TechSmith Relay® (Self-Hosted)
Documentation Library

Version 5

August 2016

TechSmith Relay® (Self-Hosted)
Administrator Help

Version 5

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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

- **Important TechSmith Relay Concepts**
- **Configuration of TechSmith Relay**
- **TechSmith Relay Administration Reference**
- **Need More Help**
- **Working with Technical Support**

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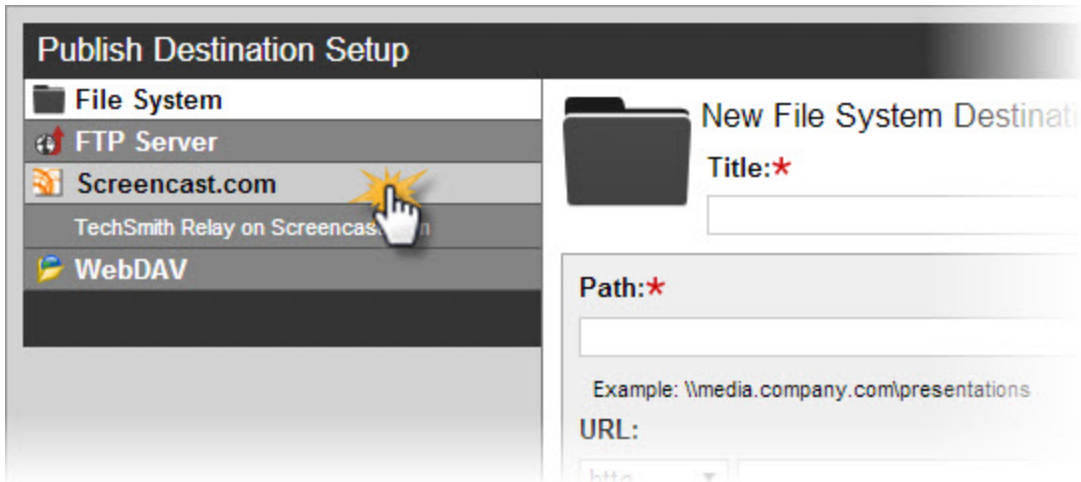
> If the publish destination you would like to use is not available in the list of publish destinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

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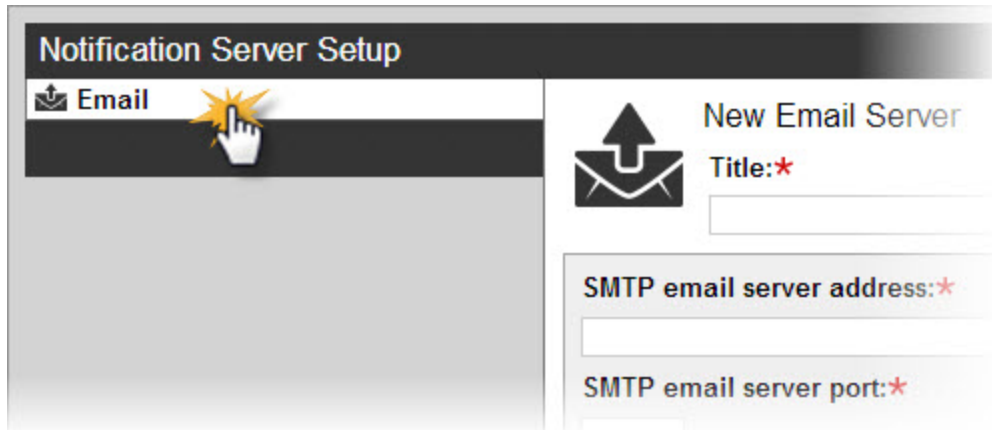
> If the notification server type you would like to use is not available in the list of notification servers, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

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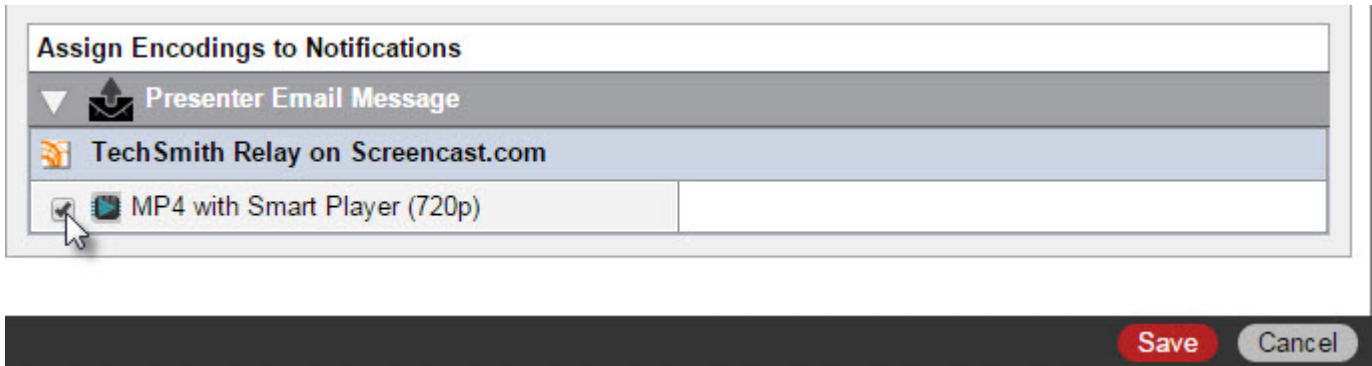
4. Repeat for each notification.
5. Click **Save**.
6. Click the **Variable Definition** tab to continue.

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.

   ![New User button icon]

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 down-loaded. 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—Power-Point, 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—Power-Point, 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:

	Presentation Actions Necessary / Recent Presentations
1	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
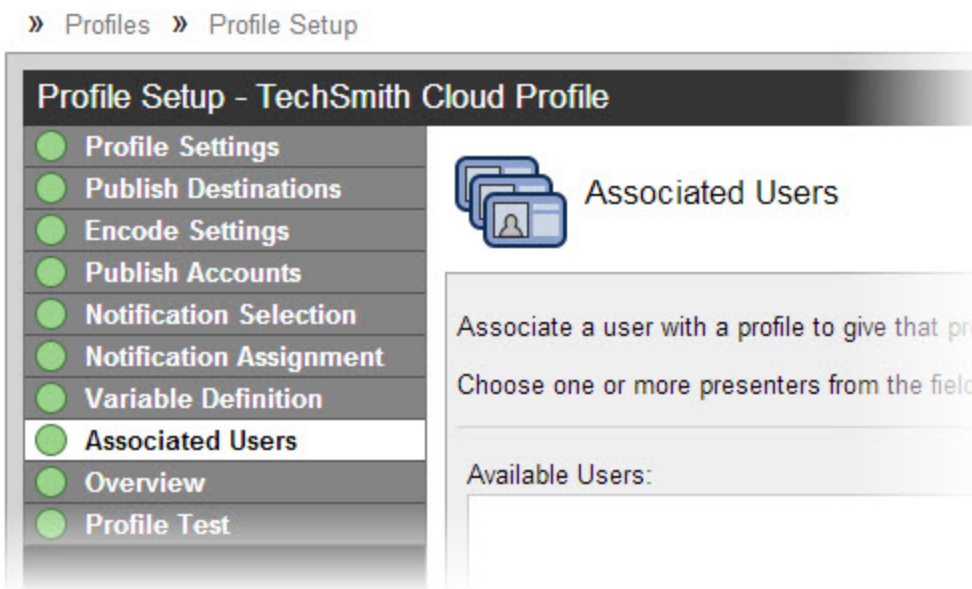
made to the automatically assigned profiles list <u>are not</u> reflected on existing TechSmith Relay users.

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 not running 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**.

Select Encode Settings for Publish Destinations Which should I choose?	
▼ 📶 TechSmith Relay on Screencast.com	📄
☐ 🖼 Image (PNG, JPG, GIF)	☐ MP4 (Up to 1080p)
☐ ▶ MP4 with Smart Player (480p)	☐ MP3 (Audio Only)
☑ ▶ MP4 with Smart Player (720p) XML	☐ Camtasia for Mac Recording
☐ ▶ MP4 with Smart Player (1080p)	☐ Camtasia Studio 7.1.1 and Earlier Recording
☐ ▶ MP4 with Smart Player (Small)	☐ Camtasia Studio Recording
☐ ▶ MP4 with Smart Player (Medium)	☐ Windows Media (Small)
☐ ▶ MP4 with Smart Player (Large)	☐ Windows Media (Medium)
☐ ▶ MP4 with Smart Player (Up to 1080p)	☐ Windows Media (Large)
☐ MP4 (480p)	☐ Windows Media (Up to 1080p)
☐ MP4 (720p)	

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 playbback. 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.

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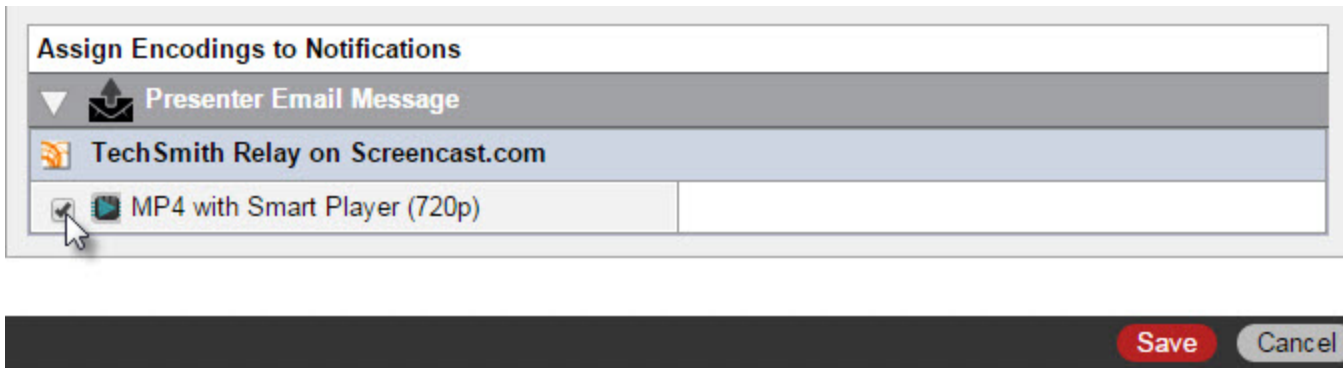
4. Repeat for each notification.
5. Click **Save**.

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.

Define Profile Variable Values

Name	Value
CourseName	HU101

Enter the value for the variable.

Profile Variable Usages

▼ ✉ **Presenter Email Message**

Recipient Name:
 {s:PresenterName}
Recipient Email:
 {s:PresenterEmailAddress}
Subject:
 Presentation Published: {s:PresentationTitle}

You can preview where the variable will be used.

Template:
 3

Template Body:
 A presentation for Course {p:CourseName} that was recorded on {s:RecordDateTime} is now ready for sharing and viewing.

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.

Profile Setup – TechSmith Cloud Profile

- ● Profile Settings
- ● Publish Destinations
- ● Encode Settings
- ● Publish Accounts
- ● Notification Selection
- ● Notification Assignment
- ● Variable Definition
- ○ **Associated Users**
- ● Overview
- ○ Profile Test

Associated Users

Associate a user with a profile to give that pre

Choose one or more presenters from the field

Available Users:

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.

Type	Destination	Status	Progress
Speech to Text Transcription		Processing	20%
Camtasia Studio Recording		Pending	0%
Camtasia Studio Recording	Personal Network Drive	Pending	0%
Silverlight (Small)		Pending	0%
Silverlight (Small)	Camtasia Relay on Screencast	Pending	0%
MP3 (Radio Quality)		Pending	0%

Camtasia Relay Profile Test

Submitted by:	m.smith (s.johnson@techsmith.com)
Recorded:	2/12/2010 at 1:37 PM
Computer Name:	
Description:	Camtasia Relay Profile Test on 2.12.2010 1.37.36 PM
Profile:	Weekly Staff Meetings
Duration:	00:01:57
Resolution:	640x480

Presentations — Processing (1)

Camtasia Relay Profile Test
Weekly Staff Meetings
2/12/2010 @ 1:37 PM
m.smith

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 des-tinations, 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 des-tinations, you may have to install the appropriate plug-in before you can use it. See **Plug-Ins** for more information.

Amazon Web Services, the "Powered by Amazon Web Services" logo, and Amazon S3 are trademarks of Amazon.com, Inc. or its affiliates in the United States and/or other countries.

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 alphanumeric 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.

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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.screen-cast.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.

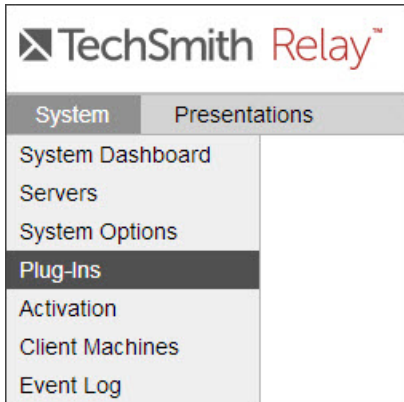**See also**

- ▶ **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.
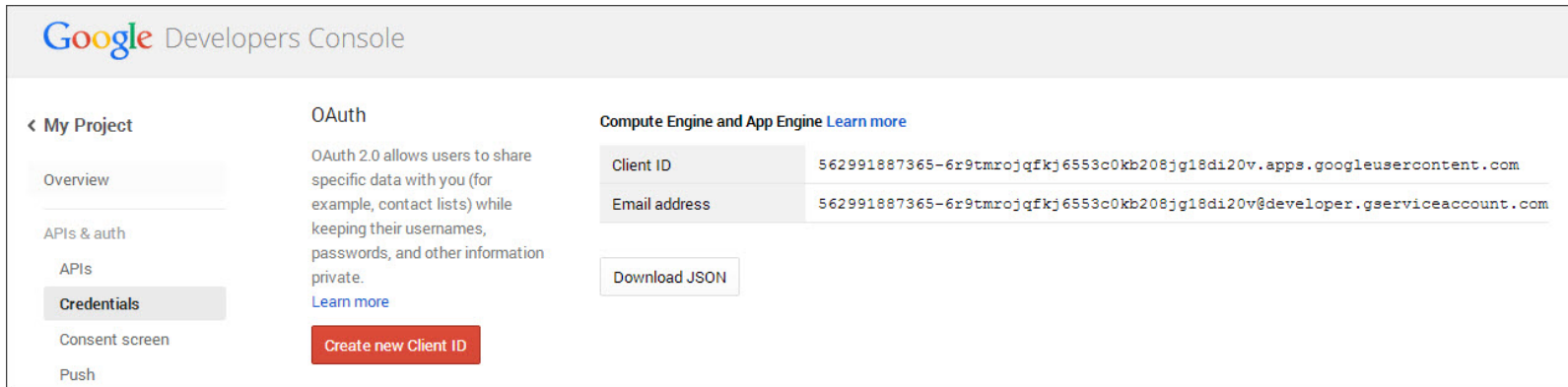
7. Paste the redirect URL from your clipboard into the console as shown below. The authorized Javascript origins should be the base URL of your TechSmith Relay server.
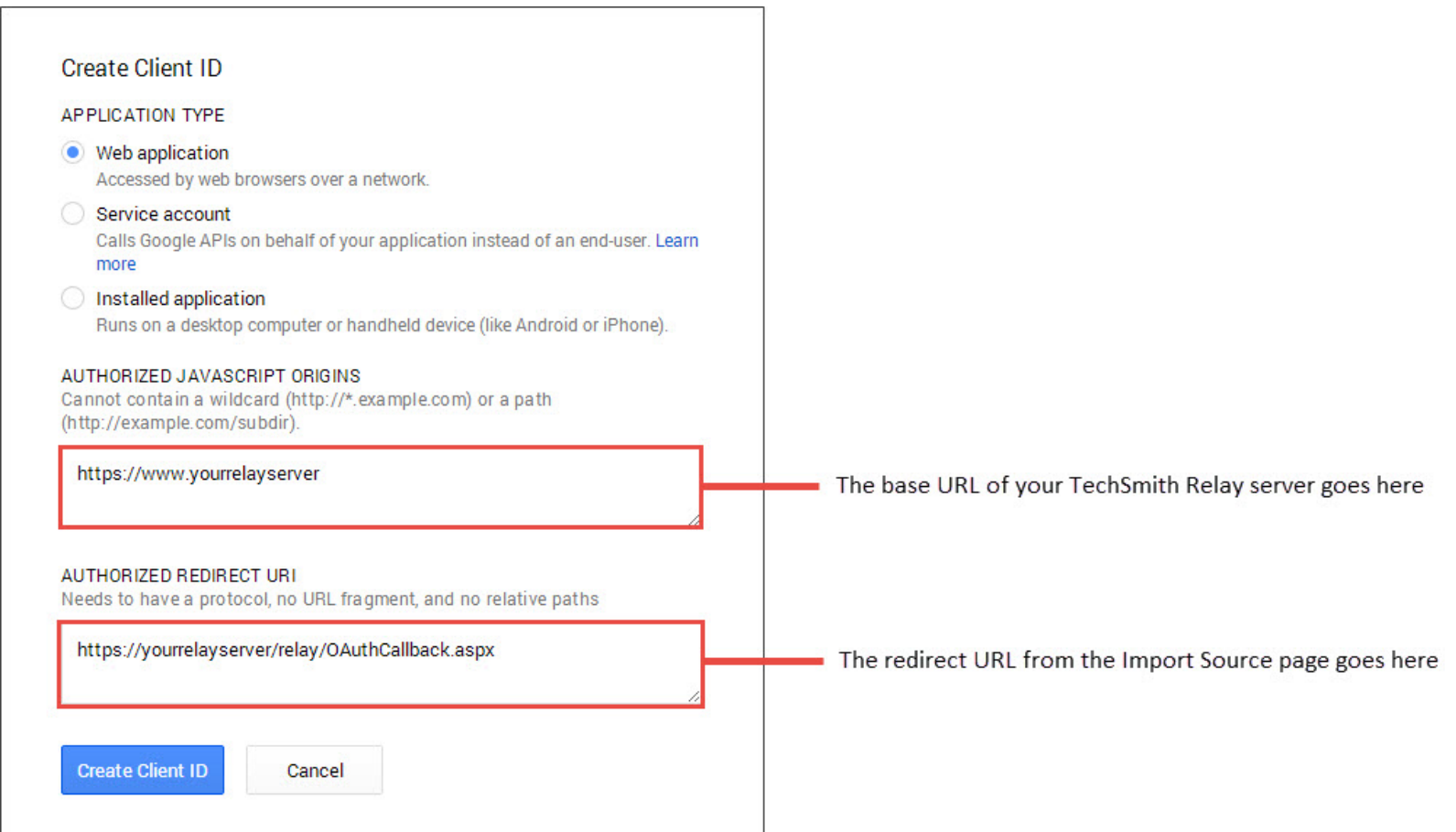
8. Click Create Client ID. A Client ID and Client Secret are generated for you.

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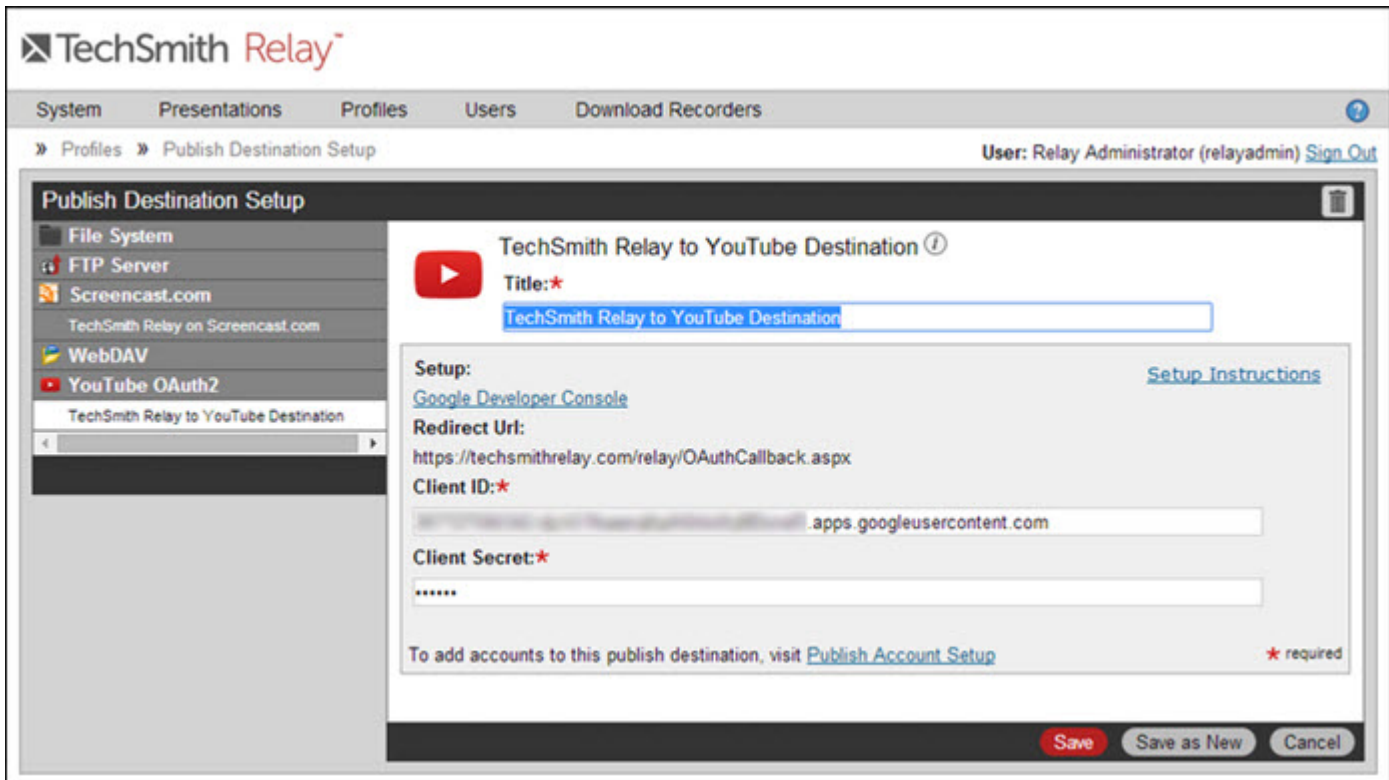
Publish to YouTube

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 Medi-aSpace™.

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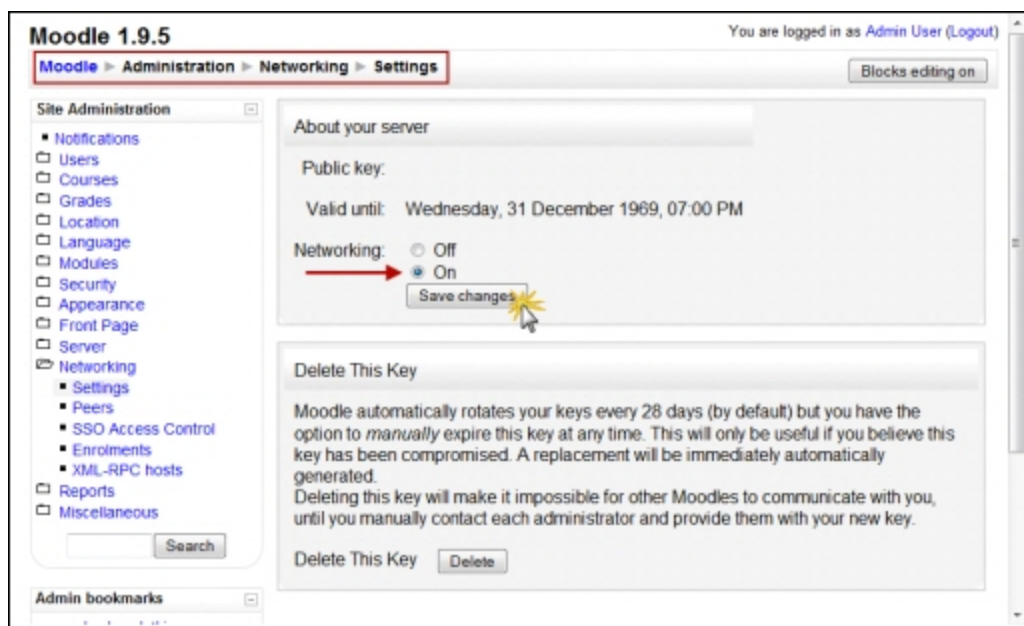
8. Navigate to **Networking > XML-RPC hosts**.

9. Add the TechSmith Relay server IP address and, optionally, a network block to the list of trusted hosts.
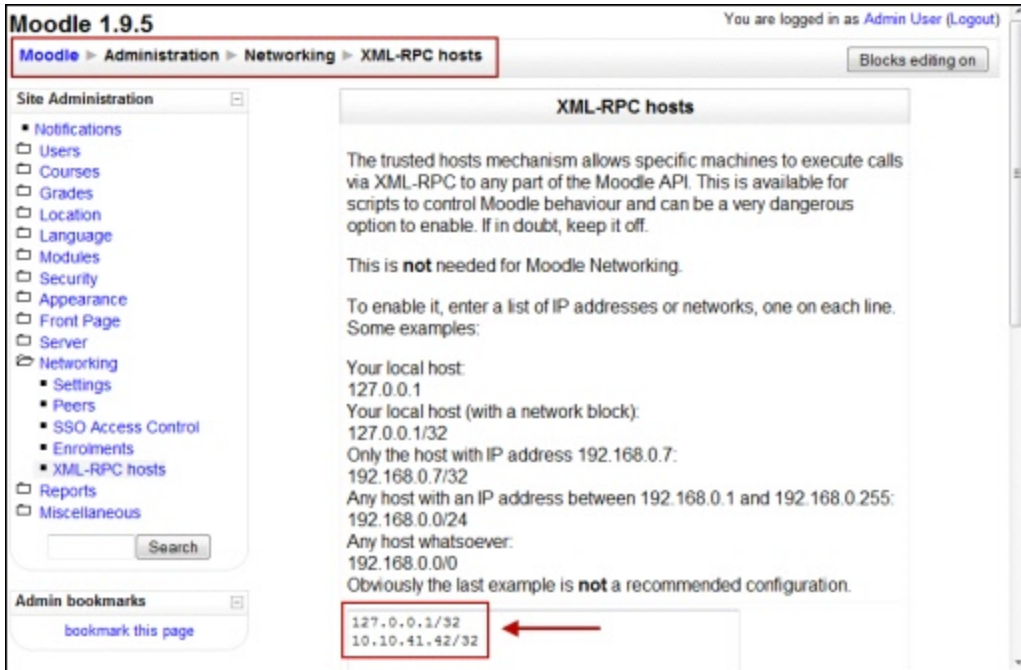
Configure a Moodle 1.9.7, 1.9.8, or 1.9.9 Server to Receive Notifications

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 announce-ment 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_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

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`

```python
# 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 present-ation 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 noti-fication. 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 noti-fications.

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

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.
Presenter: Mary Smith
Duration: 0:53:24

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

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.
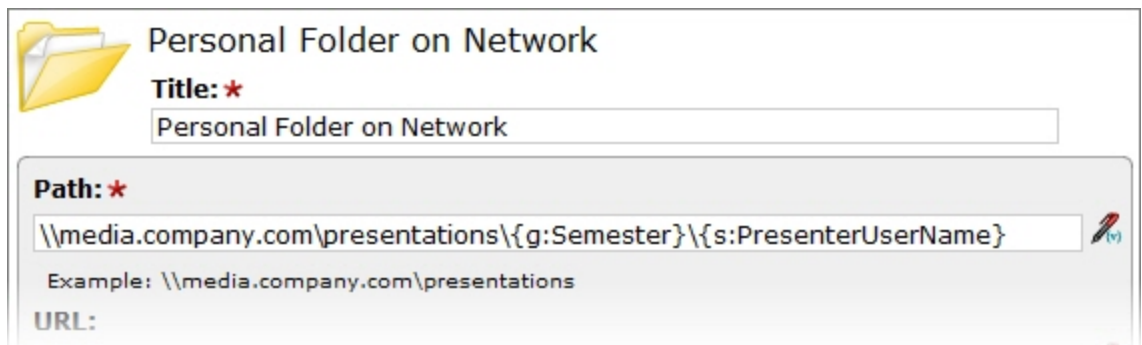
System Variables

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 presentation.
{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.

Recipient email: ★
{s:PresenterUserName}
Subject: ★
Presentation Ready for Editing: {s:PresentationTitle}
Message:
The CAMREC file of your presentation is ready for editing. If you require assistance with editing your file in Camtasia Studio, please contact {g:CamrecHelp}.

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.

CamrecHelp   Mary Smith (m.smith@company.com)

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 `\\me-dia.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.

TechSmith Relay® (Self-Hosted)
Presenter Help

Version 5

August 2016

Table of Contents

Introduction

With TechSmith Relay, 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 a wide variety of media formats on multiple playback devices including portable media devices such as the Apple iPod and via iTunes U.

There are two parts to TechSmith Relay--the recorder which runs on your computer and the server which processes and publishes all presentations.

Important TechSmith Relay Concepts

Before you start using TechSmith Relay, there are several concepts you should be familiar with. Please review the following topics.

The TechSmith Relay Recorder

To record a presentation, you first need to download and install the TechSmith Relay recorder on your computer. Click **Download Recorders** and then click the recorder download link for your operating system to start the download.

The portable recorder can be installed on a mobile storage device, such as a USB flash drive. This recorder provides you with an option for recording when you:

- ▶ Do not have permission to install applications.

- ▶ Have limited or no network access.

- ▶ Have several presentations and want to upload them collectively at a later time.

> Depending on your organization, the portable recorder may or may not be available. Contact your administrator for more information.

For more information on the recorder, see **Download Recorders**.

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.

Profiles are created by the administrator and include settings that define how the presentation is recorded, processed, and published. When selecting a profile in the TechSmith Relay Recorder, only the profile title is available to help presenters choose which one to use; the profile description is only visible on the website.

The *Upload and Decide Later Profile* sends the recording to the TechSmith Relay server but does not process the recording in any way. The presentation stays in the *Needs Attention* state on the server until an administrator or the presenter selects a profile to use or deletes the presentation.

For more information, see **Profiles**.

Accounts

After presentations are processed, they are sent to *publish destinations* for viewing. Publish destinations include locations like iTunes, a Screencast.com account, a file server, etc. In many cases, account credentials are required to access publish destinations.

There are two ways that TechSmith Relay can handle credentials. Credentials can be supplied by an administrator, or a presenter may be required to enter his or her own account credentials.

In the case where a presenter is required to enter credentials, he or she must log into the TechSmith Relay website and add a *publish account* for a given publish destination.

Presentations submitted using a profile that needs a presenter to add a publish account are held in the *Needs Attention* state until a valid publish account is added.

For more information on how to add a publish account, see **Publish Account Setup**.

See also

- ▶ **Introduction**
- ▶ **Account Settings**
- ▶ **Help and Resources**
- ▶ **Presentations**
- ▶ **Caption Editor**
- ▶ **Profiles**
- ▶ **Profile Setup**
- ▶ **Publish Account Setup**
- ▶ **Download Recorders**
- ▶ **TechSmith Relay Portable Recorder**

Account Settings

Depending on how your TechSmith Relay administrator sets up TechSmith Relay, you may need or want to modify your TechSmith Relay account.

> Presenters may not have the ability to modify their TechSmith Relay account information in some cases. For example, if presenter login information in TechSmith Relay is bound to network credentials presenters cannot edit username and password on the TechSmith Relay website.

On the Change Account Information tab, presenters can access the following fields:

▶ The Name field changes the name used in presentation notifications.

▶ The Email Address field changes the email address to which email notifications, such as completed presentations, are sent.

If the Change Password tab is available, presenters can change the password they use to log into the TechSmith Relay website and recorder.

See also

▶ **Introduction**

▶ **Important TechSmith Relay Concepts**

▶ **Help and Resources**

▶ **Presentations**

▶ **Caption Editor**

▶ **Profiles**

▶ **Profile Setup**

▶ **Publish Account Setup**

▶ **Download Recorders**

▶ **TechSmith Relay Portable Recorder**

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
- 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 **Edit Captions** to open the presentation in the caption editor or **Release Hold** to continue processing the presentation.

See also

- **Introduction**
- **Important TechSmith Relay Concepts**
- **Account Settings**

- **Help and Resources**
- **Caption Editor**
- **Profiles**
- **Profile Setup**
- **Publish Account Setup**
- **Download Recorders**
- **TechSmith Relay Portable Recorder**

Caption Editor

The Caption Editor page allows presenters and global caption editors to review and edit captions that were created automatically by TechSmith Relay. When a presentation is held for caption editing, all processing and publishing is stopped until the presenter releases the presentation to complete processing and publishing.

Users can only access the Caption Editor page if they have a presentation that is being held for caption editing.

See also

- **Access the Caption Editor**
- **Edit Presentation Captions**
- **Caption Editing Tips**

Access the Caption Editor

When a presenter has uploaded media that is ready for captioning, there are a few ways to get to the caption editor. Global caption editors have access to a third option, the Presentations page.

▶ From a Notification Email.

Click the **Edit the presentation captions** link in the email you receive when a presentation is ready for caption editing.

▶ From the TechSmith Relay Website Dashboard
Click the name of a presentation shown under Presentations held for caption editing.

▶ From the Presentation List on the TechSmith Relay Website.

   ▶ Select **Held For Captioning** from the Status dropdown list.

   ▶ Click a presentation to select it.

   ▶ On the right side of the page, click **Edit Captions**.

See also

▶ **Edit Presentation Captions**

▶ **Caption Editing Tips**

Edit Presentation Captions

Once a presentation is open on the Caption Editor page, use the following process for editing captions and submitting the presentation for final processing and publishing:

1. On the Edit Captions tab, use the video controls review the automatic captions.

2. Edit existing captions by clicking inside a caption and editing the text.

3. Add , delete , and split captions as needed using the controls.

4. Everything you do is automatically **saved.**

5. When the captions are complete, click **Preview** to see how they will appear on your video and review for any errors.

6. Click **Edit Captions** to make any final adjustments to the text or timing of the captions.
7. When you are satisfied with the captions, click **Publish**.

   The presentation continues processing and publishing.

See also

▶ **Access the Caption Editor**

▶ **Caption Editing Tips**

Caption Editing Tips

Here are some tips to help you when editing captions:

▶ While working in a caption, click **Replay** to repeatedly click the **Replay** button until you are able to transcribe the entire caption.

▶ The number in the lower right of a caption shows the remaining characters available to keep the caption within ADA compliance guidelines. The number in the lower left displays the duration. If a caption has too many characters or is too long or short, it turns red.

▶ Click the **Split** button to separate a caption into two smaller captions.

▶ Use the standard keyboard shortcuts for Undo (**CTRL+Z**, **Command+Z**) and Redo (**CTRL+Y**, **Command+Y**) to undo or redo your actions in the caption editor.

See also

▶ **Access the Caption Editor**

▶ **Edit Presentation Captions**

Profiles

A profile consists of settings that determine how a presentation is recorded, processed, and presented. Profiles are created by the TechSmith Relay administrator. If you do not have a profile that provides you with the options that you need, see **Can I Change My Profiles?**

To access information on profiles available to you:

1. Log in to the TechSmith Relay website.
2. Click **Profiles**
3. In the list of profiles, click a profile.
4. Click **Overview**. See **Profile Setup** for additional information.

> Only TechSmith Relay administrators can create or modify profiles.
>
> If you are not satisfied with existing profile options, you can select the Upload and Decide Later Profile. This sends the recording to the server where it remains until you contact your TechSmith Relay administrator to create or modify a profile.

Can I Change My Profiles?

Only TechSmith Relay administrators can create or modify profiles. If you are not satisfied with your existing profile options, contact your TechSmith Relay administrator. Consider the following questions before contacting your administrator.

- What kind of recording do you want to make:
    - Will there be a lot of movement, such as video, in your presentations?
    - Are you going to record PowerPoint presentations?
    - Anything else the administrator should know about what you are recording?
    - Are you planning on editing presentations in Camtasia Studio?

- What kind of files do you want to produce:
    - Do you need multiple file types for the same presentation?
    - Is there a certain kind of file you need?
    - Do you want an audio-only file?
    - Should the produced presentations be certain dimensions?

- Where do you want the produced files to end up:
    - Do you have a file folder location for the produced files?
    - Do you have an account on Screencast.com that you want to use?

Do you want to send your presentations to a website via an FTP server?

Do you want to send your presentations to iTunes U?

Some of the options mentioned above may not be available for your use.

See also

▶ **Introduction**

▶ **Important TechSmith Relay Concepts**

▶ **Account Settings**

▶ **Help and Resources**

▶ **Presentations**

▶ **Caption Editor**

▶ **Profile Setup**

▶ **Publish Account Setup**

▶ **Download Recorders**

▶ **TechSmith Relay Portable Recorder**

Profile Setup

On the Profile Setup page for a profile, presenters can select publish accounts to use for the profile and access an overview of a profile.

Publish Accounts

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

Select a publish account for each encode setting or select one publish account to use for all encodings within a publish destination.

Profile Overview

Settings included in a profile:

1	**Description:** What should you use this profile for? The description is entered by an administrator to help you to choose the correct profile for your needs.
2	**Publish destinations:** Where the produced files go. Presentations can be published to one or more destinations. Examples include an FTP server, a network drive, Screencast.com, or iTunes U.

3	**Encode settings:** What kinds of files are produced. The original recording is encoded into one or more formats. Examples include an audio only (MP3) encoding, an iPod-compatible encoding, or Windows Media format. Encoding can reduce the frame rate and audio quality, but can never improve the original recording.
4	**Publish accounts:** How to access the publish destinations. These accounts contain specific information used to place processed presentations in a publish destination, such as authentication information, folder selection, etc.
5	**Notifications:** How people are informed when presentations are published. Notifications are sent per profile and can include information about multiple encodings of the same presentation.

See also

▶ **Introduction**

▶ **Important TechSmith Relay Concepts**

▶ **Account Settings**

▶ **Help and Resources**

▶ **Presentations**

▶ **Caption Editor**

▶ **Profiles**

▶ **Publish Account Setup**

▶ **Download Recorders**

▶ **TechSmith Relay Portable Recorder**

Publish Account Setup

On the Publish Account Setup page for a profile, presenters can select publish accounts to use for the profile and access an overview of a profile.

For each available 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.

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.

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

> YouTube publish accounts require verification to upload videos longer than the YouTube maximum (15 minutes as of November 2011). For more information on verifying your YouTube account, visit **YouTube.com**.

See also

- **Introduction**
- **Important TechSmith Relay Concepts**
- **Account Settings**
- **Help and Resources**

- **Presentations**
- **Caption Editor**
- **Profiles**
- **Profile Setup**
- **Download Recorders**
- **TechSmith Relay Portable Recorder**

Download Recorders

On the Download Recorders page, presenters can access and download the TechSmith Relay Recorders.

As of version 4.1, when a new version of the TechSmith Relay server is installed, an update notification is sent to TechSmith Relay Recorder clients informing users of the availability of an update. Recorders downloaded from versions of TechSmith Relay prior to 4.1 receive no update notifications.

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

- **Windows Operating Systems**
    - 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 Operating Systems**

    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.

- **TechSmith Fuse®**

    In addition to recording a computer screen, live video footage taken with a mobile device recorded with TechSmith Fuse can be sent to a TechSmith Relay server.

    Existing videos on your mobile device can also be uploaded via TechSmith Fuse.

    TechSmith Fuse is available for iOS, Android, and Windows devices.

See also

- **TechSmith Relay Portable Recorder**
- **Introduction**
- **Important TechSmith Relay Concepts**
- **Account Settings**
- **Help and Resources**
- **Presentations**
- **Caption Editor**
- **Profiles**

- **Profile Setup**
- **Publish Account Setup**

Download the Portable Recorder

If you need a portable version of TechSmith Relay, 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 and format the device as FAT32.
2. If available on the Download Recorders page, click **Download Portable Recorder** and save the ZIP file to your computer.

   You may have to request the portable recorder. Click the button to send a request to your administrator.

3. Locate and open `PortableTechSmithRelay.zip`.
4. Copy all files from the ZIP file onto the mobile storage device. All files from the ZIP folder need to be copied to the root of the device.

> Depending on your organization, the portable recorder may or may not be available. Contact your administrator for more information.

See also

- **TechSmith Relay Portable Recorder**
- **Run the Portable Recorder**
- **Log In to the Portable Recorder**
- **Record with the Portable Recorder**
- **Upload Presentations from the Portable Recorder**

Log In to the Portable Recorder

There are some considerations to keep in mind when you attempt to log in to the TechSmith Relay portable recorder.

- To log in on the portable recorder, you must first run the portable recorder on a computer that can connect to the TechSmith Relay server.

  To do this, connect the mobile storage device to a computer with the "regular" TechSmith Relay recorder installed on it. Open the portable recorder and log in. This saves your presenter information on the portable recorder and allows you to access your profiles when you are not connected to the server.

- If you run the portable recorder without previously logging in while connected to the server, you are not able to log in. Identify yourself as a guest to use the Upload and Decide Later profile.

See also

- **TechSmith Relay Portable Recorder**
- **Download the Portable Recorder**
- **Run the Portable Recorder**
- **Record with the Portable Recorder**
- **Upload Presentations from the Portable Recorder**

Record with the Portable Recorder

You may notice a few differences when running TechSmith Relay from a mobile storage device, but generally, the process of recording is the same.

Differences when Recording with Portable Recorder

- Click the **View Presentations** button to see and upload the presentations saved to the mobile storage device.

- In most cases, you will not be connected to the server. When you see this icon , you are not connected to the server.
- After you finish recording, you must save your file to the mobile storage device running the TechSmith Relay portable recorder. You cannot submit it for upload from the computer you are using.
- You may not be able to log in. See **Log In to the Portable Recorder** for more information.
- When you finish your recording, click **Save** to save the presentation to the mobile storage device.
- If you are running the portable recorder on a computer with TechSmith Relay installed, you can choose to save your presentation or submit it for upload to the server.
- To upload saved presentations, connect the mobile storage device to a computer with TechSmith Relay installed on it. You can then **Upload Presentations from the Portable Recorder**.

See also

- **TechSmith Relay Portable Recorder**
- **Download the Portable Recorder**
- **Run the Portable Recorder**
- **Log In to the Portable Recorder**
- **Upload Presentations from the Portable Recorder**

Run the Portable Recorder

Depending on the operating system and security settings of a computer, you can start the portable recorder in one of the following ways.

Windows Operating System with AutoPlay Enabled

Under certain conditions, when you connect a mobile storage device that contains the portable recorder with a computer, you are presented with the option to immediately start the application.

Click **Start TechSmith Relay** to run the portable recorder.

Windows Operating System with AutoPlay Disabled

If AutoPlay is disabled, to run recorder:

1. Open Windows Explorer (Right-click **Start** and select **Explore**.)
2. Navigate to the mobile storage device.
3. Double-click **PC TechSmith Relay.exe**.

Mac Operating System

1. Navigate to the mobile storage device.
2. Double-click **Mac TechSmith Relay**.

See also

▶ **TechSmith Relay Portable Recorder**

▶ **Download the Portable Recorder**

▶ **Log In to the Portable Recorder**

▶ **Record with the Portable Recorder**

▶ **Upload Presentations from the Portable Recorder**

TechSmith Relay Portable Recorder

Download and use the TechSmith Relay portable recorder if there is any reason you cannot (or should not) record and upload directly from the presentation computer.

Examples of When to Use the Portable Recorder

▶ You need to record on a computer where you do not have permission to install applications.

▶ You need to record on a computer with limited or no network access.

▶ You want to record several presentations and upload them collectively at a later time.

> Depending on your organization, the portable recorder may or may not be available. Contact your administrator for more information.

Upload Presentations from the Portable Recorder

To upload saved presentations from a mobile storage device, you must connect the mobile storage device to a computer with TechSmith Relay Recorder installed on it.

> You can submit saved presentations at any time. If you are not connected to the Internet, the presentations upload to the server when your computer is next connected.

To submit saved presentations for upload:

1. Click the **View Saved Presentations** button. The Saved Presentations dialog opens.

2. Click **Submit All** to submit all of the presentations for upload or click [icon] to submit individual presentations.

   ▪ If you are online and connected to the server, your presentation starts to upload.

   ▪ If you are offline, your presentation is stored on the computer and automatically upload to the server once you are online and connected.

Help and Resources

The Help and Resources page assists presenters in answering questions or finding help for the TechSmith Relay website.
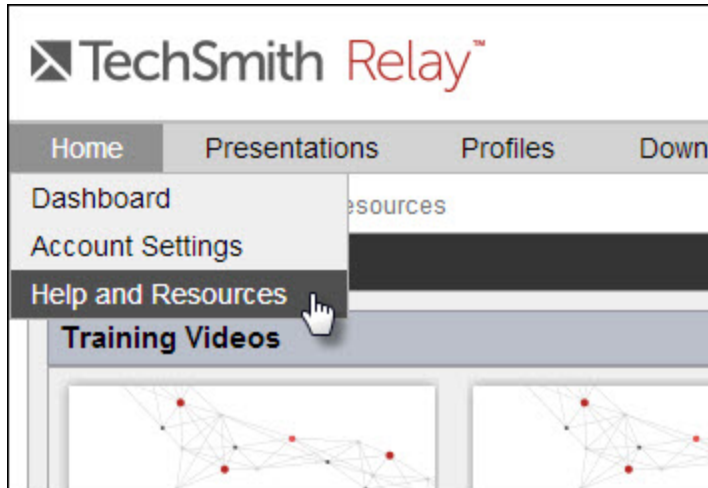
Here presenters can view training videos, access frequently asked questions and answers, and link directly to the Download Recorders page.

TechSmith Relay® (Self-Hosted)
Caption Editor Help

Version 5

August 2016

Introduction

This document introduces you to the TechSmith Relay caption editing process for global caption editors. A global caption editor has access to all the presentations in queue that require captioning

For more information, see **The Global Caption Editor Role**
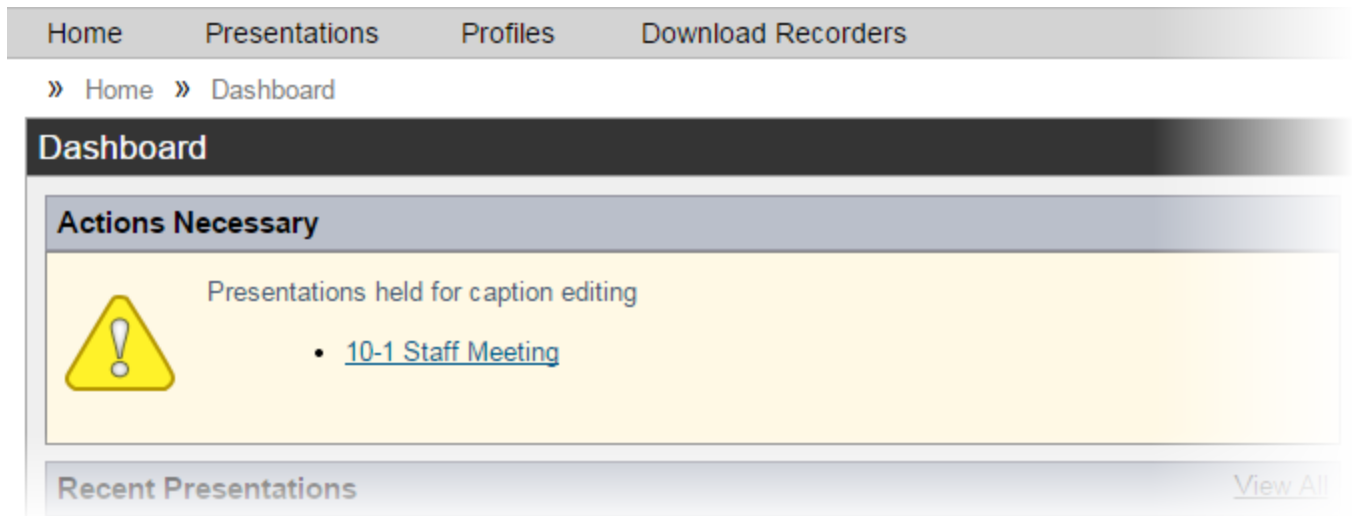
TechSmith Relay Administration Help Topics

▶ **The Global Caption Editor Role**

▶ **Caption Editor**

▶ **Access the Caption Editor**

▶ **Edit Presentation Captions**

▶ **Caption Editing Tips**

▶ **Help and Resources**

The Global Caption Editor Role

A global caption editor role is a user who has access to the TechSmith Relay website, but is unable to record presentations. The global caption editor has access to all presentations that are held for captioning on the TechSmith Relay server.

When a user who has been assigned to the role of global caption editor logs in to the TechSmith Relay website, a list of presentations currently held for captioning is displayed.

> Multiple global caption editors cannot caption the same presentation at the same time. If a global caption editor opens a presentation that is currently being captioned by another user, the changes made by the first user to open the presentation for captioning are lost.

Global caption editors can receive daily email notifications that list presentations currently held for captioning on the TechSmith Relay server.

See also:

▶ **Caption Editor**

▶ **Access the Caption Editor**

▶ **Edit Presentation Captions**

▶ **Caption Editing Tips**

Caption Editor

The Caption Editor page allows presenters and global caption editors to review and edit captions that were created automatically by TechSmith Relay. When a presentation is held for caption editing, all processing and publishing is stopped until the presenter releases the presentation to complete processing and publishing.

Users can only access the Caption Editor page if they have a presentation that is being held for caption editing.

See also

- **Access the Caption Editor**
- **Edit Presentation Captions**
- **Caption Editing Tips**

Access the Caption Editor

When a presenter has uploaded media that is ready for captioning, there are a few ways to get to the caption editor. Global caption editors have access to a third option, the Presentations page.

▶ From a Notification Email.

Click the **Edit the presentation captions** link in the email you receive when a presentation is ready for caption editing.

▶ From the TechSmith Relay Website Dashboard
Click the name of a presentation shown under Presentations held for caption editing.

▶ From the Presentation List on the TechSmith Relay Website.

   ▶ Select **Held For Captioning** from the Status dropdown list.

   ▶ Click a presentation to select it.

   ▶ On the right side of the page, click **Edit Captions**.

See also

▶ **Edit Presentation Captions**

▶ **Caption Editing Tips**

Edit Presentation Captions

Once a presentation is open on the Caption Editor page, use the following process for editing captions and submitting the presentation for final processing and publishing:

1. On the Edit Captions tab, use the video controls review the automatic captions.

2. Edit existing captions by clicking inside a caption and editing the text.

3. Add , delete , and split captions as needed using the controls.

4. Everything you do is automatically **saved.**

5. When the captions are complete, click **Preview** to see how they will appear on your video and review for any errors.

6. Click **Edit Captions** to make any final adjustments to the text or timing of the captions.
7. When you are satisfied with the captions, click **Publish**.

   The presentation continues processing and publishing.

See also

▶ **Access the Caption Editor**

▶ **Caption Editing Tips**

Caption Editing Tips

Here are some tips to help you when editing captions:

▶ While working in a caption, click **Replay** to repeatedly click the **Replay** button until you are able to transcribe the entire caption.

▶ The number in the lower right of a caption shows the remaining characters available to keep the caption within ADA compliance guidelines. The number in the lower left displays the duration. If a caption has too many characters or is too long or short, it turns red.

▶ Click the **Split** button to separate a caption into two smaller captions.

▶ Use the standard keyboard shortcuts for Undo (**CTRL+Z**, **Command+Z**) and Redo (**CTRL+Y**, **Command+Y**) to undo or redo your actions in the caption editor.

See also

▶ **Access the Caption Editor**

▶ **Edit Presentation Captions**

TechSmith Relay® (Self-Hosted)
Recorder Help

Version 5

August 2016

Table of Contents

TechSmith Relay Overview

TechSmith Relay is an end-to-end media hosting solution that offers simple recording on multiple devices and secure hosting for your shared content.

TechSmith Relay Recorder is just one of the components in the overall TechSmith Relay solution. This desktop recorder is what records and sends media to your secure hosting site. With TechSmith Relay Recorder, capture and publish anytime, anywhere -- in the classroom, in the conference room, at your desk, or at home. TechSmith Relay supports a wide variety of file formats, allowing any lecture or presentation to be viewed by your audience on multiple devices.

See also

- Log In to TechSmith Relay Recorder
- Make a Video Recording
- Need More Help?

TechSmith Relay Recorder Overview

With TechSmith Relay Recorder, capture and publish a recording anytime, anywhere -- in the classroom, in the conference room, at your desk, or at home. TechSmith Relay supports a wide variety of video formats allowing any lecture or presentation to be viewed by your audience on multiple playback devices.

There are two parts to TechSmith Relay--the recorder, which runs on your computer or mobile device, and the website, which hosts all your video recordings. In this help file, you will find topics specific to the TechSmith Relay Recorder.

See also

- Make a Video Recording
- Record a PowerPoint Presentation
- Log In to TechSmith Relay Recorder
- After Recording
- The TechSmith Relay Website
- Upload Media
- FAQs

Log In to TechSmith Relay Recorder

When you open TechSmith Relay Recorder, it prompts you to log in using your TechSmith Relay credentials.

If you choose not to log in when prompted, you can log in before or after recording using the Log In button.
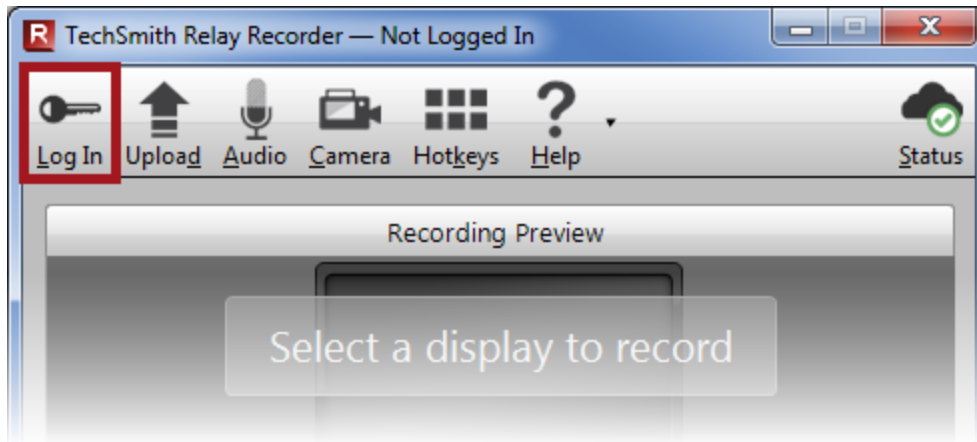
- Why log in?
- Do I have to log in before recording?
- I don't know my username or password. What should I do?

Why Log In?

> You must log in as a presenter before you can submit or save your presentation.

When you log in to TechSmith Relay Recorder, you do the following:

▶ **Identify yourself as a presenter**

Log in to gain access to your profiles and identify yourself as the presenter. You can log in before or after recording.

▶ **Save settings**

When you select an audio device or set hotkeys while logged in, the audio device and hotkeys are stored and available the next time you log in.

> If you enable the **Remember Me** option, you do not see the TechSmith Relay Login dialog box each time you open the TechSmith Relay Recorder. All of your settings are saved and you can immediately access your profiles. Depending on the administrator's choice of security settings, **Remember Me** may occasionally be reset. You just need to log in again and enable **Remember Me**.

See also

▶ Do I Have to Log in Before Recording?

▶ Having Problems with Your Username or Password?

Do I Have to Log in Before Recording?

Running late for your presentation? Can't remember your password?

For these and other reasons, you are not required to log in before recording.

> Although you can record without logging in, you must log in before you can submit media. If you try to submit or save media without logging in, you are prompted to do so.

See also

- Log In to TechSmith Relay Recorder
- Having Problems with Your Username or Password?

Having Problems with Your Username or Password?

Here are a few things to try if you're having problems logging in to TechSmith Relay Recorder:

- If you were not given a username or password, you can try logging in with your network username and password. Some organizations set up TechSmith Relay to use these network credentials.
- In the TechSmith Relay Recorder login dialog, click **Forgot password**.
- If you can't remember your username or password and none of the above work for you, contact your TechSmith Relay administrator.

See also

- Log In to TechSmith Relay Recorder
- Why Log In?

Upload Media

If you have existing media files that you want to share to TechSmith Relay, you can do that using the Upload Media function.
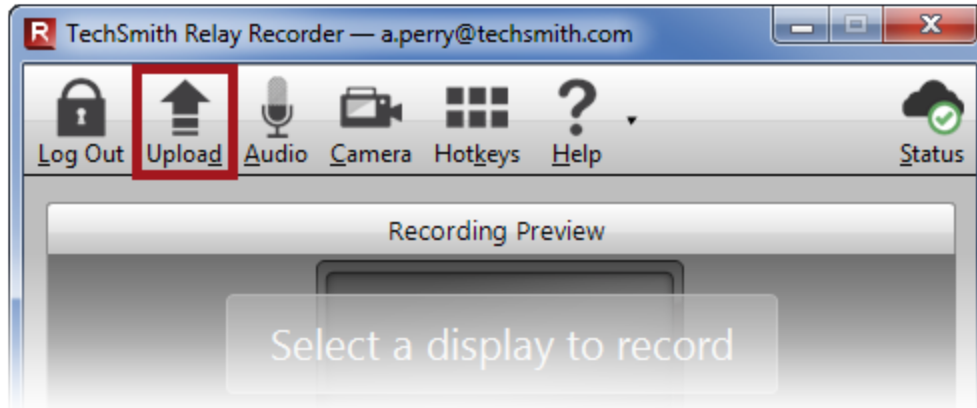

The following file types are supported for upload:

▶ Video: MOV, MP4

▶ Image: PNG, JPEG, JPG, GIF

Note: Your assigned profiles may limit what media types you are permitted to upload. If you have questions about uploading media, contact your TechSmith Relay administrator.

To upload media:

1. Log in to the TechSmith Relay Recorder and select Upload.
2. Click the Add Media button and select your files for upload.

   To upload more than one at a time, hold down the Control button and select multiple files. With your files selected, click Open.Your files will be added to the upload list.
3. Edit the titles and descriptions of your media files if you wish, then click Upload All to share the entire list to TechSmith Relay.

   ▪ To share a single file from the list, click the Upload icon to the right of the file information.

   ▪ To remove an item from the list, click on the X to the far right of the file information.
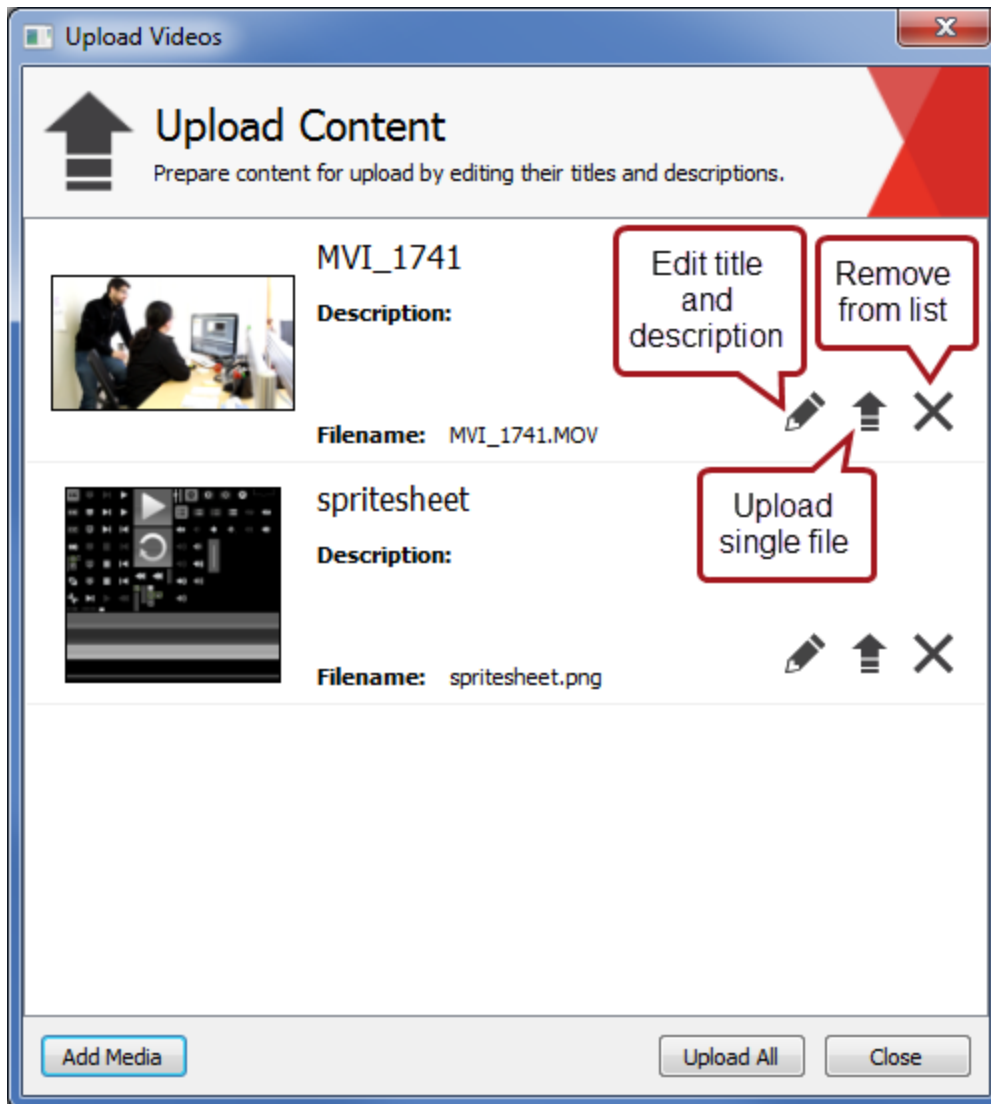
Note: It is important to maintain your internet connection while the media is uploading. If you become disconnected while the media is uploading, the process will pause and resume when your connection is reestablished.
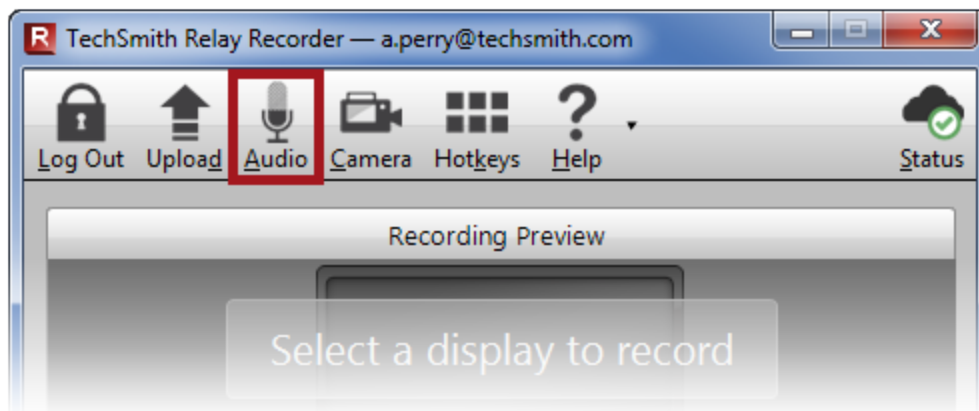
Audio Devices

TechSmith Relay Recorder captures audio from the system as well as a single audio device, such as:

- Built-in microphones

- Standard microphones

- USB microphones

- Webcams

- Device line-in connected to a sound mixer

> You cannot change the audio device selection once a recording begins.
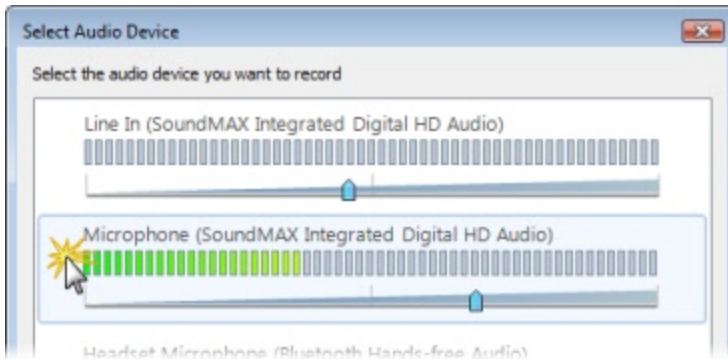
Select an Audio Device

1. Connect your audio device to the computer before launching TechSmith Relay Recorder.
2. Launch the TechSmith Relay Recorder and click the **Audio** button.

The Select Audio Device dialog opens.

> The Select Audio Device dialog shows the levels of all audio devices connected to the computer.

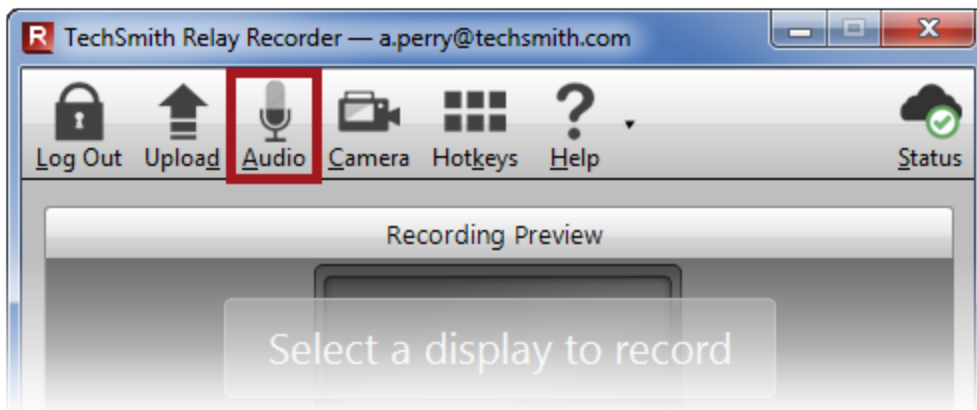3. Click your audio device to select it.

4. Click **OK** to close the dialog.
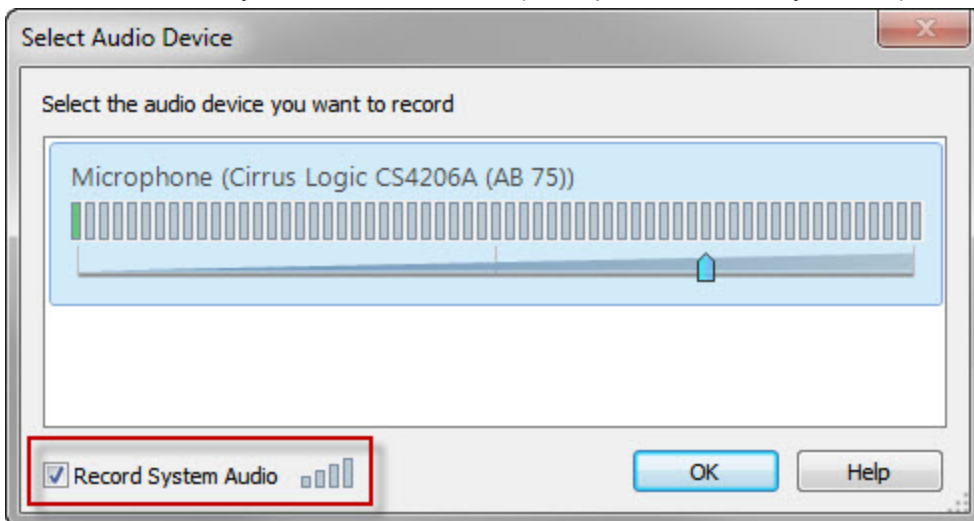
Record System Audio

To record the audio that plays on your system (the audio that you hear played back by your computer):

1. Click the **Audio Device** button.

The Select Audio Device dialog opens.

2. Enable the Record System Audio checkbox. (This option is enabled by default.)

The option to record system audio is not available for users of the Microsoft Windows XP operating system.

See also

▶ Auto Adjust Audio Level

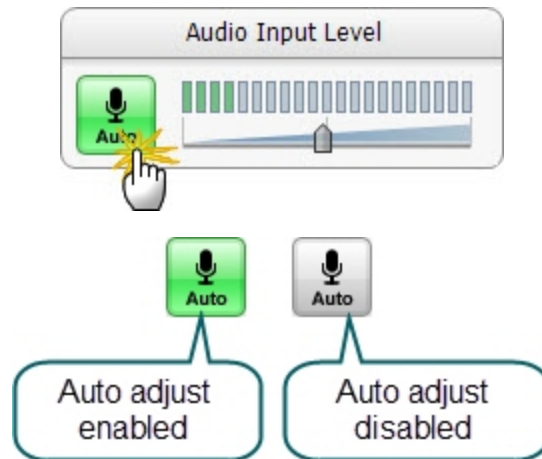▶ Audio Tips

Auto Adjust Audio Level

If the audio levels are too high when recording, the quality of your processed presentation is poor. Recordings with poor audio also have a low level of accuracy in captions and full audio search (when transcription is provided by the profile).

By default, TechSmith Relay Recorder automatically adjusts the input level of the selected audio device to provide the best possible audio for your presentation. As the volume of the audio changes, the slider moves automatically to adjust the level of the recorded audio.

There are some cases when you may want to disable the auto adjust option:

▶ You use a sound mixer to combine and control the levels of multiple devices into a single audio input.

▶ You want more manual control of your audio input levels.

To disable the auto adjust feature, click the **Auto Adjust** button.

See also

▶ Audio Devices

▶ Audio Tips

Audio Tips

Use the following tips to help you get the best audio in your recording.

- **Verify you are recording the correct audio input.**
  - Make sure you click the **Audio Device** button, view all available devices while speaking into your microphone, and click the device based on the input levels. The names of devices can be deceiving and viewing the levels of all the connected devices helps you choose the correct device.
  - Make a test recording. Speak in your presentation voice and volume.
  - If you are using an external microphone, move away from the computer and speak to ensure you record the external microphone and not a potential built-in microphone on the computer.
  - Use the Windows Control Panel to verify desired audio input devices are enabled and working properly.
- **Use auto adjust or manually adjust the input level.**

  If the audio levels are too high and "clip" when recording, the quality of your processed recording is poor. Recordings with poor audio also have a low level of accuracy in captions and full audio search (when transcription is provided by the profile.)

  If you are not using the option to automatically adjust the audio input levels, make sure to adjust the audio level appropriately. Speak in your presentation voice and adjust the audio input slider so the indicator peaks near the end of the green bars and is not consistently showing red bars. You can adjust the audio input level before and after you start recording.

In TechSmith Relay Recorder, use the sliders to adjust the audio input level.

> If you see the following message, enable the auto adjust option or move the audio slider to the left to decrease the input level.

- **Obtain a good external microphone.**

Some computers have decent built-in microphones. Some do not. It might be worth investing in a USB or line-in microphone.

▶ **Verify audio inputs are enabled.**

Click **Start > Control Panel > Sound** (Sound and Audio Devices on the Microsoft Windows XP operating system). Verify that audio inputs are enabled.

▶ **If necessary, use a powered audio input.**

Some laptops do not have powered audio input ports. This means you need to use a powered microphone or a USB microphone.

▶ **Make a test recording to check system audio levels.**

If you plan on recording system audio, check to make sure it is recording at an appropriate volume level. For instance, if you plan on playing music during your recording, play that music during your test recording. The volume level of system audio is recorded before volume adjustments from your laptop or the room's audio system affect the signal, so the volume heard from your speakers or the room's sound system may not match the volume of the system audio in the recording.

▶ **If you lose audio during a recording, a notification appears on screen**

If the batteries in your microphone die, or the microphone becomes unplugged, a warning notification will appear to let you know that the TechSmith Relay Recorder is no longer recording audio.

See also

▶ Audio Devices

▶ Auto Adjust Audio Level

Record with a Camera

Before recording, select a camera to record with your presentation. The camera video appears in the lower right corner of your produced presentation. During your presentation, the camera is not displayed on your screen.

Currently, there are no options to change the position or size of the picture-in-picture camera video.

> Camera video is only included in profiles that use encode settings for the TechSmith Smart Player.

> TechSmith Relay Recorder only supports recording video from webcam-type cameras. It does not support DV camera input.

Select a Camera

To select a camera to record with your presentations:

1. Click the **Camera** button in the recorder toolbar.
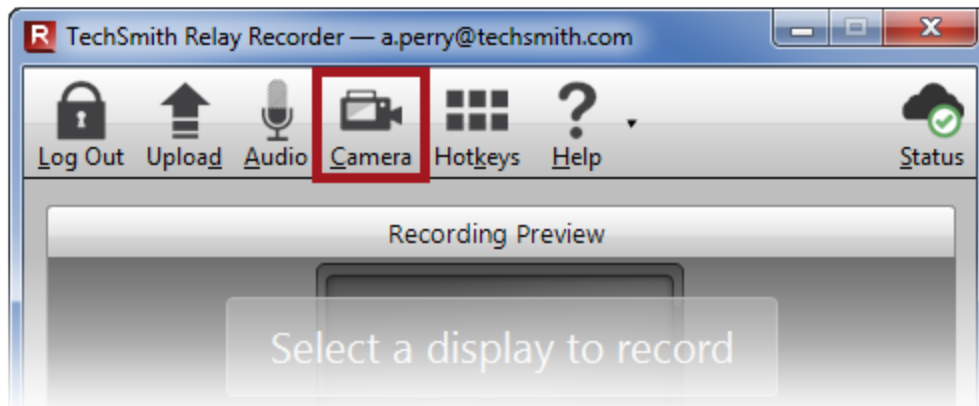
2. The camera selection window appears. Select from available cameras to record that camera video with your presentation. Select "Do not record camera" to turn off camera video recording.

If another application is using the camera, TechSmith Relay Recorder may be unable to record.
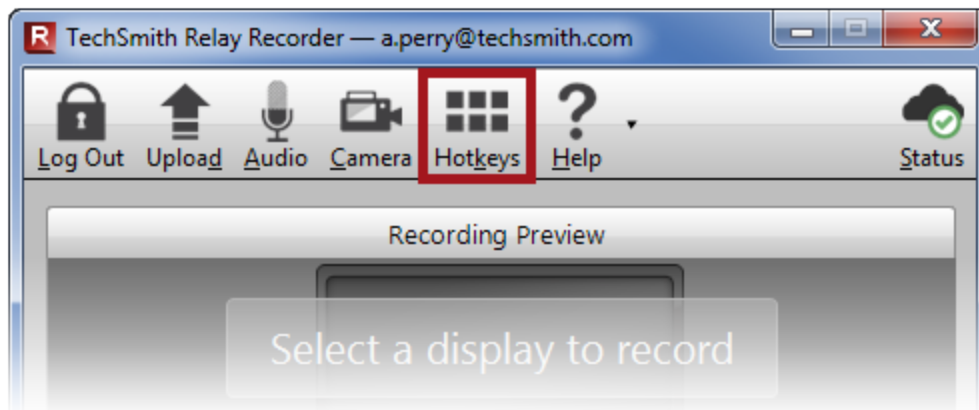
Hotkeys

In TechSmith Relay Recorder, hotkeys are for more than just convenience.
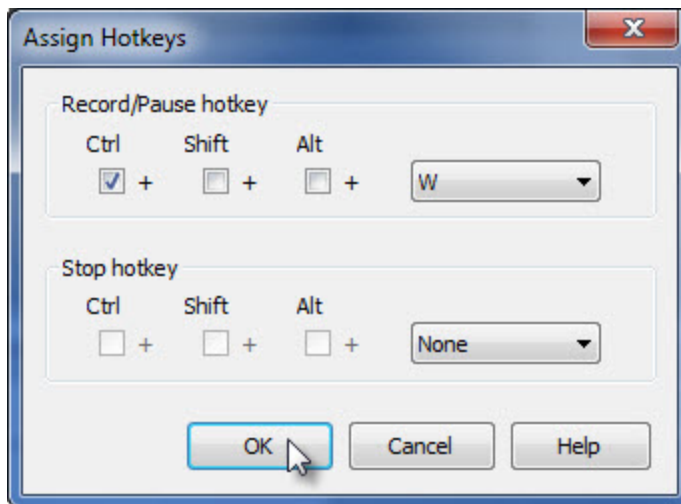
While they do save time, they also allow you to start, pause, and stop your recording without the audience seeing TechSmith Relay Recorder during the presentation.

To set hotkeys:

1. Choose **Hotkeys**.

2. Select a key combination for each hotkey.

3. Click **OK**.

See also

- Audio Devices

- More Than One Display

- Record with a Camera

- Available Disk Space

More Than One Display

TechSmith Relay Recorder records one entire display. If your computer has multiple monitors or is connected to a projector, you need to specify which display to record.

> TechSmith Relay Recorder displays a small window on the display not selected for recording. You can leave this up to help show how long you've been recording, or if you prefer, minimize it to the taskbar.

To select a display:

1. Click in the **Recording Preview**.

   > Depending on whether you have previously selected a display, you will see either a message to select a display or the currently selected display.
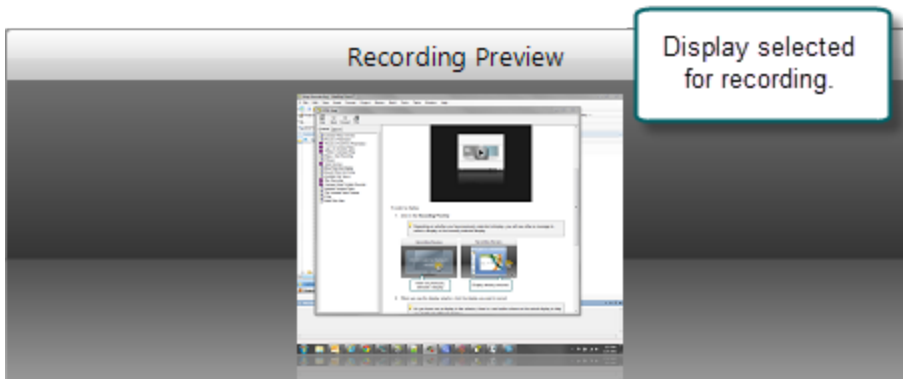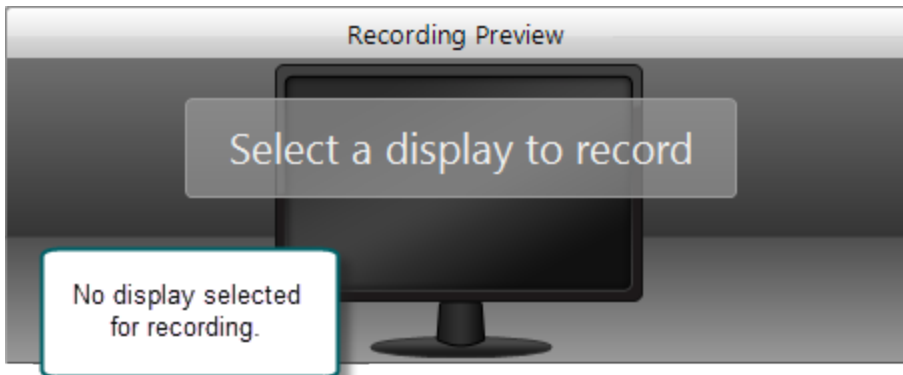
2. When you see the display selector, click the display you want to record.

   > As you hover over a display in the selector, there is a red outline shown on the actual

display to help you identify the different displays.
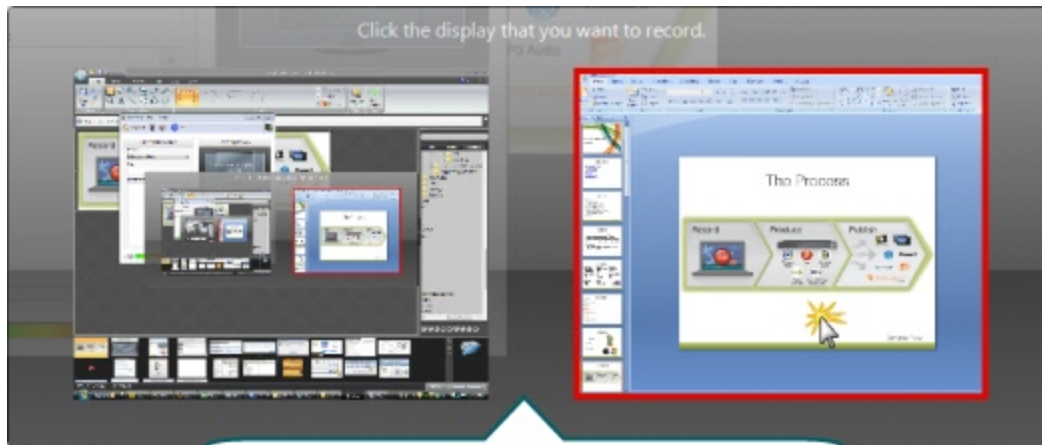
The display selector shows a preview of what is currently on your displays. If you change what is shown a display, it is reflected here.

If you click the Test button or the Record button prior to selecting a display to record, you are prompted to make a selection before recording starts.

When using PowerPoint with multiple monitors or a projector, make a test recording while running the presentation as a slide show to verify you record the correct screen. PowerPoint setting may affect which display slide shows appear on.

Make a Video Recording

Learn how to make a recording and submit it to TechSmith Relay.

If you are recording a Microsoft Office PowerPoint presentation, you can use the TechSmith Relay Recorder Add-In for PowerPoint.

1. Launch TechSmith Relay Recorder.
2. Log in with your username and password.

3. Click the **Audio** button and select an audio device in the Select Audio Device dialog.
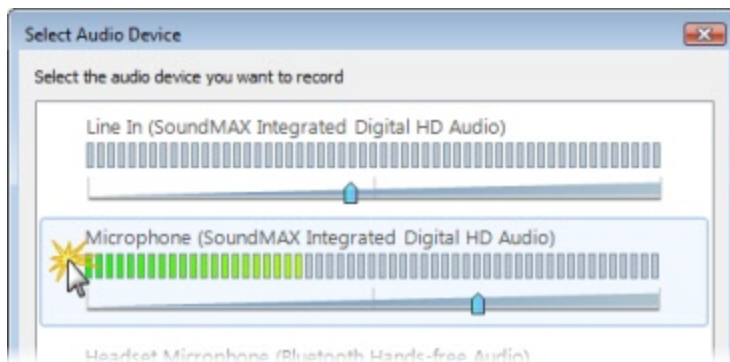
   Select Record System Audio to include the sound you hear from your speakers in the recording.

4. Select which display to record if using a projector displaying a different screen or multiple displays.

Recording Preview

Select a display to record

No display selected for recording.

Recording Preview

Display selected for recording.
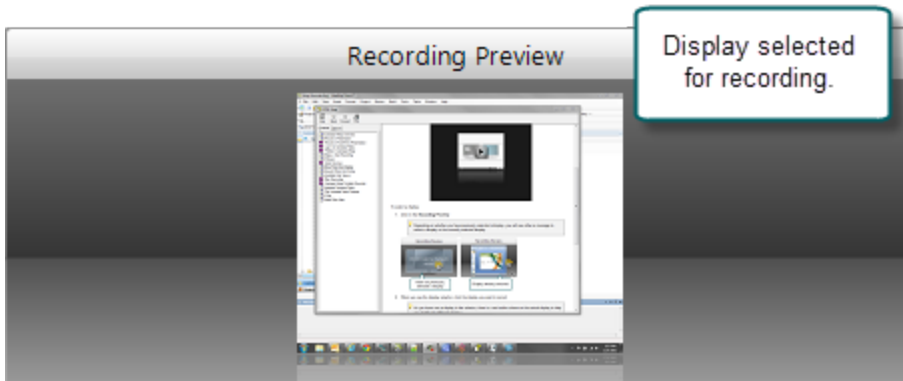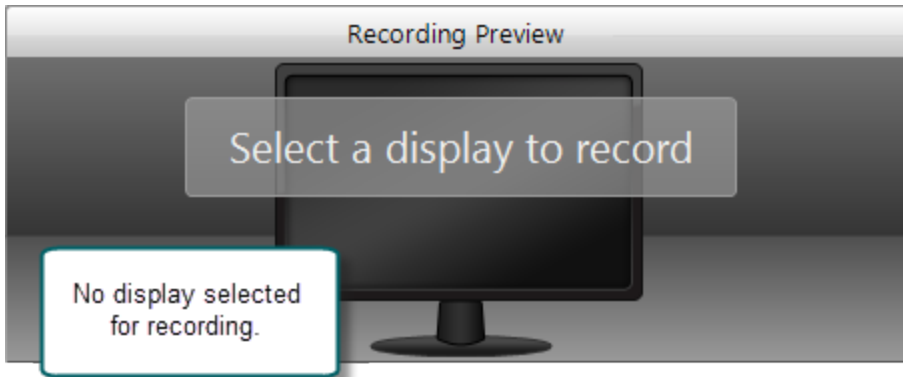
5. Click the **Camera** button to select a camera to record along with your video. This camera is displayed in the lower right corner of your video in a picture-in-picture format.

Camera
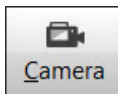
6. Enter a video title and description.

Title:

Monthly Report - May

Description:

Discussion about events in May 2009. New procedures.

7. Make a test recording to verify that you are recording from the correct display, camera, and audio device.

8. Click the Record button. The recorder is minimized to the system tray.

9. Complete your presentation or screen recording. TechSmith Relay Recorder records everything on your screen, selected camera, and the selected audio device.
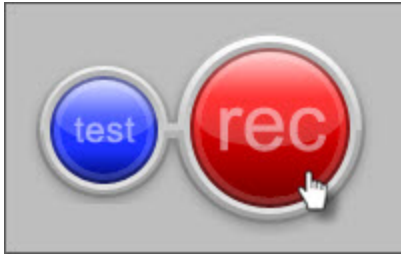
10. Stop the recording using a hotkey or right-click the icon in the system tray. There may be a delay as the recording is finalized. The recording opens in the TechSmith Relay Recorder review window.

11. If needed, click Trimming to set trim points to cut out extra video at the beginning and end of the recording.

12. Click the **Submit** button.

   ▪ If you <u>are</u> connected to the Internet, the recording starts uploading to the TechSmith Relay website.

   ▪ If you <u>are not</u> connected to the Internet, the recording automatically starts uploading when you connect to the Internet. You do not receive notice when your recording begins uploading.

   > After you submit a recording for upload, you cannot access it or view its status on your computer. Instead, you can Check the Status of Submitted Media on the TechSmith Relay website.

Make a Test Recording

Few things are worse than recording an important presentation only to find out later there was no audio or you were recording the wrong screen. It is important to make a test recording—especially when new to TechSmith Relay Recorder.

To make a test recording:

1. Prepare your computer exactly as if you were presenting:
   - If you will use a projector, connect the projector.

   - If using a specific microphone, make sure it is connected and selected.

2. Click the blue **Test** button to initiate a 10-second test recording.

   During the test recording, speak in your presentation voice and launch your PowerPoint or Keynote presentation, or whatever will be on your screen during your recording.

3. At the conclusion of the test recording, the video opens in a review window.

   Click the **Play** button to review the recording. Verify the audio is acceptable and the correct screen content was recorded. Adjust as necessary.

4. Click **Close**.

See also

- Audio Devices
- More Than One Display
- Record with a Camera
- Available Disk Space

Available Disk Space

While recording, at the bottom of the TechSmith Relay Recorder is a disk space monitor. This monitor shows how much disk space is available to record.

The disk space monitor shows how much space is available.
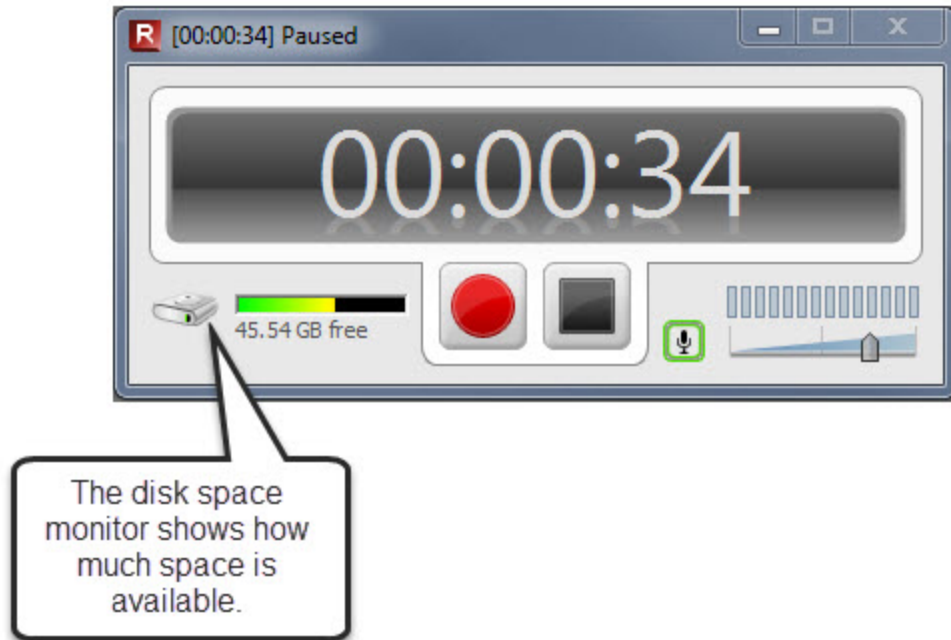
If you run out of space during a recording, the recording is paused. You can make more room on the computer by removing other files.

> To avoid interrupting you during a recording, you are not notified when a recording is paused due to low disk space.

After Recording

After you finish recording, the video is finalized and opens in the TechSmith Relay Review window. Here, you can Trim the Presentation and Preview and Submit Your Presentation.

See also

- What Happens After I Submit Media?
- Check the Status of Your Media

Preview and Submit Your Presentation

After you finish recording your presentation, it opens in the TechSmith Relay Review window.

1. Preview your recording by clicking the play button.
2. If you did not do so prior to recording, log in and enter a title and description.
3. If you wish, trim the beginning and end of the recording.
4. When you are ready to submit your presentation, click Submit. If you do not wish to upload the presentation, click Discard.
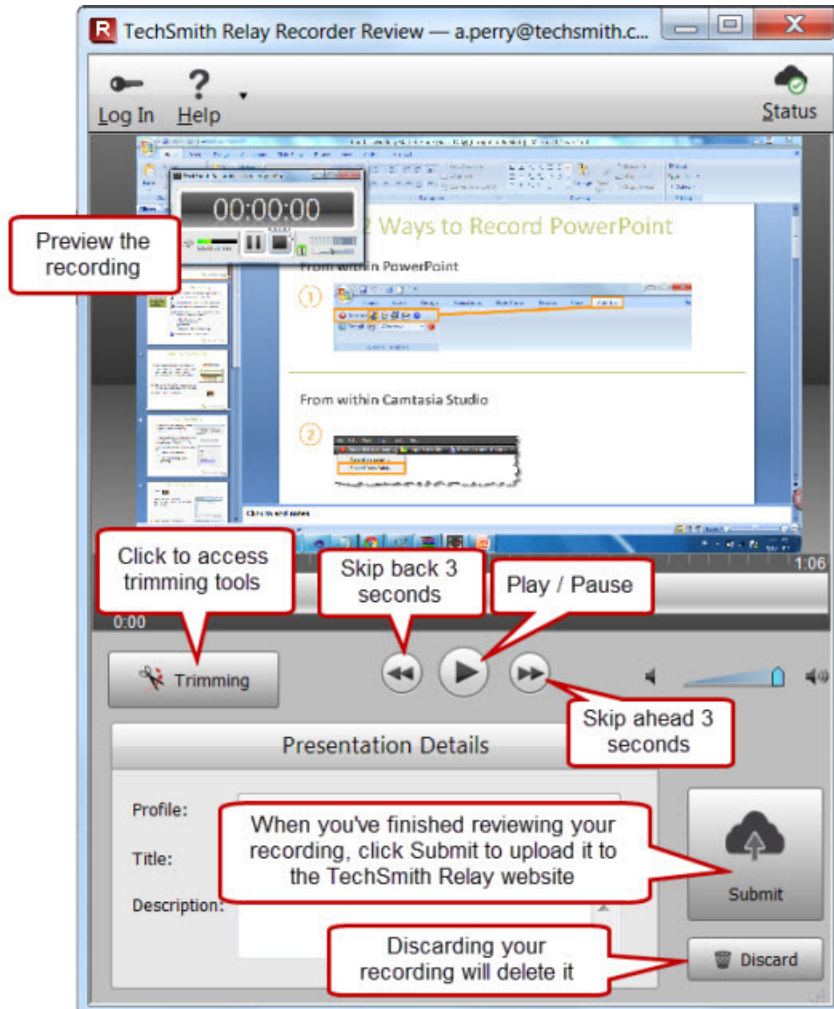
Trim the Presentation

With TechSmith Relay Recorder, you can edit your presentation to remove extra video at the beginning or end. Trim your presentation to remove any extra audio and video you do not want in your published presentation.

To trim a presentation:

1. After you finish recording, click **Trimming** to access the trimming tools.
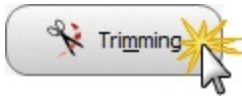
2. Move the playhead to the location you want to set as the beginning of the presentation and click the **Set presentation start** button.
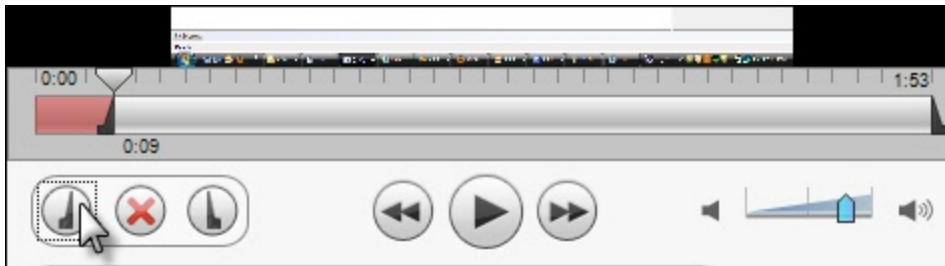
3. Move the playhead to the location you want to set as the end of the presentation and click the **Set presentation end** button.
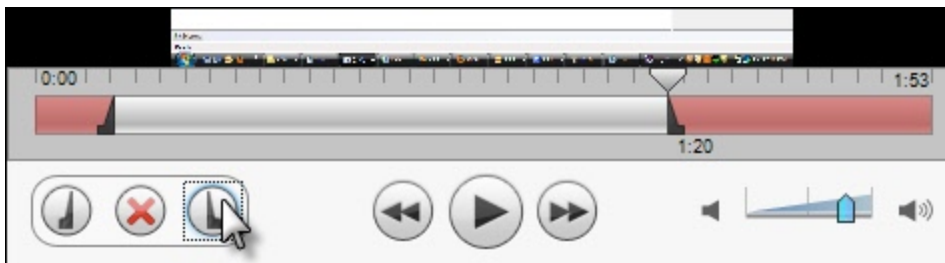
The red area of the timeline is cut from the presentation. Once you submit or save the recording, you permanently lose this part of the recording.

> If you want to remove the trim points, click Cancel trim (the red X button.) This removes the trim points and closes the trimming tools.

See also

- Preview and Submit Your Presentation
- What Happens After I Submit Media?
- Check the Status of Your Media

What Happens After I Submit Media?

After you click Submit, your presentation is uploaded to the website.

- If you are connected to the Internet, the recording starts uploading immediately. You receive an email when your video is published.
- If you are not connected to the Internet, the recording automatically starts uploading when you connect to the Internet. You do not receive notice when your recording begins uploading.

You can Check the Status of Your Media on the TechSmith Relay website. You also receive an email when your presentation is produced and published.

> After you submit your video, you cannot access or view your video or the status of the upload in the TechSmith Relay Recorder.

> If your connection is lost while the presentation is uploading, the process is paused and continues when the computer next connects to the Internet.

See also

- Preview and Submit Your Presentation
- Trim the Presentation
- Check the Status of Your Media

Check the Status of Your Media

The easiest way to learn the status of your uploaded media is to log in to the TechSmith Relay website.

To check the status of your uploaded media

1. Go to the TechSmith Relay website.

2. Log in to the website using your username and password. From the website you'll be able to view your recently uploaded media and see its status.

See also

▶ Preview and Submit Your Presentation

▶ Trim the Presentation

▶ What Happens After I Submit Media?

Record a PowerPoint Presentation

To record a Microsoft PowerPoint Presentation with the TechSmith Relay Add-In:

1. Open PowerPoint.

   > After you install TechSmith Relay Recorder, it automatically prompts you to record when you start a PowerPoint slide show. You can change this and other default settings in the recording options.

2. Start a slideshow.

   A prompt asks if you want to record.

3. Verify the audio selection and level.
4. Click **Record Slide Show**.

5. Give your presentation as normal.

   When you finish the slide show, you can end the recording or continue recording.

6. When prompted, click **Stop Recording** to end the presentation.

7. The recording is shown in the TechSmith Relay Recorder Review dialog. You can review, trim, edit details, log in (if needed), and submit your recording for processing. See After Recording for more information.

See also

▶ TechSmith Relay Add-In Toolbar
▶ TechSmith Relay Add-In Recording Options

TechSmith Relay Add-In Toolbar

Use the add-in toolbar in PowerPoint to adjust the available options.
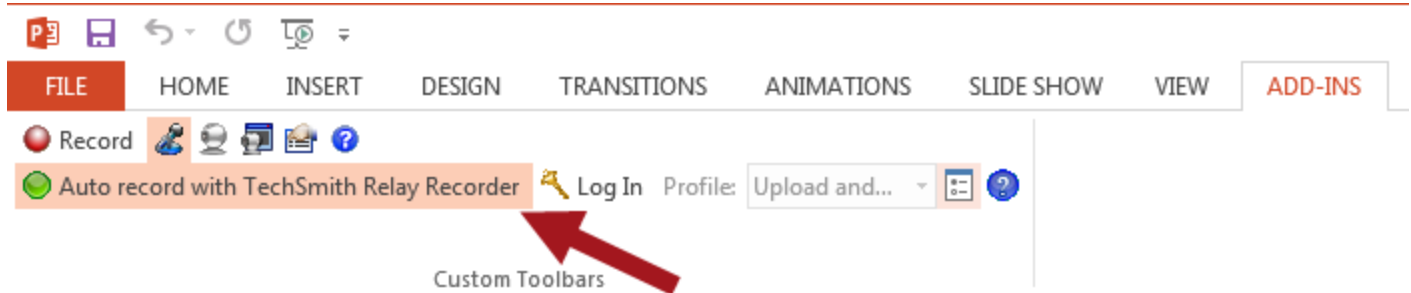
> With auto record toggled on, TechSmith Relay will prompt you to start recording whenever and however you start a presentation.

See also

- ▶ Record a PowerPoint Presentation
- ▶ TechSmith Relay Add-In Recording Options

TechSmith Relay Add-In Recording Options

To change the recording settings in Microsoft PowerPoint, click the Recording options button in the Power-Point Add-Ins tab.
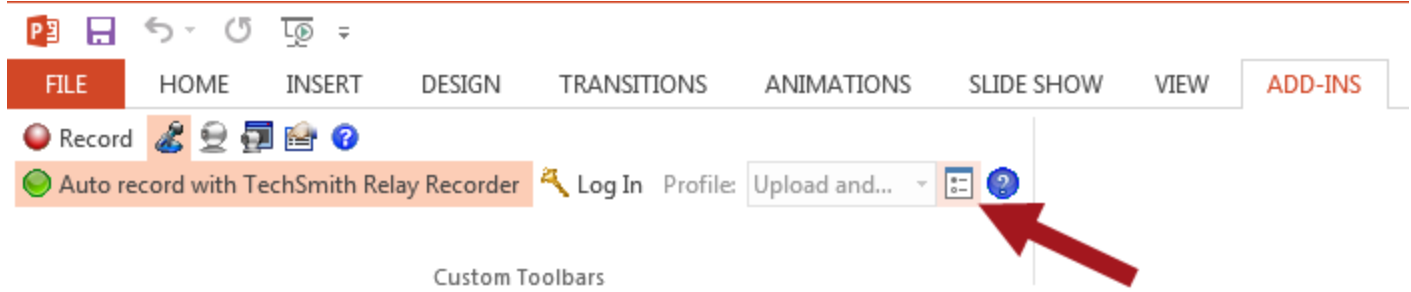
See also

▸ Record a PowerPoint Presentation

▸ TechSmith Relay Add-In Toolbar

Update TechSmith Relay Recorder

When a new version of the TechSmith Relay Recorder is available, an update notification appears in the recorder window.

Update the Recorder

1. Click the **Update** button. (This button only appears when an update for TechSmith Relay Recorder is available.)

2. Click **Get update**. This will prompt you to run the update installer.
3. Run the installer.

Check for Updates Manually

1. Open TechSmith Relay Recorder
2. From the Help menu, choose **Check for Updates**.

Need More Help?

In addition to the in-product help files, technical support is available for using TechSmith Relay Recorder. In the TechSmith Support Center you can search for answers to technical issues and contact support.

The TechSmith Relay Website

The TechSmith Relay Recorder runs on your computer, and the website, which processes and publishes all video recordings, is specific to and run by your organization.

Video creators use the same username and password to log in to both the recorder and the website.

If you do not know the URL (web address) of your TechSmith Relay website, contact your administrator.

FAQs

Have a question about TechSmith Relay Recorder? The following questions and answers might help.

- What is TechSmith Relay Recorder?

- How do I know that TechSmith Relay Recorder is recording?

- Can I edit my recording?

- Are there things I should do before I start recording?

- I'm not currently online. Do I wait to submit my recording?

- Where can I find more help?

What is the TechSmith Relay Recorder?

TechSmith Relay Recorder lets you easily create a video and audio account of your lecture, presentation, or meeting. It captures all on-screen activity and audio on computers running on both Windows and Mac operating systems.

How do I know that the TechSmith Relay Recorder is recording?

There are a couple of visual signals to help you know that TechSmith Relay Recorder is recording:
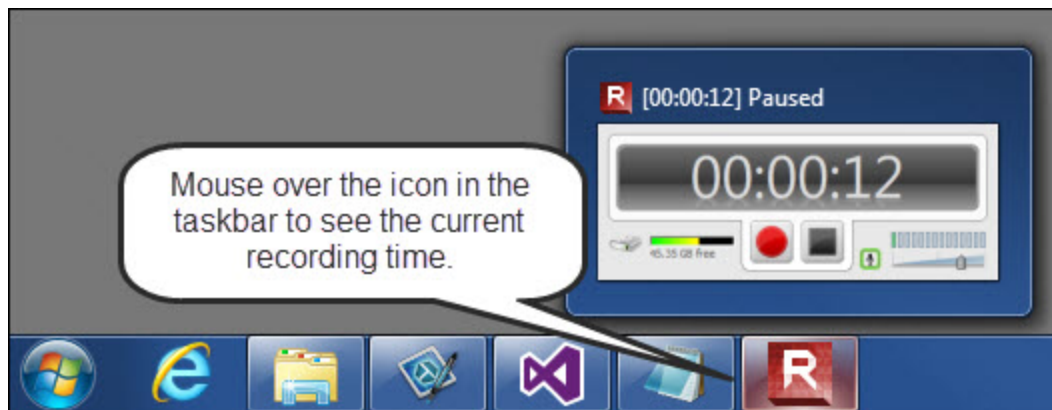
Can I edit my recording?

The TechSmith Relay recorder supports only trimming the beginning and end of your recording. See Trim the Presentation for more information.

If you are interested in more serious editing capabilities, Camtasia Studio and Camtasia for Mac can both share edited videos to TechSmith Relay. This requires access to Camtasia software and approval from your administrator. Please contact your administrator to find out if this is available in your organization.

Are there things I should do before I start recording?

- TechSmith Relay Recorder records everything on your screen and all audio picked up on your selected microphone. To avoid interruptions during the recording, you may want to shut down other programs, such as email, calendar reminders, instant messaging application, etc.

- You should do a test recording to verify TechSmith Relay Recorder is recording what you think it is recording and that your audio levels are appropriate. See Make a Test Recording for more information.
- Make sure you have enough disk space for recording. Check your Available Disk Space and remove any unnecessary files from your computer or portable storage device.

I'm not currently online. Do I wait to submit my recording?

No, you do not need to wait. After you finish recording, you should submit, whether you are online or not. When you submit, the recording is "readied" for upload. If you are not online, the recording is saved to your computer and automatically starts uploading the next time your computer is online. It uploads "behind the scenes" and you will not see any visible cues on your computer. You can Check the Status of Your Media on the TechSmith Relay website.

Where can I find more help?

- For general TechSmith Relay resources from TechSmith, see Need More Help?

- Please contact your administrator for organization-specific information such as the final location of your video recordings, login or password issues, microphone issues, etc.

TechSmith Relay® (Self-Hosted)
Upgrade Guide

Version 5

August 2016

Table of Contents

Upgrade to a New Release

This document covers two specific upgrade cases:

- Upgrade from 1.x to the Current Version

- Upgrade from 2.0 and Later to the Current Version

The installer detects your current setup and will present you with different screens depending on what release you are upgrading from.

> It is strongly recommend that you backup your current database before starting any upgrade.

Installers

- `TechSmithRelayServer_x64.exe`

  Use this installer for upgrading TechSmith Relay on a 64-bit server operating system.

If you need additional assistance, you can contact TechSmith Technical Support at http://support.techsmith.com/. Additional contact information is provided at http://www.techsmith.com/contact.asp.

> After you complete an upgrade, you may want to review the current known issues for TechSmith Relay 5.0. You can find the list of known issues in the TechSmith Support Center: https://support.techsmith.com/hc/en-us

TechSmith Relay Recorders

For information about upgrading TechSmith Relay recorders, please see Upgrade Recorders.

Upgrade from 1.x to the Current Version

> If you are currently running TechSmith Relay (formerly Camtasia Relay) version 1.0 and want to upgrade to the most current version of TechSmith Relay, it is important to know that this is a two step upgrade. There is NOT a direct upgrade option from version 1 to the current version of TechSmith Relay.

Before you start, you will need one of the available TechSmith Relay installers:

▶ `Relay_Server_Setup_2.0_x64.exe`

   Use this installer for upgrading TechSmith Relay on a 64-bit server operating system.

> If you need assistance locating these installers, see the TechSmith Support Center: https://support.techsmith.com/hc/en-us.

Upgrade from 1.0 to the Current Version

1. Upgrade the TechSmith Relay (formerly Camtasia Relay) server to version 2.0 by running the 2.0 installer. Follow the instructions in the installer to complete the upgrade.
2. If it is not already installed, you are prompted to install . NET Framework 3.5 with Service Pack 1. This is likely to be the longest part of the installation.

> The installation of .NET Framework 3.5 with Service Pack 1 requires a server reboot, so to minimize downtime for the TechSmith Relay server, you may wish to schedule the upgrade during off-peak hours.

   After the .NET Framework has been installed, the TechSmith Relay server upgrade continues.

3. The installer prompts for the password for the "RelayAdmin" user which is used as the default admin account for the TechSmith Relay website. If using the Express setup installation path, this password is also used as the password for the "Relay" SQL user for the database.
4. Continue with Upgrade from 2.0 and Later to the Current Version.

Considerations

▶ All server settings are preserved during the upgrade.

▶ All user information is preserved.

▶ All profiles and publish settings are preserved, but some concepts changed with version 2.0. Please log into the TechSmith Relay website as an administrator and review the online help.

▶ Job information (i.e. presentations) ARE NOT preserved.

- 1.0.x recorders do not work with a current server.
  - Presenters running on the Windows operating system are able to record and submit presentations, but they cannot upload to the server. The recorder appears offline and run as not connected to the server. Once presenters install the new version, any submitted presentations will then upload to the server.
  - Presenters running on Mac operating systems receive a message to download a new recorder, but there is a known bug that crashes the recorder when you click the button to download the upgrade. These presenters need to download and install the most recent recorder to do any further recording.
- When the user installs a current recorder and has jobs from version 1.0 pending on their computer, the 1.0 jobs are converted to current version jobs and submitted automatically. The titles and descriptions are preserved, but the user and profile ARE NOT preserved. The presentation is uploaded to the server using the Upload and Decide Later profile with a guest user that has the original presenter's email address. This allows the administrator to push through or delete the jobs, and it also allows the presenters to log in and see their old jobs.

  A result of this is that jobs in a pending state (Needs Attention or Error) before upgrade are uploaded again. Depending on the server settings, the presenter and administrator may get an email saying a guest has uploaded a presentation on the presenter's behalf.

- All installations of TechSmith Relay (formerly Camtasia Relay) 1.0, 1.1, and 1.2 used the same encryption key. If you installed 2.0 as an upgrade to versions 1.0, 1.1, or 1.2 then your server/team uses this same key.

  For security reasons, you may wish to change your server/team to use a random encryption key. You can accomplish this using the TechSmith Relay Configuration Protection Tool. You can find the instructions for using this tool in the **TechSmith Relay Server Security Administrator Guide**, found on the TechSmith website: http://www.techsmith.com/tutorial-techsmith-relay-self-hosted-current.html.

Upgrade from 2.0 and Later to the Current Version

All server settings, users, profiles, publish settings, and presentations are preserved during an upgrade.

> We recommend that you backup your current database before starting any upgrade.

1. Log in to the TechSmith Relay website as an administrator.

2. Go to System > Servers.

3. Select each server and click **Take Server Offline**. This lets the servers continue to process all existing presentations but not accept any additional presentations.

4. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

> Any presentations that are not completed are canceled. After Relay is upgraded and the server brought back online, all canceled jobs are automatically retried.

5. Run the installer and follow the instructions in the installer to complete the upgrade.

6. When the upgrade is complete, repeat the upgrade on all teamed servers. The upgrade process automatically restarts the servers.

> You must upgrade all teamed servers to the same version.
>
> While upgrading a server team, if you fail to upgrade a server in the team, it is possible to bring the server still running the older version online. If this happens, this server connects to the old version database and appears to be working correctly but it cannot interact with the upgraded current servers.

Upgrade Recorders

Following the upgrade of the server, you can notify the presenters that a new version of the TechSmith Relay recorder is available. Presenters are also notified through the recorder that there is a new version available for download and installation.

The recorder is available from the homepage after a presenter logs into the TechSmith Relay server.

To deploy the recorder in a Windows enterprise environment, the MSI file can be used. Log in to your TechSmith Relay website as an administrator and open the help for more information.

Presenters should close the TechSmith Relay recorder if it is open and then run the new recorder installer. The previous recorder is uninstalled and the new version is installed. They do not lose any saved recordings and any submitted recordings will upload after the upgrade.

> For recorder clients downloaded from a 4.1.0 or later server, an upgrade notification is displayed in the toolbar of the recorder when a new version of the TechSmith Relay recorder is available.

Server Certificate Errors

By default, TechSmith Relay recorders fail to connect to a TechSmith Relay Server with an invalid server certificate.

If your organization is using a self-signed server certificate on the TechSmith Relay server, then you have the following options to allow recorders to connect to the server:

- Add the self-signed server certificate to client's trusted certificate stores

- If self-signed server certificate is added to a client's trusted certificate store, users on that client machine should be able to use a web browser to connect to the TechSmith Relay server website without having to click through a server certificate warning.

- Modify the recorder's configuration to ignore all server certificate errors
    - By default, the configuration option to Ignore Server Certificate Errors is not enabled.

    - If you need to allow TechSmith Relay recorders to connect to a server with an invalid server certificate, you must enable this option. When enabled, recorders ignore all server (SSL) certificate errors when connecting to the TechSmith Relay server.

    - When you change this option, TechSmith Relay's Manager Service must be restarted on all teamed servers for it to take effect. Any recorders installed before changing this option must be updated or they will fail to connect to the TechSmith Relay server.

Migrate TechSmith Relay to a New Server

The following procedures cover the three different scenarios for migration of TechSmith Relay components to a new server:

- Migrate the TechSmith Relay Application and Database to a New Server

- Migrate Only the TechSmith Relay Database to a New Server

- Migrate Only the TechSmith Relay Application to a New Server

Important Information

- These procedures are necessary only if you wish to maintain your TechSmith Relay database information moving forward. The database includes information such as users, profiles, publishing destinations, and historical presentation information.

  If you do not wish to maintain this data and would rather start with a fresh installation on the new server, first deactivate your current server and then follow the process in the TechSmith Relay Installation Guide, which is available in the TechSmith Relay tutorials section: http://www.tech-smith.com/tutorial-techsmith-relay-self-hosted-current.html

- These procedures require taking your TechSmith Relay server offline and then into a shutdown mode. It is recommended that you read through the whole procedure prior to actual migration. You should familiarize yourself with the procedures and understand how the procedure may impact presentation processing for TechSmith Relay presenters.

- Prior to using the procedures in this document, the following prerequisites must be met:

  - TechSmith Relay 2.0 (known as Camtasia Relay 2.0) or above installed on the current server.

    If the version of Camtasia Relay is lower than 2.0, see Upgrade from 1.x to the Current Version for more information.

  - SQL Server Management Studio installed on a machine that can access the databases of both the current SQL server and the new server.

  - SQL Server installed with an instance called Relay installed on both servers.

    It is recommended that you install SQL Server 2014 Express Edition of SQL Server. To download the installer, go to http://www.microsoft.com/en-us/download/details.aspx?id=42299.

- If you have upgraded TechSmith Relay on your current server, you may have multiple databases, with different names, in your Relay SQL instance. Make sure you choose the most recent TechSmith Relay database. The names for the TechSmith Relay databases are:

TechSmith Relay Version	Database Name
2.0	Relay20

TechSmith Relay Version	Database Name
3.0.0	Relay300
3.0.1	Relay301
3.0.2	Relay302
3.0.3	Relay303
3.1.0	Relay310
4.0.0	Relay400
4.0.1	Relay401
4.0.2	Relay402
4.0.3	Relay403
4.1.0	Relay410
4.1.1	Relay411
4.1.2	Relay412
4.2.0	Relay420
4.2.1	Relay421
4.3.0	Relay430
4.4.0	Relay440
5.0.1	Relay501

Migrate the TechSmith Relay Application and Database to a New Server

1. Log in to the TechSmith Relay website as an administrator on the source (current) server.
2. Go to System > Servers. Click **Take Server Offline**.

   The server continues to process all existing presentations but does not accept any additional present-
   ations.

3. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

Any presentations that are not completed are canceled. (After the database is moved and the TechSmith Relay server is brought back online, all canceled jobs are automatically restarted.)

4. Go to System > Activation.
5. Click **Deactivate**.
6. Please back up the TechSmith Relay database using instructions found in Back Up the Database.
7. Copy the database backup file to the target server.
8. Using the same path and name of the media directory on the source server, create a media directory on the target server.

   The media directory location was set during the initial installation of TechSmith Relay.

   > The location of the media directory on the target server must be exactly the same as the source server. To find this information, open a web browser and go to `https://(RelayWebsiteName)/Relay/relayconfig.aspx`. The path is located in the MediaDirectory row.

9. Copy the contents of the media directory from the source server to the target server.
10. On the source server, navigate to `[install directory]/Utilities` and open the Configuration Protection Tool (`ConfigurationProtectionTool.exe`).
11. Click **Load Current Server Settings**.

    > Later in this procedure, you will need the SQL username and password for TechSmith Relay. If you do not already have this information, click the SQL Connection tab. The username and password are listed.

12. Go to the Import/Export tab.
13. Click **Export Settings to File** to export the server encryption settings.
14. Move the resulting XML file to the target server.
15. If you want currently installed TechSmith Relay recorders to be able to connect to the target server, the server must keep the same endpoint (often the Fully Qualified Domain Name) as the source server. If the endpoint is not kept the same, presenters must download and install new recorders from the target server in order to connect.

    To keep the same endpoint on the target server, perform one of the following procedures:

    - If the TechSmith Relay recorders address the server by host name only (e.g. `https://relay`):
      - Rename your source server to free the computer name. For information on how to do this, see http://support.microsoft.com/kb/295017.
      - Reboot the source server.
      - Change the target server to the original name of the source server.
      - Reboot the target server.

    - If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name is <u>different</u> than the DNS host

name:

- Name the target server as desired.

- Modify the DNS record for the TechSmith Relay endpoint to point to the IP address of the target server.

- If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name <u>matches</u> the DNS host name:

  - Confirm that the TechSmith Relay endpoint DNS name is the result of dynamic DNS registration. Your Active Directory or DNS administrator should be able to provide this information.

  - Rename your source server to free the computer name. For information on how to do this, see http://support.microsoft.com/kb/295017.

  - Reboot the source server.

  - Change the target server to the original name of the source server.

  - Reboot the target server.

  - Verify that the DNS record for the Relay endpoint reflects the IP address of the target server.

16. Restore the database on the target server using the instructions found in Restore the Camtasia Relay Database.

17. In the Object Explorer pane of SQL Server Management Studio, go to Relay Database Instance > Security > Logins.

18. Right-click Logins and select **New Login**.

> The following assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

19. Enter `Relay` (or your selected database user) for the Login name.

20. Enable the SQL Server authentication option and enter the same password used on the source server. (See tip in step 11.)

21. Disable the User must change password at next login option.

22. Right-click Logins and select **New Login**.

23. Enter `RelayCache` (use `RelayCache` even if you selected a different name for the database user) for the Login name.

24. Enable the SQL Server authentication option and enter the same password used on the source server.

25. Disable the User must change password at next login option.

26. Replacing `RelayDbName` with your TechSmith Relay database name, run the following query against the Relay instance on the target SQL server:

> The following SQL statement assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

```
USE RelayDbName

ALTER USER Relay WITH LOGIN = Relay

ALTER USER RelayCache WITH LOGIN = RelayCache

USE master

ALTER DATABASE RelayDbName SET SINGLE_USER WITH ROLLBACK
IMMEDIATE

ALTER DATABASE RelayDbName SET ENABLE_BROKER

ALTER DATABASE RelayDbName SET MULTI_USER
```

27. Run the TechSmith Relay installer on the target server, making sure to:

   ■ Select **Keep your existing database**.

   ■ Set the media directory the same as what it was on the source server.

   ■ Use the same Relay SQL user password as on the source server's database.

   ■ The TechSmith Relay website and manager service will not be able to access the database unless the Relay SQL password on the target server is the same password that was used on the source server's database.

28. Go to `[install directory]/Utilities` and open the Configuration Protection Tool (`ConfigurationProtectionTool.exe`).

29. Go to the Import/Export tab.

30. Click **Browse**, locate the XML file that you created on the source server, and then click **Open**.

31. Click the SQL Connection tab. Change the Data Source to the instance name (e.g. `yourservername\Relay`) on the target server.

32. Go to the Encryption tab.

33. Click **Install New Key**.

34. Log in to the server website as an administrator.

35. Go to System > Activation and enter your license key.

36. You can now uninstall TechSmith Relay from the source server.

37. If the target server was not updated to have the same endpoint as the source server (step 15), there is still an entry for the source server's endpoint in the database. Contact TechSmith Technical Support (http://support.techsmith.com) for assistance removing the source endpoint.

Migrate Only the TechSmith Relay Database to a New Server

1. Log in to the TechSmith Relay website as an administrator on the source (current) server.
2. Go to System > Servers. Click **Take Server Offline**.

The server continues to process all existing presentations but will not accept any additional presentations.

3. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

   Any presentations that are not completed are canceled. (After the database is moved and the TechSmith Relay server is brought back online, all canceled jobs are automatically restarted.)

4. Please back up the TechSmith Relay database using instructions found in Back Up the Database.
5. Copy the database backup file to the target (new) server.
6. Restore the database on the target server using the instructions found in Restore the Camtasia Relay Database.
7. In the Object Explorer pane of SQL Server Management Studio, go to Relay Database Instance > Security > Logins.
8. Right-click Logins and select **New Login**.

   > The following assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

9. Enter `Relay` (or your selected database user) for the Login name.
10. Enable the SQL Server authentication option and enter the same password used on the source server.
11. Disable the User must change password at next login option.
12. Right-click Logins and select **New Login**.
13. Enter `RelayCache` (use `RelayCache` even if you selected a different name for the database user) for the Login name.
14. Enable the SQL Server authentication option and enter the same password used on the source server.
15. Disable the User must change password at next login option.
16. Replacing `RelayDbName` with your TechSmith Relay database name, run the following query against the Relay instance on the target SQL server:

    > The following SQL statement assumes that `Relay` is used as the database user. If you chose to use a different database user during initial installation of TechSmith Relay, substitute that user name for the user named `Relay` in the following process.

    ```
    USE RelayDbName

    ALTER USER Relay WITH LOGIN = Relay

    ALTER USER RelayCache WITH LOGIN = RelayCache

    USE master

    ALTER DATABASE RelayDbName SET SINGLE_USER WITH ROLLBACK
    IMMEDIATE

    ALTER DATABASE RelayDbName SET ENABLE_BROKER
    ```

```
ALTER DATABASE RelayDbName SET MULTI_USER
```

17. Uninstall the TechSmith Relay server software on the server. This allows a reinstall while pointing to a different database server.
18. Run the TechSmith Relay installer on the server, making sure to:
    - Select the Advanced installation option.
    - When prompted for a SQL Server Connection, specify the target database server name (`TargetServerName\Relay`) as the SQL Server name.
    - Select **Keep your existing database**.
    - Set the media directory to the same directory that it was before the uninstall.
    - Use the same Relay SQL user password as on the source server's database.
    - The TechSmith Relay website and manager service <u>will not</u> be able to access the database unless the Relay SQL password on the target server is the same password that was used on the source server's database.
19. Log in to the server website as an administrator.

Migrate Only the TechSmith Relay Application to a New Server

It is recommended that you let all existing presentations finish processing before performing the migration. To do this you must first take the server offline, which prevents it from further accepting presentation uploads, and then lets it process those presentations. Instructions for performing those functions are listed below.

1. Log in to the TechSmith Relay website as an administrator on the source (current) server.
2. Go to System > Servers. Click **Take Server Offline**.

   The server continues to process all existing presentations but will not accept any additional presentations.

3. When all encoding and publishing jobs have moved to Completed, click **Shutdown**.

   Any presentations that are not completed are canceled. (After the database is moved and the TechSmith Relay server is brought back online, all canceled jobs are automatically restarted.)

4. Go to System > Activation.
5. Click **Deactivate**.
6. Using the same path and name of the media directory on the source server, create a media directory on the target server.

   The media directory location was set during the initial installation of TechSmith Relay.

   > The location of the media directory on the target server must be exactly the same as the source server. To find this information, go to `yourservername/Relay/relayconfig.aspx`. The path is located in the MediaDirectory

row.

7. Copy the contents of the media directory from the source server to the target server.

8. On the source server, navigate to `[install directory]/Manager` and open the Configuration Protection Tool (`ConfigurationProtectionTool.exe`).

9. Click **Load Current Server Setting**.

10. Go to the Import/Export tab.

11. Click **Export Settings to File** to export the server encryption settings.

12. Move the resulting XML file to the target server.

13. If you want currently installed TechSmith Relay recorders to be able to connect to the target server, the server must keep the same endpoint (often the Fully Qualified Domain Name) as the source server. If the endpoint is not kept the same, presenters must download and install new recorders from the target server in order to connect.

To keep the same endpoint on the target server, perform one of the following procedures:

- If the TechSmith Relay recorders address the server by host name only (e.g. `https://relay`):
  - Rename your source server to free the computer name. For information on how to do this, see http://support.microsoft.com/kb/295017.
  - Reboot the source server.

  - Change the target server to the original name of the source server.

  - Reboot the target server.

- If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name is <u>different</u> than the DNS host name:
  - Name the target server as desired.

  - Modify the DNS record for the TechSmith Relay endpoint to point to the IP address of the target server.

- If the TechSmith Relay recorders address the server by the fully-qualified domain name (e.g. `https://relay.university.edu`) and the server name <u>matches</u> the DNS host name:
  - Confirm that the TechSmith Relay endpoint DNS name is the result of dynamic DNS registration. Your Active Directory or DNS administrator should be able to provide this information.
  - Rename your source server to free the computer name. For information on how to do this, see http://support.microsoft.com/kb/295017.
  - Reboot the source server.

  - Change the target server to the original name of the source server.

  - Reboot the target server.

- Verify that the DNS record for the TechSmith Relay endpoint reflects the IP address of the target server.

14. Run the TechSmith Relay installer on the target server, making sure to:

- Change the SQL Server name listed to the database server of your installation when prompted for a SQL Server Connection.

- Select **Keep your existing database**.

- Set the media directory the same as what it was on the source server.

- Use the same Relay SQL user password as on the source server's database.

    The TechSmith Relay website and manager service <u>will not</u> be able to access the database unless the Relay SQL password on the target server is the same password that was used on the source server's database.

15. Go to `[install directory]/Manager` and launch the Configuration Protection Tool.
16. Go to the Import/Export tab.
17. Click **Browse**, locate the XML file that you created on the source server, and click **Open**.
18. Go to the SQL Connection tab. Change the Data Source to the instance name (e.g. `yours-ervername\Relay`) on the target server.
19. Go to the Encryption tab.
20. Click **Install New Key**.
21. Log in to the server website as an administrator.
22. Go to System > Activation and enter your license key.
23. You can now uninstall TechSmith Relay from the source server.
24. If the target server was not updated to have the same endpoint as the source server (step 15), there is still an entry for the source server's endpoint in the database. Contact TechSmith Technical Support (http://support.techsmith.com) for assistance removing the source endpoint.
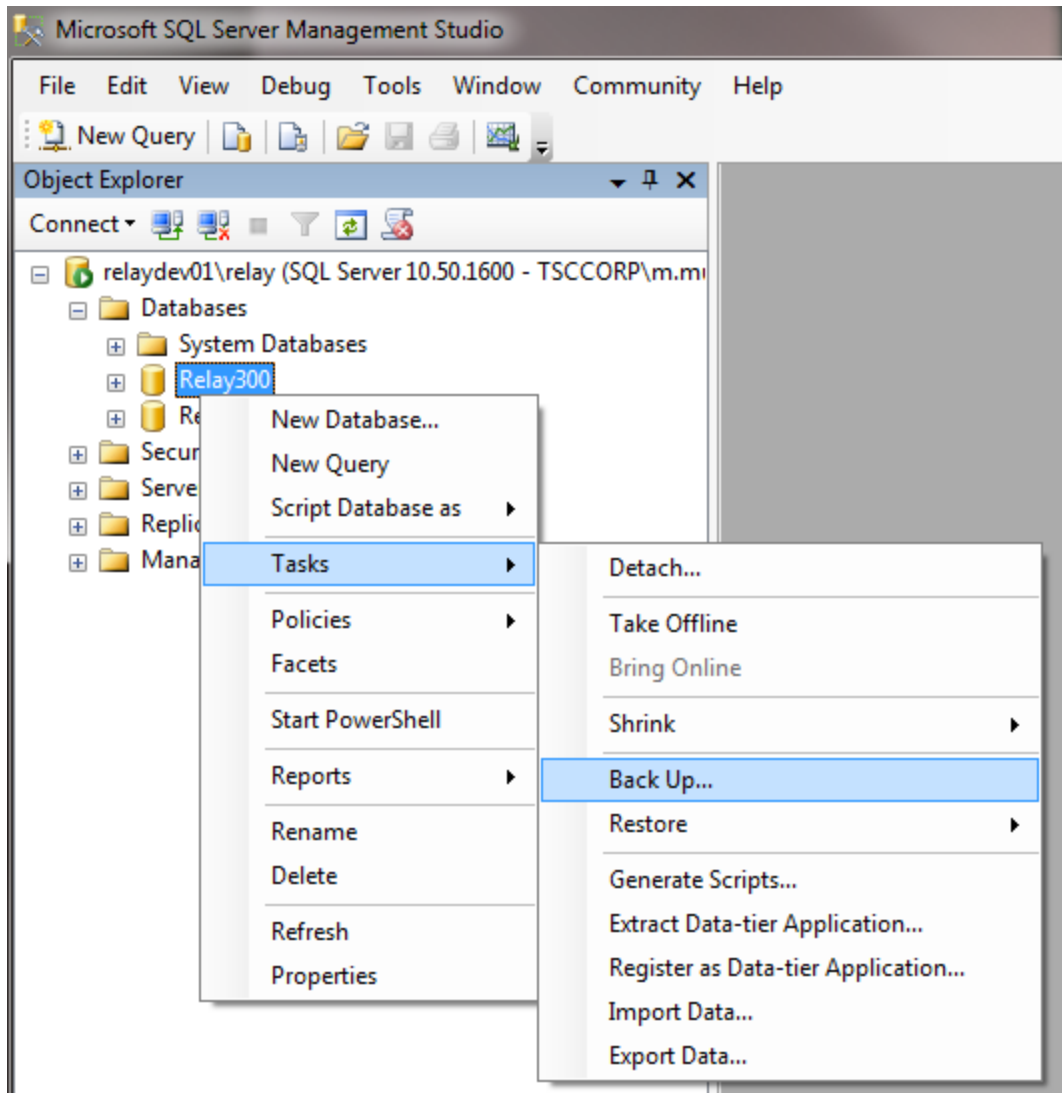
Back Up the Database

The following procedure covers how to back up the TechSmith Relay database using SQL Server Management Studio. For additional information and other ways to perform a backup, see the following:

- TechSmith Relay Technical Reference Guide (available in the TechSmith Relay Tutorials section: http://www.techsmith.com/tutorial-techsmith-relay-self-hosted-current.html)
- How to: Back Up a Database (SQL Server Management Studio): https://msdn.microsoft.com/en-us/library/ms187510(v=sql.110).aspx

This procedure can be performed locally on the database server or from a remote management workstation with SQL Server Management Studio installed if remote access to the database server has been allowed. However, disk locations denoted in the backup procedure will always be local to the database server.

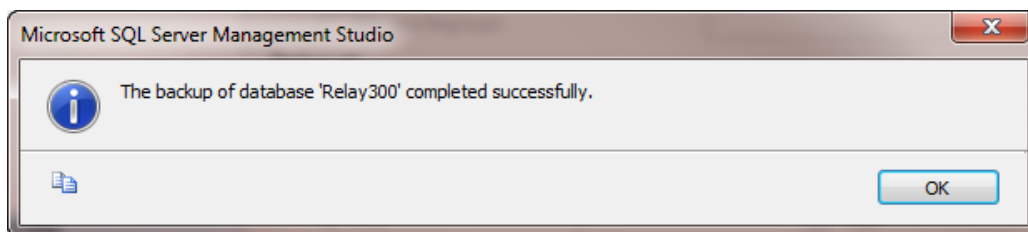1. Right-click the database to back up and select Tasks > Back Up.

2. On the General tab, select backup type Full and set a location on disk for the backup file.
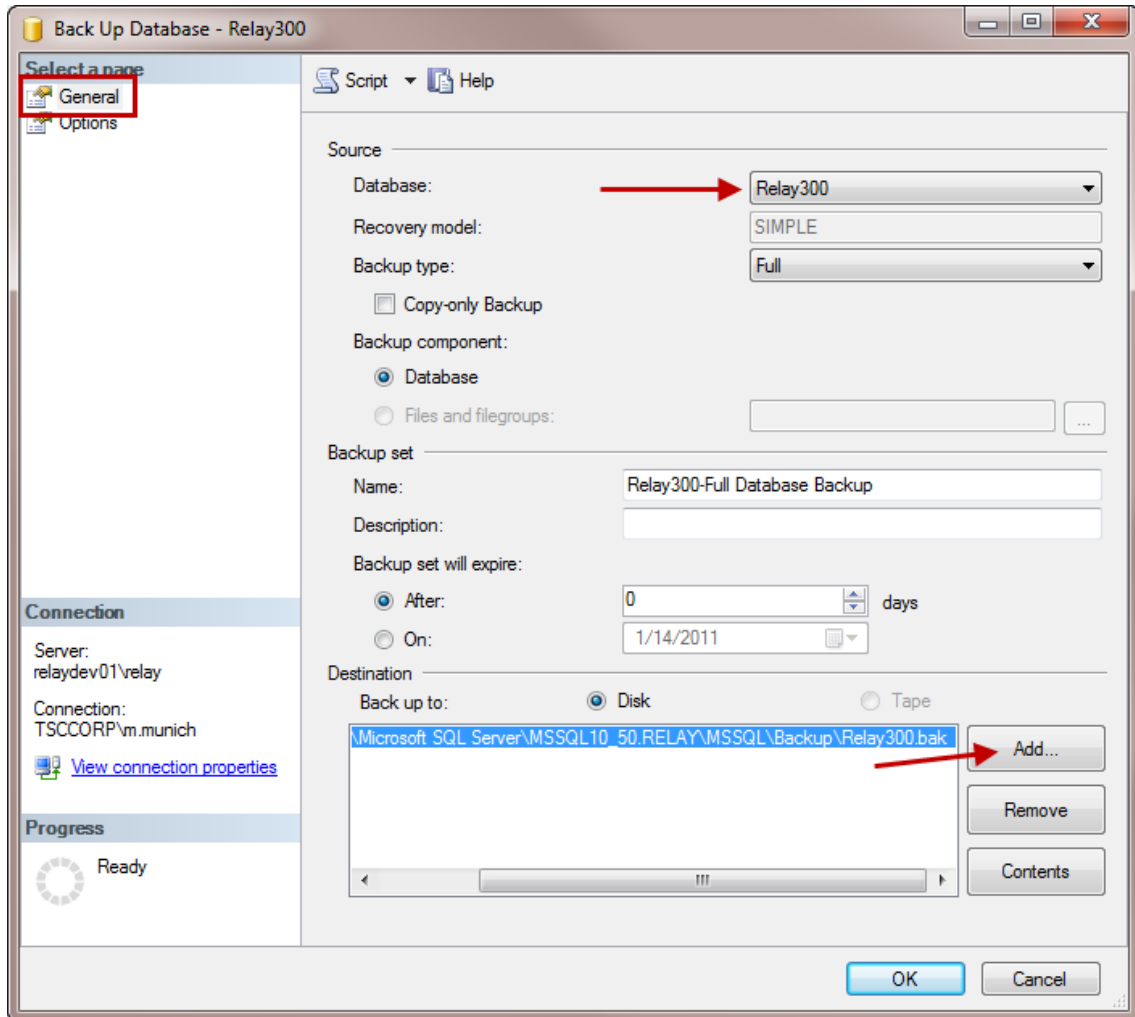
3. Choose to back up to an existing backup set or to append to a new backup set. Selecting Verify backup when completed is recommended. Then, click **OK**.

The backup is complete.

Restore the Camtasia Relay Database

The following procedure covers how to restore the TechSmith Relay database using SQL Server Management Studio. For additional information and other ways to perform a backup, see the following:

▶ TechSmith Relay Technical Reference Guide (available on TechSmith.com: http://www.tech-smith.com/tutorial-techsmith-relay-self-hosted-current.html)

▶ How to: Restore a Database Backup (SQL Server Management Studio): http://msdn.-microsoft.com/en-us/library/ms177429.aspx

To restore a database backup file using SQL Server Management Studio:

1. Place the backup file in a folder on the database server that can be locally accessed by SQL Server.
2. Open SQL Server Management Studio.
3. Right-click the existing database or Databases (if restoring to a new database) and select Tasks > Restore > Database.
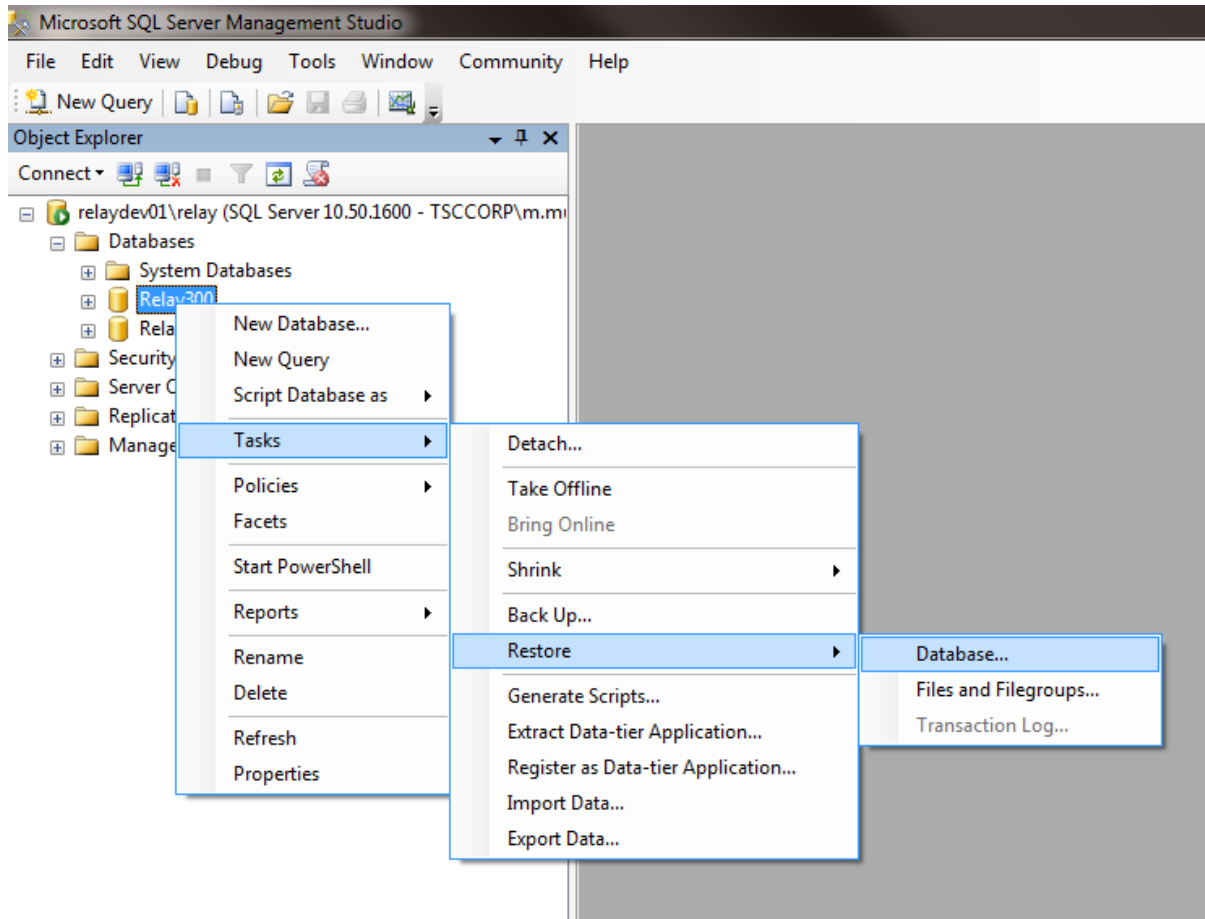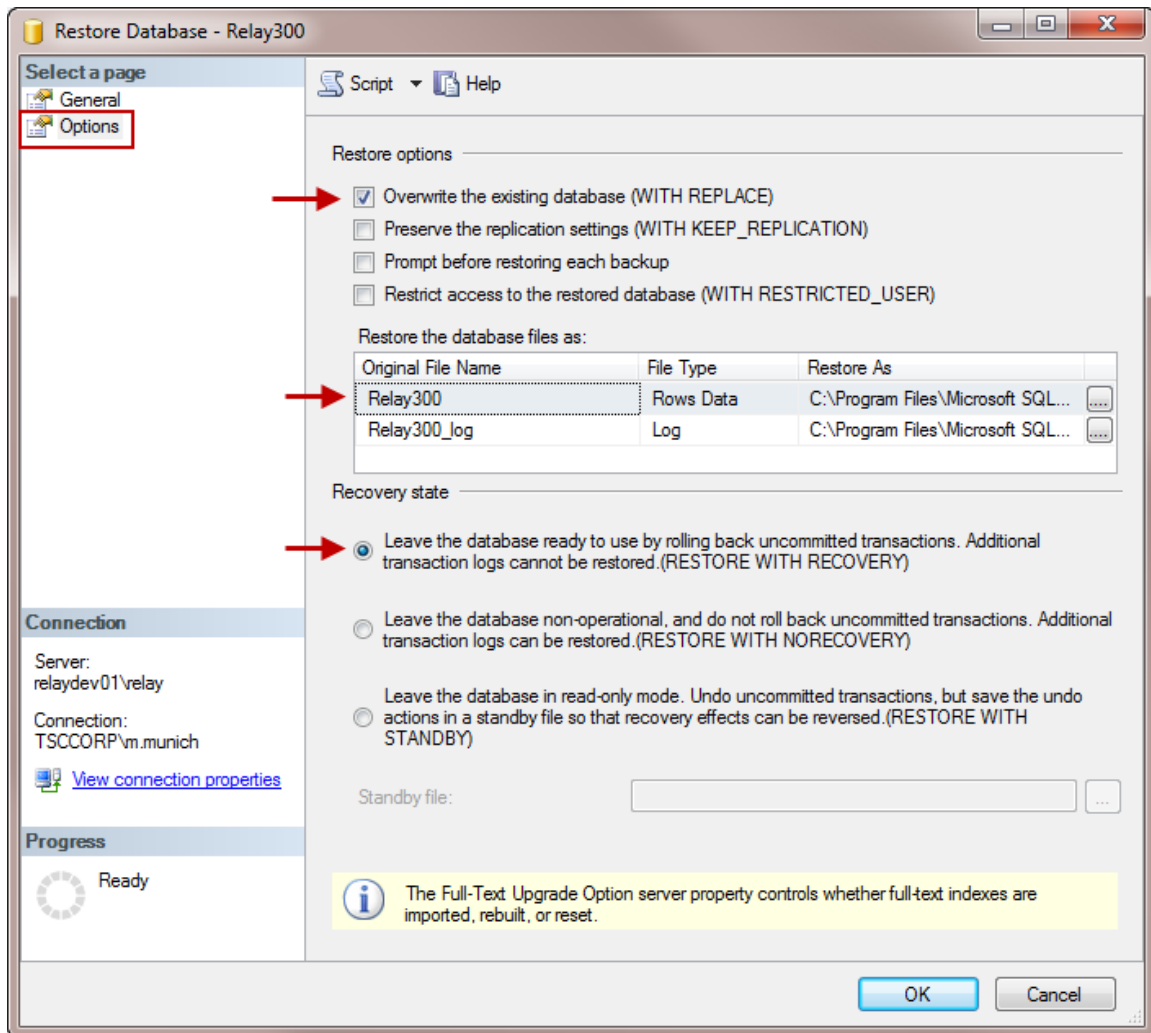

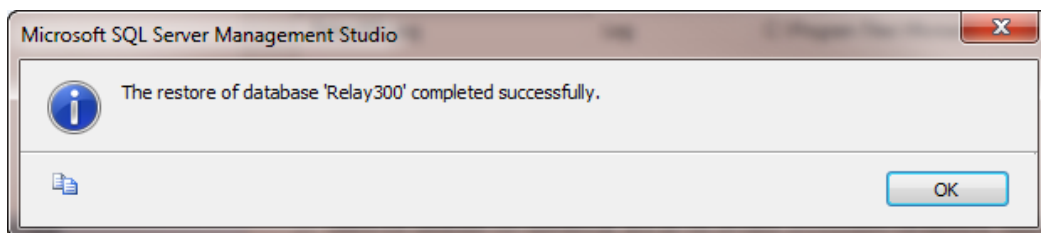4. Set the database name to restore. Select From Device and click … to select the backup file.
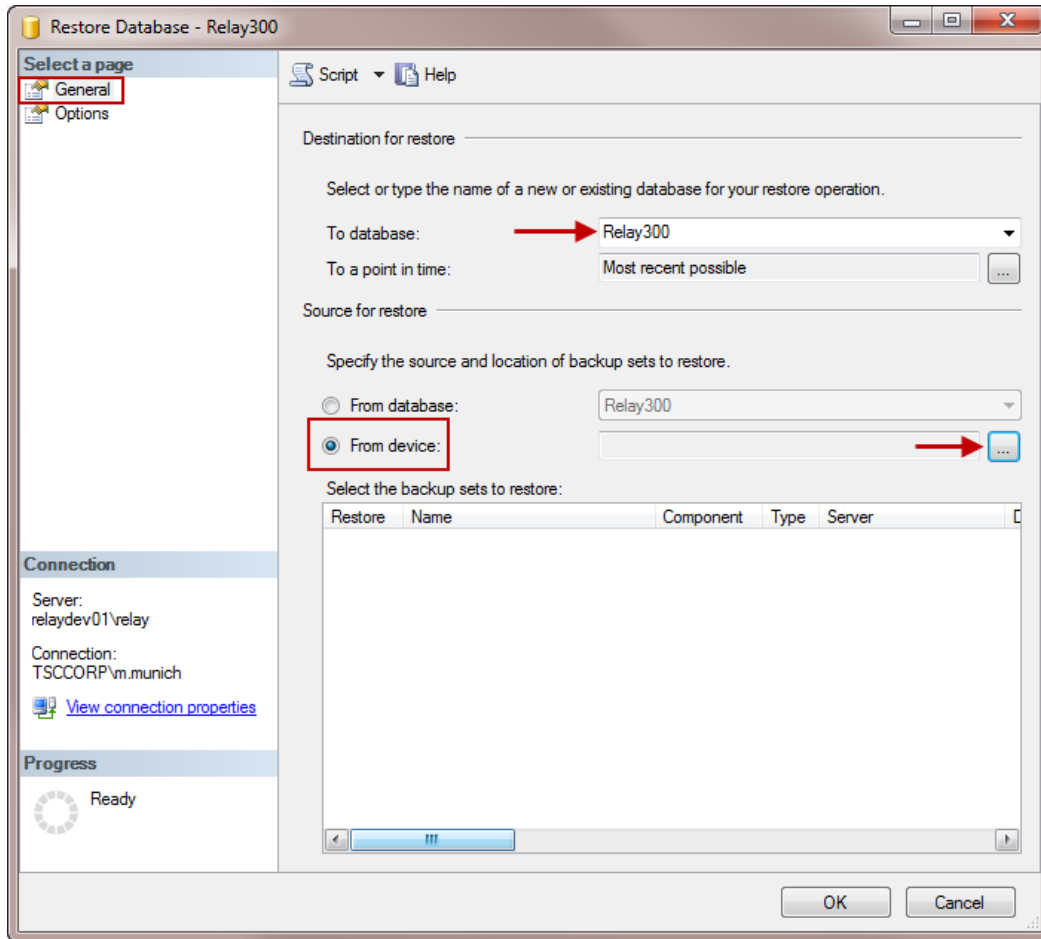
5. Click Add to select the location of your database backup file. Click OK.
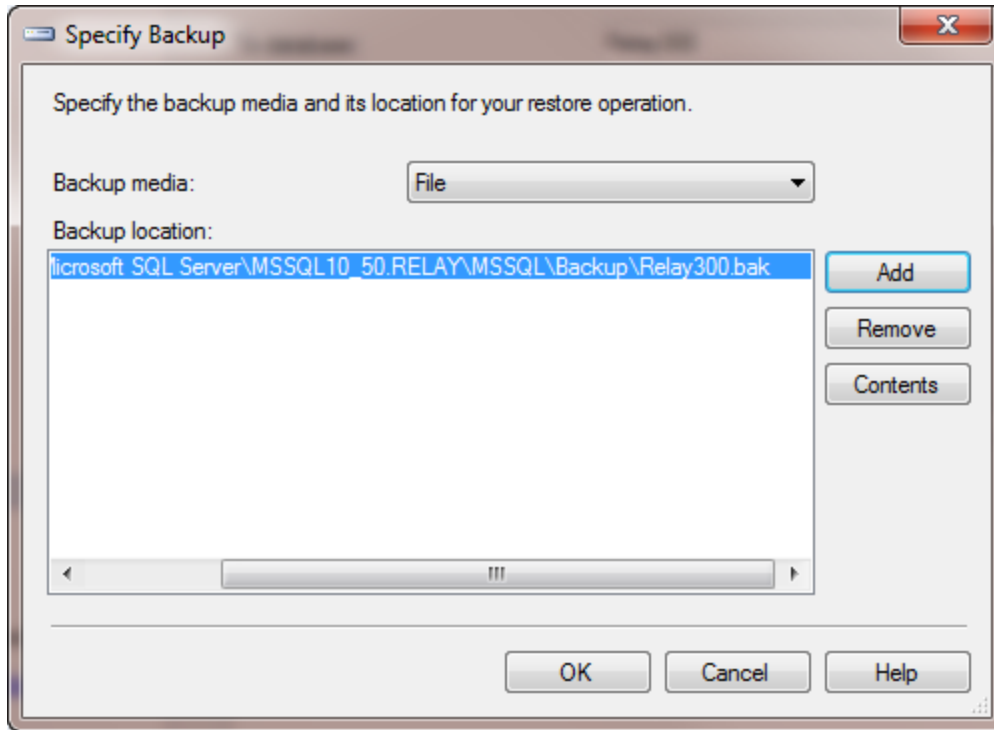
6. Set Restore options to overwrite the database (if applicable), restore files to correct path, and Leave the database ready to use. Click OK.

The database is now restored.

TechSmith Relay® (Self-Hosted)
Camtasia Integration

Version 5

August 2016

Table of Contents

TechSmith Relay and Camtasia Studio

Harness the editing power of Camtasia Studio in TechSmith Relay!

Edit TechSmith Relay videos in Camtasia Studio, and then send back to TechSmith Relay for distribution. They play nicely together so your content flows seamlessly from one application to another.

There are several ways to use Camtasia Studio with TechSmith Relay, depending on what you are trying to do. Find which option will work best for you:

- Automatically Produce Multiple Formats and Destinations
- Full Editing Capability with Ease of TechSmith Relay Recording
- Record with TechSmith Relay, Edit with Camtasia Studio, Publish with TechSmith Relay

> The procedures that follow assume that you are already familiar with Camtasia Studio and TechSmith Relay. To learn about Camtasia Studio or TechSmith Relay, please refer to the in-product help or the TechSmith tutorials.

The Basics

- The TechSmith Relay Recorder must be installed on the same computer as Camtasia Studio in order for the TechSmith Relay production preset to appear in the Camtasia Studio Production Wizard.
- TechSmith Relay profile settings take precedence over Camtasia Studio presets. When processing and publishing presentations with TechSmith Relay, the final formats and publish locations are dictated by profile settings.
- The CAMPROJ project file used in Camtasia Studio is rendered to AVI before it uploads to TechSmith Relay for processing; some features available when working in Camtasia Studio are disregarded when producing through TechSmith Relay because they are not compatible with the AVI file type.

Automatically Produce Multiple Formats and Destinations

Summary

1. Record: Camtasia Studio
2. Edit: Camtasia Studio
3. Produce: TechSmith Relay

When to Use	- You are familiar with Camtasia Studio and its recording and editing features. - You would like to use TechSmith Relay to efficiently publish a variety of video formats and/or to multiple locations. - You are familiar with Camtasia Studio and your workplace requires all

	videos to be published to locations under the control of a network administrator (via a TechSmith Relay profile).
Advantages	▶ Ability to use SmartFocus and other Camtasia recording effects (not available in TechSmith Relay recordings). ▶ Recording file (CAMREC) is saved locally and ready for immediate editing in Camtasia Studio. ▶ TechSmith Relay production saves the person editing from having to make processing and publishing decisions. ▶ TechSmith Relay production saves time if you want multiple video formats and automated publishing to multiple destinations.
Considerations	▶ When recording, select Full Screen as the recording dimensions. ▶ In Camtasia Studio, choose dimensions that match your largest TechSmith Relay profile. If you are uncertain, select Recording Dimensions as the preset (in Editing Dimensions). Later, TechSmith Relay will use your profile to determine final dimensions and formats. ▶ Cannot use Flash hotspots, quizzes, survey, end actions (lose when converted to AVI). ▶ Closed captions are available when producing with TechSmith Relay only when the selected profile supports captions (MP4 with Smart Player encode settings). ▶ Camtasia Studio first produces an AVI file and then sends it to TechSmith Relay, where it is processed and published as dictated in the selected profile.

How To

1. Open Camtasia Studio. In the Welcome dialog box, click **Record the screen**.
2. Click **Full Screen** in the Camtasia Recorder.
3. Click the **Record** button.
4. Give your presentation. When finished, click **Stop**.
5. In the Preview window, click **Save and Edit**.
6. Select **Original recording dimensions** in the Editing Dimensions dropdown list and click **OK**.
7. Edit the presentation with Camtasia Studio.

   Note: Do not add Flash hotspots, quizzes, surveys, or end actions; these items are not supported.

8. From the Produce and share dropdown list, select **Share to TechSmith Relay**.
9. Log in with a TechSmith Relay presenter username and password.
10. Select a profile. Enter a title and description. Click **Submit**.

See the TechSmith Relay Recorder help for more information about what happens after a presentation is submitted.

Full Editing Capability with TechSmith Relay Recording

Summary

1. Record: TechSmith Relay
2. Edit: Camtasia Studio
3. Produce: Camtasia Studio

When to Use	▶ Multiple presenters record and one or more experienced Camtasia Studio users do the editing and production. ▶ Since the presenters just record, submit the presentation, and walk away, this option works great for conferences or quality control. ▶ This workflow can come in handy when presenting on a computer that does not have Camtasia Studio, but you want to edit and produce with Camtasia Studio.
Advantages	▶ Presenters use the simple TechSmith Relay Recorder and others can edit with Camtasia Studio. ▶ Can record on both Mac and Windows operating systems and then edit and produce the presentation on a computer running on a Windows operating system. ▶ Full editing capabilities of Camtasia Studio.
Considerations	▶ Cannot use SmartFocus, ScreenDraw, or other Camtasia Recorder features (not available in TechSmith Relay recordings). ▶ Each video format must be produced individually; no automatic production and publishing as when using Camtasia Studio for production. ▶ **Profile required**: A profile that generates a Camtasia Studio recording (CAMREC) and publishes to a location where the person doing the editing can retrieve it.

How To

1. Open the TechSmith Relay Recorder.
2. Log in with a presenter username and password.
3. Select a profile. Make sure to choose one that creates a CAMREC.
4. Enter a title and description.
5. Click the **Record** button.
6. Give your presentation. When finished, click **Stop**.
7. Review the presentation and click **Submit**.
8. When the CAMREC is ready, locate the file and copy it to your computer.
9. Open Camtasia Studio. In the Welcome dialog box, click **Import media**.

10. Locate the CAMREC file and click **Open**.
11. Drag the capture to the timeline and select Recording Dimensions in the Editing Dimensions dropdown list and click **OK**.
12. Edit and produce the presentation with Camtasia Studio.

See the Camtasia Studio help or the Camtasia Studio tutorials for information about editing and producing.

Record with TechSmith Relay, Edit with Camtasia Studio, Publish with TechSmith Relay

Summary

1. Record: TechSmith Relay
2. Edit: Camtasia Studio
3. Produce: TechSmith Relay

When to Use	▶ The ease of the recording and publishing with TechSmith Relay is needed, but there is also a need for editing beyond just trimming the beginning and ending of the presentation. ▶ A designated editor receives a CAMREC of the presentation and publishes back to TechSmith Relay because there is a need for multiple formats and/or publish destinations. ▶ A presentation recorded with TechSmith Relay unexpectedly needs a more involved edit than available with TechSmith Relay.
Advantages	▶ Presenters use the simple TechSmith Relay Recorder. ▶ Presentations are processed and published automatically based on the selected profile. ▶ Video can undergo advanced editing and still be efficiently produced in numerous formats and locations.
Considerations	▶ When recording, select Full Screen as the recording dimensions. ▶ Camera video from TechSmith Relay Recorder is not included in the file sent to Camtasia Studio. ▶ In Camtasia Studio, choose dimensions that match your largest TechSmith Relay profile. If you are uncertain, select Original recording dimensions as the preset (in Editing Dimensions). Later, TechSmith Relay will use your profile to determine final dimensions and formats. ▶ Cannot use Flash hotspots, quizzes, survey, end actions (lost when converted to AVI). ▶ Cannot use SmartFocus (not available when recording with TechSmith Relay).

	▶ Camtasia Studio first produces a n AVI file and then sends it to TechSmith Relay, where it is processed and published as dictated in the selected profile.
	▶ **Profiles required**: One profile that generates a Camtasia Studio recording (CAMREC) and publishes to a location where the person doing the editing can retrieve it; a second profile to designate the formats and publishing destinations for the final presentations.

How To

1. Open the TechSmith Relay Recorder.
2. Log in with a presenter username and password.
3. Select a profile that creates a CAMREC.
4. Enter a title and description.
5. Click the **Record** button.
6. Give your presentation. When finished, click **Stop**.
7. Review the presentation and click **Submit**.
8. When the CAMREC is ready, locate the file and copy it to your computer.
9. Open Camtasia Studio. In the Welcome dialog box, click **Import media**.
10. Locate the CAMREC file and click **Open**.
11. Drag the capture to the timeline and select Recording Dimensions in the Dimensions dropdown list and click **OK**.
12. Edit and produce the presentation with Camtasia Studio.

    Note: Do not add Flash hotspots, quizzes, surveys, or end actions; these items are not supported.

    See the Camtasia Studio help or Camtasia Studio Tutorials for information about editing with Camtasia Studio.

13. From the Produce and share dropdown list, select **Share to TechSmith Relay**.
14. Log in with a TechSmith Relay presenter username and password.
15. Select a profile. Enter a title and description. Click **Submit**.

See the TechSmith Relay Recorder help for more information about what happens after a presentation is submitted.

TechSmith Relay and Camtasia for Mac

Harness the editing power of Camtasia for Mac in TechSmith Relay.

Edit TechSmith Relay videos in Camtasia for Mac, and then send back to TechSmith Relay for distribution. They play nicely together so your content flows seamlessly from one application to another.

There are several ways to use Camtasia for Mac with TechSmith Relay, depending on what you are trying to do. Find which option will work best for you:

- Automatically Produce Multiple Formats and Destinations
- Full Editing Capability with Ease of TechSmith Relay Recording
- Record with TechSmith Relay, Edit with Camtasia for Mac, Publish with TechSmith Relay

Note: The procedures that follow assume that you are already familiar with Camtasia for Mac and TechSmith Relay. To learn about Camtasia for Mac or TechSmith Relay, please refer to the in-product help or the TechSmith Tutorials.

The Basics

- The TechSmith Relay Recorder must be installed on the same computer as Camtasia for Mac in order for the Share to TechSmith Relay option to appear.
- TechSmith Relay profile settings take precedence over Camtasia for Mac production options. When processing and publishing presentations with TechSmith Relay, the final formats and publish locations are dictated by profile settings.
- Some features available when working in Camtasia for Mac are disregarded when producing through TechSmith Relay. Only markers and closed captions are passed through and only when the selected profile supports these options (MP4 with Smart Player encoding type).

Automatically Produce Multiple Formats and Destinations

Summary

1. Record: Camtasia for Mac
2. Edit: Camtasia for Mac
3. Produce: TechSmith Relay

When to Use	- You are familiar with Camtasia for Mac and its recording and editing features. - You would like to use TechSmith Relay to efficiently publish a variety of video formats and/or to multiple locations. - You are familiar with Camtasia for Mac and your workplace requires all videos to be published to locations under the control of a network administrator (via a TechSmith Relay profile).

Advantages	▶ Recording file (CMREC) is saved locally and ready for immediate editing in Camtasia for Mac. ▶ TechSmith Relay production saves the person editing from having to make processing and publishing decisions. ▶ TechSmith Relay production saves time if you want multiple video formats and automated publishing to multiple destinations.
Considerations	▶ When recording, select Full Screen as the recording dimensions. ▶ Camera video recorded in TechSmith Relay Recorder is not included with the file sent to Camtasia for Mac. ▶ In Camtasia for Mac, choose canvas dimensions that match your largest TechSmith Relay profile. If you are uncertain, select the same dimensions that were used during recording. Later, TechSmith Relay will use your profile to determine final dimensions and formats. ▶ Closed captions and markers are available when producing with TechSmith Relay only when the selected profile supports captions (Flash and Silverlight encoding types only). ▶ Camtasia for Mac first produces a video file and then sends it to TechSmith Relay, where it is processed and published as dictated in the selected profile.

How To

1. Open Camtasia for Mac.
2. Select to record the **Full Screen**.
3. Click the **Record** button.
4. Give your presentation. When finished, click **Stop**.
5. Camtasia for Mac adds the recording file to the Media Bin and on the timeline.
6. Edit the presentation with Camtasia for Mac.
7. Select the option to share to TechSmith Relay.
8. Log in with a TechSmith Relay presenter username and password.
9. Select a profile. Enter a title and description. Click **Share**.

See the TechSmith Relay Recorder help for more information about what happens after a presentation is submitted.

Full Editing Capability with TechSmith Relay Recording

Summary

1. Record: TechSmith Relay
2. Edit: Camtasia for Mac
3. Produce: Camtasia for Mac

When to Use	▶ Multiple presenters record and one or more experienced Camtasia for Mac users do the editing. ▶ Since the presenters just record, submit the presentation, and walk away, this option works great for conferences or quality control. ▶ This workflow can come in handy when presenting on a computer that does not have Camtasia for Mac, but you want to edit and produce with Camtasia for Mac.
Advantages	▶ Presenters use the simple TechSmith Relay Recorder and others can edit with Camtasia for Mac. ▶ Can record on both Mac and Windows operating systems and then edit and produce the presentation on a computer running on a Mac operating system. ▶ Full editing capabilities of Camtasia for Mac.
Considerations	▶ Cannot use SmartFocus (not available in TechSmith Relay recordings). ▶ Camera video recorded in TechSmith Relay Recorder is not included with the file sent to Camtasia for Mac. ▶ Each video format must be shared individually; no automatic production and publishing as when using Camtasia for Mac for production. ▶ Profile required: A profile that generates a Camtasia for Mac recording and publishes to a location where the person doing the editing can retrieve it. TechSmith Relay produces a ZIP file for the Camtasia for Mac recording files. The ZIP file, when opened on a Mac, automatically unzips into a directory.

How To

1. Open the TechSmith Relay Recorder.
2. Log in with a presenter username and password.
3. Select a profile. Make sure to choose one that creates a Camtasia for Mac recording.
4. Enter a title and description.
5. Click the **Record** button.
6. Give your presentation. When finished, click **Stop**.
7. Review the presentation and click **Submit**.
8. When the Camtasia for Mac recording is ready, locate the file and copy it to your computer.
9. Open the ZIP folder.
10. Double-click to launch the CMPROJ in Camtasia for Mac.
11. Edit and produce the presentation with Camtasia for Mac.

See the Camtasia for Mac help or Camtasia for Mac tutorials for information about editing and producing.

Record with TechSmith Relay, Edit with Camtasia for Mac, Publish with TechSmith Relay

Summary

1. Record: TechSmith Relay
2. Edit: Camtasia for Mac
3. Produce: TechSmith Relay

When to Use	▶ The ease of the recording and publishing with TechSmith Relay is needed, but there is also a need for editing beyond just trimming the beginning and ending of the presentation. ▶ A designated editor receives a Camtasia for Mac recording of the presentation and publishes back to TechSmith Relay because there is a need for multiple formats and/or publish destinations. ▶ A presentation recorded with TechSmith Relay unexpectedly needs a more involved edit than available with TechSmith Relay.
Advantages	▶ Presenters use the simple TechSmith Relay Recorder. ▶ Presentations are processed and published automatically based on the selected profile. ▶ Video can undergo advanced editing and still be efficiently produced in numerous formats and locations.
Considerations	▶ When recording, select Full Screen as the recording dimensions. ▶ In Camtasia for Mac, choose editing dimensions that match your largest TechSmith Relay profile. If you are uncertain, select the same dimensions that were used during recording. Later, TechSmith Relay will use your profile to determine final dimensions and formats. ▶ Cannot use SmartFocus (not available when recording with TechSmith Relay). ▶ Closed captions and markers are available when producing with TechSmith Relay only when the selected profile supports captions (MP4 with Smart Player encoding types only). ▶ Camtasia for Mac first produces a video file and then sends it to TechSmith Relay, where it is processed and published as dictated in the selected profile. ▶ Profiles required: One profile that generates a Camtasia for Mac recording and publishes to a location where the person doing the editing can retrieve it: a second profile to designate the formats and publishing destinations for

| | the final presentations. |
| | TechSmith Relay produces a ZIP file for the Camtasia for Mac recording files. The ZIP file, when opened on a Mac, automatically unzips into a directory. |

How To

1. Open the TechSmith Relay Recorder.
2. Log in with a presenter username and password.
3. Select a profile. Make sure to choose one that creates a Camtasia for Mac recording.
4. Enter a title and description.
5. Click the **Record** button.
6. Give your presentation. When finished, click **Stop**.
7. Review the presentation and click **Submit**.
8. When the Camtasia for Mac recording is ready, locate the file and copy it to your computer.
9. Open the ZIP folder.
10. Double-click to launch the CMPROJ in Camtasia for Mac.
11. Edit the presentation with Camtasia for Mac.

    See the Camtasia for Mac help or Camtasia for Mac tutorials for information about how to use Camtasia for Mac.

12. Select the option to share to TechSmith Relay.
13. Log in with a TechSmith Relay presenter username and password.
14. Select a profile. Enter a title and description. Click **Share**.

See the TechSmith Relay Recorder help for more information about what happens after a presentation is submitted.