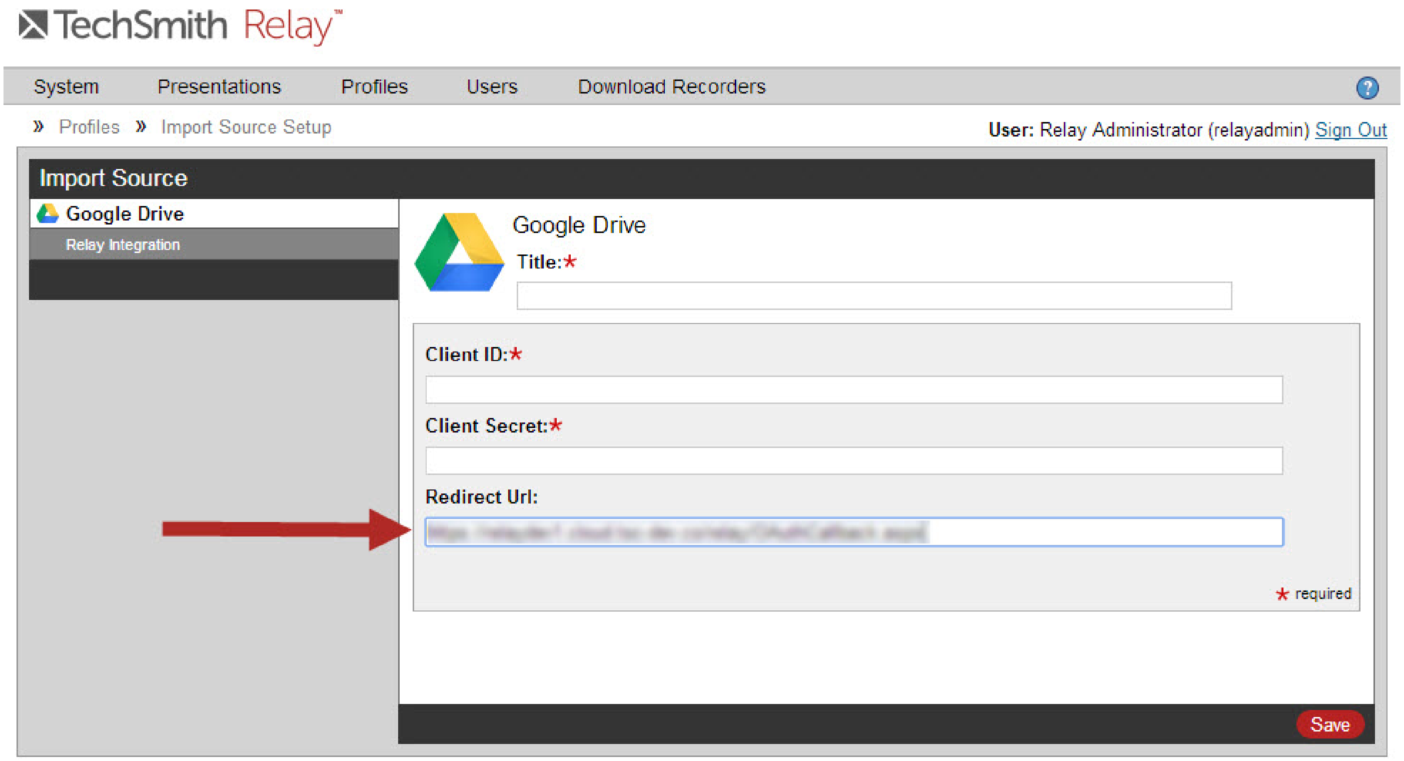
Overview

Google Drive Configuration

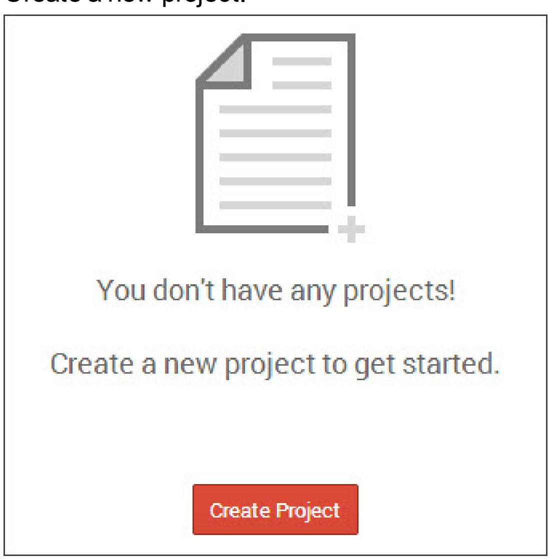
1. Go to https://yourrelayserver/relay/PluginList.aspx and install the Google Drive plug-in.



2. Then, navigate to https://yourrelayserver/relay/ImportSourceSetup.aspx and copy the redirect URL.

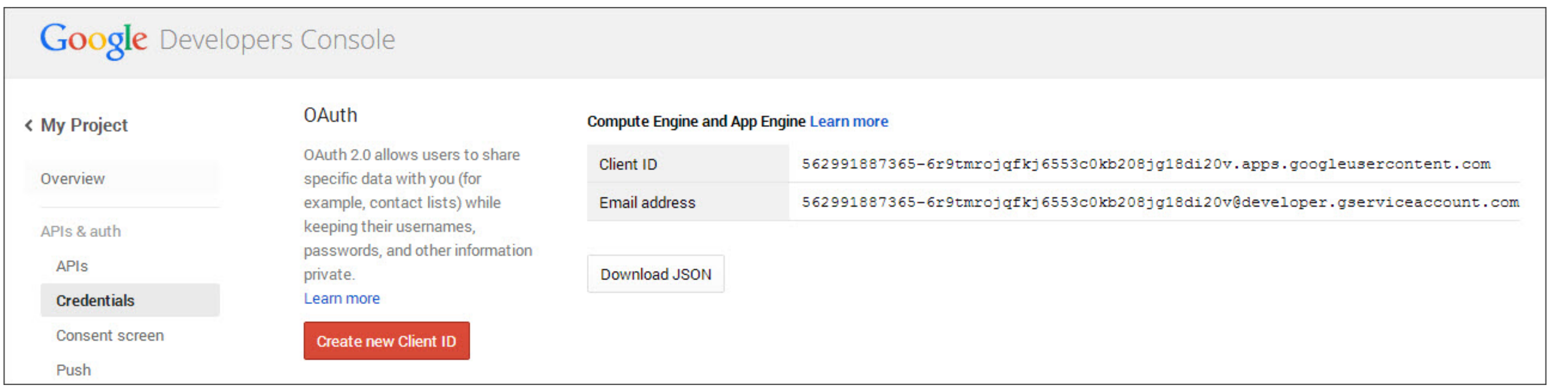


3. In a new browser window, sign in to **https://console.developers.google.com**. If you do not have a Google account, create one and then sign in.
4. Create a new project.

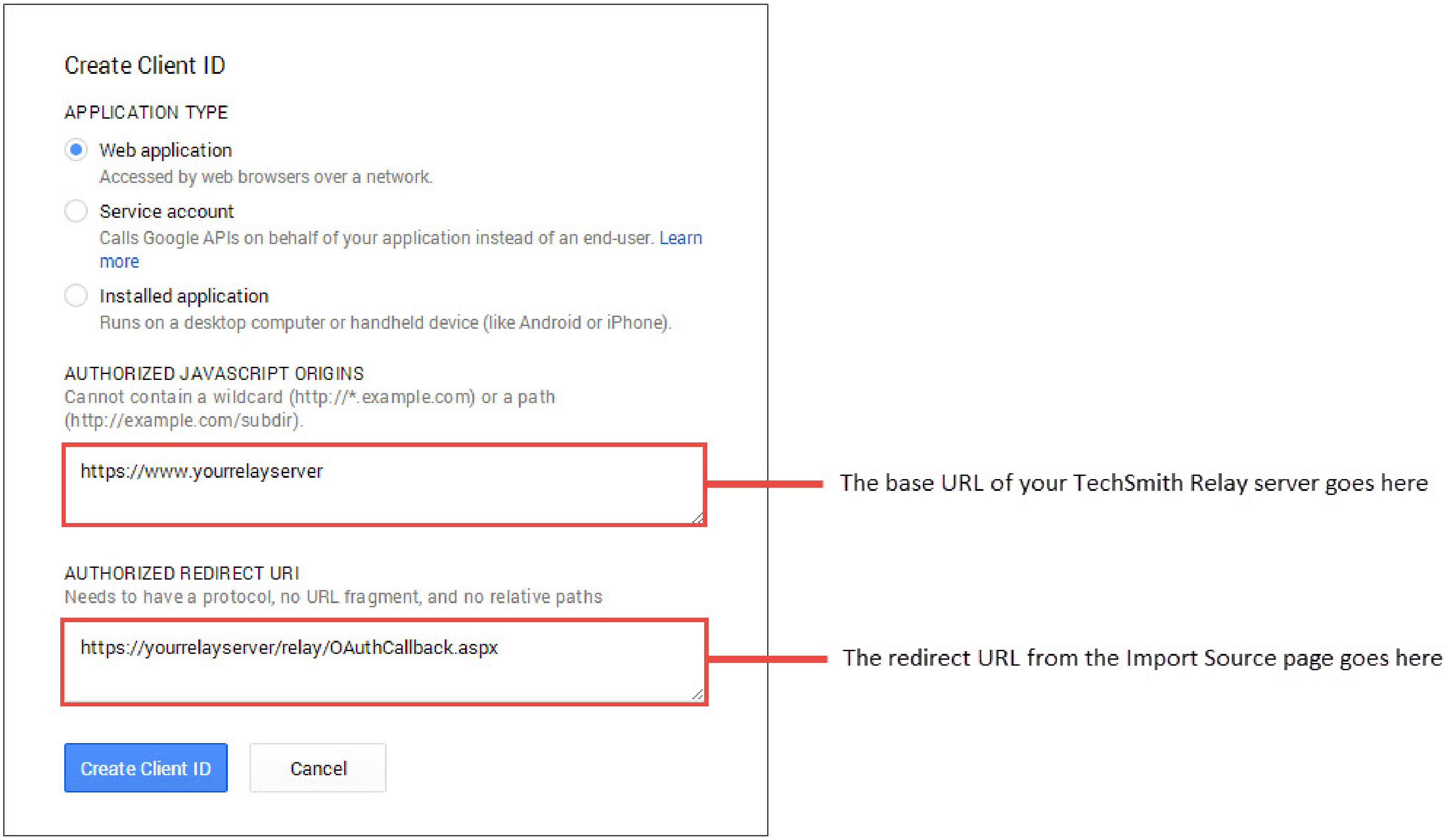


5. From the Project Dashboard, go to the APIs & auth tab, select APIs, and enable both the Drive API and Drive SDK options.

6. Then select the Credentials tab, and click Create a new Client ID to open a developer console.

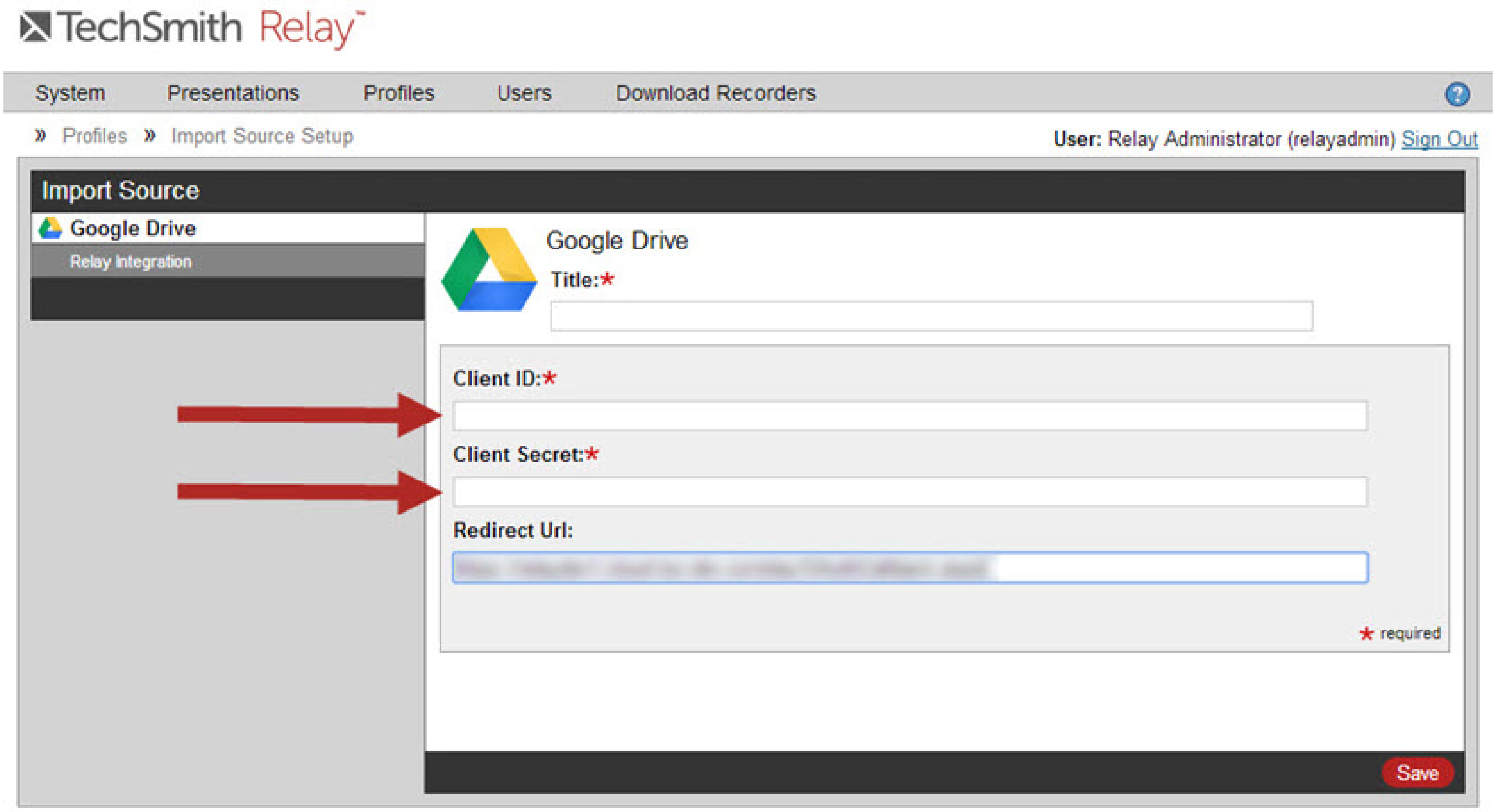


7. Paste the redirect URL from your clipboard into the console as shown below. The authorized Javascript origins should be the base URL of your TechSmith Relay server.



8. Click Create Client ID. A Client ID and Client Secret are generated for you.

9. Return to https://yourrelayserver/relay/ImportSourceSetup.aspx, paste the Client ID and Client Secret into their respective fields, and click Save.



10. Optional: If you would like to use the TechSmith Relay icon for the Google Drive consent screen, you can paste the following link into the APIs & Auth > Consent screen in the Google developer console in the LOGO field:
http://assets.techsmith.com/Images/content/mkt-product-camtasiaRelay/Relay-icon.png

Publish Destination Setup

TechSmith Relay can publish presentations to one or more of the following locations. Click the publish destination type to learn more.

- **File System** (Network drives, etc)
- **FTP Server** (FTP & sFTP)
- **Screencast.com** (TechSmith's media-hosting service)
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U** (TechSmith Relay formats supported by iTunes U include MP4 and MP3)
- **Kaltura**

- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See Plug-Ins for more information.

Publish to Amazon S3

To create an Amazon S3 publish destination:

1. Click **Profiles > Publish Destinations**.
2. Click **Amazon S3** on the left to create a new destination.
3. Enter a title, the Amazon Access Key, and Amazon Secret Key.
   The access key and secret key are provided by Amazon.
4. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
5. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **File System**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Mediasite**

- **Drupal**
- **YouTube**

Publish to Drupal

> TechSmith Relay currently supports release 6.1 and 7 of Drupal. The TechSmith Relay Drupal plug-in has been tested with version 6.1.9 and version 7.2.

1. Click **Profiles > Publish Destinations**.
2. Click **Drupal** on the left to create a new destination.
3. Enter all required information and select FTP and XMLRPC protocol options.
4. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
5. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See**Plug-Ins** for more information.

See also

- **File System**
- **FTP Server**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Mediasite**
- **YouTube**
- **Amazon S3**

Publish to File System

To create a file system publish destination:

1. Go to **Profiles > Publish Destination Setup**.
2. Click **File System** on the left to create a new destination.

3. Enter all required information. Use **variables** to help create multi-purpose publish destination paths and URLs, as needed.
4. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
5. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **FTP Server**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to FTP Server

To create an FTP (or sFTP) publish destination:

1. Click **Profiles > Publish Destinations**.
2. Click **FTP Server** on the left to create a new destination.
3. Enter all required information. Use **variables** to help create multi-purpose publish destination paths and URLs, as needed.
   - Use the dropdown to select from :
     - http
     - https
     - mms

        - rtmp
        - rtsp
    - Use the dropdown to select between FTP or sFTP protocol.

4. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.

5. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **File System**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to iTunes U

1. Click **Profiles > Publish Destinations**.
2. Click **iTunes U** on the left to create a new destination.
3. Enter all required information.
4. Click **Save**.
5. The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
6. Click the link to continue with **Publish Account Setup**.

iTunes U Publishing Requirements

TechSmith Relay can publish presentations directly to iTunes U provided the following conditions are satisfied:

- Your institution has an iTunes U account. TechSmith is not affiliated with iTunes U.
- The published presentations are encoded into a file type supported by iTunes U. TechSmith Relay offers MP4, and MP3. (iTunes U supports M4A, MP3, MP4, M4V, MOV, and PDF.)
- You know the Shared Secret code provided to your school by Apple. This is a 32 character alpha-numeric code.
- You have access to desired Media Group ID codes. These are 10-digit numbers that direct the produced media into a specific instructor's class. **Learn how to find your Media Group ID**.
- Viewers need iTunes on their computers.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See**Plug-Ins** for more information.

See also

- **File System**
- **FTP Server**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **Kaltura**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to Kaltura

TechSmith Relay can automatically publish presentations to Kaltura and Kaltura MediaSpace™.

Custom Data in Kaltura

To allow TechSmith Relay to publish to Kaltura, your Kaltura account must have Custom Data enabled. To verify this option is enabled, log in to your Kaltura administrator account and go to Settings.

If you do not see a Custom Data tab under Settings, please contact Kaltura support.

Configure TechSmith Relay to Publish to Kaltura

1. Go to **Profiles > Publish Destinations**.
2. Click **Kaltura** on the left to create a new destination.
3. Enter a title for the publish destination.

4. Enter the Service URL.
5. Enter the Partner ID and Administrator Secret.

   To locate this information, log in to the Kaltura Management Console and go to **Settings > Integration Settings**.
6. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination. See **Kaltura Publish Accounts** for additional information.
7. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **File System**
- **FTP Server**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to Mediasite

> TechSmith Relay currently supports and has been tested with release 5.5 of Mediasite.

1. Click **Profiles > Publish Destinations**.
2. Click **Mediasite** on the left to create a new destination.
3. Enter all required information and select the FTP protocol option.
4. Click **Save**.
5. The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
6. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **File System**
- **FTP Server**
- **Screencast.com**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to Screencast.com

To create a Screencast.com publish destination:

1. Click **Profiles > Publish Destinations**.
2. Click **Screencast.com** on the left to create a new destination.
3. Enter a default folder. You can use **variables** to help automatically personalize the folder name.
4. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
5. Click the link to continue with **Publish Account Setup**.

What is Screencast.com?

Screencast.com is the place to share your high-quality videos, documents, presentations, and images—simply and professionally. We never compress or alter your content...so what you upload is what viewers see. And with four levels of privacy controls, you get to decide who sees what.

Benefits of Publishing to Screencast.com

- Presenters can easily manage, organize, and delete their presentations.
- Presenters can attach additional materials to the video. For example, a viewer can download notes, the actual presentation slides, etc.

- Screencast.com is hosted by TechSmith and is helpful for customers with limited bandwidth and media storage space.
- Presenters can exercise individual control over how their content is protected.
- Presenters can allow viewers to comment on their presentations. See **http://www.screencast.com/answers** for more information.

Presenter Accounts for Screencast.com

When publishing to Screencast.com, set the Publish Accounts to Use presenter account.

Every TechSmith Relay presenter needs a Screencast.com account. To obtain Screencast.com accounts, visit **http://www.screencast.com**. Accounts are not created via TechSmith Relay.

By default, presentations are stored in the TechSmith Relay folder on Screencast.com. TechSmith Relay Administrators can create multiple Screencast.com destinations for organizational purposes, and can also create multiple folders for presenters. Presenters may also create their own folders on Screencast.com and assign them to their profile.

Inform Presenters

Presentations are not published until presenters sign in to the TechSmith Relay website and enter their account information. Ideally, introduce presenters to the TechSmith Relay website and have them enter their Screencast.com information before making recordings.

Presenters that make a recording and upload a presentation before the information is entered receive an email with a hyperlink and instructions to solve the problem.

See also

- **File System**
- **FTP Server**
- **WebDAV**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to Microsoft Windows SharePoint

Microsoft® Windows® SharePoint™ websites allow users to share information, collaborated on documents, and manage media.

> For additional information about Microsoft Windows SharePoint, see the training portal at: **http://www.microsoft.com/learning/en/us/training/sharepoint.aspx**.

To create a SharePoint publish destination:

1. Go to **Profiles > Publish Destination Setup**.
2. Click **SharePoint** on the left to create a new destination.
3. Enter the SharePoint URL.
4. If you have an invalid certificate on your SharePoint server that is not currently trusted by your TechSmith Relay server, enable the option to **Trust All Certificates**. This allows TechSmith Relay to ignore any certificate errors and publish to the SharePoint server.
5. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
6. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **File System**
- **FTP Server**
- **WebDAV**
- **Screencast.com**
- **iTunes U**
- **Kaltura**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

Publish to WebDAV

WebDAV (Web-based Distributed Authoring and Versioning) provides a way to manage files over HTTP. It allows web server directories to display as folders on a local computer. WebDAV lets you use these folders like any other folder on the local computer. The URL that you publish a presentation to is the same as the URL you use to view the presentation.

> For additional information about WebDAV, please see WebDAV Resources online at **www.webdav.org**.

To create a WebDAV publish destination:

1. Go to **Profiles > Publish Destination Setup**.
2. Click **WebDAV** on the left to create a new destination.
3. Enter the WebDAV URL.

   > If you want to publish to a SharePoint server, you must **create a SharePoint publish destination**; you cannot use a WebDAV publish destination to send presentations to a SharePoint server.

4. If you have an invalid certificate on your WebDAV server that is not currently trusted by your TechSmith Relay server, enable the option to **Trust All Certificates**. This allows TechSmith Relay to ignore any certificate errors and publish to the WebDAV server.
5. Click **Save**.

   The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.

6. Click the link to continue with **Publish Account Setup**.

> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See Plug-Ins for more information.

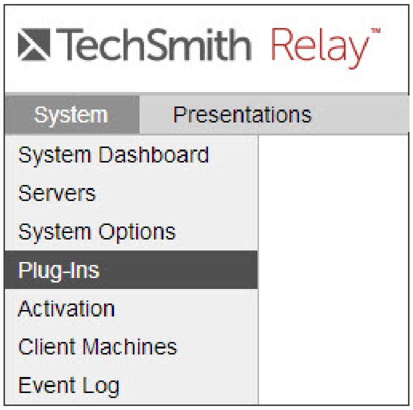
See also

- **File System**
- **FTP Server**
- **Screencast.com**
- **Microsoft Windows SharePoint**
- **iTunes U**
- **Kaltura**
- **Mediasite**
- **Drupal**
- **YouTube**
- **Amazon S3**

YouTube Configuration

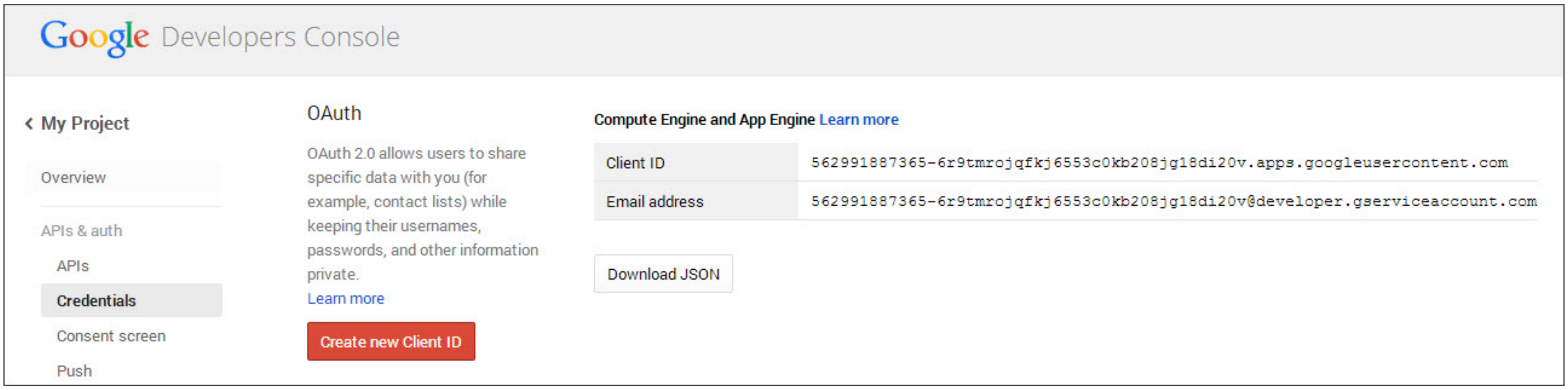
The YouTube Data API lets you incorporate YouTube functionality into your own application. To configure TechSmith Relay (Self-Hosted) for YouTube integration, refer to the following steps:

1. Go to https://yourrelayserver/relay/PluginList.aspx and install the YouTube plug-in from the list provided.

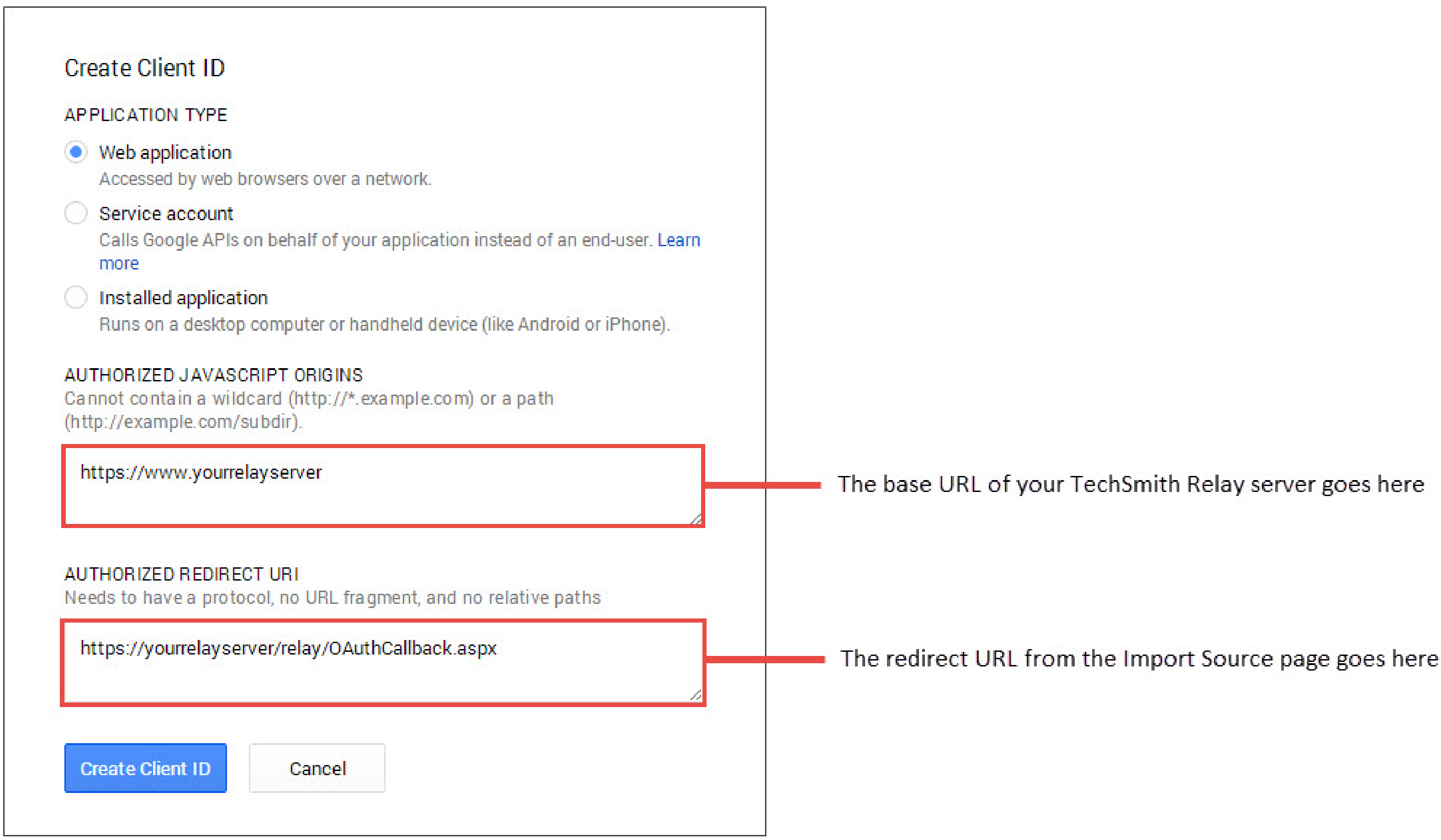


2. Then, navigate to https://yourrelayserver/relay/PublishSettingList.aspx, click on the YouTube tab and copy the redirect URL.
3. In a new browser window, sign in to **https://console.developers.google.com**. If you do not have a Google account, create one and then sign in.
4. Create a new project or open an existing project.
5. From the Project Dashboard, go to the APIs & auth tab, select APIs, and enable YouTube Data API v3.

6. Then select the Credentials tab, and click Create a new Client ID to open a developer console.

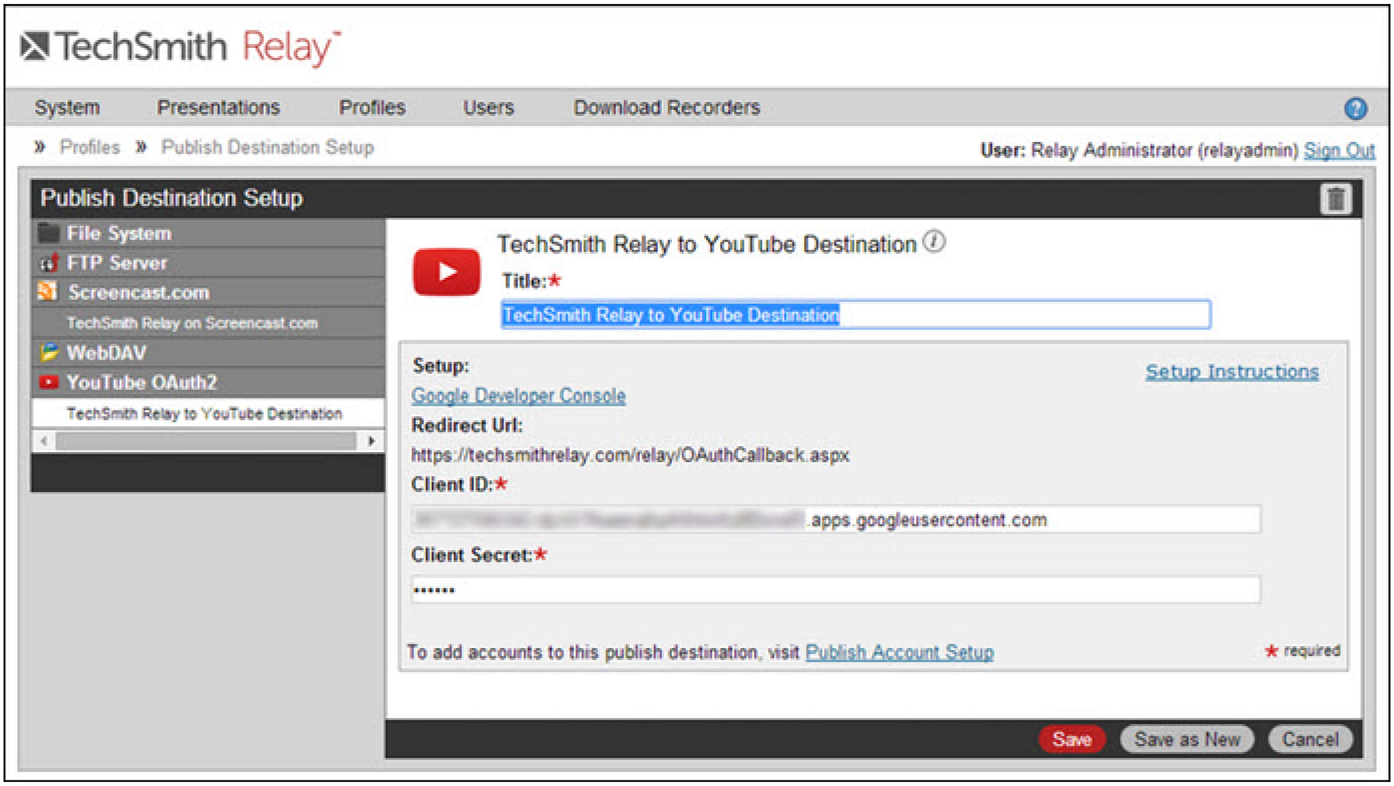


7. Paste the redirect URL from your clipboard into the console as shown below. The authorized Javascript origins should be the base URL of your TechSmith Relay server.



8. Click Create Client ID. A Client ID and Client Secret are generated for you.

9. Return to https://yourrelayserver/relay/PublishSettingList.aspx, and paste the Client ID and Client Secret into their respective fields, and click **Save**.



Publish to YouTube

To create a YouTube publish destination:

1. Click **Profiles > Publish Destinations**.
2. Click YouTube on the left to create a new YouTube publish destination.
3. Enter a title and select a category that is applied to all videos published to this destination.
4. Click Save.
5. The publish destination is saved and you are presented with a link to the **Publish Account Setup** for this destination.
6. Click the link to continue with **Publish Account Setup**.

> If the YouTube publish destination is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **YouTube Configuration** for more information.

Presenter Accounts for YouTube

YouTube accounts have a length limit for videos uploaded to unverified accounts. Be sure publish accounts (either a default account or individual presenter accounts) are verified to ensure that videos uploaded through TechSmith Relay will be accepted.

Videos that are longer than YouTube's length limit will be discarded by YouTube. To avoid losing videos that YouTube may reject, it is recommended that profiles publishing to YouTube also create a copy of the original recording.

> Before videos can be published to a YouTube account, that account must have a channel. For more information on creating a channel for a YouTube account, see the documentation on YouTube.com.

See also

- File System
- FTP Server
- Screencast.com
- WebDAV
- Microsoft Windows SharePoint
- iTunes U
- Kaltura
- Mediasite
- Drupal
- Amazon S3

Publish Account Setup

For each publish destination, you can define the accounts for TechSmith Relay to use to access it.

Publish Accounts include the specific information used to place processed presentations in a publish destination, such as user authentication information, folder selection, etc.

See additional account information for **iTunes U Accounts** and **Kaltura Publish Accounts**.

To Create a Publish Account

1. On the Publish Account page (**Profiles > Publish Accounts Setup**), click one of the publish destinations you have set up.
2. Enter information for the new account.
3. Select if you want to make the account the **default account**. See the tips below for information about default accounts.
4. If not a default account, select if you want to **Use account information from default account**. This allows you to use the credentials from the default account and modify other account information, such as paths, folders, and URLs.
5. Click **Save**.

Things to Consider About Publish Accounts

The following information might help you in making some decisions when creating your publish accounts.

- You can let presenters enter their own information.

  If you would like to use this option, you do not have to set up a publish account. Instead, you will select to **Use presenter account** when configuring a profile.
- Each publish destination can have a **default account**.
  - This can be helpful in several ways:
  - You can set up a default account to hold the credentials used to access a publish destination, and then use the other accounts to place presentations into various folders.
  - When you select a publish destination and encode setting in a profile, the default account is selected automatically for the publish account.
  - If the default account for a publish destination may change from time to time, you can select **Use default account** when configuring a profile. You can then change which account is the default account without having to change anything in the affected profiles. The profiles use the currently selected default account for a given publish destination.
- You can select different publish accounts for each publish destination/encode setting combination in a profile.

iTunes U Accounts

Each iTunes U course requires a Media Group ID. The Media Group ID is a 10-digit number supplied by Apple. Each instructor usually has a Media Group ID for each class.

1. Click the New account link.
2. Enter the Media Group ID. The remaining fields are optional, but they can be helpful when assigning iTunes U publish destinations to profiles.
3. Click Save. There is a delay as TechSmith Relay verifies the settings with iTunes U.
4. Add additional accounts as necessary. iTunes U will be available as a publish destination for encode types supported by iTunes U.

What is My Media Group ID?

iTunes 11 and later

1. Log in to your iTunes U account in iTunes 11 or later as an administrator.
2. Click on the category you wish to retrieve the Media Group ID from.
3. On the right side of the screen, click on **Upload and Manage Files**.
4. The Media Group ID is in the URL.
5. Paste the URL into a document. It will look similar to:

```
https://deimos.apple.com/WebObjects/Core.woa/
BrowsePrivately/example.com.1927435401.01099125312
```

6. The Group ID is the last 10 digits in the URL, indicated in this example in bold (`1099125312`).

iTunes 10 and earlier

1. Click on a class in iTunes U.
2. Right-click the Videos tab and select Copy iTunes Store URL.

3. Paste the URL into a document. It will look similar to:

```
https://deimos.apple.com/WebObjects/Core.woa/
BrowsePrivately/example.com.1927435401.01099125312
```

4. The Group ID is the last 10 digits in the URL, indicated in this example in bold (1099125312).

Kaltura Publish Accounts

Accounts for Kaltura publish destinations define how presentations are published to Kaltura and Kaltura MediaSpace™.

1. Enter a Title for the publish account.

   This title is meant to help administrators understand what a specific account is meant for during profile creation. Try to use descriptive naming conventions for easy identification.

2. Select if you want to make the account the default account. See **Things to Consider about Publish Accounts** for information about default accounts.

   If not a default account, select if you want to **Use account information from default account**. This allows you to use the credentials from the default account and modify other account information, such as paths, folders, and URLs.

3. Enter the Creator for this account.

   By default, the Creator field is filled in with the system variable PresenterUserName. This variable is replaced with the presenter's user name associated with a presentation during publishing. This variable is a great choice if user names are the same in both TechSmith Relay and Kaltura, as presentations will automatically map to the correct Kaltura user.

4. Enter any Tags for this account, using commas to separate entries. Tags are searchable in Kaltura and Kaltura MediaSpace.
5. Enter any Categories associated with this account.Categories define where (which tab, hierarchy, etc.) a presentation is published on a Kaltura MediaSpace site.
6. Click **Save**.

Notification Server Setup

You can configure notifications from three types of servers:

- **Email Server**
- **Blackboard Server**
- **Moodle Server**

> If the notification server type you would like to use is not available in the list of notification server, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

Email Server Configuration

You configure the email server when you first log into TechSmith Relay after installation.

If you need to later modify the email server information, go to **Profiles > Notification Server Setup > Email Server** tab.

> You can only have one email server configured in TechSmith Relay.

The configuration includes:

- The SMTP email server address (Required)
- The SMTP email server port (Required)
- The name and email address that shows in the Reply To fields of email notifications

> If the notification server type you would like to use is not available in the list of notification server, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

See also

- **Blackboard Server**
- **Moodle Server**

Blackboard Server Configuration

TechSmith Relay can automatically post announcements on Blackboard. Configuring Blackboard announcements is a two-step process. First, install the TechSmith Relay Building Block on Blackboard and establish the Shared Secret. Next, configure TechSmith Relay to publish Blackboard announcements.

> The configuration steps vary depending on your version of Blackboard Learn™. TechSmith Relay currently supports release 9.1. The TechSmith Relay Blackboard plug-in has been

tested with version 9.1.407.

Install TechSmith Relay Building Block

1. Locate the TechSmith Relay Building Block (`RelayAnnounce.war`) installed during the server installation at: `C:\Program Files\Techsmith\Relay Server\Blackboard Building Block`.
2. Go to your Blackboard site. E.g. http://blackboard.example.com.
3. Click **User Login** and sign in as a System Administrator.
4. Click the **System Admin** tab.
5. Click **Building Blocks**.

6. Click **Installed Tools**.
7. Click the **Upload Building Blocks** button.
8. Under Install Building Block, browse to `RelayAnnounce.war`. Click **Open**.
9. Click the **Submit** button and verify the Building Block is available.
10. Click the **Settings** button. This displays the Shared Secret.
11. Choose and enter a secure Shared Secret, and make a note of it as you need to enter the Shared Secret into TechSmith Relay.

Configure a Blackboard Server

1. Go to **Profiles > Notification Server Setup > Blackboard Server** tab.

2. Enter a title (name) for the server.

3. Enter the Blackboard URL and Shared Secret.

4. Click **Save**.

If the notification server type you would like to use is not available in the list of notification server, you may have to install the appropriate plug-in before you can use it. See Plug-Ins for more information.

See also

- **Email Server**
- **Moodle Server**

Moodle Server Configuration

TechSmith Relay can automatically post notifications on a Moodle server. Configuring Moodle notifications is a two-step process. First, configure the Moodle server to receive the notifications; next, configure TechSmith Relay to publish notifications to Moodle.

- **Configure a Moodle 2.0 or Later Server to Receive Notifications**
- **Configure a Moodle 1.9.7, 1.9.8, or 1.9.9 Server to Receive Notifications**
- **Configure a Moodle 1.9.5 or 1.9.6 Server to Receive Notifications**
- **Configure TechSmith Relay to Send Notifications to Moodle**
- **Troubleshooting Sending Notifications to Moodle**

> The configuration steps vary depending on your version of Moodle. TechSmith Relay currently supports version 2.0 and later and 1.9. The TechSmith Relay Moodle plug-in has been tested with Moodle versions 1.9.5, 1.9.6, 1.9.7, and 1.9.9. Version 2.x has been tested with up to version 2.2.

> If the notification server type you would like to use is not available in the list of notification server, you may have to install the appropriate plug-in before you can use it. See Plug-Ins for more information.

See also

- **Email Server**
- **Blackboard Server**

Moodle 2.0 and Later Plug-In Setup

Enabling TechSmith Relay to send publish notifications to a Moodle 2.0 or later server requires two steps. This topic covers the first, installing and configuring the plug-in on the Moodle server. The second is step is to **Configure TechSmith Relay to Send Notifications to Moodle**.

Install the TechSmith Relay Plug-In on the Moodle Server

1. On your TechSmith Relay server, navigate to `C:\Program Files\TechSmith\Relay Server\Moodle Components\`.
2. Extract the `techsmith_relay.zip` file to your Moodle server in the `{moodle_install_dir}/server/moodle/local/` directory.

3. Log in to the Moodle website as an administrator and go to Home.
4. A prompt appears to upgrade the TechSmith Relay Notification plug-in. Click **Update** and then click **Continue** to check for updates.
5. Go to Site Administration > Plugins > Web Services > External Services and verify the service shows up in the Built-in Services List.

Configure the TechSmith Relay Plug-In on the Moodle Server

Log in to the Moodle site as an administrator. Next, Navigate to Site Administration > Plugins > Web Services > Overview. The instructions in the overview describe how to configure the TechSmith Relay plug-in.

1. Enable web services.
2. Enable protocols. Enable XML-RPC and Web Services Documentation.
3. Create a new user to act as the "Relay User." This user is used with the web service so TechSmith Relay can access the Moodle server.
4. Check for user capability. The user should have appropriate capabilities according to the protocols used. Use either an existing role or add a new Web Services role. To add a new role:
    a. Go to Site Administration > Users > Permissions > Define Roles.
    b. Add a new role.
    c. Give the new role System and User context types.
    d. Allow capabilities for this role.
        i. Allow Web Service: XML-RPC protocol > Use XML-RPC protocol
        ii. Allow Forum > Start New Discussions.
5. Add the new role to the "Relay User" account created earlier. Go to Site Administration > Users > Permissions > Assign User Roles
    a. Click on the Web Service or other role and assign to the "Relay User."
    b. Go to Site Administration > Users > Permissions > Check System Permissions to verify that the TechSmith Relay User has the required capabilities.
6. Create a token for the Relay User.
    a. Go to Site Administration > Plugins > Web Services > Manage Tokens.
    b. Create a new token. Select "Relay User" and TechSmith Relay Notification Service and save changes.
    c. Record the newly created token string. This is the token used to set up a notification on the TechSmith Relay website. It must be entered on the TechSmith Relay website when setting up the publish notification.

To finish configuring the publish notification on the TechSmith Relay website, see **Configure TechSmith Relay to Send Notifications to Moodle**.

See Also

- **Troubleshooting Sending Notifications to Moodle**

Moodle 1.9.x Server Configuration

- **Configure a Moodle 1.9.5 or 1.9.6 Server to Receive Notifications**
- **Configure a Moodle 1.9.7, 1.9.8, or 1.9.9 Server to Receive Notifications**

Configure a Moodle 1.9.5 or 1.9.6 Server to Receive Notifications

> These steps may also work with Moodle versions prior to 1.9.5, but this has not been verified by TechSmith Corporation.

To support TechSmith Relay notification integration, install a new PHP file, `rpclib.php`, on the Moodle server as follows:

1. Locate and copy the following file:

   ```
   C:\Program Files\TechSmith\Relay Server\Moodle Components\rpclib.php
   ```

2. Paste the file to the Moodle server at:

   ```
   <IIS or apache-path>/htdocs/moodle/mod/forum/rpclib.php
   ```

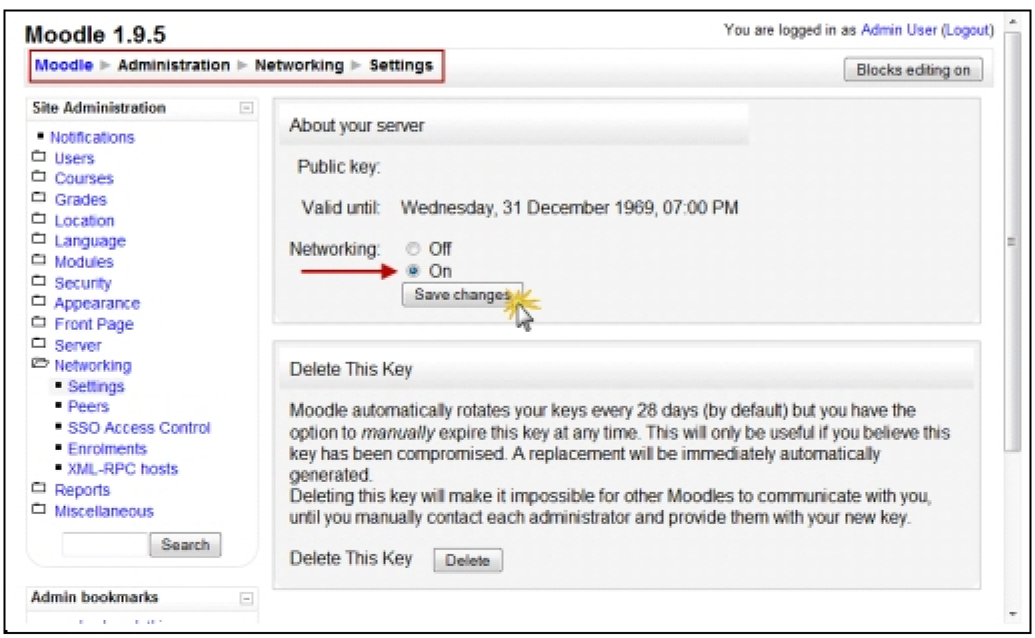
3. Locate the following file on the Moodle server:

   ```
   .../htdocs/moodle/lang/en_utf8/forum.php
   ```

4. Add the following lines to the forum.php:

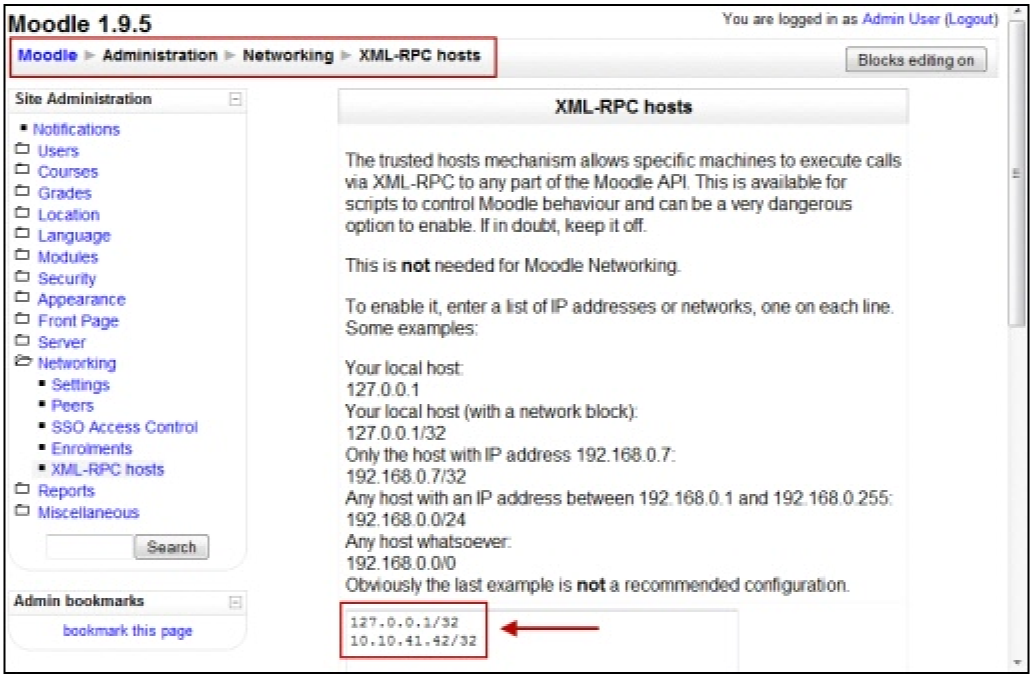
   ```
   $string['forum_add_discussion1_name'] = 'forum_add_dis-
   cussion';
   $string['forum_add_discussion1_description'] = 'calls forum_
   add_discussion';
   ```

5. On the Moodle server, log in as an administrator.
6. Navigate to **Networking > XML-RPC hosts**.
7. Enable the **On** option and click **Save changes**.



8. Navigate to **Networking > XML-RPC hosts**.

9. Add the TechSmith Relay server IP address and, optionally, a network block to the list of trusted hosts.



Configure a Moodle 1.9.7, 1.9.8, or 1.9.9 Server to Receive Notifications

Moodle versions 1.9.7, 1.9.8, and 1.9.9 include several changes to the way networking and XML-RPC are handled.

It is necessary to make manual updates to your Moodle database. This can be accomplished with phpMyAdmin or MySQL CLI if you are using MySQL; otherwise, use the appropriate utility for your database.

> This procedure assumes you have a standard installation of Moodle.

1. Follow the **steps used for 1.9.5 and 1.9.6**.
2. Insert a new row into **mdl_mnet_service** to represent the forum announcement service.

id	name	description	apiversion	offer
The next highest value, for this example, it is 4	forum	course announcement service	1	1

3. Insert a new row into **mdl_mnet_rpc** to represent the forum announcement service.

Column Name	Value
id	*The next highest value, for this example, it is* 15

Column Name	Value
function_name	forum_add_discussion_1
xmlrpc_path	mod/forum/rpclib.php/forum_add_discussion1
parent_type	forum
parent	mnet
enabled	1
help	Post a message to a forum
profile	*blank*

4. Insert a new row into **mdl_mnet_service2rpc** to link the *mdl_mnet_service* record to the *mdl_mnet_rpc* record.

id	serviced	rpcid
The next highest value, for this example, it is 15	*The id entered into mdl_mnet_service, for this example, it is* 4	*The id entered into mdl_mnet_rpc, for this example, it is* 15

5. Insert a new row into **mdl_mnet_host2service** to link the *mdl_mnet_host* record to the *mdl_mnet_service* record.

id	hostid	serviceid	publish	subscribe
The next highest value, for this example, it is 1	1 *(This id comes from mdl_mnet_host defining your Moodle server having the forum announcement service plugin.)*	*The id entered into mdl_mnet_service, for this example, it is* 4	1	0
The next highest value, for this example, it is 2	0	*The id entered into mdl_mnet_service, in this example, it is* 4	1	0

The MySQL insert statements for the above:

```
insert into mdl_mnet_service (id,-
name,description,apiversion,offer) values (4,'forum', 'course
announcement service', 1, 1);
insert into mdl_mnet_rpc (id,function_name,xmlrpc_path,parent_
type,parent,enabled,help)
values (15, 'forum_add_discussion1', 'mod-
/forum/rpclib.php/forum_add_discussion1', 'forum', 'mnet', 1,
'Post a message to a forum');
insert into mdl_mnet_service2rpc (id, serviceid, rpcid) values
(15, 4, 15);
insert into mdl_mnet_host2service (id, hostid, serviceid, pub-
lish, subscribe) values (1, 1, 4, 1, 0);
insert into mdl_mnet_host2service (id, hostid, serviceid, pub-
lish, subscribe) values (2, 0, 4, 1, 0);
```

> Prior to using these statements, first verify the correct table ids in these insert statements.

Configure TechSmith Relay to Send Notifications to Moodle

1. Go to **Profiles > Notification Server Setup > Moodle Server** tab.
2. Enter a title (name) for the server.
3. Enter Moodle **Server** URL.

   For example: `http://moodle.our-university.edu`.

   If the Moodle server is configured to use a port other than the default of 80, the URL you need to include the port. For example, if you are running Moodle on your own computer using port 8080, the URL would be http://localhost:8080.
4. Enter the **Server path**.

   Typically this is `mnet/xmlrpc/server.php` or `moodle/mnet/xmlrpc/server.php`. This can vary depending on your Moodle configuration.
5. Enter the **Service path**.

   Typically this is `mod/forum/rpclib.php/forum_add_discussion1`, if the rpclib.php is used as provided by TechSmith.

   If desired, you may implement your own XML-RPC method using the same parameters as `forum_add_discussion1`. The Service Path described above would need to be set appropriately.
6. Click **Save**.

See Also

- Install the TechSmith Relay Plug-In on the Moodle Server
- Configure a Moodle 1.9.5 or 1.9.6 Server to Receive Notifications
- Troubleshooting Sending Notifications to Moodle

Troubleshooting Sending Notifications to Moodle

Below is a simple Python 3.x script that can be used to troubleshoot the Moodle course announcement plug-in. To use it, you will need to:

1. Install Python 3.0+ on a client computer.
2. Copy the script below into a file on the client computer, e.g., xmlrpc-moodle.py.
3. Edit serverUrl and server to match your Moodle server configuration.
4. Run the script like something like this: `C:\python31\python.exe xmlrpc-moodle.py`

```
# For use with Python 3.x

import sys
import time
import xmlrpc.client

timestamp = time.strftime("%Y-%m-%dT%H:%M:%S") # iso_time

# Server settings

serverUrl = "http://localhost:80/"

server = "moodle199" # can be empty if the serverUrl identifies the
server

service = "forum_add_discussion1"

username="admin"

# format and mailnow are hardcoded for now

format=1
mailnow=1

# Announcement settings

courseshortname="CHEM101"
subject="python3 test's subject " + timestamp + ", <a
href=\"http://www.techsmith.com/\">TechSmith!</a>"
message="python3 \"test's\" msg " + timestamp
```

```
# RPC call and results

rpcServerUrl = serverUrl + server + "/mnet/xmlrpc/server.php"

service = "mod/forum/rpclib.php/" + service

xmlRpcServer = xmlrpc.client.Server(rpcServerUrl)
print("*** Calling XML-RPC service {0} on server URL {1}".format
(service, rpcServerUrl))
try:

    result = xmlRpcServer._ServerProxy__request(service,
    (courseshortname, subject, message, format, username,
    mailnow))

    print("result =", result)

    except Exception as e:

    print("Unexpected error:", sys.exc_info())

    raise
```

See also

- **Install the TechSmith Relay Plug-In on the Moodle Server**
- **Configure a Moodle 1.9.5 or 1.9.6 Server to Receive Notifications**
- **Configure TechSmith Relay to Send Notifications to Moodle**

Notification Setup

Set up notifications to let administrators, presenters, or viewers receive information about processed presentations.

You can set up notifications to be sent by email or posted on Blackboard or Moodle.

Create a Notification

1. On the Notification Setup page (**Profiles > Notification Setup**), click one of the notification servers.
2. Enter information for the notification. Depending on which server type you select, you will enter different types of information.

   You can use variables to allow one notification to be used in multiple cases. For more information, see **Variables**.
3. Select a **Details Template** to use.

   Click **Samples** to preview what information each template includes.

This template defines what information to include in the notification. A notification contains information for each encoding you select to include in this notification in the profile.

Choose **Message only** if you only want to specify a message and not include additional details.

4. Enter a message to include in the notification. This can be a personalized greeting, additional presentation information, or left blank. You can use **variables** in this field.
5. Click **Save**.

Things to Consider About Notifications

The following information might help you in making some decisions when creating notifications.

- When you set up a profile, you can choose which encodings you want to include in each notification.

  For example, you could create a profile that contains both a Web video and a TREC file. You can include the Web video information in a notification that goes straight to viewers and include information on the TREC file in a notification that goes only to the presenter.
- You can preview the information included in each of the details templates by clicking the Samples link. For more information on the details templates, see **Details Templates**.
- You can use variables to allow for a single notification to be used for multiple uses.

  For example, use the system variable *{s:PresenterEmailAddress}* in the *To* field of an email notification. Any profile that uses that notification always sends an email to the email address of the presenter associated with the presentation.
- If you use variables in the message of a notification, some variables only receive information from the last processed encoding in a presentation.

  For example, if you use the system variable *{s:PublishFilePath}* in the message of a notification and have multiple encodings set up in the selected profile, only the file path of last published encoding are included in the message.
- TechSmith Relay does not send separate notifications for each encoding selected in a profile, but instead rolls information for each encoding into a single notification.

  For example, if in a profile, you select to include three encoding types in a notification, the recipient receives one notification including information about all three encodings rather than three separate notifications.

Details Templates

The following details templates are available to use in your notifications. These samples contain example information to demonstrate what information is included in notifications that use each template.

> If you do not want to include any details, select the **Message Only** template. This template will only include the text you enter in the message field.

Administrator

The following details are included in the notification when you choose this template.

Presenter name: Mary Smith
Presenter email: m.smith@company.com
Title: Monthly Team Meeting - Jan

Profile: Monthly Meeting to Web
Processing start: 5/14/2010 9:21:35 AM
Source file size: 50.8 MB

Type	Size	Publish Destination	File Name
Silverlight (Medium)	4.66 MB	Presenter Account on Screencast.com	Monthly_Team_Meeting_-_Jan_-_Silverlight_(Medium)_-_20100127_09.21.35AM.wmv
Flash (Medium)	2.92 MB	Presenter Account on Screencast.com	Monthly_Team_Meeting_-_Jan_-_Flash_(Medium)_-_20100127_09.21.35AM.mp4

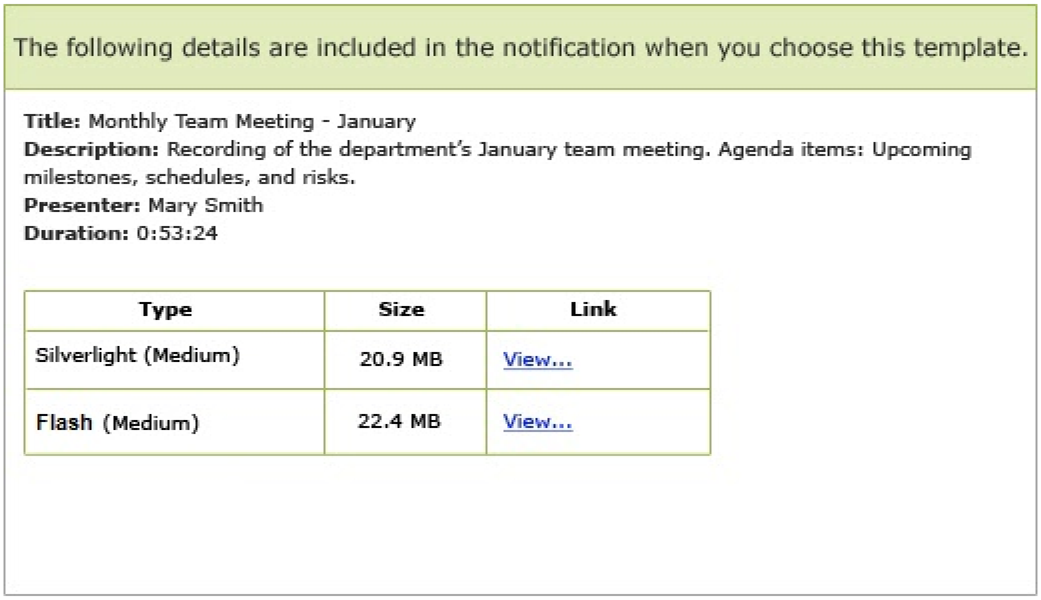
Presenter

The following details are included in the notification when you choose this template.

Title: Monthly Team Meeting - January
Description: Recording of the department's January team meeting. Agenda items: Upcoming milestones, schedules, and risks.
Duration: 0:53:24

Type	Size	Link
Silverlight (Medium)	20.9 MB	View...
Flash (Medium)	22.4 MB	View...

Viewer



Variables

Variables can help simplify the management of profiles, publish destinations, publish accounts, and notifications. These "placeholders" have a value applied to them at the time a presentation processes.

There are three different types of variables available:

- **System Variables**

  Select from variables included in the TechSmith Relay system and that change their value based on the information for the presentation that is being processed.

- **Global Variables**

  Create a variable, use the variable in multiple places, and manage the value in central location.

- **Profile Variables**

  Create a variable, use the variable in multiple places, and define the value per profile.

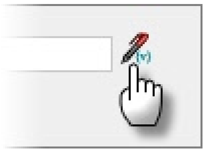
Where and How to Use Variables

Variables are available in multiple fields on the TechSmith Relay website, but you use the same interface to access them in all locations.

- **Where Can I Use Variables?**

  Variables are available in publish destinations, publish accounts, and notifications. You can use them to reuse file paths, URLs, folder names, email recipients, notification messages, and more

  Next to each field that can accept variables, you will see the Variable button.

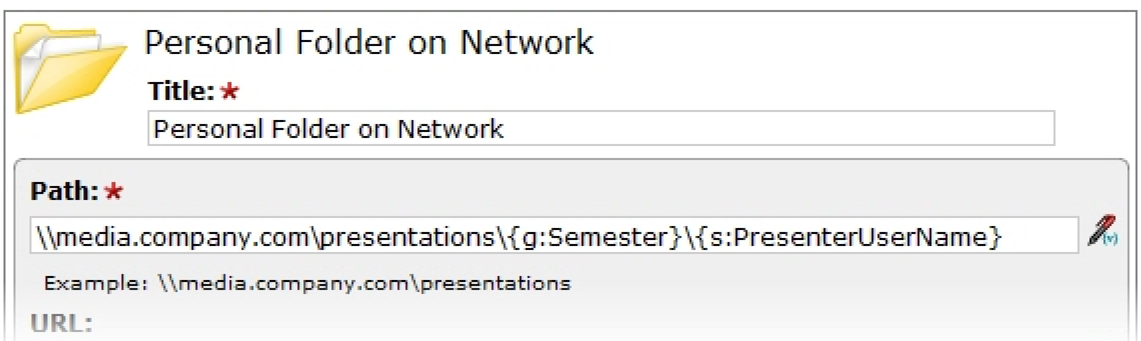


- **How Do Add a Variable to a Field?**

  To use a variable:

  - Click the **Variable** button to open the *Variable Selection* window.
  - Select a Variable type (Global, System, or Profile).
  - Select a variable from the list of variables of the selected type.
  - Click **Add**. The variable is added at the cursor location.

  - Repeat as needed. You can use the window to add variables and to edit the content of the field.
  - When you are done, click **OK** to close the window.



System Variables

System variables have dynamic values that change based on the presentation that is being processed. These variables are included with the TechSmith Relay system and include the following:

Variable Name	Variable Value
{s:EncodeSettingTitle}	Title of the encode setting used to process a presentation.
{s:PresentationDescription}	Description of the presentation.

Variable Name	Variable Value
{s:PresentationDuration}	Duration, in milliseconds, of the presentation.
{s:PresentationResolution}	Maximum resolution in the presentation.
{s:PresentationTitle}	Title of the presentation.
{s:PresenterEmailAddress}	Email address of the presenter associated with the present-ation.
{s:PresenterName}	Name of the presenter associated with the presentation.
{s:PresenterUserName}	Username of the presenter associated with the presentation.
{s:ProfileDescription}	Description of the profile used to process the presentation.
{s:ProfileTitle}	Title of the profile used to process the presentation.
{s:PublishDestinationTitle}	Title of the publish destination of the presentation.
{s:PublishFileDuration}	The duration of the published presentation, in milliseconds.
{s:PublishFileName}	File name of the presentation.
{s:PublishFilePath}	The output path of the published presentation.
{s:PublishFileSize}	The file size of the published presentation.
{s:RecordDateTime}	Date and time the presentation was recorded.
{s:RecorderComputerName}	Name of the computer that recorded the presentation.
{s:RecorderIpAddress}	IP address of the computer that recorded the presentation.
{s:RecordSettingTitle}	Title of the record setting used to record the presentation.
{s:ServerUrl}	URL of the server that processed the presentation.
{s:SourceFileSize}	Size of the original recording of the presentation.
{s:StartProcessingDateTime}	Date and time the presentation started processing.

Example Uses

- Use the variable for the presenter's username in a publish destination file path such as:

```
\media.company.com\presentations\{s:PresenterUserName}
```

When the presentation is published, the presenter's username is substituted in the file path and places the presentation in that presenter's network folder.

- Use the variable for the presenter's email, `{s:PresenterEmailAddress}`, in the *Recipient email* field of an email notification. This notification is always sent to the presenter of the presentation, without having to create a notification for each user.
- Use the variable for the presentation title in the *Subject* field of an email notification. Use something like "Presentation Ready for Viewing: {s:PresentationTitle}" to let the recipients know what presentation is ready from just the subject of the email.

See also

- **Where and How to Use Variables**
- **Global Variables**
- **Profile Variables**

Global Variables

Global variables are static strings defined by an administrator. Changes made to the values of these variables are instantly reflected wherever they are used in TechSmith Relay.

Create and use a global variable when you have a value that is used across multiple profiles and needs to change at some point.

Example Uses

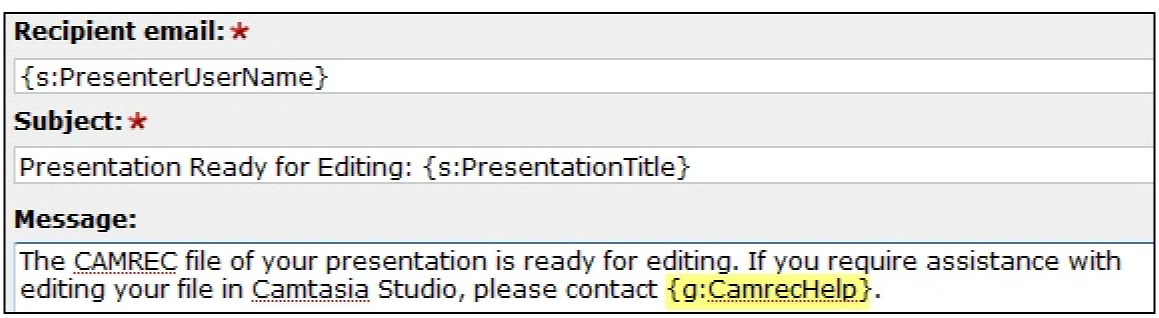
- Create a variable for *Semester* and add it to a file system publish destination path, such as:

```
\\media.company.com\presentations\{g:Semester}
```

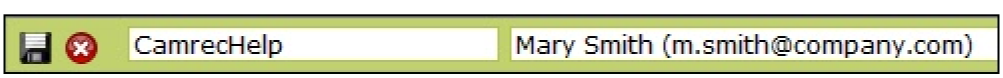
  You can use this publish destination for multiple profiles. When the semester is over, change the value on the **Profiles > Variables > Global Variables** tab and all profiles are automatically adjusted to reflect the change.

- Create a variable for the person to contact if a presenter needs assistance with editing a TREC file.

  Use the variable in the email notification to the presenter.



  When the responsibility to help presenters passes to a new person, you can easily change the variable value on the **Profiles > Variables > Global Variables** tab.



See also

- Where and How to Use Variables
- System Variables
- Profile Variables

Profile Variables

Profile variables have dynamic values that are profile specific. These variables can be used in multiple profiles but the value is defined per profile.

To fill in the value for a profile variable, go to **Profiles > [Select a Profile] > Variable Definition** tab.

Example Use

Your organization's network folder structure contains a "department" value. If you want a profile for each department, create a variable for Department. Use this variable in a publish destination such as `\\media.company.com\presentations\{p:Department}\{s:PresenterUserName}`.

When you create a profile, you are prompted to define the value of the profile variable. In this case, the department name that is also found in the network folder structure.

See also

- Where and How to Use Variables
- System Variables
- Global Variables

Users Menu

The Users menu allows you to manage TechSmith Relay users and related settings. The following pages are available in this menu:

- Users
- Configure TechSmith Relay to Use LDAP
- User Account Security Settings

Users

The Users page contains a list of the current users in the TechSmith Relay system. On this page you can:

- Review the users in the system. At a glance, you can see:
  - Usernames
  - Name (user's "real" name)

  - Email Address
  - User Type (created in TechSmith Relay or imported from LDAP)
  - Access Level (Administrator, Presenter, Globlal Caption Editor, No Access)
- Click a user to edit user information (TechSmith Relay-created users only)
  - Username
  - Name
  - Access level
  - Email address
  - Password
  - Modify a presenter’s available profiles
- Delete a user
- **Add a TechSmith Relay user**
- **Manually Import Users with LDAP**
- **Automatically Import Users with LDAP**

More than One Kind of User

TechSmith Relay allows you to use both LDAP users and TechSmith Relay created users.

Some examples of why you may want to use both LDAP and TechSmith Relay managed users:

- You use LDAP and need a temporary account for a visiting presenter.
- You use LDAP and need a presenter account for someone already in the system as an administrator.

Manually Add TechSmith Relay Users

If you do not use LDAP for authentication, you can create users manually in TechSmith Relay.

> You can have both LDAP and TechSmith Relay created users.

To Create a New User

1. Go to the **Users** page.
2. Click the **New User** link.

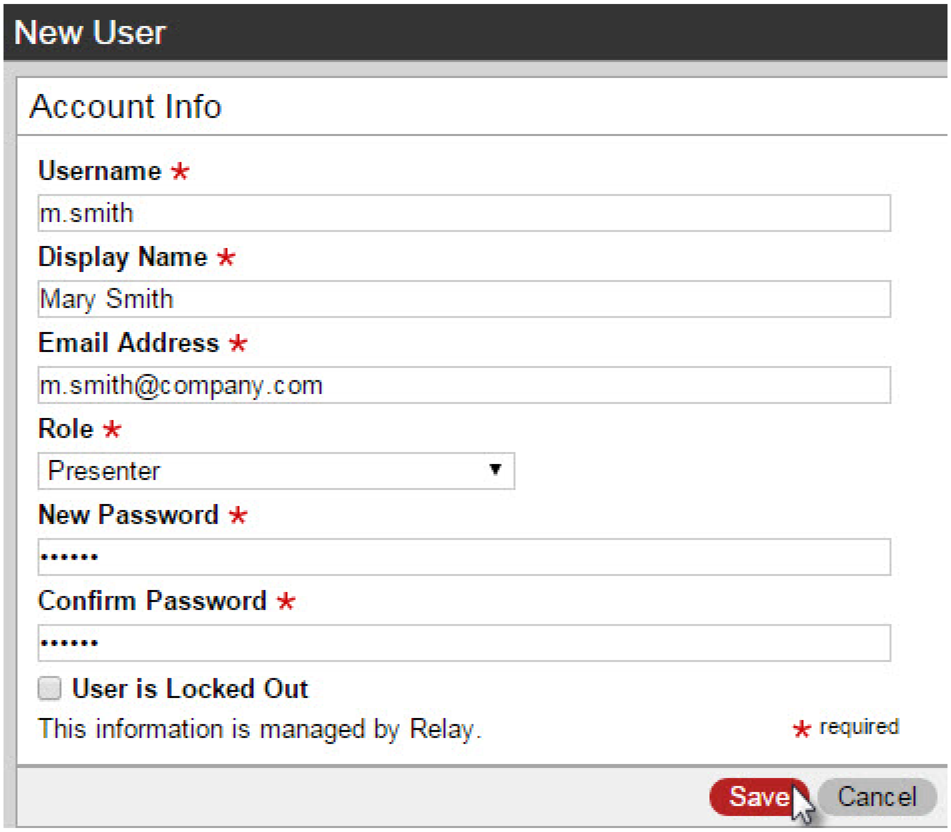
   
3. Enter a **username**.

   This is the username the presenter uses to log in to the TechSmith Relay website and recorder.
4. Enter the name (given name). This is associated with the recordings.

5. Select **Presenter** or **Global Caption Editor** in the Access Level dropdown list.

> No Access restricts the user from logging into the website and Recorder. For example, you can use it to turn off a presenter's privileges at the end of a semester/term.

6. Enter an email address.
7. Enter and confirm a password.
8. Click **Save** or **Save & Add**.



Configure TechSmith Relay to Use LDAP

To configure LDAP, you should first set up a RelayPresenter Service Account.

RelayPresenter Service Account

Prior to configuring TechSmith Relay to work with LDAP, we recommend creating a "RelayPresenter" service account in your LDAP directory and associate this account when you bind credentials in LDAP. Use this account to perform the initial step in authenticating users.

When a user tries to authenticate over LDAP, TechSmith Relay uses this "RelayPresenter" user to search the LDAP directory and retrieve the user's qualified domain name. The user's qualified domain name is given to the LDAP directory along with their password for authentication.

TechSmith Relay never stores LDAP passwords with the exception of the password of this service account.

> The service account should have a password that does not expire. TechSmith Relay ceases to function for all users if the password of the service account in LDAP is not the same as the password stored in the TechSmith Relay database.

Configure TechSmith Relay to Use LDAP

1. Go to **Users > LDAP Configuration**.
2. Click **Configure LDAP**.
3. Enter server information:
   - *Server address*
   - *Port*
     - *Use secure authentication:* Select if you want to connect to the LDAP server over SSL.
     - *Trust all certificates:* Enable if you cannot connect over SSL due to an invalid certificate. If you have a valid self-signed certificate, import the signing certificate into the Trusted Root Certificate Authority on the TechSmith Relay Server for better security.
   - *Authentication method* (Basic or Negotiate)
   - *Username & password* to authenticate
4. Click **Next**.
5. Select the returned base distinguished name or enter another.

   TechSmith Relay returns the root of the LDAP directory, and pre-fills the Base distinguished name field. Or, if you know exactly where your users reside in the LDAP directory, you can manually enter the Base DN.
6. Click **Next**.
7. Select the “RelayPresenter” service account as the representative user with the following attributes:
   - Full name
   - Username
   - Email address
8. Click **Next**.
9. Map the attributes from the selected user to the fields TechSmith Relay requires.

   You can choose from the dropdown list of attributes returned from LDAP or type in an attribute if it is not found in the dropdown list.
10. Click **Next**.
11. Review the configuration information.
12. Enter a valid username and password into the *Test Authentication* fields and click **Test**.
13. Click **Finish**.

    You can now configure TechSmith Relay to Automatically Import Users with LDAP or .

If you disable LDAP, users remain in the TechSmith Relay database. However, since TechSmith Relay never stores LDAP-associated passwords, users cannot access the TechSmith Relay website or make recordings.

To re-enable users, select a user then click the **Convert to Relay** link. The user is emailed a randomly generated password. The user must access the TechSmith Relay website and change their random password.

Adding Dynamic LDAP Groups

To set up a new Dynamic LDAP Group, first make sure your TechSmith Relay site is configured to use LDAP. For more on configuring TechSmith Relay for LDAP, see **Configure TechSmith Relay to Use LDAP**.

To set up an LDAP group

1. Go to Users > Dynamic LDAP Groups.
2. Click the add button to add a new group.

   
3. Under Group Info, enter a title for your group.
4. Select an Attribute Key, Equality, and Attribute Value if you know those values.
   - Attribute Key: This is the name of the attribute, or properties. When you click on the Attribute Key dropdown, you'll be able to choose from a complete list of attribute keys.
   - Equality: Choose whether you want to return only exact value matches or if you want it to just contain the value. If only one of these options works on a query, TechSmith Relay will disable the other, leaving only one option.
   - Attribute Value: This is the criteria, or data--numeric or otherwise.

   If you need assistance filling out these fields, click **Show existing object selector**.The tree view drops down, allowing you to navigate to existing users with the attribute you want to isolate. If you click on the user attribute displayed on the right, it will populate the Attribute Key and Value fields. Adjust the Equality and Value fields as needed.
5. Click **Add**.
6. Optional: Add more rules (or query strings) by clicking the gray plus button. Once the group contains more than one, an Operator field will appear and let you choose whether you want your return to have both attributes (And), or if you want to return results with either attribute (Or).

Query String

The query string that generates on this page is LDAP syntax to search LDAP directories. That means that LDAP administrators can enter this string into their directory program and it will return a list of users in this group.

To assign profiles to a group

1. Go to Users > Dynamic LDAP Groups
2. Click on the group title, and then under the Profiles Assigned section of the group page, choose an existing profile from the dropdown.
3. Click the add a new profile button to assign the selected profile to the group.

Updating user information with LDAP changes

Individual user information will get updated with group information when one of the following happens:

- The user logs in (TechSmith Relay will sync their user information with groups and respective profiles at that time).
- An administrator manually syncs the user's LDAP information from the User List page.

A user's associated dynamic LDAP groups can be viewed by going to Users > User List and clicking on a user.

User Account Security Settings

To help secure TechSmith Relay, you can set the following:

- **Recorder Security Settings**
- **Forgot Password Settings**
- **Account Lockout Settings**
- **Password Complexity**

Recorder Security Settings

To manage the security of the TechSmith Relay recorders, you can choose to enable or disable the following options.

Ignore Server Certificate Errors

If your server certificate is invalid, TechSmith Relay notifies you on the **Dashboard** and the Recorder Security settings page.

- **Enable** this option if you need to let the recorder connect to the server even if the server has an invalid server certificate. When enabled, the TechSmith Relay recorders ignore all server (SSL) certificate errors when connecting to the TechSmith Relay server.

  > This option should be used as a temporary solution as it reduces the security of the TechSmith Relay server.

- **Disable** this option if you have security concerns and want to be sure that recorders only connect when there are no SSL certificate errors.

More information about certificate errors:

- When you change this option, TechSmith Relay recorders will be unavailable until they are rebuilt to reflect this security change.

  It may take several minutes before the TechSmith Relay recorders are again available for download. Allow about five minutes for the updated recorders to be available on the **System > Download Recorders** page.
- Recorders downloaded before changing this option cannot connect to the server and must be updated. Please inform presenters that they must download and install a new recorder from the TechSmith Relay website. Presenters are not informed automatically.

Expire Recorder Authentication Codes

Enable this option to have presenter authentication codes expire. This can prevent an attacker from learning a presenter's code, posing as the presenter, and sending requests to the server.

> This may affect presenters that select **Remember me** in the recorder. When the authentication code expires, the presenters need to log in again.

See also

- Forgot Password Settings
- Account Lockout Settings
- Password Complexity

Forgot Password Settings

You can allow users to change forgotten passwords. Set the amount of time (in minutes) that a change password link is active and how often users can request a new password.

See also

- Recorder Security Settings
- Account Lockout Settings
- Password Complexity

Account Lockout Settings

You can allow accounts to lock after a given number of failed logins. Also set the length of time to lock an account, how often to reset login attempts, and whether users can unlock accounts using CAPTCHA.

CAPTCHA Option to Unlock Accounts

CAPTCHA uses distorted text in an image to help protect websites from malicious computer programs. CAPTCHA helps to make sure a person trying to access the website, not a computer program.

Enable this option to allow users to unlock their accounts by typing in the distorted text shown in the image. Using this option should help to cut down on emails to administrators by users locked out of accounts.

See also

- Recorder Security Settings
- Forgot Password Settings
- Password Complexity

Password Complexity

Create rules for password complexity that adhere to organization standards. You can set the following password attributes:

- Password character length
- Uppercase and lowercase character requirements
- Letters and numbers requirements
- Special character (~!@#$%^&*.-_+?;) requirements

See also

- Recorder Security Settings
- Forgot Password Settings
- Account Lockout Settings

Need More Help

In addition to the in-product help files, there are several different ways to get help using TechSmith Relay.

- **TechSmith Relay Tutorials**

  Looking for “How to…?” or “How do I…?” information? In the TechSmith Relay section of the TechSmith.com tutorials page you can find the most up-to-date tutorials and product information.

- **TechSmith Technical Support**

  Having a technical issue? In the TechSmith Support Center you can search for answers to technical issues and contact support. See **Working with Technical Support** for more information about how to contact TechSmith’s Technical Support team.

Working with Technical Support

In the event you have an issue that cannot be answered with the TechSmith Relay Help and documentation, please follow the steps below when working with TechSmith Technical Support.

Step 1: Knowledge Base Search

Before contacting TechSmith for Technical Support, please make sure to search the Knowledge Base on the Support Center (**http://support.techsmith.com**). It is possible that the issue is a known issue and there is already an answer available.

Step 2: Submit a Question

If you are unable to find an answer to your issue, send a question to Tech Support.

Step 3: Call Tech Support

The TechSmith Relay Tech Support team is ready and waiting for your questions. Should you have problems that you cannot solve using the resources provided, please give us a call and we will be happy to assist.

> The following information is available on the TechSmith website by clicking **Company > Contact Us**. Always refer to that location for latest, most accurate information.

- **Phone:** +1.517.381.2300 (ext. 784)
- **Toll Free in the U.S. & Canada:** +1.800.517.3001 (ext. 784)
- **Tech Support Website:** http://support.techsmith.com

How to Export Event Viewer Logs

The following information explains how to export the event viewer logs for the components of TechSmith Relay.

> If the TechSmith node is not present on a server where TechSmith Relay Server has been installed, this means that the Relay Manager Service never started on that server. If the server isn't running and you there isn't a TechSmith node in the Event Viewer, try the Restart TechSmith Relay Server shortcut on the desktop, it may solve the problem.

TechSmith Relay Recorder

Windows XP

1. Go to **Start > Run > eventvwr**.
2. Right-click **TechSmith** and select **Save Log Files As**.
3. Save the log in the EVT format.
4. Right-click **Application** and select **Save Log Files As**.
5. Save the log in the EVT format.
6. Right-click **System** and select **Save Log Files As**.
7. Save the log in the EVT format.

Windows Vista and Windows 7

1. Open the Start menu and in the search box, type "event viewer" and press **Enter**.
2. When the Event Viewer opens, expand **Applications and Services Logs**.
3. Right-click **TechSmith** and select **Save Events As**.
4. Save the log in the EVTX format.
5. Expand **Windows Logs**.
6. Right-click **Application** and select **Save Events As**.
7. Save the log in the EVTX format.
8. Expand **Windows Logs**.

9. Right-click **System** and select **Save Events As**.
10. Save the log in the EVTX format.

Windows 8

1. Open the Start menu and search for “event viewer.”
2. Click **Settings**. On the left, click **Event Viewer**.
3. When the Event Viewer opens, expand **Applications and Services Logs**.
4. Right-click **TechSmith** and select **Save Events As**.
5. Save the log in the EVTX format.
6. Expand **Windows Logs**.
7. Right-click **Application** and select **Save Events As**.
8. Save the log in the EVTX format.
9. Expand **Windows Logs**.
10. Right-click **System** and select **Save Events As**.
11. Save the log in the EVTX format.

Mac OS X

1. i. Open **Finder** and go to `/Library/Logs/TechSmith/`.
2. ii. Right-click **TechSmith Relay** and select **Compress TechSmith Relay** to create a ZIP file of the log files on the desktop.

TechSmith Relay Server

Windows Server 2003

1. Go to **Start > Administrative Tools > Event Viewer**.
2. Right click **TechSmith** and select **Save Log Files As**.
3. Save the log in the EVT format.
4. Right-click **TechSmith** and select **Save Log Files As**.
5. Save the log in the EVT format.
6. Right-click **Application** and select **Save Log Files As**.
7. Save the log in the EVT format.
8. Right-click **System** and select **Save Log Files As**.
9. Save the log in the EVT format.

Windows Server 2008 and Greater

1. Open the *Start* menu and in the search box, type “event viewer” and press **Enter**.
2. When the Event Viewer opens, expand **Applications and Services Logs**.
3. Right-click **TechSmith** and select Save Events As.
4. Save the log in the EVTX format.
5. Expand **Windows Logs**.
6. Right-click **Application** and select **Save Events As**.
7. Save the log in the EVTX format.
8. Expand **Windows Logs**.

9. Right-click **System** and select **Save Events As**.
10. Save the log in the EVTX format.

9. Right-click **System** and select **Save Events As**.
10. Save the log in the EVTX format.