Cisco Media Suite Merchandiser

User Guide

For software version: 5.7.13

Rev. 1.00, 06 December 2016

Total pages: 189

Cisco Media Suite Merchandiser
User Guide

EDCS-
Rev. 1.00, 06 December 2016

Owner: Ed Beliczynski

Author: Ed Beliczynski

Reviewers: Dinesh Rathnam
Dongfang Zhao
Michael Kitchen
Ramakrishna Hegde

Cisco Confidential
SPVSS & Approved Recipients

Americas Headquarters
Cisco Systems, Inc.
San Jose, CA

Asia Pacific Headquarters
Cisco Systems (USA) Pte. Ltd.
Singapore

Europe Headquarters
Cisco Systems International BV Amsterdam
The Netherlands

Cisco has more than 200 offices worldwide. Addresses, phone numbers, and fax numbers are listed on the Cisco Website at **www.cisco.com/go/offices**.

Contents

List of Tables

1 Preface

1.1 Purpose of This Document

This user guide explains the purpose of the Cisco Media Suite Merchandiser user interface and how to use it to manage the video on demand (VoD) catalogue, configure the ingest of asset images and control the rules that can be used to automate certain actions in the system.

> **Note** Cisco Media Suite Merchandiser is the new name for the application formerly known as the VCM (Video on Demand Catalogue Manager) and subsequently the CMS (Content Management System). The product will be referred to as Merchandiser throughout.

1.2 Using This Document

Section 2 2 provides an introduction to the Merchandiser user interface and how it fits in the wider Media Suite product line.

An explanation of the principles of navigating around and using the user interface is given in section 3 3.

1.3 Applicability

This document is useful for anyone wanting to know how to use the Merchandiser user interface to perform the various administrative, processing and scheduling tasks possible from within the UI.

1.4 References

Table 1 lists documents and other reference sources containing information that may be essential to understanding topics in this document.

Table 1 References

No.	Designation	Title
1.	AIM-USR-901	VAM Config UI User Guide
2.	AIM-USR-912	Merchandiser DAL Installation, Configuration and Invocation Guide
3.	AIM-USR-913	Merchandiser Server Installation, Configuration and Invocation Guide
4.	AIM-USR-914	VAM Installation, Configuration and Invocation Guide

2 Introduction

2.1 Welcome to the Merchandiser UI

The **Merchandiser user interface** is used to control the configuration and operation of the Merchandiser server, the component that ingests assets (items of content, typically movies) and is responsible for metadata and content management.

Using this UI, you are able to:

- view the catalogue, visualizing the content on the platform in a time-based manner
- manage individual programs
- promote assets to subscribers

In addition to processing incoming assets and associated metadata, you can also use the Merchandiser UI to:

- manage classifications and collections

Quick Start

To learn more about the role of the Merchandiser, and to understand the most commonly used functions of the Merchandiser UI, see the following topics:

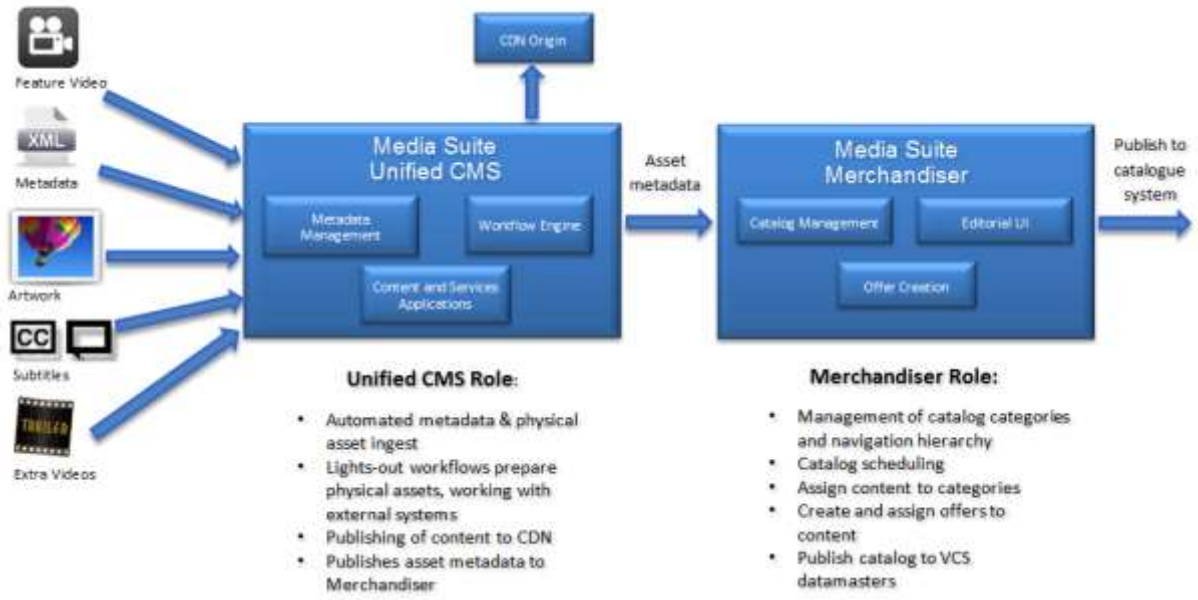
- What is Merchandiser?
- What's New in this Release?
- Introduction to the Merchandiser UI
- Search Types
- Program Overview
- Collection Overview
- Classification Overview

2.2 What is Merchandiser?

Merchandiser is a part of the Media Suite product line. This product line consists of several products in addition to Merchandiser, the major one being the Unified CMS. The products used and specific architecture will vary from deployment to deployment. Contact your account team for information on the specifics of your particular deployment.

In a generic deployment of the Media Suite product line, the Unified CMS provides lights-out workflows that are responsible for ingesting physical

assets and metadata. The Unified CMS then publishes the catalogue metadata to Merchandiser, which is used to promote the asset to subscribers, define a schedule for its availability, add offers to generate revenue from the content, include it in catalogues and classifications and publish it to the catalogue system.



2.3 What's New in this Release?

This release of the Merchandiser UI introduces a range of new functionality and changes to the UI.

Product title

The product's name has changed to Cisco Media Suite Merchandiser. This is reflected throughout this user guide.

Search changes

The process by which Media ID and Asset ID searches are performed has been changed. See How to Perform a Media ID Search and How to Perform an Asset ID Search for details.

Program ADI Details

A **Show ADI** button has been added to the Program Details panel. This enables you to view the ADI which accompanied the program on ingest. See How to View Program Details for details of this functionality. A new **Offering ID** field

has also been added to the Program Details panel. See Fields on the Program Details Panel for further information.

Program and Collection Offers

The functionality of the program and collection management areas of the system have been enhanced. Program Offers and Collection Offers accordion panels have now been provided so that you can view details of the offers associated with any given program or collection and their scheduling. See How to View Program Offers and How to View Collection Offers for more information.

Genre/Sub Genre for Programs

On the Program Details accordion panel, the Genre and Sub-genre fields have been combined into a single field. See Fields on the Program Details Panel for details.

Collection Details Changes

A Genre/Sub Genre table has been added to the Collection Details accordion panel in which you can optionally define the genres and sub-genres applicable to a collection. A Group ID field has also been added which is populated with a system generated value when you create a collection. See How to Create a Collection and How to Modify the Details of a Collection for further information on how to use these new fields.

Classification ID

A Classification ID field has been added to the Classification Details panel for all classification types. See the Classifications section for details.

Classification Re-ordering

This release of the Merchandiser provides the capability for you to move classifications in the hierarchy by dragging and dropping them on the Classification Placement accordion panel. See How to Change Classification Order for further information.

3 Understanding the User Interface

3.1 Introduction to the Merchandiser UI

The Merchandiser UI operates within the structure of the VCS Console. Specific features of the Merchandiser UI are explained below so that you are able to easily navigate and use the screens. These features are:

- Tab Structure
- Classification Tree
- Visualiser
- Multiple Languages
- Multiple Catalogues
- Accordion Panels
- Action Selector
- Mandatory Fields
- Padlock
- Refresh Button

Tab Structure

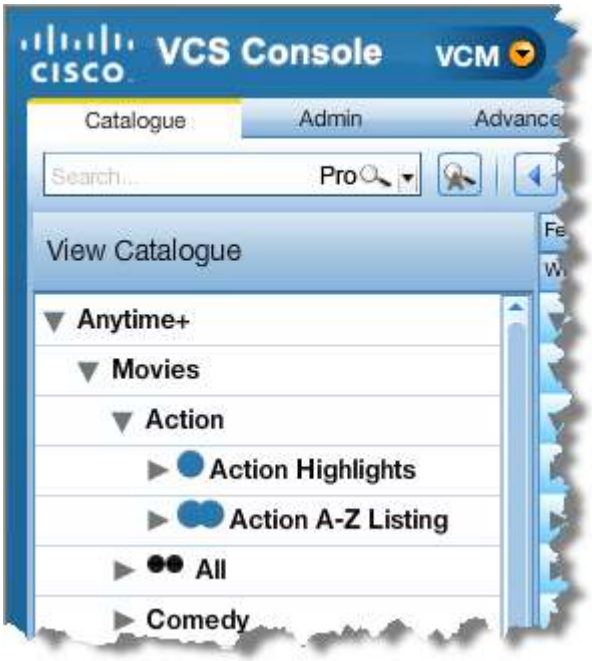
Once you have logged into the Merchandiser UI, a series of tabs are available at the top of the screen that enable you to move between the different functional areas of the user interface. Clicking on a tab displays the screen relevant to that functional area.

See the Tab Structure section for further details.

Classification Tree

The classification tree is displayed in the View Catalogue panel on the left of the Catalogue tab. This tree enables you to drill down into the catalogue to see details of the classifications, collections and programs in the system.

See the Classification Tree section for further details.



Visualiser

The visualiser fills the main area of the screen on the Catalogue tab to the right of the classification tree. This shows a graphical timeline of the classifications, including the programs they contain and when they are scheduled to be available.

See the Visualiser section for further details.

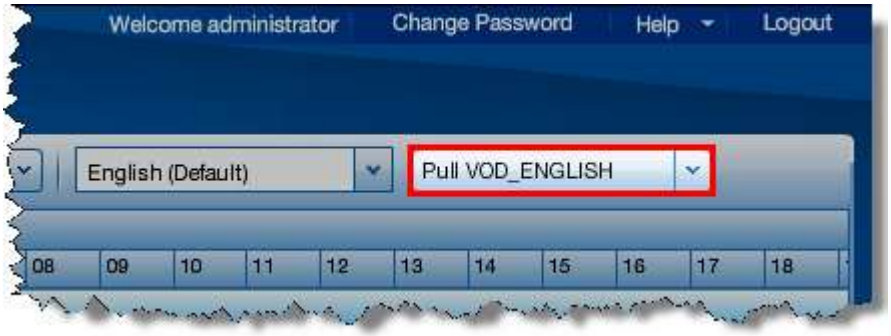
Multiple Languages

Where the Merchandiser is configured to include multiple languages, a Language Selector field is shown in the toolbar. This drop down list enables you to select the display language in which you want to see the catalogue's contents on the screen.

See Multiple Language Support for further details.

Multiple Catalogues

Where the Merchandiser contains details of multiple catalogues, a Catalogue Selector field is shown on the toolbar. This drop down list enables you to select the particular catalogue for which you want to see the details in the visualiser.

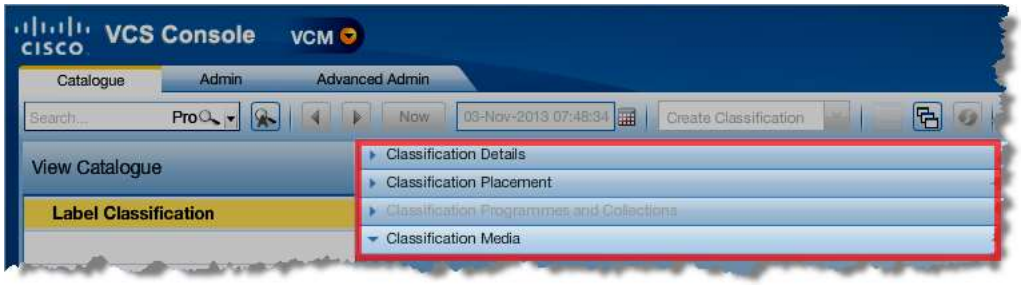


See Multiple Catalogue Support for further details.

Accordion Panels

Within a tab are a series of accordion panels. Each of these panels is focused on a particular set of data or task and can be displayed or hidden as required, depending on the information you want to view or change at the time.

See the Accordion Panels section for further details.



Action Selector

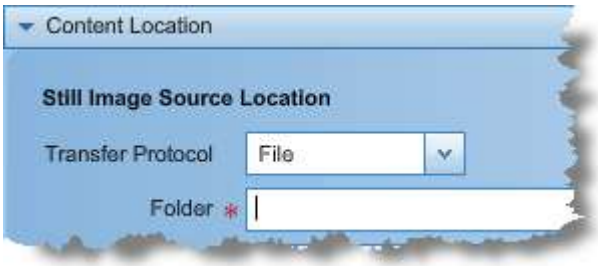
On any given screen in the Merchandiser UI, the fields and details displayed are read only by default. To make updates, or to start a workflow, you need to select an action from the Action Selector list box found either in the toolbar on the Catalogue tab or at the bottom of the screen when you have accessed an accordion panel.

See the Action Selector section for further details.

Mandatory Fields

Depending on the task you are completing, some fields are mandatory. These are marked with a red asterisk and are found in a variety of places in the Merchandiser UI.

See Mandatory Fields for further details.



Padlock

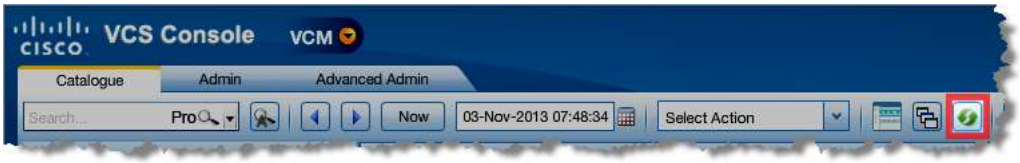
When you enter an accordion panel that belongs to a Classification, Collection or Program, a padlock icon is displayed at the bottom of the screen. If you access an accordion panel in view mode, the padlock is shown as closed, indicating that the screen is currently read only. The actions available in the action selector only give you the option to view the various details.

In order to unlock the screen so that you can edit the available fields, click on the padlock icon. The icon changes to unlocked, and the action selector now contains options to add and edit details rather than just view them.

If you access an accordion panel to either create or edit the details of a Classification, Collection or Program, then the padlock is shown as open, so the fields are unlocked and you are able to edit them as required.

Refresh Button

The refresh button is located in the toolbar of the Catalogue tab and is also present at the top of the Admin tab. Click this to pull the latest updates from the database to ensure that the data you are viewing is up to date and accurate. For example, another user may have updated the details of a classification or asset source. The refresh button is permanently available, apart from when you are in edit mode to update data yourself.



Note The Merchandiser UI is never locked in terms of navigating around the system. You are able to double click an item in the classification tree or visualiser at any time, enabling you to move away from the screen you are currently viewing and opening a new screen with the details of your selected item. Click **Close** to close your current screen and return to the visualiser view. This flexibility enables you to review details of a given element while completing a task, such as checking a classification while creating a collection.

3.2 Tab Structure

Once you have logged into the Merchandiser UI, a series of tabs are available at the top of the screen that enable you to move between the different functional areas of the user interface.

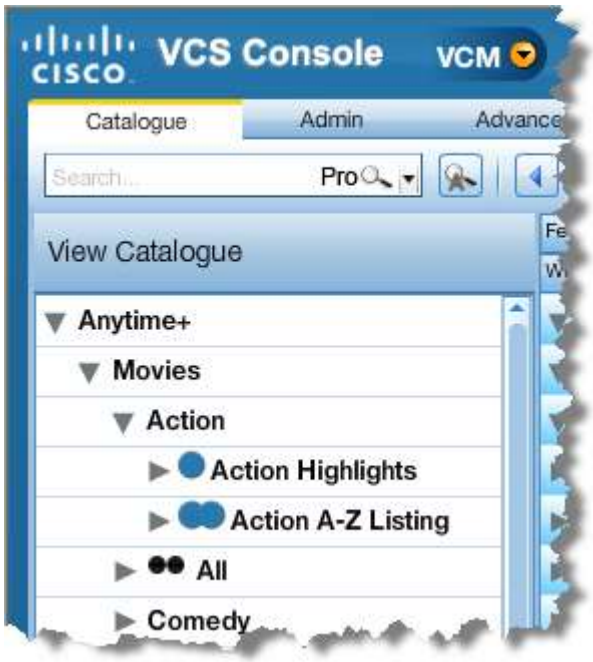
Clicking on a tab displays the screen relevant to that functional area. The **Catalogue** tab is shown by default when you enter the Merchandiser UI and this contains the classification tree and visualiser elements that show the classifications, collections and assets held in the catalogue and when they are scheduled to be available to subscribers.

The **Admin** tab enables you to configure the asset sources from which content is ingested into the Merchandiser and also control the parental ratings that are applied to that content. In addition, you are able to update certain elements of the system configuration, such as the default language and currency, and define the term attributes that can be applied when creating certain types of classification (a term attribute provides a classification with some form of additional behaviour).

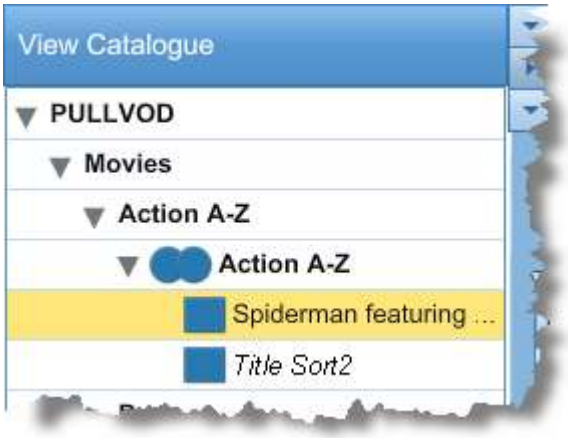
The **Advanced Admin** tab enables you to define multiple CDN locations to which content can be uploaded. This means you can define different CDN locations for different vendors, or you could configure different CDN destinations for different media types, such as movies, trailers, posters and box covers.

3.3 Classification Tree

The classification tree is shown on the left of the Catalogue tab in the **View Catalogue** panel. This tree contains all of the classifications, collections and programs currently held in the catalogue.



Any entry in the tree with an arrow icon ▶ can be expanded by clicking it to drill down further into the tree. The arrow icon next to an expanded node changes to ▼. Once you reach a level of the tree where no arrow icon is displayed, usually the program level, that is the lowest level you can reach.



Using the arrow icons to expand classifications in the tree reveals the first five collections or assets in that classification. If more than these five collections or assets exist, then a **More** option is displayed at the end of the list. Click this to reveal the next five items in the classification. This option continues to be available until all items are displayed. Once you have used the More option, a **Less** option is also available at the end of the asset list. Click this to reduce the list by five entries.

From the third level of the classification tree and lower, you have the option to right click on a classification in the hierarchy and choose **Expand All** from the popup menu. This is a quicker way of revealing the contents of a classification where it contains a large number of items.

Expand All shows the first 200 items in a classification. If there are more items not yet displayed, then an Expand option is presented at the end of the list. Click this to see the next 200 items.

To close this long list of classification content, right click on the classification title and choose **Collapse All** from the popup menu. The classification is collapsed and is shown as just the classification title with an expand arrow.

Items in the tree appear with a variety of icons next to the item entry. These icons identify the type of entry as follows:

Icon	Description
	Program.
	Incomplete program. A program that still needs to be added to a collection or classification, or that needs other details defining, is marked as incomplete.
	Editorial classification. A user generated highlights classification.
	Genre classification.

Icon	Description
	Ask parent. An ask parent classification doesn't contain any programs itself, but pulls all asset listings from parent level and below from the tree, creating a list of available content from multiple classifications. On the client device, this is shown as a list of available content in A-Z format.
	Catch up TV classification. A classification seen on the subscriber's device that represents the content of a specific day. Each catch up day classification contains only the content previously broadcast on that specific day.
	Curated feed classification.
	Collection.
SD	Program in standard definition with complete information.
SD	Program in standard definition with incomplete information.
HD	Program in high definition with complete information.
HD	Program in high definition with incomplete information.
3D	Program in 3D with complete information.
3D	Program in 3D with incomplete information.

In addition to these icons, the text used in the tree view also provides information as to the nature of each entity and its availability to subscribers. The font weight (whether it is normal or bold) indicates the entity type of the tree entry:

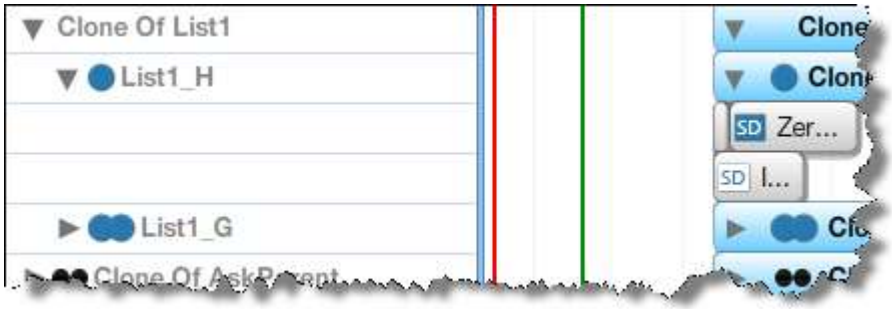
Entity	Font Weight
Classification	Bold
Collection	Bold
Program	Normal

The text colour indicates whether the entity is currently available to subscribers:

Time Schedule/Availability	Colour
Present (available now)	Black
Future (not yet available)	Grey
Past (no longer available)	Grey

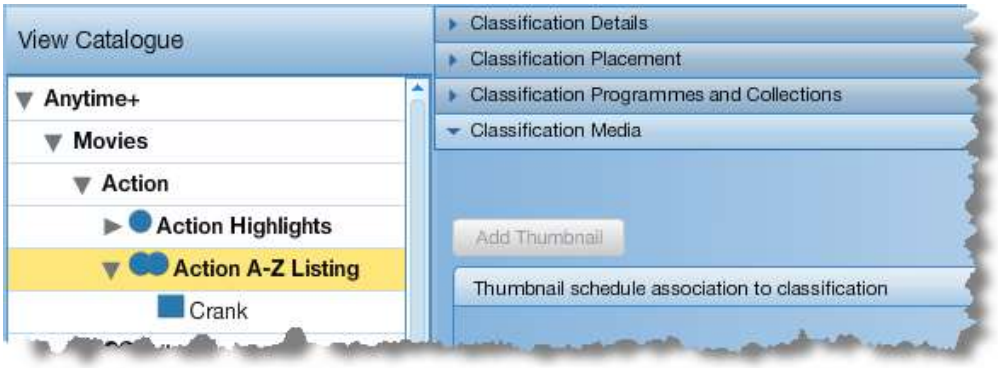
An editorially controlled highlights classification has a defined number of slots allocated that can be filled by programs being promoted to subscribers.

Where the number of assigned programs doesn't fill the number of potential slots, the UI only displays those slots that have programs assigned; any empty slots are collapsed and not shown in either the catalogue tree or visualiser. The only time you will see an empty slot in the tree view is when programs are associated with the classification, but they are not scheduled to be available at the date and time represented by the green line in the visualiser.

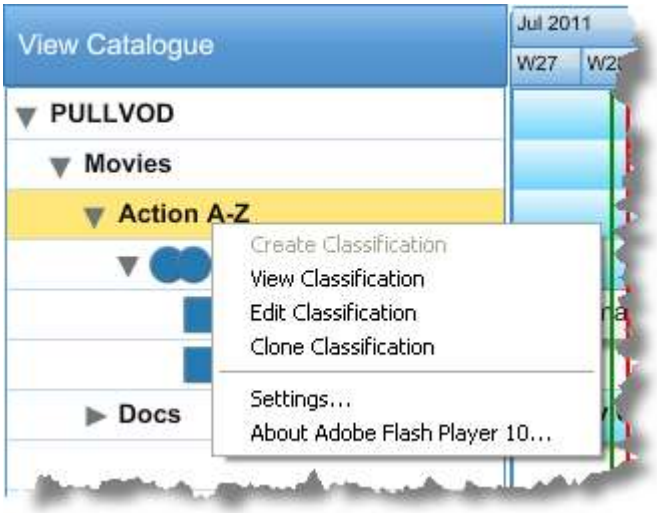


If the green line is moved to a time when the programs are available, the slots are populated with the relevant details.

Double click any entry in the tree to see further details relating to that classification, collection or program. When you do this, the View Catalogue panel and classification tree remain in place but the visualiser display is replaced by a series of accordion panels. These panels contain all of the details relating to your selected classification, collection or program, so you can see information such as the media associated with the entry, its placement on the schedule timeline and relevant metadata.



You can also right click on any item in the classification tree to present a contextual menu of the actions that you can perform in relation to that item. The action selector presents all of the actions possible on the screen with the context menu showing what is possible in the context of the item you have clicked on.



By default, your view of the classification tree is read only. In order to add or change details, you need to use either the context menu or action selector to start a workflow and enable the relevant screens and fields for editing.

3.4 Visualiser

The visualiser fills the main area of the screen on the Catalogue tab to the right of the classification tree. This shows a graphical timeline of the classifications listed in the tree, including the programs they contain and when they are scheduled to be available.

Two coloured vertical lines are drawn on the timeline. The **red** line represents "now", so the current date and time at which you are viewing the visualiser. The **green** line shows the selected date and time specified in the date field in the toolbar, so you are able to view which classifications, collections, programs and offers are available on any specified date for the selected catalogue and language. All entities in the tree that are available at the time the green line represents are shown in normal text, whether they are classifications, collections or programs. Any entities that either end before the green line, or which start after it, are shown in italic text as they are not available at the specified time.

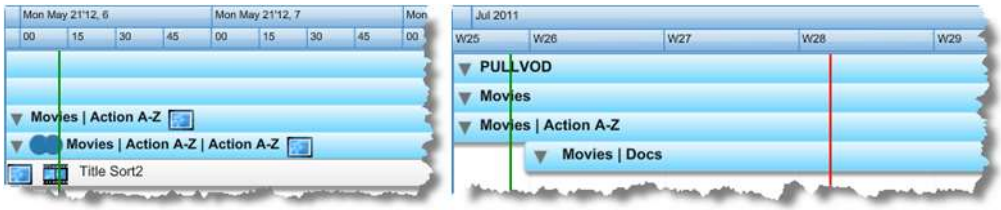
Between them, the classification tree and visualiser timeline show the intersection of the classification hierarchy, the assets it contains and the offers applied to those assets to show what will be available to platform subscribers at any given time.

Both the classification tree and the visualiser bars are re-drawn dynamically as the time window is changed to provide an accurate view of the classifications, collections, programs and offers that will be visible on the platform on the specified date.

You are able to view a total time window of +/- 13 months across the catalogue. The visualiser does not hold details beyond that window.

As well as using the date/time field to specify a date to view in the visualiser, you can also use the forward and back buttons in the toolbar to scroll through the timeline, and clicking **Now** returns you to today's view, represented by the red line. As an alternative, you can click on the timeline and drag it either left or right to move forwards and backward through the schedule.

Use the combination of the **CTRL** key and the wheel on your mouse to zoom in and out of the timeline, changing the magnification and granularity of the timeline from units of as small as a minute up to a month. The full range of zoom levels is: 1 minute, 5 minutes, 10 minutes, 15 minutes, 1 hour, 4 hours, AM/PM, 1 day, 1 week, 1 month.



As well as graphically representing when classifications, collections and programs are available, the visualiser also features popups that are displayed when you hover the mouse over a classification, collection or program bar. These popups contain metadata relating to the corresponding classification, collection or program. All of the popups display the name, start date and end date, and a thumbnail of the content. In addition, the program popup states whether a trailer is available, the Series Name, Series No, Episode No and Hiatus period. The border of the popup is colour co-ordinated with the entity it represents; the classification bar and popup are blue, the collection bar and popup are green and the program bar and popup are grey. In addition, there is a tab at the bottom of each popup stating whether it is for a classification, collection or program.

For details of the toolbar controls on the visualiser screen, see Toolbar Controls.

> **Note** The visualiser is read only for browsing the timeline to see availability. You need to choose an action from the action selector to make changes.

3.4.1 Toolbar Controls

The following table describes the controls available on the toolbar in the visualiser screen of the Catalogue tab.

Control	Description
Search... Pro	**Search** field. Enter a search term to perform a basic search. The search can be restricted to particular areas (programs, actors, etc.) by selecting the relevant icon from the drop down list. See How To Perform a Quick Search for details.
	Advanced Search button. Opens the Advanced Search screen to enable a more targeted search. See How To Perform an Advanced Search for details.
	Back button. Scrolls the visualiser back through the historic timeline by the time interval specified in the zoom control.
	Forward button. Scrolls the visualiser forward through the future timeline by the time interval specified in the zoom control.
Now	**Now** button. Returns the timeline to today's view.

Control	Description
03/07/2011 12:15	**Date/Time** selection field. Specify a date and time to display on the visualiser timeline.
Select action	**Action selector**. Select an action to perform in the classification tree. See Action Selector for details.
	Visualiser controls button. Opens a floating pallet of controls for the visualiser that can be moved around the screen. See the following table for further details of the options provided here.
	Multiscreen button. Opens a second screen in read only mode so you can check data in one screen while editing the live UI. Visual indicators are provided that the second screen is read only so there is no confusion as to which is which.
	Refresh button. Pulls the latest data from the database to ensure you're working on the most recent version of the data.
Print	**Print, Save As** and **Preview** button. **Print** launches a print dialogue enabling you to print the PDF of the current timeline view. **Save As** saves the current timeline view to disk. **Preview** generates a PDF of the current timeline view. The button's function varies depending on the process you are completing.
English (Default)	**Language selector** field. Determines the language in which the contents of the catalogue are displayed. Contains a drop down list of all languages configured in the system; if only a single language is configured, the field is hidden. See Multiple Language Support for details.
Pull VOD_ENGLISH	**Catalogue selector** field. Determines the catalogue displayed in the tree view and visualiser. Contains a drop down list of all catalogues configured in the system; if only a single catalogue is configured, the field is hidden. See Multiple Catalogue Support for details.

The following table describes the controls available on the Visualiser controls pallet.

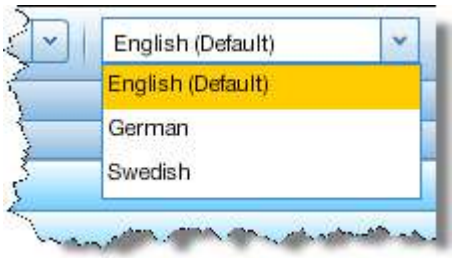
Control	Description
	Zoom In button. Increases the magnification level of the visualiser timeline.

Control	Description
	Zoom Out button. Decreases the magnification of the visualiser timeline.
1 Month	**Zoom** control. Set the level of the zoom by which the forward and back buttons scroll through the visualiser timeline.
	Show STB View button. Shows how the classifications look on the STB at a given point on the timeline. Where both box cover and covert art images are available, a drop down is provided so that you can select which set of images to view.

3.5 Multiple Language Support

Where the Merchandiser is configured to include multiple languages, a Language Selector field is shown in the toolbar. This drop down list enables you to select the display language in which you want to see the catalogue's contents on the screen. Your choice here also defines the language in which quick and advanced searches the performed.

On entry to the Merchandiser UI, the catalogue contents are displayed in the default language. To change the view to display them in one of the other available languages, choose a language from the list and the catalogue view is refreshed in your selected language.



The language change applies to the catalogue content and its associated metadata, including the display of the Show STB View screen, but does not alter the field and button labels on the UI itself; these remain in English.

> **Note** If your system is configured with only a single language, the Language Selector field is hidden.

While the Language Selector field controls the display language in the catalogue view and for the quick and advanced searches, a separate Entity Language Selector field is shown in the action bar at the bottom of the UI to control the display language during entity workflows, such as managing classifications, collections and programs, including the contextual searches that you may carry out during these workflows.

As with the Language Selector field, the Entity Language Selector is only shown if your system is configured with multiple languages. If your system only has a single language, the field is hidden.

To change the language during the course of a workflow, choose a language from the Entity Language Selector and your workflow screen view is refreshed so that the language dependent values are reloaded in your selected language. This does not alter the field and button labels; they remain in English.

When you perform contextual searches as a part of a workflow, search categories are searched by your chosen entity language. Some search filters are also displayed in the entity language:

- Classification
- BSS Genre/Sub-genre
- List of Providers
- Studio Code
- Catalogues (if multiple catalogues are configured in your system)

All other search filters are shown in the default language.

In the Search Results screen, language dependent fields are shown in your selected language rather than the default.

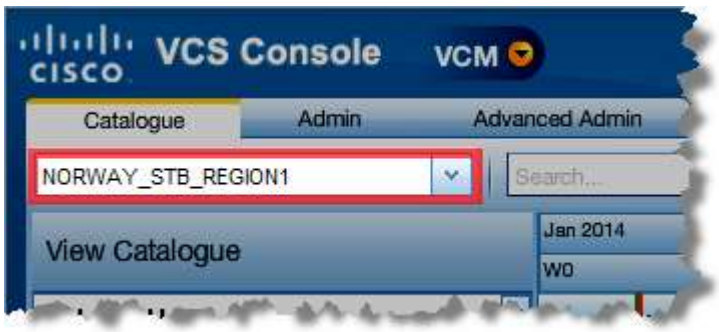
The visualiser bars in the relevant workflow placement accordion panels are also shown in your selected language.

In association with the Entity Language Selector, a **Copy All** button is available on the action bar while you are working on the Details accordion panel relevant to your workflow and you have selected a display language other than the default.

If you click Copy All, any of the mandatory fields that are empty on the screen are automatically populated with the corresponding entries in the default language.

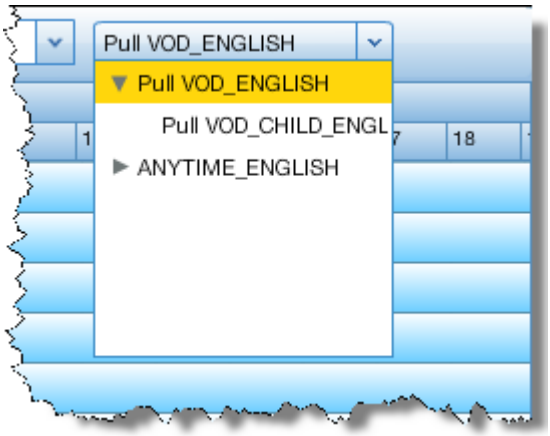
3.6 Multiple Catalogue Support

Where the Merchandiser contains details of multiple catalogues, for example representing different geographic regions, target devices or platforms, a Catalogue Selector field is shown on the toolbar. This drop down list enables you to select the particular catalogue for which you want to see the details in the visualiser.



On entry to the Merchandiser UI, the details of the default catalogue are shown. The drop down list in the Catalogue Selector field contains all of the catalogues configured in your system, displayed in a hierarchical structure. Where a catalogue contains child items, you can expand the catalogue tree in

the drop down by clicking the relevant expand icon (▶). You can expand the list of available catalogues down to three levels of detail if necessary and if this catalogue depth is available.



To display the content of one of the listed catalogues, click on it in the drop down list. The catalogue's details are populated in the View Catalogue tree and visualiser view.

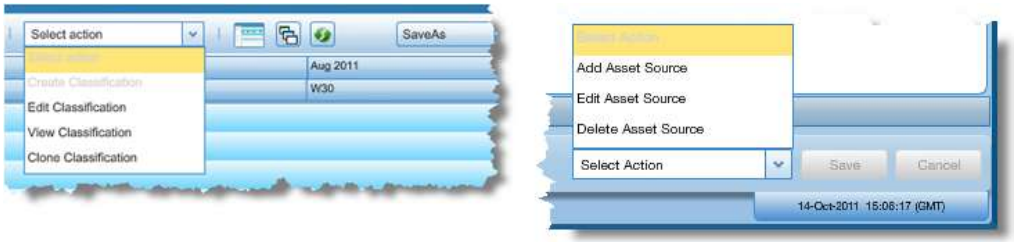
> **Note** If your system is configured with only a single catalogue, the Catalogue Selector field is hidden.

If multiple catalogues are configured in your system, you will see additional options at various stages of the classification, collection, program and search workflows where you are able to specify the catalogue to which your configuration should apply. See the relevant individual process topics for further details.

3.7 Action Selector

When you access the various tabs and accordion panels of the Merchandiser UI, the fields and details displayed are read only. To review particular data or to make updates, you need to select an action from the action selector list box found in the toolbar of the visualiser display and at the bottom of the screen for all the accordion panels.

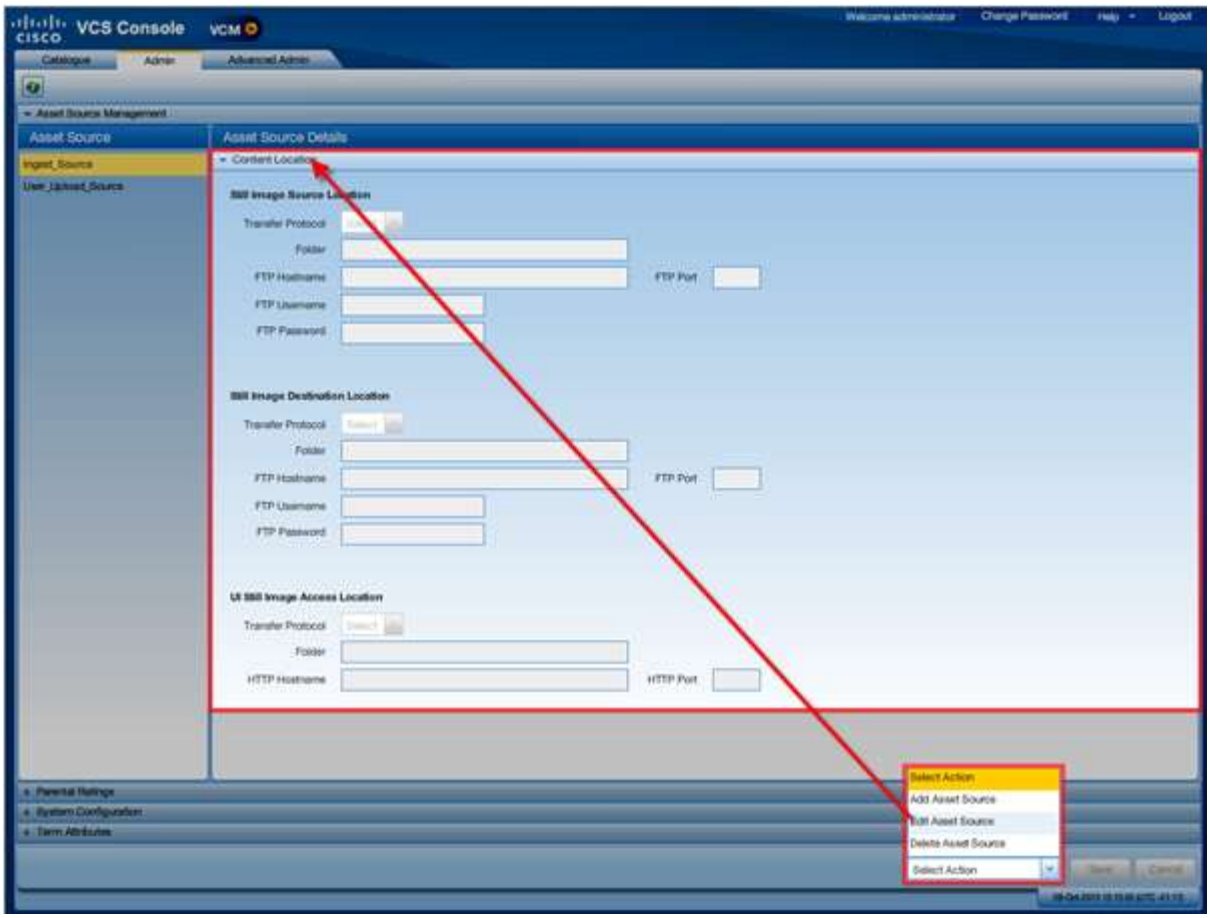
The action selector contains a list of all the available actions for the area of the UI you are currently viewing. This list is contextual and changes depending on which screen you currently have open. For example, you are presented with different actions when viewing the visualiser on the Catalogue tab compared with those available on the Asset Source Management accordion panel on the Admin tab:



The list of available actions also changes depending on whether the screen is locked or unlocked, indicated by the state of the padlock icon at the bottom of the screen. With the screen locked, you are only presented with a variety of "View" actions so you aren't able to change any data. By clicking the padlock icon to unlock the screen, the list in the action selector changes to include "Add" and "Edit" actions appropriate to the screen you are viewing, enabling you to make changes.

Once you have started a particular workflow, the options in the action selector maintain the context of that workflow, so only presents actions applicable to the task you are completing.

Selecting an action from the list automatically displays the corresponding accordion panel for that action so that you can make the changes required. For example, if you select the **Edit Asset Source** option on the **Admin** tab, the **Content Location** panel is displayed.



A sub-menu of available actions is also shown if you right click in the Merchandiser UI. This is a contextual popup menu that only presents action options applicable to the area you have clicked on, such as the classification tree, visualiser or list of asset sources. This contextual menu is a sub-set of the total list of options for the current screen that can be accessed via the action selector.

> **Note** All fields in the Merchandiser UI remain read only until you select an action, either from the action selector or the right click context menu.

3.8 Accordion Panels

Once you have logged into the Merchandiser UI, a series of tabs are available at the top of the screen that enable you to move between the various functional areas of the user interface. Clicking on a tab displays the screen relevant to that functional area. Within each screen (apart from the main visualiser view) are a series of accordion panels. Each panel contains the fields and information needed for a particular aspect of a workflow or functional area and these panels can be hidden or displayed according to the task you are performing. In this way, the UI only presents the information required to complete your current task.

You display an accordion panel by clicking on the title bars which highlight when you move your mouse over them.

When you expand a panel, the arrow icon on the left of the panel title bar changes from ▸ to ▾, indicating that the panel is now being displayed.

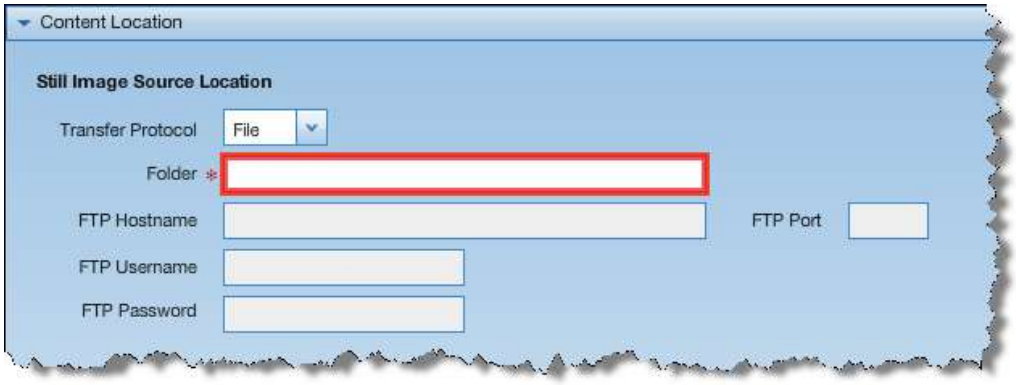
This principle of accordion panels operates for both the main functional areas of the UI (such as the **Asset Source Management**, **Parental Ratings**, **System Configuration** and **Term Attributes** panels on the Admin tab), and for the sub-elements within a workflow, such as the series of panels required to define a Classification.

When you start a workflow by selecting an action from either the action selector or the right click popup context menu, the accordion panel required to start that task is displayed automatically.

3.9 Mandatory Fields

When you enter information on the various accordion panels in the Merchandiser UI, you will notice that some fields are displayed with a red asterisk next to them:

This indicates that the field is mandatory, so you must make an entry before you are able to complete your configuration. Different fields may become mandatory depending on the options you select. For example, on the **Content Location** accordion panel on the **Admin** tab, selecting a **Transfer Protocol** of "File" for the source or destination location makes the **Folder** field mandatory, while the fields relating to FTP information are disabled.



Selecting a Transfer Protocol of "FTP" results in all the fields being enabled and mandatory.

Entering information in fields that are enabled but which aren't marked with a red asterisk is optional.

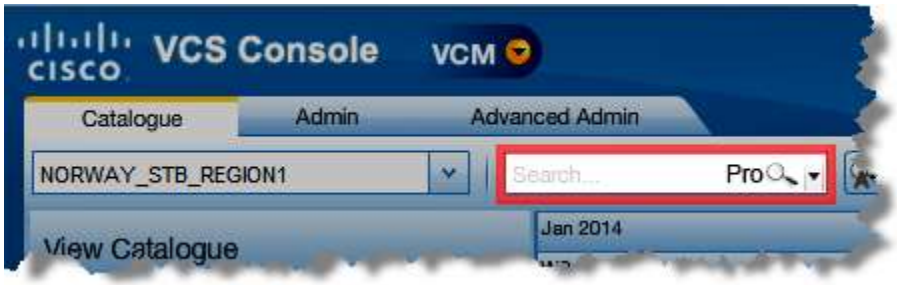
4 Searches

4.1 Search Types

The Merchandiser UI features a range of different search types, depending on which area of the UI you are working in and what kind of content you are searching for.

Quick Search

A quick search facility is located in the top left corner of the Catalogue tab. This provides an instant, broad search where you are able to define the scope of the content you are searching in.



Use this search field to enter a search term and click the search icon at the end of the field, or press **Return**, to display the results. See How to Perform a Quick Search for further details.

Advanced Search

Clicking the icon next to the quick search field  opens the advanced search screen where you are able to define much more specific parameters for your search, or alternatively perform a bulk search where you could, for example, find all the content in a particular classification. For further details, see How to Perform an Advanced Search. Also included on the advanced search screen are further options to either perform a more specific search on media or asset ID, and you also have the option to view the last search that was executed.

Media and Asset ID Searches

If you are searching for a particular piece of content and know the individual media or asset ID, then specific searches are available on the advanced search screen that enable you to search by these IDs. See How to Perform a Media ID Search and How to Perform an Asset ID Search for details.

View Last Search

If you want to reload your previous search, then you can use the View Last Search facility rather than having to specify your search criteria again. See How to View the Last Search for details.

4.2 Search Operators

The implementation of the search facility in the Merchandiser UI uses Oracle's text engine. This engine applies a variety of search operators and functions so that results are returned as quickly and accurately as possible.

4.2.1 Stemming

The process of stemming involves taking the search keyword and adding either a prefix, suffix or making it plural to cover a wider variety of search words all related to the original "stem" term. For example, if you entered the word "search" as your keyword, stemming would search for additional related keywords such as "searches", "searcher", "searching" and "searched". This process would then return hits for these related terms in your search results in addition to results for the original keyword.

4.2.2 Fuzzy Matching

Fuzzy matching is a means of returning search results that are a possible match for your entered keyword. This function assumes that related words are likely to have the same core word as their foundation, but may differ at the beginning or end. For example, if you entered "matching" as your search term, fuzzy matches could include entities containing "match", "matches", "matched" and so on. However, this process may also return potentially unrelated terms that have the same search word origin, so for a keyword of "matching", you may have a fuzzy match containing the word "matchbox" which isn't necessarily relevant to your search. Fuzzy matching is also used to return best effort search results if you misspell your search term.

4.2.3 Scoring

All of the search results found by the Oracle search engine are subjected to a scoring process to judge how relevant they are to your entered search term. Only results that achieve a certain score or higher are considered to be relevant matches, and so only these successful matches are returned by the search results. This allows the search engine to discard any results generated

as a product of stemming or fuzzy matching that are not close enough to the original keyword to be useful.

By adopting the scoring function, Merchandiser only returns accurate search results that are relevant to your entered search term.

> **Note** These search operators and functions are applied across all search types except for Media and Asset ID searches which return results based on exact matches.

4.2.4 Stop Word List

A stop word is a word in a search term that doesn't have any important influence on the result of the search. For example, in the search term "The Crow", "the" is a stop word and will be filtered out, so the search is only applied for "Crow".

Stop words are usually filtered out because they have the potential to return a high volume of unnecessary information. Examples of stop words would be:

a	he	out	up	be	more	but	at	had	one
will	from	it	then	and	is	only	when	also	not
she	in	says	was	by	to	about	her	over	because
most	there	has	or	with	that	are	of	which	could
same	been	have	other	were	after	who	for	search	the

4.2.5 Search Syntax

Particular rules apply to the syntax you use when entering search terms.

Quotation marks are always interpreted as operators signifying a quoted phrase. It is therefore impossible for you to search for a quotation mark as a part of a search term. If you use punctuation marks in your search term and they are within quotation marks, such as the hyphen in "The-Matrix", then they are considered to be part of the search string. Punctuation loses any special operator significance if you use it within quotation marks.

Outside of quotation marks, the following punctuation has special significance as operators which are applied to your search. All other punctuation is ignored.

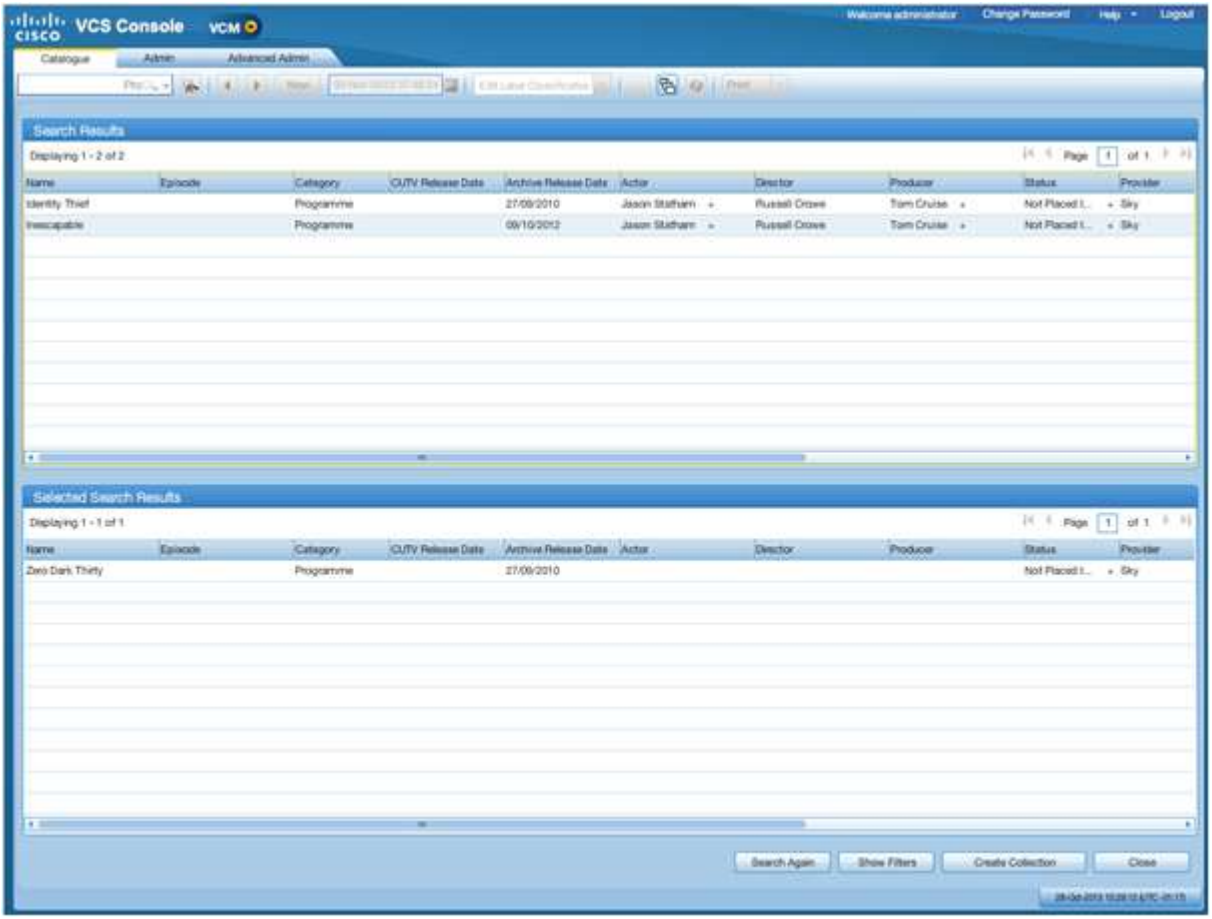
Table 2 Search Syntax

Entry	Rules	Example
a&b&c	& is used as an AND operator. The search looks for results that contain all the entered terms, so a and b and c.	“Pirates&Caribbean&Curse” would return “Pirates of the Caribbean: The Curse of the Black Pearl”, but not “Pirates of the Caribbean: Dead Man’s Chest”.
a | b | c	The pipeline (|) is used as an OR operator. The search looks for results that contain any of a or b or c.	The search term “James | Bond” would return all James Bond films, but also any other entities featuring “James” or “Bond”, such as “James and the Giant Peach”.
a ~ b	The tilde (~) is used as a NOT operator. The search looks for results that contain term a but not term b.	A search for “Star ~ Wars” would return Star Trek and Star Ship Troopers, but not Star Wars.
“a b c”	Double quotes (“ ”) are used to search for an exact match. The search looks for an exact match for the entire phrase “a b c”.	A search for “The Bourne Identity” would return “The Bourne Identity”, but not “The Bourne Ultimatum”.
%	The search treats the percent as a wildcard character. It can appear any number of times in any part of the search term. The search term is expanded into an equivalence list of terms which contains all terms in the index that match the wildcarded term, with zero or more characters in place of the percent.	A search for Star% will return Star Wars, Star Trek and any other entity beginning with Star. A search for %Knight finds The Dark Knight and all other entities ending with Knight, but not A Knight’s Tale. A search for %man% will return all entities with man anywhere in the title, so Rain **Man**, The **Man** in the Iron Mask and The **Man**churian Candidate.
Multiple search operators	Parentheses can be used to combine multiple search operators to perform more complex searches.	(Rise & Planet) | Evil The part of the term in parentheses is performed first. The logical AND would return “Rise of Planet of the Apes”. The logical OR is then performed and would additionally return “Rise of the Evil”. However, “Planet of the Apes” would not be returned as it doesn’t match either part of the expression.

4.3 Search Results

When you perform a search in the Merchandiser UI, the results are returned in a tabular format. You are then able to drag and drop entries from the **Search Results** grid at the top of the screen into the lower **Selected Search**

Results grid as required to add assets to collections or classifications, or to associate collections with classifications.



The columns shown in the Search Results tables will vary depending on whether your search is for programs, collections or classifications. The following tables outline the column headings for each type of entity search and the information they contain. Click on any of the column headings in the Merchandiser UI to order the results by that heading, either alphabetically A to Z or Z to A, or numerically in ascending or descending order.

Table 3 Columns in the Program Search Result grid

Column Title	Description
Name	The name of the program.
Episode	If the program is part of a series, the name of the individual episode.
Category	Whether the returned result is a program, collection or classification.

Column Title	Description
CUTV Release Date	The earliest available start date for the first catch up TV availability window for the program.
Archive Release Date	The earliest available start date for the first archive TV availability window for the program.
Actor	The lead actor(s) in the program. Where more than one is listed, click + to expand the list.
Director	The director of the program.
Producer	The producer of the program.
Status	The placement status of the program, whether it is placed, partially placed or not placed in the hierarchy. It may have multiple placements in different collections and classifications. If so, click + to expand the list.
Provider	The home location of the program, so Movies Channel,. History, etc.
Studio Code	The studio who produced the program, such as Columbia Tri-Star, Paramount Pictures Itl, etc.
Collections	The collections to which the program belongs. Where more than one is listed, click + to expand the list.
Classifications	The classifications to which the program belongs, such as Movies | Comedy | A-Z. Where more than one is listed, click + to expand the list.
BSS Genre/Sub Genre	The genre and sub-genre to which the program belongs, such as entertainment | arts or movies | comedy.
Warnings	Whether the program has any associated warnings for sex, violence, strong language, etc.
Rating	The parental rating of the program, such as PG, 15, 18, etc.
Time Condition	Details of any time conditions that are applicable to the program, such as whether it may only be shown after a certain watershed time.
Format	Whether the program is in SD, HD or 3D.
Usage Type	Whether the program is for archive or catch up TV. Where more than one is listed, click + to expand the list.

Table 4 Columns in the Collection Search Result grid

Column Title	Description
Name	The name of the collection.
Category	Whether the returned result is a program, collection or classification.

Column Title	Description
Status	The placement status of the collection, whether it is placed, partially placed or not placed in the hierarchy. It may have multiple placements in different classifications. If so, click + to expand the list.
Provider	The home location of the collection, so Movies Channel, History, etc.
Classifications	The classifications to which the collection belongs, such as Movies | Comedy | A-Z. Where more than one is listed, click + to expand the list.

Table 5 Columns in the Classification Search Result grid

Column Title	Description
Name	The name of the classification.
Category	Whether the returned result is a program, collection or classification.
Status	The placement status of the program, whether it is placed, partially placed or not placed in the hierarchy. It may have multiple placements. If so, click + to expand the list.
Usage Types	Whether the classification is for archive or catch up TV. Where more than one is listed, click + to expand the list.

4.4 How to Perform a Quick Search

The Merchandiser UI provides a variety of different quick search types to enable you to restrict your search criteria and return a more focused set of results. When you first enter the Merchandiser UI, the quick search field on the Catalogue tab has the search choice of **Programs** pre-selected. This is indicated by the Programs search icon being shown on the right of the search field next to the drop down arrow:

Click the drop down arrow to display the list of available quick search types. When you choose a search type from this list, the search icon in the quick search field updates according to your selection so you can quickly identify the type of search to be carried out. The entries in this list are configurable, but the default available search types and their associated icons are as follows:

Table 6 Quick Search Icons

Search Type	Icon
All	All
Programs	Pro
Collections	Col
Classifications	Cla
Actor	Act
Director	Dir

To perform a quick search:

1. Enter a search term in the quick search field.
2. Click the quick search icon at the end of the entry field, or press **Return**.
3. The results screen is presented containing the results of your search. Only results available from now onward are returned.
4. A range of options are available on the Results screen, so you have several choices as to your next action once your search results are returned:
   - Drag and drop entries from the **Search Results** grid to the **Selected Search Results** grid. If your selected search results are all programs, then the **Create Collection** button is made available. Click this to start a new collection of assets. See How to Create a Collection for details.
   - Double click on a particular returned result, or right click and choose the View Classification/Collection/Program (depending on the nature of the entry) option from the popup menu, to open read only accordion panels to view further details of the entity. From these accordions, click **Back** to return to the search results screen. You could decide to unlock the accordion panels to edit the details of the entity, but you can’t return to the search results screen if you choose this action.
   - Press **CTRL** + **A** to select all the items in the results list.
   - Press **Shift** and click individual results to select multiple items.

- By default, results are returned sorted by name. They can be further sorted by clicking on the other column titles.
- When multiple data types exist for an item, the search result entry includes a **+** symbol. You are able to expand the entry to view the items it contains. The expanded search result entries are sorted alphabetically.
- Click **Search Again** to be taken to the advanced search screen so that you can amend your search criteria to produce different results. If you select this option, you can choose to either keep or discard your existing selected results, so you can supplement existing results with a modified search if required.
- Click **Show Filters** to display the filters that apply to your results. From here, you can deselect filters and further refine the parameters of your search to produce different results. If you have already moved search results to the Selected grid, these are not affected by running another search and remain in your selected list. You can perform the following actions to the filters:

  Reset Filters: If you change a search by deselecting some filters and selecting others, this option returns the filters to the original set for the search.

  Apply Filter: Whenever you change the selected filters, this option is enabled to apply your new criteria to the search. Note that if all possible filters in a block (e.g. Provider) are unchecked, then **Apply Filter** is not available as at least one filter needs to be checked in a block before the option is enabled.

  Select All Filters: This option is enabled whenever you change the selected filters and selects all available filters.

  See Search Filters for further details of how the filters work.
- Click **Close** to exit the search function and return to the visualiser display.

4.5 How to Perform an Advanced Search

The advanced search function provides you with greater flexibility and granularity when defining your search compared with the quick search. It enables you to perform a range of different search types:

- A surgical search, using many criteria of the Merchandiser metadata to search for a particular set of assets;

- A bulk search, such as searching for all the content from a particular provider or that belongs to a certain classification, collection or other entity;
- A specific media ID or asset ID search, looking for a small number of assets (IDs could be reused);
- A repeat of the last search to be executed;
- A contextual search, as part of a specific workflow, where a subset of the advanced search filters is shown depending on the context of the workflow being performed.

To perform an advanced search:

1. On the Catalogue tab, click the advanced search icon next to the quick search field. The advanced search screen is displayed.
2. A wide variety of optional parameters are available for you to tightly define your search.

> **Note** In order to generate a valid search, you need to define a set of parameters that contain at least an Available From date/time and a search category. You can add further options beyond these criteria to refine your search.

- **Time/Date**. If you want to restrict your search to content that is only available between specific dates and times, enter the parameters in the **Available From** and **Available To** fields using the popup calendars provided by clicking the respective calendar icons. If you do not specify an end date, the Available To value is automatically assumed to be 13 months in the future. Additionally, you can specify whether the search results are available for the entire duration of your specified search window, and possibly also extend beyond these dates and times, by selecting the **Full Availability Only** radio button. If you want to return results that are available for at least some of the search window, and that may or may not be available outside the window, select the **Some Availability Between These Dates** radio button. These radio button options are mutually exclusive and are only available if you specify both a From and To date for your search. Click **Clear** under either of the date/time fields to clear the fields and start again.
- **Search Categories**. The Search Categories area enables you to specify sub-areas of the Programs, Collections and Classifications set up in the system to apply your search to. For example, under Programs, you can choose to only search for your specified term within **Episode**

Title or **Actor**. Select as many of these check boxes as you need. Click **Clear All** next to the Search Categories title to clear any selections you have made.

- **Asset Search**. If you are searching for a specific piece of content and know the **Media** or **VAM Asset ID** for that particular asset, enter the IDs here. See How to Perform a Media ID Search and How to Perform an Asset ID Search for further details.
- **Search Filter**. In the Search Filter area, you have the following options:

  Load Filters: This option is enabled when minimum search criteria are not met, such as the search term, availability and search categories not being entered, and populates the available search filters that can be applied to your search. Select each of the filters that you want to apply to your search. These include being able to search only in content from specific providers, only in a particular format (HD, SD, etc.), only in particular catalogues (if multiple catalogues are present) or only from particular classifications. If you uncheck all the filters from a specific block, e.g. Provider, then the upper frame of the screen is disabled as at least one filter needs to be selected in a block. Click **Apply** to apply the selected filters to your search. A result count is displayed in red at the top of the screen showing how many results would be returned by the search as you currently have it defined if you were to execute it at this stage.

  Reset Filters: When the minimum search criteria are met, i.e. search term, availability and search categories, the Load Filters option changes to **Reset Filters**. If you change a search by deselecting some filters and selecting others, this option returns the filters to the original set for the search.

  Apply Filters: This option is enabled when the minimum search criteria have been met and you have changed the filter selection. It allows you to apply your new criteria to the search. Note that if all possible filters in a block (e.g. Provider) are unchecked, then **Apply Filters** is not available as at least one filter needs to be checked in a block before the option is enabled.

  Select All Filters: This option is enabled whenever you change the selected filters and selects all available filters.

  See Search Filters for further details of how the filters work.

3. With your search parameters defined, you can enter an optional alphanumeric search term in the **Search For** field. Search syntax is applied to your entries in this field as described in 4.2, Search Operators.

Click **Apply** next to the Search For field and the screen is updated to show a summary of the results from the search, including the number of results the search would return if you were to execute it now. Click **Undo** and your search term is either removed, replaced with a blank field if you hadn't entered another term previously, or it is replaced with the previous search term if you have already used the field in this search session.

> **Note** If you click **Apply** with no entry in the **Search For** field, any search filters that you have selected are removed, any summary result count is removed and the **Load Filters** control is enabled.

4. Click **Show Summary** to display a popup that contains a summary of the search you have defined, listing the criteria you have specified in a compact visual format. Click **Close** on this popup to return to the advanced search screen.

5. Click **View Results** to execute your search and see the results.

   If you perform a search from within the classification or collection workflows, it is possible that the number of results shown on the Search screen when you click Apply will differ from the number of records actually returned in the Search Results grid of the results screen. This is

due to one or more of the results that match your search criteria already being present in the Selected Results Grid. For example, if you are searching for films containing Daniel Craig, and the collection or classification you are performing the search from already includes “Quantum of Solace”, then the predicted results may show that there are 4 matches for your search criteria. When you execute the search, only 3 results will be returned in the Search Results grid as “Quantum of Solace” is already present in the Selected Search Results grid.

> **Note**
> 1. Where the minimum search criteria are met, i.e. search term, availability and search categories, but the number of matching search results to be returned is 0 (zero), the **View Results** button is disabled.
> 2. If you have not retained results in the Selected grid from a previous search, and the number of matching results for your current search is 0 (zero), the **View Results** button is disabled.
> 3. If you have retained results in the Selected grid from a previous search, the **View Results** button is always enabled, even if the number of matching results for your current search is 0 (zero).
> 4. The **View Results** button is enabled when you select availability and search categories to perform a bulk search.

6. A range of options are available on the Results screen, so you have several choices as to your next action once your search results are returned:
   - Drag and drop entries from the **Search Results** grid to the **Selected Search Results** grid. If your selected search results are all programs, then the **Create Collection** button is made available. Click this to start a new collection of assets. See How to Create a Collection for details.
   - Double click on a particular returned result, or right click and choose the View Classification/Collection/Program (depending on the nature of the entry) option from the popup menu, to open read only accordion panels to view further details of the entity. From these accordions, click **Back** to return to the search results screen. You could decide to unlock the accordion panels to edit the details of the entity, but you can’t return to the search results screen if you choose this action.
   - Press **CTRL** + **A** to select all the items in the results list.
   - Press **Shift** and click individual results to select multiple items.
   - By default, results are returned sorted by name. They can be further sorted by clicking on the other column titles.

- When multiple data types exist for an item, the search result entry includes a **+** symbol. You are able to expand the entry to view the items it contains. The expanded search result entries are sorted alphabetically.
- Click **Search Again** to be taken to the advanced search screen so that you can amend your search criteria to produce different results. If you select this option, you can choose to either keep or discard your existing selected results, so you can supplement existing results with a modified search if required.
- Click **Show Filters** to display the filters that apply to your results. From here, you can deselect filters and further refine the parameters of your search to produce different results. If you have already moved search results to the Selected grid, these are not affected by running another search and remain in your selected list. You can perform the following actions to the filters:

  Reset Filters: If you change a search by deselecting some filters and selecting others, this option returns the filters to the original set for the search.

  Apply Filter: Whenever you change the selected filters, this option is enabled to apply your new criteria to the search. Note that if all possible filters in a block (e.g. Provider) are unchecked, then **Apply Filter** is not available as at least one filter needs to be checked in a block before the option is enabled.

  Select All Filters: This option is enabled whenever you change the selected filters and selects all available filters.
- Click **Close** to exit the search function and return to the visualiser display.

4.6 How to Perform a Media ID Search

Content that originated from physical media, such as a tape or disk, inherit the ID of that physical media when it is ingested into the Merchandiser. This is known as the media ID. If you know the specific media ID of a piece of content, then the quickest way of finding the asset is to use the Media ID search facility which forms part of the advanced search screen.

To perform a media ID search:

1. On the Catalogue tab, click the advanced search icon next to the quick search field. The advanced search screen is displayed.

2. In the **ID Search** area of the screen, choose **Media ID** from the drop down list. Enter the media ID for the piece of content in the associated text field. This field is case insensitive, but the search is exact and is performed against your specific entry, so wildcard entries are not valid for this search type.
3. Click the search icon at the end of the text field , or press **Return**, to execute the search and see the results. All results are returned that match your entered media ID, regardless of their availability dates.

> **Note** If you have retained results in the Selected results grid from a previous search and you perform a media ID search with an invalid search term, the search still executes. While the returned Search results grid will be empty, your existing items will be retained in the Selected results grid.

4. A range of options are available on the Results screen, so you have several choices as to your next action once your search results are returned:
   - Drag and drop entries from the **Search Results** grid to the **Selected Search Results** grid. If your selected search results are all programs, then the **Create Collection** button is made available. Click this to start a new collection of assets. See How to Create a Collection for details.
   - Double click on a particular returned result, or right click and choose the View Program option from the popup menu, to open read only accordion panels to view further details of the entity. From these accordions, click **Back** to return to the search results screen. You could decide to unlock the accordion panels to edit the details of the entity, but you can't return to the search results screen if you choose this action.
   - Press **CTRL** + **A** to select all the items in the results list.
   - Press **Shift** and click individual results to select multiple items.
   - By default, results are returned sorted by name. They can be further sorted by clicking on the other column titles.
   - When multiple data types exist for an item, the search result entry includes a **+** symbol. You are able to expand the entry to view the items it contains. The expanded search result entries are sorted alphabetically.
   - The **Media ID** search field is disabled as a contextual search. The **Show Filters** button is also disabled.
   - Click **Search Again** to be taken to the advanced search screen so that you can amend your search criteria to produce different results. If

you select this option, you can choose to either keep or discard your existing selected results, so you can supplement existing results with a modified search if required.

- Click **Close** to exit the search function and return to the visualiser display.

4.7 How to Perform an Asset ID Search

The asset ID of a piece of content is the ID given to it by the traffic system from the ADI ingest. If you know the specific asset ID of a piece of content, then the quickest way of finding the asset is to use the asset ID search facility which forms part of the advanced search screen.

To perform an asset ID search:

1. On the Catalogue tab, click the advanced search icon next to the quick search field. The advanced search screen is displayed.
2. In the **ID Search** area of the screen, choose Asset ID from the drop down list. Enter the asset ID for the piece of content in the associated text field. This field is case insensitive, but the search is exact and is performed against your specific entry, so wildcard entries are not valid for this search type.
3. Click the search icon at the end of the text field , or press **Return**, to execute the search and see the results. All results are returned that match your entered asset ID, regardless of their availability dates.

> **Note** If you have retained results in the Selected results grid from a previous search and you perform an asset ID search with an invalid search term, the search still executes. While the returned Search results grid will be empty, your existing items will be retained in the Selected results grid.

4. A range of options are available on the Results screen, so you have several choices as to your next action once your search results are returned:
   - Drag and drop entries from the **Search Results** grid to the **Selected Search Results** grid. If your selected search results are all programs, then the **Create Collection** button is made available. Click this to start a new collection of assets. See How to Create a Collection for details.
   - Double click on a particular returned result, or right click and choose the View Program option from the popup menu, to open read only accordion panels to view further details of the entity. From these

accordions, click **Back** to return to the search results screen. You could decide to unlock the accordion panels to edit the details of the entity, but you can't return to the search results screen if you choose this action.

- Press **CTRL** + **A** to select all the items in the results list.
- Press **Shift** and click individual results to select multiple items.
- By default, results are returned sorted by name. They can be further sorted by clicking on the other column titles.
- When multiple data types exist for an item, the search result entry includes a **+** symbol. You are able to expand the entry to view the items it contains. The expanded search result entries are sorted alphabetically.
- The **Asset ID** search field is disabled as a contextual search. The **Show Filters** button is also disabled.
- Click **Search Again** to be taken to the advanced search screen so that you can amend your search criteria to produce different results. If you select this option, you can choose to either keep or discard your existing selected results, so you can supplement existing results with a modified search if required.
- Click **Close** to exit the search function and return to the visualiser display.

4.8 How to View the Last Search

The advanced search screen includes the **View Last Search** button. This option enables you to view the results of the previous search executed in the advanced search screen; it doesn't re-run either quick searches, the asset searches (Media ID and Asset ID) or contextual searches that were performed as part of a workflow.

If you have only just started a search session, so you haven't yet executed an advanced search, then the view last search function recreates the last executed search from your previous search session. Equally, the details of the last search are saved, so if you close and re-open the Merchandiser UI, clicking View Last Search reloads the last executed search from your previous UI session.

If you have performed multiple searches during your current search session, then View Last Search loads the last but one search that you performed.

It presents the advanced search screen with the search term and associated filters and parameters applied as defined for the previous search. As with

other searches on the advanced search screen, click **View Results** to execute the search.

If you are in a contextual search screen, the View Last Search button is disabled.

> **Note** Search results are only saved to the database when either:
>
> 1. Minimum search criteria are met, i.e. search term, availability and search categories have been defined.
>
> Or:
>
> 2. You click **View Result** with the availability window defined and search categories selected.

5 Programs

5.1 Program Overview

A program is a single item of long form content. It may also be referred to as a movie, an item or an asset, but all of these terms refer to a single piece of content. Examples of a program would be Harry Potter and the Chamber of Secrets, The Boat That Rocked or Schindler's List.

Programs can be grouped together with other similar programs to form collections, and can optionally be assigned associations with classifications when they are ingested depending on the nature of the program's content as conveyed in the metadata. Offers are assigned to programs by internal Merchandiser offer rules, so information about price and availability within an offer window is visible to subscribers.

The Merchandiser UI enables you to view a program's details, the media associated with the program (the thumbnail images used to promote the program on the EPG), the program's placement and associations with collections and classifications. You are also able to view details of the offers that apply to the program; these control who is able to view the content based on required permissions.

In addition to viewing program details, you can also use the Merchandiser UI to add programs to collections and genre classifications. See How to Add Programs to a Collection and How to Add a Genre Classification Association for details.

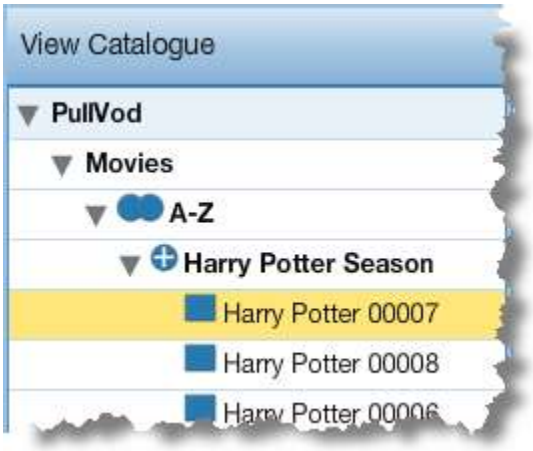
5.2 How to View Program Details

Every program has an associated set of metadata describing that program, providing the parental rating, actors, director, synopsis and other details that can be used to categorise the program and enable it to be easily found on the EPG by subscriber searches.

These details are populated when the program is ingested into the system and you have read only access to them through the Merchandiser UI. In order to change program details, they need to be altered at source and the program then re-ingested via ADI; such editorial control is not currently provided by the UI.

To view a program's details:

1. In the main visualiser view, expand the nodes in the catalogue until the program that you want to view the details for is displayed. This is the finest level of granularity available in the classification hierarchy.



2. Either double click the program, right click and choose View Program from the context menu, or select the program and choose View Program from the Action Selector. All of these actions display the Program Placement and Conditional Access panel in read only mode.

   These actions can either be performed on the program listed in the View Catalogue panel or on the program bar in the visualiser timeline view.

   > **Note** In a system that contains hundreds or even thousands of assets, you can use either the quick or advanced search facility to find the program you want to view and then double click the returned result to open the program's details.

3. Click the Program Details accordion panel. The metadata associated with the program is shown in read only mode. A full description of these fields is provided in Fields on the Program Details Panel, but remember that you can't edit this information in the Merchandiser UI; the program needs to be updated at source and re-ingested to change the metadata. A **Show ADI** button is available in the top right of the panel.

   Click this and the program details fields are replaced by the ADI file that accompanied the program on ingest. This is displayed in read only mode,

so you can scroll through it but not change any content. Click **Show Details** to return to the usual program details display.

4. Click **Close** to return to the visualiser view.

5.2.1 Fields on the Program Details Panel

The fields on the Program Details accordion panel contain the following details:

Table 7 Fields on the Program Details Panel

Field	Description
EPG Title	The title of the program as it will appear in the EPG. If the program is part of a series, then this title is also used for the series name, such as "Harry Potter".
Title	The title of the program. If the program is a part of a series, this is used as the episode name, for example "Harry Potter and the Order of the Phoenix".
Series Info	If the program is a part of a series, then this field contains further details about the series number and the number of the program within that series, such as “series 3, episode 5 of 23”.
Provider	The provider of the program.
Rating	The parental rating of the program.
Year of Production	The year in which the program was made.
Studio Code	The reference code of the studio who produced the program.
Duration	The running time of the program.
Genre/Sub Genre	The genre and sub-genre of the program, such as Entertainment > Family.
Synopsis	A short description of the program.
Marketing Message	A short message to market the program to subscribers.
VOD License Period	Start and end dates and times that define the complete duration of the program's availability.
VOD Availability Periods	Start and end dates and times that define windows in the overall license period when the program is made available on the platform as a VOD offer. The **Offer Type** column defines the type of the VOD offer.
VOD Hiatus Periods	Start and end dates and times that define windows in the license period when the program cannot be made available as a VOD offer on the platform.

Field	Description
Broadcast Date	The date on which the program was broadcast (used to identify correct content for catch up TV).
Actor	The main actors in the program shown in a comma separated list, for example "Daniel Radcliffe, Emma Watson, Rupert Grint".
Director	The director(s) of the program.
Producer	The producer(s) of the program.
Warning	Any warnings that need to be associated with the program, such as for violence, flashing images or bad language.
Aspect Ratio	The aspect ratio of the program, such as the standard 16:9.
Time Conditions	Information about when a program should be shown. For example, a program that contains graphic violence may only be shown after 10pm.
Audio Type	The audio type associated with the program, such as digital surround sound.
Editorial Comments	
A set of fields is shown under the title Editorial Comments. The entries in these fields consist of extra comments added by reviewers when they view the program. As with the other fields on the Program Details panel, these are pre-populated when the program is ingested and are read only.	
Technical	Further information on the format of the program, for example “16:9 letter box format”.
Recap	If the program is a sequel, or part of a series, this field can contain information about the previous instalment to set the scene for the program. For example, for Toy Story 2, this field could include brief details about the original Toy Story.
Trailer	Information about the program’s trailer, such as parental rating and audience suitability.
Presentation	Presentation details such as “anamorphic wide screen”.
Sponsorship	Whether the program has an advertising sponsor and if so, who.
To Be Continued	If there is a sequel to the program, or further episodes in the series, this field contains information about the next instalment.
Warning	Whether the program contains violence, strong language, flashing images, sexual scenes, etc. that need to be raised as warnings to the audience.
Identifying Information	
Media ID	Programs that originated from physical media, such as a tape or disk, inherit the ID of that physical media when it is ingested into the CMS. This is known as the media ID.

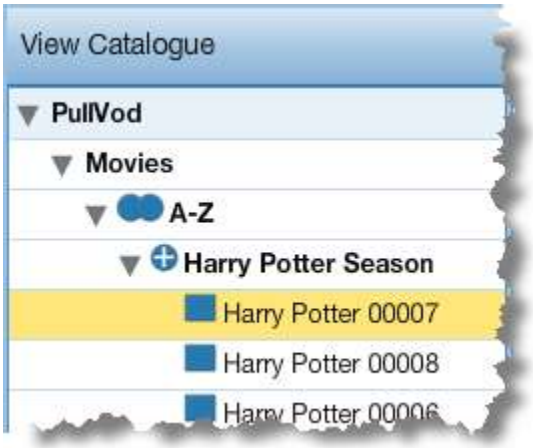
Field	Description
Asset ID	The ID given to the program by the traffic system from the ADI ingest.
Offering ID	A unique ID per program, generated by the system.
Format	SD (standard definition), HD (high definition) or 3D.

5.3 How to View Program Placement

Every program needs to be placed in the catalogue, being associated with classifications, collections or both, so that it appears on the visualiser timeline when it is scheduled to be available on the EPG.

To view details of a program's placement:

1. In the main visualiser view, expand the nodes in the catalogue until the program that you want to view the details for is displayed. This is the finest level of granularity available in the classification hierarchy.



2. Either double click the program, right click and choose **View Program** from the context menu, or select the program and choose **View Program** from the Action Selector. All of these actions display the **Program Placement** panel in read only mode.

> **Note** These actions can either be performed on the program listed in the View Catalogue panel or on the program bar in the visualiser timeline view.

3. The program is shown on the Program Placement panel, listed underneath any collection or classification it has been added to. Hovering your cursor over the program's bar displays a popup containing further

details about the program such as availability and other information from the Program Details panel.

If you move your cursor over the collection or classification's bar, a popup is shown with further details of that collection or classification.

4. Click **Close** to return to the visualiser view.

5.4 How to View Program Media

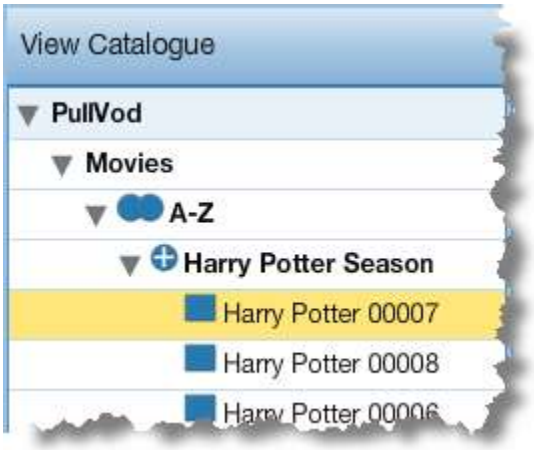
When programs are ingested into the system, images and trailers used to represent the program visually on the EPG are also ingested. The images could be box covers, posters, cover art or stills from the program itself.

> **Note** The file locations to which images and trailers are saved are defined using the Admin tab in the Merchandiser UI. See How To Edit the Content Location for details.

Once ingested, these images and trailers are permanently associated with the programs they represent and can't be edited through the Merchandiser UI. To change the image or trailer, the program has to be re-ingested.

To view the media associated with a program:

1. In the main visualiser view, expand the nodes in the catalogue until the program that you want to view the details for is displayed. This is the finest level of granularity available in the classification hierarchy.



2. Either double click the program, right click and choose **View Program** from the context menu, or select the program and choose **View Program** from the Action Selector. All of these actions display the **Program Placement** panel in read only mode.

> **Note** These actions can either be performed on the program listed in the View Catalogue panel or on the program bar in the visualiser timeline view.

3. Click the **Program Media** accordion panel. The program's box cover thumbnail is displayed with associated **File Name** and **File Size** details. The program's cover art thumbnail is also shown. This is provided so that a larger image can be shown on customer devices for particular classifications. Again, **File Name** and **File Size** details are displayed. The program's trailer is shown with details of the **File Name**, **File Size**, **Duration** and **Cart Number**. This information is read only and cannot be changed in the Merchandiser UI. To view the program's trailer, click the play control in the top left corner of the trailer image .

4. Click **Close** to return to the visualiser view.

5.5 How to View Program Offers

When a program is ingested into Merchandiser, it is associated with an offer which defines how it is made available to subscribers. The offer details include the start and end dates of the offer, the rental duration, the cost of the offer and its currency. It is possible for a program to have multiple offers associated with it, for example if it is made available in both archive and catch up TV catalogues. You can see details of the offers associated with a program on the Program Offers accordion panel.

To view a program's offer details:

1. In the main visualiser view, expand the nodes in the catalogue until the program that you want to view the offers for is displayed. This is the finest level of granularity available in the classification hierarchy.

2. Either double click the program, right click and choose **View Program** from the context menu, or select the program and choose **View Program** from the Action Selector. All of these actions display the Program Placement panel in read only mode.

> **Note** These actions can either be performed on the program listed in the View Catalogue panel or on the program bar in the visualiser timeline view.

3. Click the **Program Offers** accordion panel. Offer availability windows, represented by black bars on the timeline, show when the program is available as an archive or catch up TV offer. A program can have both archive and catch up TV offers associated with it, the catch up TV offer expiring after a limited number of days and the archive offer lasting longer. The type of offer window is shown in white text on these black bars.
4. White bars representing individual offers are shown under the respective Archive and Catch Up bars. These bars display the name and type of the offer. Hover over an offer bar and a tooltip is displayed containing a range of details in relation to the offer:
   - The start/end date of the offer (From / To)
   - The offer's expiry date
   - The rental duration
   - Planner retention (how long it remains on the device planner)
   - The catalogue names with which the offer is associated.
5. Right click on an offer bar and a popup menu is displayed including a **View offer price** option. Select this and a popup is shown containing the price, currency and region of the offer. Click **OK** to close the dialog and return to the Program Offer accordion panel.
6. Click **Close** to return to the visualiser view.

5.6 How to Add a Genre Classification Association

Classifications are a means of categorising content into meaningful groups for navigational purposes on the EPG. Different types of classifications exist to form a hierarchy which can then be represented visually in a tree view. For further details on classifications, see Classification Overview.

There will be occasions when you need to add a program to a classification, such as when a new piece of content is ingested that needs to be associated with multiple classifications, for example Star Wars could be added to all of the Family, Action and Sci Fi classifications.

> **Note** You are not able to add genre classification associations to a program that doesn't currently have an offer.

To add a genre classification association to a program:

1. Expand the tree view in the **View Catalogue** panel to show the program you want to add to a classification. Click on the program, either in the tree or on the timeline, and choose **Edit Program** from the Action Selector.
2. The **Program Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

   > **Note** You are also able to reach this point by:
   > - Right clicking on the program in the Catalogue View and choosing **View Program** from the context menu. The Program Placement panel is shown but in read only mode. Click the padlock icon to unlock the program for editing.
   > - Searching for the program using either the quick or advanced search facility. Double click the returned search result to open the program's details in read only mode. Click the padlock icon to unlock the program for editing.

3. Click on the program in the timeline and either choose **Add Genre Classification** from the Action Selector, or right click the program and select Add Genre Classification from the context menu.
4. You are taken to the contextual search screen to find the classification you want to add your program to. The search screen has certain initial context filters loaded, so by default you are only searching for classifications that fit the criteria of your program. The availability fields are pre-populated with the dates you defined in the Set Duration dialog, so you will only be returned results that are valid for this period. Click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.
5. Your search results are returned in a grid format. Drag and drop the classifications you want to add the program to from the Search Results grid to the lower Selected Search Results grid. If you need to run another search to find more classifications, click **Search Again**. If you have chosen all the classifications you need, click **Add Genre Classification**.
6. You are returned to the Program Placement panel and your selected classification associations are now shown on the timeline. You are able to manage the details of these classification associations; see How to Modify a Genre Classification Association for details.

7. Click **Save** and your classification associations are committed. Click **Close** to return to the main visualiser view.

5.7 How to View a Program's Classification Associations

Every program needs to be associated with at least one classification or collection so that it is a part of the catalogue and appears on the visualiser timeline. A program could be associated with multiple classifications. For example, a Harry Potter film could have associations with both the Family and Action film classifications.

To view a program's classification association details:

1. Expand the tree in the **View Catalogue** panel to show the program you want to view the associations for. Click on the program, either in the tree or the timeline, and choose **View Program** from the Action Selector.
2. The **Program Placement** panel is displayed in read only mode, indicated by the closed padlock at the bottom of the screen.

> **Note** You are also able to reach this point by:
> - Right clicking on the program in the Catalogue View and choosing **View Program** from the context menu.
> - Searching for the program using either the quick or advanced search facility. Double click the returned search result to open the program's details in read only mode.

3. You are able to review the program's existing classification associations. If the program is associated with multiple classifications, then all of these associations, and the program's scheduling within them, are shown on the timeline. To view the full details of a particular classification, double click on the relevant classification bar.
4. Click **Close** to return to the main visualiser view.

5.8 How to Modify a Genre Classification Association

Once you have created an association between a program and a classification, you are able to manage that association in the **Program Placement** panel. For example, you may have set up an association between a James Bond film and an Action movies classification, but you want to change the duration for which the program is offered within that classification.

To manage a program's association with a classification:

1. Expand the tree in the **View Catalogue** panel to show the program for which you want to change the classification associations. Click on the program, either in the tree or the timeline, and choose **Edit Program** from the Action Selector.
2. The **Program Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by:
> - Right clicking on the program in the Catalogue View and choosing **View Program** from the context menu. The Program Placement panel is shown but in read only mode. Click the padlock icon to unlock the program for editing.
> - Searching for the program using either the quick or advanced search facility. Double click the returned search result to open the program's details in read only mode. Click the padlock icon to unlock the program for editing.

3. Right click on the bar of the program you want to manage and a range of options are presented in the context menu. Select the operation you need according to the table below:

Table 8 Manage programs context menu options

Menu Option	Description	Illustration
Snap time sliders to bar	If you have changed the duration or placement of the program within a classification, use this option to snap the time sliders to the start and end of the updated program, rather than their default position.	
Split Classification Association	Splits the program's association with the classification. The program bar is split in two, and each section can now have association dates and times defined. You may want to use this option to make a program available for a defined period, then to withdraw it for a period, and then make it available again.	

Add Genre Classification	5.9	**Enables you to add the program to more classifications. See How to View Program Offers** When a program is ingested into Merchandiser, it is associated with an offer which defines how it is made available to subscribers. The offer details include the start and end dates of the offer, the rental duration, the cost of the offer and its currency. It is possible for a program to have multiple offers associated with it, for example if it is made available in both archive and catch up TV catalogues. You can see details of the offers associated with a program on the Program Offers accordion panel. **To view a program's offer details:** 1. In the main visualiser view, expand the nodes in the catalogue until the program that you want to view the offers for is displayed. This is the	N/A

finest level of granularity available in the classification hierarchy.

2. Either double click the program, right click and choose **View Program** from the context menu, or select the program and choose **View Program** from the Action Selector. All of these actions display the Program Placement panel in read only mode.

> **Note** These actions can either be performed on the program listed in the View Catalogue panel or on the program bar in the visualiser timeline view.

3. Click the **Program Offers** accordion panel. Offer availability windows, represented by black bars on the timeline, show when the

program is available as an archive or catch up TV offer. A program can have both archive and catch up TV offers associated with it, the catch up TV offer expiring after a limited number of days and the archive offer lasting longer. The type of offer window is shown in white text on these black bars.

4. White bars representing individual offers are shown under the respective Archive and Catch Up bars. These bars display the name and type of the offer. Hover over an offer bar and a tooltip is displayed containing a range of details in relation to the offer:
   - The start/end date of the offer (From / To)
   - The offer's expiry date
   - The rental duration
   - Planner retention (how long it remains

Menu Option	Description	Illustration
	on the device planner) ■ The catalogue names with which the offer is associated. 5. Right click on an offer bar and a popup menu is displayed including a **View offer price** option. Select this and a popup is shown containing the price, currency and region of the offer. Click **OK** to close the dialog and return to the Program Offer accordion panel. 6. Click **Close** to return to the visualiser view. How to Add a Genre Classification Association for details.	
Set Association Dates	Opens a **Set Duration** dialog in which you can define start and end dates and times for the program within the classification. Enter the dates and times required and click **OK**. The program bar's length and position is changed to represent the revised dates and duration of availability within the classification.	
Remove Associations	Enables you to remove a program's association from the classification. See How to Delete a Genre Classification Association for details.	N/A
Copy	Makes a copy of the selected program that you can paste in another location on the timeline.	N/A

Menu Option	Description	Illustration
Place time selector	Places the green timeline at a particular point in the program so you are able to see what is scheduled at a specific date and time.	N/A

In addition to these context menu options, you can also use the mouse to drag and drop programs within a classification, and to change the start and end dates by moving the left and right ends of a program bar which become dragable when you move your cursor over them.

7. Click **Save** to commit your changes and **Close** to return to the main visualiser view.

5.10 How to Delete a Genre Classification Association

There may be occasions on which you need to remove the association between a program and a classification, for example if you realise that a program has been associated with an unsuitable classification by mistake.

> **Note** You can only remove a program's association from a classification if the start date of the association has not yet been reached. If a program is already available to subscribers as part of a classification, then you cannot remove it, but should change the end date of the association instead so that the program is no longer available.

To remove the association between a program and a classification:

1. Expand the tree in the **View Catalogue** panel to show the program you want to remove from a classification. Click on the program, either in the tree or on the timeline, and choose **Edit Program** from the Action Selector.
2. The **Program Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by:

- Right clicking on the program in the Catalogue View and choosing **View Program** from the context menu. The Program Placement panel is shown but in read only mode. Click the padlock icon to unlock the program for editing.
- Searching for the program using either the quick or advanced search facility. Double click the returned search result to open the program's details in read only mode. Click the padlock icon to unlock the program for editing.

3. The program is shown on the timeline with all of the classification associations that currently exist for that program, and when these associations are scheduled. If a program is associated with multiple classifications, then each of these classifications is represented by a different bar on the timeline.

4. Click the instance of the program for which you want to remove the classification association and choose **Remove Associations** from the Action Selector. The program's association to the classification is removed and the classification bar is deleted from the timeline. This action doesn't delete the program, it just removes its association with this particular classification. If you need to remove multiple associations, then it is quicker to do that in this workflow rather than follow the process explained in How to Remove a Program from a Classification; multiple associations can be removed from a single screen, rather than needing to open each classification separately.

Note You can also right click on a program and choose **Remove Associations** from the context menu.

> An alternative method to remove a program from a classification is to use the search facility to find content to add to the classification. On the search results screen, the content currently associated with the classification is shown in the **Selected Search Results** grid. Choose the program you want to remove from the classification and drag it up to the Search Results grid. Click **Add to Classification** to confirm your change.

5. Click **Save** and your revised associations are committed. Click **Close** to return to the main visualiser view.

5.11 How to View a Program's Collection Associations

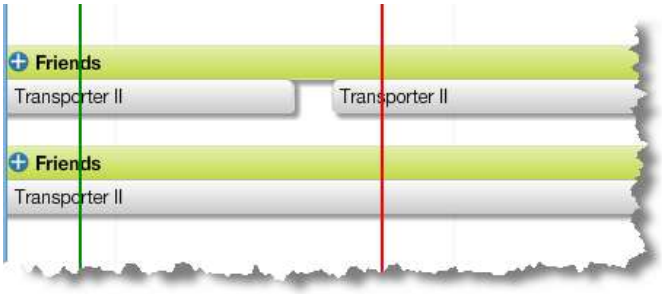
Programs can be associated with one or more collections to promote that content to subscribers. For example, Star Wars could have associations with a Sci Fi collection, a special Star Wars Season collection and a Harrison Ford Season collection.

To view a program's collection associations:

1. Expand the tree in the **View Catalogue** panel to show the program you want to view the collection associations for. Click on the program, either in the tree or the timeline, and choose **View Program** from the Action Selector.
2. The **Program Placement** panel is displayed in read only mode, indicated by the closed padlock at the bottom of the screen.

> **Note** You are also able to reach this point by:
> - Right clicking on the program in the Catalogue View and choosing **View Program** from the context menu.
> - Searching for the program using either the quick or advanced search facility. Double click the returned search result to open the program's details in read only mode.

3. The program is shown on the timeline with all of the collection associations that currently exist for that program, and when these associations are scheduled. If a program is associated with multiple collections, then each of these collections is represented by a different bar on the timeline. To view the full details of a particular collection, double click on the relevant collection bar.



4. Click **Close** to return to the main visualiser view.

6 Collections

6.1 Collection Overview

Collections are a means of manually grouping related programs and presenting them to subscribers on the set top box to aid navigation and advertise availability. For example, a collection could be created for a particular season of films, such as a Harry Potter or James Bond season, or to advertise the work of a particular actor or director, so a Clint Eastwood or Steven Spielberg season.

A collection has a defined lifetime and consists of multiple program associations with each of these programs being scheduled individually within the collection's lifetime. For example, if the Lord of the Rings trilogy is grouped as a collection and scheduled over a three week period, each of the individual films may only be available for a week within that larger window.

The grouping of programs within a collection is only significant from a presentational perspective; a subscriber cannot purchase a collection as a single entity and any offers associated with the individual programs within the collection are unaffected by the grouping.

Collections and Classifications

A collection is not visible to subscribers until it is associated with at least one classification. It is also possible to create associations between collections and multiple classifications, so a Harry Potter collection might be associated with classifications for Family movies, Fantasy movies and Action/Adventure movies.

Collections are designed to have a smaller volume of content in comparison with classifications. While a classification may potentially contain thousands of items of content, a collection can only contain up to 99 items.

You also have greater creative control over a collection than a classification. While a single thumbnail image, such as a box cover, is associated with an entire classification block, every collection has its own thumbnail image which can be tailored much more closely with the collection's content. Every collection must have an image specified as they are used to advertise collections on the STB.

This section explains how to create a collection, add programs and thumbnails to it, schedule the collection and add it to a classification. The timeline views that you see during the collection workflow represent the STB view of the

catalogue, so programs, collections and classifications are only shown on the timeline when a subscriber would be able to see them on the STB.

6.2 How to Create a Collection

The Merchandiser UI supports two methods of collection creation; you can either create the framework for a collection and then use the search facility to find programs to add to the collection, or you can search for programs first and then create a collection from your selected results. Both methods are equally valid, so both are covered in this topic.

6.2.1 Create a Collection and Search for Programs

To create a collection and then populate it with programs:

1. Navigate to the position in the classification hierarchy where you want to add your collection and scroll to the future time when you want the collection to be available. Select the genre classification (the A-Z listing classification) to which you want to add your collection and choose **Create Collection** from the Action Selector.

   > **Note** You can also create a collection without first selecting a genre classification by choosing Create Collection from the Action Selector. In this case, you need to select a placement for the collection later in the process; this allows for a partially completed collection to be saved before it is associated with a classification.

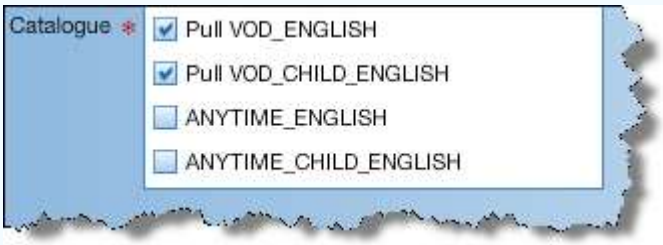
2. The collection accordion panels are displayed with Collection Details being the only active panel. You need to complete the mandatory fields here to create your collection and enable the other panels.

In the **Collection Name** field, enter a meaningful name for your collection, such as Harry Potter Season. Select a **Collection Provider** from the drop down list provided. This is a mandatory field as "provider" is a search criteria on the EPG. A provider will usually be a channel, such as Sky Premiere. An option of “Various” is available for situations where your collection contains content from a variety of different providers.

> **Note** Your choice of collection provider cannot be changed once the collection is saved.

Using the calendar controls provided, enter start and end dates for your collection in the relevant fields. The dates you enter here determine the availability window for the collection when it will be made available on the EPG. In the **Synopsis** field, enter some brief text describing the collection you are creating. This is seen by subscribers on the EPG, so it needs to advertise the collection you are creating. The **Group ID** field is empty and disabled. When you save your collection, a system generated group ID is produced for the collection and is then associated with it automatically.

> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then an additional **Catalogue** field is shown under the Group ID field. This contains a list of all the available catalogues in your system; select the checkboxes of each catalogue to which you want to add your collection.

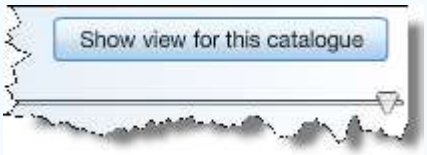
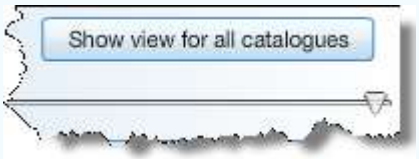


If your Merchandiser is configured with a single catalogue, this field is hidden.

In the **Genre/Sub Genre** table, enter the genre or sub-genre(s) to which your collection is to belong. Click the **add** button (⊞) to add an active row to the table. Select the relevant entry from the drop down list. You can add multiple genres and sub-genres if necessary by clicking **add** again and repeating the selection process. To remove a genre or sub-genre association, select the relevant entry in the table and click **remove** (✖).

> **Note** The Genre/Sub Genre table is optional.

3. Once you have made entries in all fields on the Collection Details panel, the other collection panels are made available. Click the **Collection Programs** panel. The timeline view is shown with the start and end dates of your collection pre-populated. This availability window is shown on the timeline by a pair of vertical black lines (time sliders). By default, these represent the collection's start and end dates, but you can move them to alter the dates between which programs will be associated with the collection, as long as they remain within the collection's lifetime. The availability fields reflect the dates shown by the time sliders and allow you to add programs to the collection for a precise period of time. For example, you may want a certain program to appear in the collection at 12pm on the 1st of June, and then be removed from the collection again at 12pm on the 8th of June. It is more accurate to define the dates in the availability fields that by using the time sliders.

> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then an additional button is shown on the Collection Programs panel. This button enables you to see the collection's availability in either the particular catalogue in which you created it, or across all catalogues held in the system. The label on the button toggles between **Show view for this catalogue** and **Show view for all catalogues**, depending on which view you currently have open:
>
> 
>
> 
>
>
> If your Merchandiser is configured with a single catalogue, this button is hidden.

4. To add programs to your collection, either right click on the timeline and select **Add Programs** from the popup context menu, or choose **Add Programs** from the Action Selector at the bottom of the screen. You are taken to the advanced search screen to find the programs that you want to add to your collection.
5. The search screen has certain initial contextual filters loaded, so by default you are searching for programs that fit the criteria of your collection. The availability fields are pre-populated with the dates defined by the time sliders on the Collection Programs panel, so you will only be returned results that are valid for this period. Enter any further required search criteria and click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.
6. Your search results are returned in a grid format. Drag and drop the programs you want to include in your collection from the Search Results grid to the lower Selected Search Results grid. If you need to run another search to find more programs, click **Search Again**. If you have all the programs you want in your collection, click **Add To Collection**.

7. You are returned to the Collection Programs panel and your selected programs are now shown in the timeline under your newly created collection.

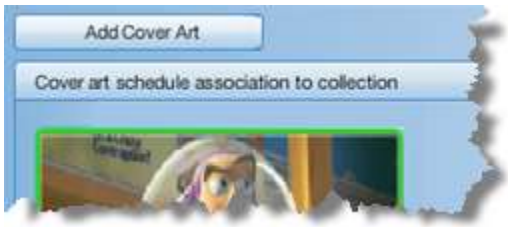
You are able to manage the scheduling and placement of these programs within the collection; see How to Manage Programs Within a Collection for details.

8. You need to define a box cover thumbnail for your collection. Without adding this image, which is used to promote the collection visually on the EPG, you cannot save your collection. Click the **Collection Media** panel.

The duration of your collection is shown at the top of the panel. Click **Add Box Cover**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the image is stored that you want to use for the collection. Select the image you need and click **Open**.

9. Your imported image is displayed in the **Box Cover schedule association to collection** area of the panel. The image is shown with a start date field underneath and the file name. Your imported image is associated with the collection from the collection's start date onwards. If you subsequently upload a second image, then this becomes the representative image for the collection, superseding the original image.

10. You can also select a cover art image to associate with your collection. This is a larger image than the box cover thumbnail and is used for display on the EPG in instances where more screen real estate is available.



Click **Add Covert Art**. This opens a standard Windows Browse dialog in which you should navigate to the local or network location where the image is stored. Select the image you need and click **Open**.

11. Your imported image is displayed in the **Cover art schedule association to collection** area of the panel. The image is shown with a start date field underneath and the file name. Your imported image is associated with the collection from the collection's start date onwards. If you subsequently upload a second image, then this becomes the representative image for the collection, superseding the original image.

12. Click the **Collection Placement** panel. From here, you can add your collection to a classification so that it appears in the catalogue hierarchy;

if you do not place your collection, it won't be accessible to subscribers. If you selected a genre classification to add your collection to in step 1, then that classification is pre-populated in the Placement screen. A collection can still be associated with multiple classifications, or you can modify the original association. It is easier to add a collection in multiple places through this workflow that by using the classification workflow. The Collection Placement panel is shown with the collection's start and end dates pre-populated and the timeline showing the availability period. Choose the **Add to Genre Classification** option, either by right clicking the timeline and selecting it from the context menu, or by choosing it from the Action Selector.

> **Note** You can only add a collection to a highlights classification in the classification workflow. See How to Add a Program or Collection to a Classification for details.

13. The advanced search screen is displayed with a contextual search for classifications pre-populated. Change the search criteria if required and click **View Results**. Drag and drop the classifications you want to create associations with from the Search Results grid to the Selected Search Results grid. Click **Add Classification Association**.
14. You are taken back to the Collection Placement panel and your collection is now shown as being associated with your selected classification.

15. Click **Save** to commit your collection to the database. This adds the collection to the catalogue hierarchy so it is now visible in the **View Catalogue** panel.

6.2.2 Search for Programs and Create a Collection

To select programs and then create a collection from them:

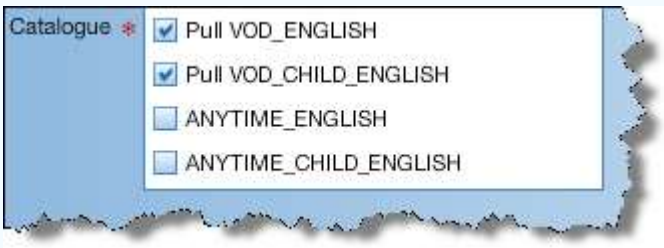
1. Using either the quick search, advanced search or asset search functionality, execute a search to find the programs you want to group into a collection. See the Searches section for a detailed explanation of how to perform searches in the Merchandiser UI.
2. Your search results are returned in a grid format. Drag and drop the programs you want to include in your collection from the Search Results grid to the lower Selected Search Results grid. If you need to run another search to find more programs, click **Search Again**. If you have all the programs you want in your collection, click **Create Collection**. You can only add a maximum of 99 programs to a collection.

3. The **Collection Details** panel is displayed. You need to complete the mandatory fields here to create your collection and enable the other panels.

In the **Collection Name** field, enter a meaningful name for your collection, such as Harry Potter Season. Select a **Collection Provider** from the drop down list provided. This is a mandatory field as "provider" is a search criteria on the EPG. A provider will usually be a channel, such as Sky Premiere. An option of “Various” is available for situations where your collection contains content from a variety of different providers.

> **Note** Your choice of collection provider cannot be changed once the collection is saved.

Using the calendar controls provided, enter start and end dates for your collection in the relevant fields. The dates you enter here determine the availability window for the collection when it will be made available on the EPG. In the **Synopsis** field, enter some brief text describing the collection you are creating. This is seen by subscribers on the EPG, so it needs to advertise the collection you are creating. The **Group ID** field is empty and disabled. When you save your collection, a system generated group ID is produced for the collection and is then associated with it automatically.

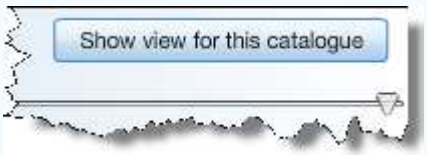
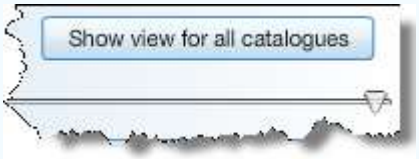
> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then an additional **Catalogue** field is shown under the Group ID field. This contains a list of all the available catalogues in your system; select the checkboxes of each catalogue to which you want to add your collection.
>
> 
>
>
> If your Merchandiser is configured with a single catalogue, this field is hidden.

In the **Genre/Sub Genre** table, enter the genre or sub-genre(s) to which your collection is to belong. Click the **add** button (⊞) to add an active row to the table. Select the relevant entry from the drop down list. You can add multiple genres and sub-genres if necessary by clicking **add** again and repeating the selection process. To remove a genre or sub-genre association, select the relevant entry in the table and click **remove** (✖).

> **Note** The Genre/Sub Genre table is optional.

4. Once you have made entries in all fields on the Collection Details panel, the other collection panels are made available. Click the **Collection Programs** panel. The timeline view is shown with the start and end dates of your collection pre-populated. This availability window is shown on the timeline by a pair of vertical black lines (time sliders). In addition, the collection itself is shown on the timeline populated with the programs you selected in steps 1 and 2. You can add further programs to your collection if you need to; see How to Add Programs to a Collection for details.

You are able to manage the scheduling and placement of these programs within the collection; see How to Manage Programs Within a Collection for details.

> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then an additional button is shown on the Collection Programs panel. This button enables you to see the collection's availability in either the particular catalogue in which you created it, or across all catalogues held in the system. The label on the button toggles between **Show view for this catalogue** and **Show view for all catalogues**, depending on which view you currently have open:
>
> 
>
> 
>
>
> If your Merchandiser is configured with a single catalogue, this button is hidden.

5. You need to define a box cover thumbnail for your collection. Without adding this image, which is used to promote the collection visually on the EPG, you cannot save your collection. Click the **Collection Media** panel.

The duration of your collection is shown at the top of the panel. Click **Add Box Cover**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the image is stored that you want to use for the collection. Select the image you need and click **Open**.

6. Your imported image is displayed in the **Box Cover schedule association to collection** area of the panel. The image is shown with a start date field underneath and the file name. Your imported image is associated with the collection from the collection's start date onwards. If you subsequently upload a second image, then this becomes the representative image for the collection, superseding the original image.

7. You can also select a cover art image to associate with your collection. This is a larger image than the box cover thumbnail and is used for display on the EPG in instances where more screen real estate is available.

Click **Add Covert Art**. This opens a standard Windows Browse dialog in which you should navigate to the local or network location where the image is stored. Select the image you need and click **Open**.

8. Your imported image is displayed in the **Cover art schedule association to collection** area of the panel. The image is shown with a start date field underneath and the file name. Your imported image is associated with

the collection from the collection's start date onwards. If you subsequently upload a second image, then this becomes the representative image for the collection, superseding the original image.

9. Click the **Collection Placement** panel. From here, you can add your collection to a classification so that it appears in the catalogue hierarchy; if you do not place your collection, it won't be accessible to subscribers. A collection can be associated with multiple classifications, and it is easier to add it in multiple places through this workflow that by using the classification workflow. The Collection Placement panel is shown with the collection's start and end dates pre-populated and the timeline showing the availability period. Choose the **Add to Genre Classification** option, either by right clicking the timeline and selecting it from the context menu, or by choosing it from the Action Selector.

> **Note** You can only add a collection to a highlights classification in the classification workflow. See How to Add a Program or Collection to a Classification for details.

10. The advanced search screen is displayed with a contextual search for classifications pre-populated. Change the search criteria if required and click **View Results**. Drag and drop the classifications you want to create associations with from the Search Results grid to the Selected Search Results grid. Click **Add Classification Association**.
11. You are taken back to the Collection Placement panel and your collection is now shown as being associated with your selected classification.

12. Click **Save** to commit your collection to the database. This adds the collection to the catalogue hierarchy so it is now visible in the **View Catalogue** panel.

6.3 How to Modify the Details of a Collection

There may be occasions when you want to change the basic details of a collection, such as if you want to extend the end date so that it is available to subscribers for a longer duration, or change the collection's title.

To modify the details of a collection:

1. Expand the tree in the **View Catalogue** panel to show the collection you want to edit. Click on the collection, either in the tree or the timeline, and choose **Edit Collection** from the Action Selector or context menu.
2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

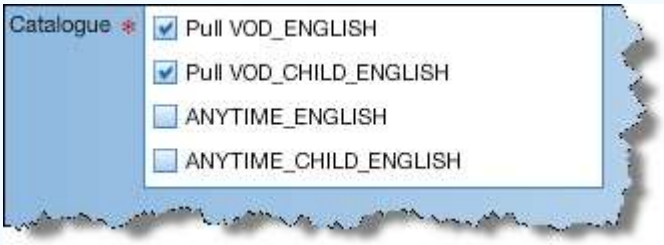
> **Note** You are also able to reach this point by:
> - Right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.
> - Searching for the collection using either the quick or advanced search facility. Double click the returned search result to open the Collection Placement panel in read only mode. Click the padlock icon to unlock the collection for editing.

3. Click the **Collection Details** panel. The existing collection details are shown. You are able to change the collection's **Name** and **Synopsis** at any

time during the life of the collection, but the collection's start and end dates can only be changed if they are in the future; you are not able to change historic data. For example, if a collection has already started and is currently available to subscribers, you cannot change the start date. The **Provider** and **Group ID** fields are read only. The Provider cannot be changed once the collection has been created, and the Group ID is a system generated value.

In the **Genre/Sub Genre** table, you can add or remove associations between the collection and any genres or sub-genres in the system. Use the **add** ( ) button to create a new row in the table, or select a populated row and click **remove** ( ) to delete an existing entry.

Note If your implementation of the Merchandiser includes support for multiple catalogues, then an additional **Catalogue** field is shown under the Synopsis filed. This contains a list of all the available catalogues in your system; select the checkboxes of each catalogue to which you want to add your collection.



If your Merchandiser is configured with a single catalogue, this field is hidden.

4. If you modify the start or end date of the collection and this either truncates or removes the collection's association with an editorially controlled classification, you are shown a message listing the classifications which have been affected.
5. If you change the collection's end date to shorten the life of the collection and this impacts on the collection's associations with either a program or genre classification, Merchandiser automatically truncates the association so that the association end date reflects the revised collection end date.
6. Click **Save** to commit your changes and **Close** to return to the main visualiser view. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.4 How to Delete a Collection

There may be occasions when you want to delete a collection, for example if a future collection is no longer required and can be removed from the catalogue before it goes live.

To delete a collection:

1. Expand the tree in the **View Catalogue** panel to show the collection you want to delete. Click on the collection, either in the tree or the timeline, and choose **Delete Collection** from the Action Selector or context menu.

   > **Note** You could also choose to edit a collection, select it on the Collection Placement panel, and choose Delete Collection from the Action Selector.

2. A confirmation message is shown asking if you are sure you want to delete the collection. Click **Yes**.
3. You are returned to the main visualiser view and your selected collection has been removed from both the timeline view and the classification tree shown in the View Catalogue panel.

> **Note** You are only able to delete a collection that is scheduled for the future. If a collection has already ended, or if it is currently available, you are not able to delete it. If you try, you will be shown an error message and returned to the visualiser view. If you want to end an existing collection, change the end date to the current date/time.

6.5 How to View a Collection

You are able to view the details of an historic, existing or future collection at any time to review information regarding name and date details, program and classification associations, placement, scheduling and thumbnails. While the process for viewing a collection displays the information in read only format, it is easy to then unlock the relevant panels for editing if required, as long as the collection is either current or scheduled for the future; you cannot edit a collection that has already ended.

To view a collection:

1. Expand the tree in the **View Catalogue** panel to show the collection you want to view. Click on the collection, either in the tree or the timeline, and choose **View Collection** from the Action Selector or context menu.
2. The **Collection Details** panel is displayed in read only mode, indicated by the closed padlock at the bottom of the screen.

> **Note** You are also able to reach this point by:
> - Right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu.
> - Searching for the collection using either the quick or advanced search facility. Double click the returned search result to open the collection's details in read only mode.
> - Double clicking the collection in the Catalogue View or visualiser.

3. You are able to review the existing collection details. The **Collection Program, Media, Offer** and **Placement** panels are also available to view.
4. Click **Close** to return to the main visualiser view.

6.6 How to Add Programs to a Collection

By definition, a collection is a group of related programs. There may be occasions when you want to add programs to an existing collection, such as when a collection has been added as a placeholder for a future date and it now needs to be populated with programs.

The instructions below describe how to add a program to an existing collection. To add programs to a new collection as you are creating it, see How to Create a Collection.

To add a program to an existing collection:

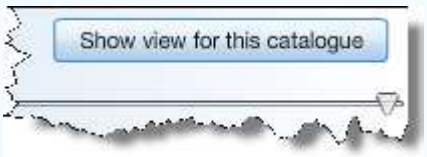
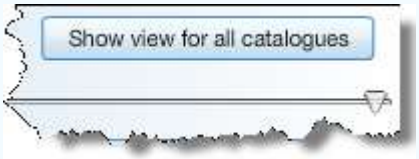
1. Expand the tree in the **View Catalogue** panel to show the collection to which you want to add a program. Click on the collection, either in the

tree or the timeline, and choose **Edit Collection** from the Action Selector or context menu.

2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by:
>
> - Right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.
> - Searching for the collection using either the quick or advanced search facility. Double click the returned search result to open the Collection Placement panel in read only mode. Click the padlock icon to unlock the collection for editing.

3. Click the **Collection Programs** panel. This shows the start and end dates of the collection and the programs currently associated with it. By default, the time sliders are set to the start and end dates of the collection. You can move the sliders to a different date range, as long as it's within the original collection dates, before choosing to add programs to the collection. This will add programs to a specified period within the collection.

> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then an additional button is shown on the Collection Programs panel. This button enables you to see the collection's availability in either the particular catalogue in which you created it, or across all catalogues held in the system. The label on the button toggles between **Show view for this catalogue** and **Show view for all catalogues**, depending on which view you currently have open:
>
> 
>
> 
>
>
> If your Merchandiser is configured with a single catalogue, this button is hidden.

Choose **Add Programs** from the Action Selector, or right click on the collection in the timeline view and select Add Programs from the popup context menu. If your collection already contains programs and you want to add further programs that overlap with the time ranges of the originals, the previously selected programs may be removed from the

collection to be replaced by the new programs. For example, you already have Star Wars assigned to a collection from June 1st to June 15th. If you try to add The Empire Strikes Back from June 8th to June 15th, then Star Wars may be removed from the collection to make room for The Empire Strikes Back on the defined dates. If your selected start date intersects with any existing program associations, a warning message is displayed stating that the contents of the collection may be replaced by the programs you are about to select. Click **OK** to clear the message and continue.

2. The **Advanced Search** screen is displayed. Enter your required search criteria and click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.

> **Note** The availability date fields on the search screen are pre-populated with the dates of the time sliders from the Collection Programs panel, so you will only be returned results that are valid for this period.

3. Your search results are returned in a grid format. Drag and drop the programs you want to add to your collection from the Search Results grid to the lower **Selected Search Results** grid. You can add up to 99 programs to a collection; the slots in the Selected Search Results grid are numbered, and you can scroll through the pages of the selected programs if required using the page forward/back arrows provided.

4. If you need to run another search to find more programs, click **Search Again**. If you have all the programs you want in your collection, click **Add To Collection**.
5. You are returned to the **Collection Programs** panel and your selected programs are now shown in the timeline under your collection. You are able to manage the availability and placement of these programs within the collection; see How to Manage Programs Within a Collection for details.
6. Click **Save** and your changes are committed to the database. Click **Close** and you are returned to the main visualiser view where your newly added programs are now visible as part of the collection. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen

for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.7 How to Manage Programs Within a Collection

Once you have created a collection and added programs to it, you are able to manage those programs in the **Collection Programs** panel. For example, you may have created a collection featuring the Lord of the Rings trilogy, but you want to manage the programs so that they are available in sequence over three consecutive weeks without one film's availability overlapping with another's.

To manage programs within a collection:

1. Expand the tree in the **View Catalogue** panel to show the collection whose programs you want to manage. Click on the collection, either in the tree or the timeline, and choose **Edit Collection** from the Action Selector or context menu.
2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.

3. Click the **Collection Programs** panel. This shows the collection on the timeline with the programs that form the collection listed below.

4. Right click on the program you want to manage and a range of options are presented in the context menu. Select the operation you need according to the table below:

Table 9 Manage programs context menu options

Menu Option	Description	Illustration
Add Programs	Enables you to add programs to the collection. See How to Add Programs to a Collection for details.	N/A
Set Association Dates	Opens a **Set Duration** dialog in which you can define start and end dates and times for the program within the collection. Enter the dates and times required and click **OK**. The program bar's length and position is changed to represent the revised dates and duration of availability within the collection.	
Remove Association	Enables you to remove a program from the collection. See How to Remove a Program from a Collection for details.	N/A
Split Collection Association	Splits the program's association with the collection. The program bar is split in two, and each section can now have association dates and times defined. You may want to use this option to make a program available at the start of the collection, then to withdraw it for a period, and then make it available again.	
Extend bar left	Use this option to extend the program bar so that it is flush left to the time slider. This helps you to make scheduling precise without overlaps or under runs.	N/A
Extend bar right	Use this option to extend the program bar so that it is flush right to the time slider. This helps you to make scheduling precise without overlaps or under runs.	N/A
Snap time sliders to bar	If you have changed the duration or placement of a program within the collection, use this option to snap the time sliders to the start and end of the updated program, rather than their default position at the start and end of the collection.	
Copy asset	Copies the selected program so that you can paste it to another slot in the collection. A copied program cannot be pasted into a time slot already occupied by the original.	N/A

Menu Option	Description	Illustration
Cut asset	Cuts the selected program so that you can paste it to another slot in the collection.	N/A
Paste inside time sliders	This option is only available if you have copied or cut a program first so there is an asset available to paste. The association is pasted so that it starts at the start time slider and ends at the end time slider. In order to achieve this, the association is truncated or extended as required. This helps to make scheduling precise without overlaps or under runs.	N/A
Paste retaining start/end date	This option is only available if you have cut a program first so there is an asset available to paste. Pastes the program while maintaining the program's original start and end dates. This helps to make scheduling precise without overlaps or under runs.	N/A
Move one row up	Shuffles the selected program, and any programs listed above it, up one row in the collection. This operation can only be performed if there is an empty row for the program to be moved into.	N/A
Move one row down	Shuffles the selected program, and any programs listed below it, one row down in the collection. This operation can only be performed if there is an empty row for the program to be moved into.	N/A
Paste	This option is only available if you have copied or cut a program first so there is an asset available to paste. The association is pasted into the slot where your mouse pointer is positioned, starting with the position of the mouse pointer, with the same association length as the original cut/copied association.	N/A
Place time selector	Places the green timeline at a particular point in the collection so you are able to see what is scheduled at a specific date and time.	N/A

Menu Option	Description	Illustration
Move all one row up	Moves all programs up by one slot within the date range indicated by the time sliders, splitting the bars at the left or right time slider if required (associations outside of the time slider duration shall not be moved). This operation can only be performed if there is an empty row for the programs to be moved into.	N/A
Move all one row down	Moves all programs down by one slot within the date range indicated by the time sliders, splitting the bars at the left or right time slider if required (associations outside of the time slider duration shall not be moved). This operation can only be performed if there is an empty row for the programs to be moved into.	N/A

In addition to these context menu options, you can also use the mouse to drag and drop programs within a collection, and to change the start and end dates by moving the left and right ends of a program bar which become dragable when you move your cursor over them.

5. Click **Save** to commit your changes and **Close** to return to the main visualiser view. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.8 How to Remove a Program from a Collection

There may be occasions on which you need to remove a program from a scheduled collection, for example if you realise that an unsuitable program has been added to a collection by mistake.

To remove a program from a collection:

1. Expand the tree in the **View Catalogue** panel to show the collection from which you want to remove a program. Click on the collection, either in

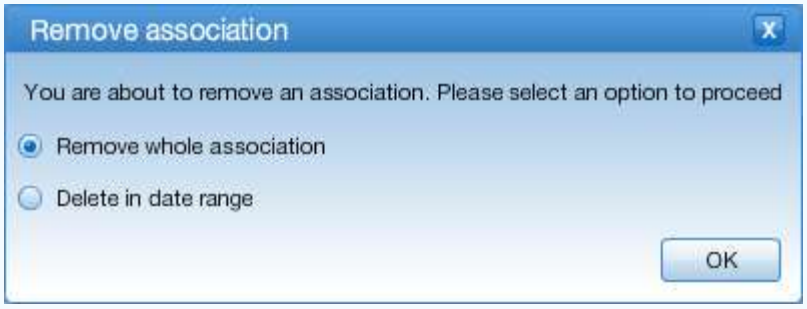
the tree or on the timeline, and choose **Edit Collection** from the Action Selector or context menu.

2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You can also reach this point by right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.

3. Click the **Collection Programs** panel. This shows the collection on the timeline with the programs that form the collection listed below.

4. Click the program you want to remove from the collection and choose **Remove Association** from the Action Selector. The program's association to the collection is removed and the program bar is deleted from the timeline. This action doesn't delete the program, it just removes its association with this particular collection. You cannot remove associations that are in the past.

> **Note** You can also right click on a program and choose **Remove Association** from the context menu. If you do this while your mouse pointer is positioned between the time sliders, and if the program association extends beyond the time sliders, you are presented with the following message:
>
> 
>

> Select the option that applies and click **OK**. If only one of these options applies, this message is not shown and a confirmation popup is shown instead.

5. Click **Save** and your revised program listing is committed. Click **Close** to return to the main visualiser view. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.9 How to View Collection Offers

When you create a collection in Merchandiser, the programs it contains are associated with offers which define how they are made available to subscribers. The offer details include the start and end dates of the offer, the rental duration, the cost of the offer and its currency. It is possible for a collection to have multiple offers associated with it, for example if it is made available in both archive and catch up TV catalogues. You can see details of the offers associated with the programs in your collection on the Collection Offers accordion panel.

To view a collection's offer details:

1. In the main visualiser view, expand the nodes in the catalogue until the collection that you want to view the offers for is displayed.
2. Either double click the collection, right click and choose **View Collection** from the context menu, or select the program and choose **View Collection** from the Action Selector. All of these actions display the Collection Placement panel in read only mode.

> **Note** These actions can either be performed on the program listed in the View Catalogue panel or on the program bar in the visualiser timeline view.

3. Click the **Collection Offers** accordion panel. Offer availability windows, represented by black bars on the timeline, show when the collection is available as an archive or catch up TV offer. A collection can have both archive and catch up TV offers associated with it, the catch up TV offer expiring after a limited number of days and the archive offer lasting longer. The type of offer window is shown in white text on these black bars.
4. White bars representing individual offers are shown under the respective Archive and Catch Up bars. These bars display the name and type of the

offer. Hover over an offer bar and a tooltip is displayed containing a range of details in relation to the offer:

- The start/end date of the offer (From / To)
- The offer's expiry date
- The rental duration
- Planner retention (how long it remains on the device planner)
- The catalogue names with which the offer is associated.

5. Right click on an offer bar and a popup menu is displayed including a **View offer price** option. Select this and a popup is shown containing the price, currency and region of the offer. Click **OK** to close the dialog and return to the Collection Offer accordion panel.
6. Click **Close** to return to the visualiser view.

6.10 How to Add Thumbnail Images to a Collection

Thumbnails are images related to programs, such as posters and box covers, that are used to promote content to subscribers in the EPG. Each collection created using the Merchandiser UI has to have at least one image associated with it so that the collection can be advertised visually on the EPG.

The instructions below describe how to add a box cover or cover art image to an existing collection. To add images to a new collection as you are creating it, see How to Create a Collection.

To add an image to an existing collection:

1. Expand the tree in the **View Catalogue** panel to show the collection to which you want to add an image. Click on the collection, either in the tree or the timeline, and choose **Edit Collection** from the Action Selector or context menu.
2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.

3. Click the **Collection Media** panel. This shows the start and end dates of the collection and the image(s) currently associated with it. You are only able to change the image(s) from now into the future; you are unable to make changes to historic images that have already expired.

4. Click **Add Box Cover**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the image is stored that you want to use for the collection. Select the image you need and click **Open**.
5. Your imported image is displayed in the **Box Cover schedule association to collection** area of the panel. The image is shown with a start date field underneath and the file name. Your imported image is associated with the collection from the collection's start date onwards. If you subsequently upload a second image, then this becomes the representative image for the collection, superseding previous images.

6. Click **Add Covert Art**. This opens a standard Windows Browse dialog in which you should navigate to the local or network location where the image is stored. Select the image you need and click **Open**.
7. Your imported image is displayed in the **Cover art schedule association to collection** area of the panel. The image is shown with a start date field underneath and the file name. Your imported image is associated with the collection from the collection's start date onwards. If you subsequently upload a second image, then this becomes the representative image for the collection, superseding the previous images.

8. Click **Save** and your new image is committed to the collection. Click **Close** to return to the main visualiser view. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.11 How to Add a Collection to a Classification

Once a collection has been created, it can be associated with multiple classifications. For example, a collection created for a season of Harry Potter films may need to be associated with all of the A-Z Movies classification, the Action Movies classification and the Family Movies classification. Collections can also be added to highlights classifications; see How to Add a Program or Collection to a Classification for details.

To add a collection to a classification:

1. Expand the tree in the **View Catalogue** panel to show the collection you want to associate with a classification. Click on the collection, either in the tree or on the timeline, and choose **Edit Collection** from the Action Selector or context menu.
2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You can also reach this point by right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.

3. If you only want the collection to be associated with a classification for a shorter duration than the overall life of the collection, use the time sliders

on the Collection Placement screen to define the start and end dates for the association.

4. Choose **Add to Genre Classification** from the Action Selector or context menu. The advanced search screen is displayed with a contextual search pre-populated to enable you to search for classifications by name. The availability dates are inherited from the start and end dates set using the time sliders on the Collection Placement panel. Change the search parameters if required and click **View Results**.
5. Your search results are returned in a grid format. Drag and drop the classifications you want the collection to be associated with from the Search Results grid to the lower Selected Results Grid. If you need to run another search to find more classifications, click **Search Again**. If you have all the classifications you want to associate the collection with, click **Add Classification Association**.
6. You are returned to the Collection Placement panel and your collection is now shown as being associated with all the classifications you selected in step 5.

7. Click **Save** to commit your new associations. Click **Close** to return to the main visualiser view. By expanding the relevant classifications in the View Catalogue panel, you can see that your collection now appears multiple times in the classification tree, being associated with multiple classifications. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.12 How to Manage a Collection's Association with a Classification

Once you have created an association between a collection and a classification, you are able to manage that association in the **Collection Placement** panel. For example, you may have set up an association between a Harry Potter collection and a Family movies classification, but you want to

change the duration for which the collection is offered within that classification.

To manage a collection's association with a classification:

1. Expand the tree in the **View Catalogue** panel to show the collection whose classification associations you want to manage. Click on the collection, either in the tree or the timeline, and choose **Edit Collection** from the Action Selector or context menu.
2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.

3. Right click on the collection you want to manage and a range of options are presented in the context menu. Select the operation you need according to the table below:

Table 10 Manage collections context menu options

Menu Option	Description	Illustration
Snap time sliders to bar	If you have changed the duration or placement of the collection within a classification, use this option to snap the time sliders to the start and end of the updated collection, rather than their default position.	
Set Association Dates	Opens a **Set Duration** dialog in which you can define start and end dates and times for the collection within the classification. Enter the dates and times required and click **OK**. The collection bar's length and position is changed to represent the revised dates and duration of availability within the classification.	
Remove Association	Enables you to remove a collection's association from the classification. See How to Remove a Collection from a Classification for details.	N/A

Menu Option	Description	Illustration
Split Classification Association	Splits the collection's association with the classification. The collection bar is split in two, and each section can now have association dates and times defined. You may want to use this option to make a collection available for a defined period, then to withdraw it for a period, and then make it available again.	
Place time selector	Places the green timeline at a particular point in the collection so you are able to see what is scheduled at a specific date and time.	N/A

In addition to these context menu options, you can also use the mouse to drag and drop collections within a classification, and to change the start and end dates by moving the left and right ends of a collection bar which become dragable when you move your cursor over them.

4. Click **Save** to commit your changes and **Close** to return to the main visualiser view. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

6.13 How to Remove a Collection from a Classification

Once an association has been created between a collection and a classification, you may want to remove that association, for example if you realise that the association has been made in error and the collection doesn't fit with the classification it has been associated with.

To remove a collection from a classification:

1. Expand the tree in the **View Catalogue** panel to show the collection you want to remove from a classification. Click on the collection, either in the tree or on the timeline, and choose **Edit Collection** from the Action Selector or context menu.

2. The **Collection Placement** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You can also reach this point by right clicking on the collection in the Catalogue View and choosing **View Collection** from the context menu. The **Collection Placement** panel is shown but in read only mode. Click the padlock icon to unlock the collection for editing.

3. Click on the collection you want to remove from a classification. Choose **Remove Association** from the Action Selector and the association between the collection and the classification is broken, so the bars on the timeline representing the collection and classification are removed. You cannot remove an association that is in the past.

> **Note** You could also right click on the required collection and choose **Remove Association** from the context menu.

4. Click **Save** to commit your changes. Click **Close** to return to the main visualiser view. By expanding the relevant classifications in the View Catalogue panel, you can see that the collection's associations with the selected classifications have been removed as the collection is no longer listed. You can click **Cancel** at any point in the process. This cancels your changes and locks the screen for editing, returning it to read only mode. Click **Close** to return to the main visualiser view.

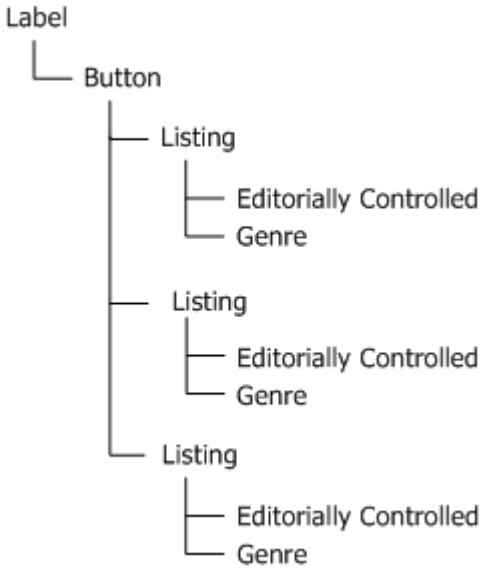
7 Classifications

7.1 Classification Overview

Classifications are a means of categorising content into meaningful groups for navigational purposes on the EPG. Different types of classifications exist to form a hierarchy that can then be represented in a tree view on the Merchandiser UI.

Each type of classification has its own behaviour, both on the EPG and for operational management within the Merchandiser. There are a variety of different classification types which are explained in detail in Classification Types.

These classification types can be linked in different ways to produce classification hierarchies containing the content on your platform. Given the flexibility these classification types enable, an example classification hierarchy may look like this:



In terms of populating this structure with examples of real classification titles, the above structure could look like this:

Within the Merchandiser UI, these classification types are condensed into generic classification blocks to make them easier to work with. For particular customer-specific implementations of the Merchandiser, two additional types of classification block, Branch and Leaf, are also available.

Branch: Branch classification blocks are for the creation of classifications that can only lead to other child classifications further down the hierarchy and that do not contain any actual content. An example would be Movies which leads to further classifications of Family, Action, etc. See How to Create a Branch Classification for details.

Leaf: Leaf classification blocks are used when you are creating classifications that actually contain content. A variety of different leaf classification templates are available in the Merchandiser UI to make it easier to create editorially controlled and genre classifications. See How to Create a Leaf Classification for details.

7.1.1 Classification Keys

A classification key is a unique ID for a classification term. This key can be used on content ingest, so that content can be directed to particular classifications without having to be associated manually. These classification keys need to be fixed across different parts of the system so that they are known universally and not duplicated.

The Merchandiser UI can run either in classification key or bookmark modes. This distinction is made through your system's configuration on the **Admin** tab

of the UI. In the **System Configuration** panel, one of the configuration values is USER_DEFINED_CLASSIF_KEY. If this parameter is set to “true”, then your system uses classification keys. If it is set to “false”, then Merchandiser operates in bookmark mode instead.

If your installation of Merchandiser is configured to run in classification key mode, then you are presented with a **Classification Key** field on the **Classification Details** panel when you create or edit a classification. If classification key mode is not enabled, then you can use the bookmark attribute when creating or editing classifications to perform a similar function. See the appropriate classification creation sections for details of how attributes are defined.

7.2 How to Create a Label Classification

The label classification (sometimes called the root classification) is the highest level in the classification hierarchy and appears at the top of the tree view in the Merchandiser UI. All other classifications and content are arranged under it. You are also able to create secondary label classifications under the top level label if, for example, you want to create different classification hierarchies for different subscriber regions.

To create a label classification:

1. In the main visualiser view, click on the level of the hierarchy at which you want to add a new label classification in either the **View Catalogue** or the timeline view.
2. Choose **Create Label Classification** from the Action Selector or right click on the required level in the tree and select **Create Label Classification** from the context popup. Either action opens the **Classification Details** accordion panel.
3. You need to populate the details of your classification as they will appear on the subscriber’s EPG and in the catalogue tree of the Merchandiser UI. See Fields on the Label Classification Details Panel for further information regarding what you should enter in each field. You need to complete the mandatory fields for your classification before you are able to save your changes.
4. As label classifications can’t be placed on the timeline or have content associated directly with them, there are no other accordion panels to populate. Click **Save** to commit the details of your new label classification.
5. Click **Close** to return to the main visualiser view. Your classification is now shown in both the View Catalogue tree and in the timeline view.

7.2.1 Fields on the Label Classification Details Panel

The fields on the Label Classification Details panel need to be completed as follows:

Table 11 Fields on the Label Classification Details Panel

Field	Description
Name	The name of the classification that will be displayed throughout the EPG. This is a mandatory field.
Classification Key	A unique identifier used by the STB to locate and display the correct hierarchy/catalogue. This is a mandatory field.
Classification ID	A unique identifier for the classification. The field is empty and disabled on entry to the panel. When you save the classification, the ID is generated automatically by the system and will be populated in the UI. When you return to view or edit the details of a classification, the Classification ID is populated with the field being disabled as it cannot be edited.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Available In	A drop down list that can be used to determine the geographic regions in which the classification is available. The list is populated with predefined regional entries. Select the required region(s) to define the classification's availability.
Usage Type	Determines whether the classification is for Archive or Catch up content. Archive is selected by default.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button . A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list.

Field	Description
	A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button .

7.3 How to Create a Generic Classification

> **Note** For particular customer-specific implementations of the Merchandiser UI, different classification types are available. For a definition of these classifications, and instructions on how to create them, see How to Create a Branch Classification and How to Create a Leaf Classification.

As stated in the Classification Overview, classifications are a means of categorising content into meaningful groups to aid navigation around the EPG. Depending on the nature of the content that you want to group together, and where you want to place it in the catalogue hierarchy, the Merchandiser UI provides you with a variety of different classification types. Despite these differences, you create all of the classification types by following the same process.

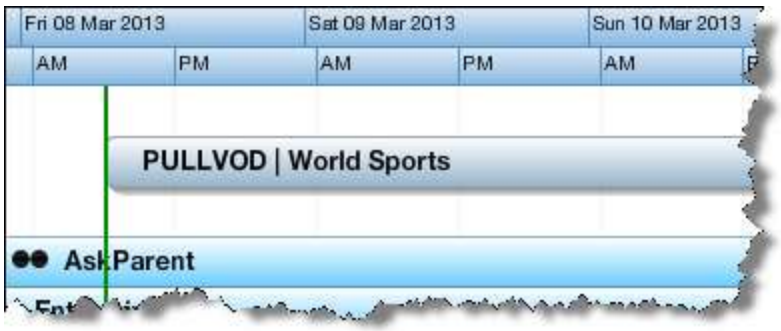
To create a generic classification:

1. In the main visualiser view, click on the level of the hierarchy at which you want to add a new classification in either the **View Catalogue** pane or the timeline view.
2. Choose **Create Classification** from the Action Selector or right click on the required level in the tree and select **Create Classification** from the

context popup. Either action opens the **Classification Details** accordion panel.

3. Choose the classification block type that you want to create from the drop down list provided. For more information on the classification types you can create, see Classification Types. Click **Next**.

4. You need to populate the details of your classification as they will appear on the subscriber's EPG and in the catalogue tree of the Merchandiser UI. See Fields on the Generic Classification Details Panel for further information regarding what you should enter in each field. You need to complete the mandatory fields for your classification before the other classification panels are enabled.
5. Click the **Classification Placement** panel. This is shown with the classification's start and, if defined in step 4, end dates pre-populated. The timeline shows the availability period. Move the classification to the required position in the catalogue hierarchy.

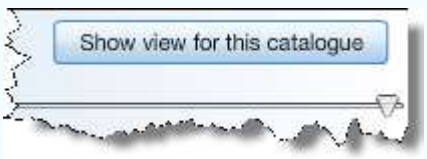


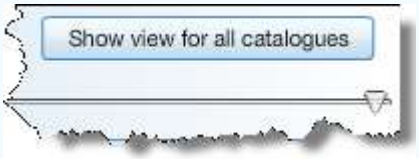
You are able to manipulate the dates of the classification and, if present, the relationship between parent and child classifications on this panel. See How to Edit a Classification Schedule for details.

6. Click the **Classification Programs and Collections** panel.

The timeline view is shown with your new classification. In order to add programs and collections to your classification, you need to define a start date and, depending on the type of classification you are creating, an end date before you are able to search for content. Either use the **Start Date** and **End Date** fields to enter the required time frame, or right click on the classification in the timeline and choose **Snap Time slider** from the context popup menu. This automatically adds a pair of vertical black lines (time sliders) at the start and end of your classification and populates the Start Date and End Date fields. You can move the time sliders to alter the dates between which programs and collections will be associated with the classification, as long as they remain within the classification's life time. The Start and End Date fields reflect the dates shown by the time sliders and allow you to add collections and programs to a classification for a precise period of time.

Note If your implementation of the Merchandiser includes support for multiple catalogues, then an additional button is shown on the Classification Programs and Collections panel. This button enables you to see the classification's availability in either the particular catalogue in which you created it, or across all catalogues held in the system. The label on the button toggles between **Show view for this catalogue** and **Show view for all catalogues**, depending on which view you currently have open:



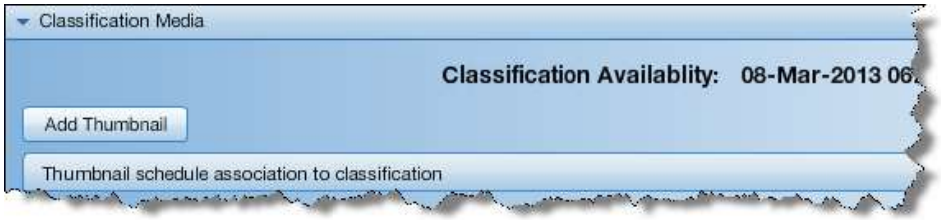


If your Merchandiser is configured with a single catalogue, this button is hidden.

7. To add content to your classification, either right click on the timeline and select **Add Programs/Collections** from the popup context menu, or choose Add Programs/Collections from the Action Selector at the bottom of the screen. You are taken to the advanced search screen to find the content that you want to add to your classification.
8. You can add both individual programs and collections to your classification. For example, if you are creating a "Family" classification, you may want to add a collection for a season of Harry Potter films to be available for a defined period of time. At the same time, you may also want to add one of the films as an individual program which would be available outside of the lifetime of the collection, but which would still be associated with the "Family" classification. The search screen has certain

initial context filters loaded, so by default you are only searching for programs and collections that fit the criteria of your classification. The availability fields are pre-populated with the dates defined by the time sliders on the Classification Programs and Collections panel, so you will only be returned results that are valid for this period. If you have not defined an end date, for example if you are creating a genre classification, then the end date field is blank and is assumed to be the inherited end date of the parent classification. Enter any further required search criteria and click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.

9. Your search results are returned in a grid format. Drag and drop the programs or collections you want to include in your classification from the Search Results grid to the lower Selected Results grid. Your selected results are automatically ordered alphabetically, and are shuffled accordingly as you drop more results in. Only a set number of results are shown in the grid per page, so you may need to scroll through the selected results pages to view all of your selected content. If you need to run another search to find more programs or collections, click **Search Again**. If you have all the content you want in your classification, click **Add to Classification**.
10. You are returned to the **Classification Programs and Collections** panel and your selected content is now shown in the timeline under your newly created classification. You are able to manage the availability and placement of these programs and collections within the classification; see How to Manage Programs and Collections Within a Classification for details.
11. Click the **Classification Media** panel. You need to define a thumbnail for your classification. Without adding a thumbnail, which is used to promote the classification visually on the EPG, you cannot save your classification.



The duration of your classification is shown at the top of the panel. Click **Add Thumbnail**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the images are stored that you want to use as thumbnails for your classification. Either double click the image you need or select it and click **Open**.

12. Your imported thumbnail image is displayed in the **Thumbnail schedule association to classification** area of the panel. Each image is shown with a start date field underneath and the file name. The start date field is disabled; the image you add is used to represent the classification on the EPG until you upload a new thumbnail.

Note Depending on the configuration of your system, you may not need to add a physical image file as a thumbnail and can instead provide a URL at which the thumbnail is stored on the CDN so that it can be retrieved by the EPG as required. The Merchandiser UI provides the ability for you to define multiple thumbnail URLs per classification, so you are able to use different thumbnails for different languages, or for focused or unfocused images in the EPG. If thumbnail URLs are enabled in your version of the Merchandiser UI, then instead of the thumbnail schedule area which is used to upload thumbnail images, you see an **Image Metadata** area on the **Classification Media** panel. To add thumbnail image metadata to your classification:

1. Click the add icon in the **Image Metadata** area. This enables the next available row in the **Classification Media Metadata** table.

2. Click in the relevant cell in the **Image Type** column to enable the list of available image types. Select the appropriate one for your classification:

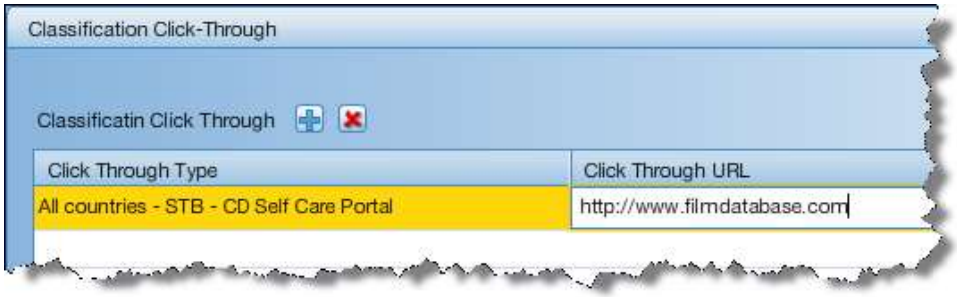
Service Logo (Highlighted) is for images shown on the EPG when the subscriber has selected a classification.

> **Service Logo** is for images shown on the EPG when the subscriber is browsing the available classifications and hasn't yet selected one.
>
> **ARR Filter** is for Automated Recommended Recording, representing classifications containing content that should be automatically recorded by the CPE.
>
> 3. Click in the corresponding **Image URL** field and enter the URL at which the thumbnail image is stored.
> 4. In the **Image Height** and **Image Width** fields, define the size for the thumbnail in pixels as it needs to appear in the EPG.
>
> This ability to define image metadata rather than uploading a physical thumbnail image is set on the **Admin** tab of the Merchandiser UI. In the **System Configuration** panel, one of the configuration values is SYSTEM_CONFIG_UI_IMAGE_METADATA_ONLY_MODE. If this is set to true, then you need to define the thumbnail URLs rather than uploading the image itself.

13. In the **Provider Branding** area, you are able to specify a particular branded skin for the classification if, for example, the classification's content has come from a particular provider. Click the **Media URL** field and enter the URL at which the branded skin can be found.

14. If you are creating either an entitled or unentitled Click Through classification, then you also need to complete the **Classification Click Through** area. If you are creating any other classification type, this area will not be shown on the UI and you can ignore this step.

    Click the add icon to create a new click through. Click the appropriate cell in the **Click Through Type** column and select the relevant entry from the drop down provided. This list of click through types is pre-defined, so simply choose the one you require. For example, there may be different click through options depending on the type of device being used, whether it is STB, tablet or smart phone. Click in the corresponding field in the **Click Through URL** column and enter the URL to which the click through will take the user.



15. Click **Save** to commit the details of your new leaf classification.
16. Click **Close** to return to the main visualiser view. Your classification is now shown in both the View Catalogue tree and in the timeline view.

7.3.1 Fields on the Generic Classification Details Panel

The fields on the Generic Classification Details panel need to be completed as follows:

Table 12 Fields on the Generic Classification Details Panel

Field	Description
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail, for example Movies, Sport or Entertainment. This is a mandatory field.
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.
Medium Name	Depending on the amount of screen real estate available on the EPG, which will vary depending on the device on which the EPG is being displayed, you can specify a variety of different length names for each classification. The appropriate length name for the available space is then selected by the EPG. Specify a different Medium Name if one is required; this can be the same as the short or long name if the classification title is short anyway.

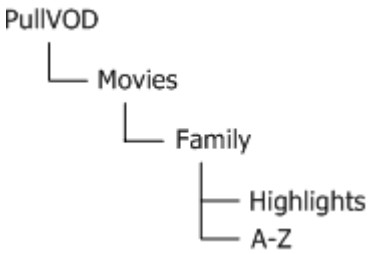
Field	Description
Long Name	Depending on the amount of screen real estate available on the EPG, which will vary depending on the device on which the EPG is being displayed, you can specify a variety of different length names for each classification. The appropriate length name for the available space is then selected by the EPG. Specify a different Long Name if one is required; this can be the same as the short or medium name if the classification title is short anyway.
Soft Key Name	If a classification is going to be associated with a specific coloured soft key on the remote control through the EPG (red, yellow, blue or green), this is where you should enter the name as you want it to appear on the EPG for that soft key.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Classification ID	A unique identifier for the classification. The field is empty and disabled on entry to the panel. When you save the classification, the ID is generated automatically by the system and will be populated in the UI. When you return to view or edit the details of a classification, the Classification ID is populated with the field being disabled as it cannot be edited.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Usage Type	Determines whether the classification is for Archive or Catch up content. Archive is selected by default.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG.

Field	Description
	A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.

7.4 How to Create a Branch Classification

> **Note** Branch classifications are only available for particular customer-specific implementations of the Merchandiser UI.

As described in the Classification Overview, a branch classification block is used when you want to create a classification that can only lead to other classifications further down the hierarchy and that do not contain any actual content. For example, in the following tree view, Movies is set up as a branch classification:



To create a branch classification:

1. In the main visualiser view, click on the level of the hierarchy at which you want to add a new branch classification in either the **View Catalogue** pane or the timeline view.
2. Choose **Create Classification** from the Action Selector or right click on the required level in the tree and select **Create Classification** from the context popup menu. Either action opens the **Classification Details** accordion panel.

3. You need to choose the classification block type you are going to create, either Branch or Leaf. These options are mutually exclusive. **Branch** is selected by default on entry to the screen, so click **Next**.
4. You need to populate the details for your classification as they will appear on the subscriber's EPG. See Fields on the Branch Classification Details Panel for further information regarding what you should enter in each field. The **Name**, **Short Name**, **Synopsis** and **Start Date** fields are mandatory, signified by the red asterisk next to the field names. You need to complete these fields before the other classification panels are enabled. Note that the **Short Name** field is only shown if you are creating your classification directly under the main label classification; if you are adding a classification further down the catalogue hierarchy, this field is not displayed as the EPG view of the catalogue is different at this level.
5. With your classification details entered, click the **Classification Placement** panel. Your new classification block is shown on the timeline view. As you are creating a branch classification that can only lead to other

classifications in the hierarchy and doesn't contain any content, the **Classification Programs and Collections** panel remains greyed and unavailable.

6. Click the **Classification Media** panel. You need to add a thumbnail which will be used to promote the classification visually on the EPG. Without adding a thumbnail, you cannot save your classification.

The duration of your classification is shown at the top of the panel. Click **Add Thumbnail**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the images are stored that you want to use as thumbnails for your classification. Either double click the image you need or select it and click **Open**.

7. Your imported thumbnail image is displayed in the **Thumbnail schedule association to classification** area of the panel. Each image is shown with a start date field underneath and the file name. The start date field is disabled; the image you add is used to represent the classification on the EPG until you upload a new thumbnail.

Note Depending on the configuration of your system, you may not need to add a physical image file as a thumbnail and can instead provide a URL at which the thumbnail is stored on the CDN so that it can be retrieved by the EPG as required. The Merchandiser UI provides the ability for you to define multiple thumbnail URLs per classification, so you are able to use different thumbnails for different languages, or for focused or unfocused images in the EPG. If thumbnail URLs are enabled in your version of the Merchandiser UI, then instead of the thumbnail schedule area which is used to upload thumbnail images, you see an **Image Metadata** area on the **Classification Media** panel. To add thumbnail image metadata to your classification:

1. Click the add icon in the **Image Metadata** area. This enables the next available row in the **Classification Media Metadata** table.

2. Click in the relevant cell in the **Image Type** column to enable the list of available image types. Select the appropriate one for your classification:

Service Logo (Highlighted) is for images shown on the EPG when the subscriber has selected a classification.

Service Logo is for images shown on the EPG when the subscriber is browsing the available classifications and hasn't yet selected one.

ARR Filter is for Automated Recommended Recording, representing classifications containing content that should be automatically recorded by the CPE.

1. Click in the corresponding **Image URL** field and enter the URL at which the thumbnail image is stored.

2. In the **Image Height** and **Image Width** fields, define the size for the thumbnail in pixels as it needs to appear in the EPG.

> This ability to define image metadata rather than uploading a physical thumbnail image is set on the **Admin** tab of the Merchandiser UI. In the **System Configuration** panel, one of the configuration values is SYSTEM_CONFIG_UI_IMAGE_METADATA_ONLY_MODE. If this is set to true, then you need to define the thumbnail URLs rather than uploading the image itself.

8. In the **Provider Branding** area, you are able to specify a particular branded skin for the classification if, for example, the classification's content has come from a particular provider. Click the **Media URL** field and enter the URL at which the branded skin can be found.

9. Click **Save** to commit the details of your new branch classification.
10. Click **Close** to return to the main visualiser view. Your classification is now shown in both the View Catalogue tree and in the timeline view.

7.4.1 Fields on the Branch Classification Details Panel

The fields on the Classification Details panel for a branch classification need to be completed as follows:

Table 13 Fields on the Branch Classification Details Panel

Field	Description
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail, for example Movies, Sport or Entertainment. This is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.

Field	Description
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Classification ID	A unique identifier for the classification. The field is empty and disabled on entry to the panel. When you save the classification, the ID is generated automatically by the system and will be populated in the UI. When you return to view or edit the details of a classification, the Classification ID is populated with the field being disabled as it cannot be edited.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Hide If Empty	Radio buttons labelled Yes and No. If the classification doesn't have any content, this option can hide the classification from view on the EPG. Select Yes to hide an empty classification. This option cascades down the catalogue, so if a parent classification is hidden when empty, then its children will be hidden too.

Field	Description
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.

7.5 How to Create a Leaf Classification

> **Note** Leaf classifications are only available for particular customer-specific implementations of the Merchandiser UI.

As described in the Classification Overview, a leaf classification block is used when you want to create a classification that actually contains content. The Merchandiser UI contains leaf classification templates that make it easier for you to create editorially controlled and genre leaf classifications. The templates are:

STB Generated A-Z List (no toggle)

The EPG pulls in all the assets below a given point in the catalogue tree and presents them in an A-Z format. You can't add programs to this type of classification manually.

Merchandiser Managed A-Z List (no toggle)

An editorially controlled genre classification that you populate using the Merchandiser UI. The contents of the classification are displayed on the EPG in A-Z format.

5 Thumbnail Editorial Controlled (no toggle)

A highlights classification that you populate using the Merchandiser UI. To promote the content on the EPG, this classification type displays 5 thumbnails to the subscriber at a time, each representing a different asset.

5 Thumbnail Editorial > Merchandiser Managed A-Z List Toggle

Generates a parent classification that contains both genre (Merchandiser Managed A-Z) and highlights (5 Thumbnail Editorial) children. The subscriber can toggle between these views, either browsing the classification's entire A-Z listing, or looking at the selected thumbnail highlights. You populate both of the classification types in the Merchandiser UI.

5 Thumbnail Editorial > STB Generated A-Z List Toggle

Generates a parent classification that contains both genre (STB Generated A-Z List) and highlights (5 Thumbnail Editorial) children. The subscriber can toggle between the views, either browsing the classification's entire A-Z listing, or looking at the selected thumbnail highlights. You populate the highlights classification using the Merchandiser UI but the genre classification is automatically generated by the EPG pulling in all the assets below a given point in the catalogue tree.

STB Managed Catchup Day

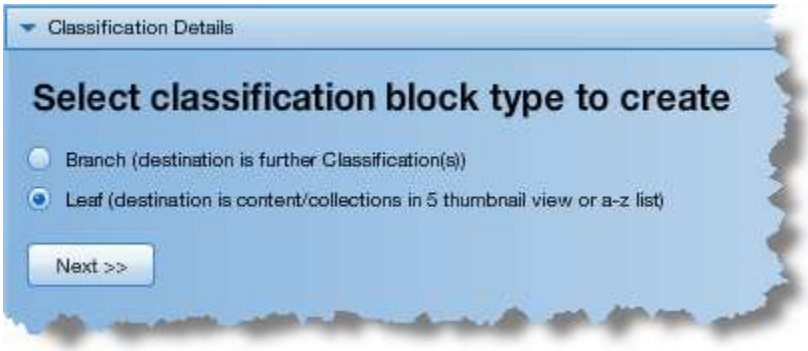
Creates a catch up classification with content from a particular day. The content of the classification is automatically populated based on the day assigned to the classification. This classification type should always belong to a catch up branch classification.

Curated Feed

Creates a classification containing content references provided by a third party as a curated feed, and is usually used for catch up TV. For example, a selection of programs may be made available within the classification by a third party, such as a channel provider or broadcaster, as a single feed which has been constructed by that third party with the explicit intention of using it as a catch up service.

To create a leaf classification:

1. In the main visualiser view, click on the level of the hierarchy at which you want to add a new leaf classification in either the **View Catalogue** pane or the timeline view.
2. Choose **Create Classification** from the Action Selector or right click on the required level in the tree and select **Create Classification** from the context popup menu. Either action opens the **Classification Details** accordion panel.
3. Choose the **Leaf** radio button and click **Next**.



4. You need to choose the type of leaf classification that you are going to create. The available leaf classification templates are presented in graphical form, showing how each type of classification is displayed on the EPG. Click on the name button of the classification you want to create.

5. You need to populate the details of your classification as they will appear on the subscriber's EPG and in the catalogue tree of the Merchandiser UI. Each leaf classification template has a different set of fields to complete as they each require different details. See Fields on the Leaf Classification Details Panel for further information regarding what you should enter in each field. You need to complete the mandatory fields for your leaf classification before the other classification panels are enabled.
6. Click the **Classification Placement** panel. This is shown with the classification's start and, if defined in step 5, end dates pre-populated. The timeline shows the availability period. If you are creating one of the classification types with a toggle capability, then the visualiser shows both the parent and child classifications, for example a "Family" parent classification with children of "Highlights" and "A-Z". Move the classification to the required position in the catalogue hierarchy.

You are able to manipulate the dates of the classifications and, if present, the relationship between parent and child classifications on this panel. See How to Edit a Classification Schedule for details.

> **Note** If you are creating a catch up TV classification, it can only be placed in one position due to the date restrictions imposed by the parent catch up TV classification. A catch up day classification with a value of “0” can only be placed under the parent catch up classification. Subsequent catch up day classifications must be placed in sequence below this first day classification, so 0, 1, 2, 3, etc. You are not able to place another classification between two catch up day classifications.

7. Click the **Classification Programs and Collections** panel.

> **Note** This options is not available if you are creating a catch up TV classification as the content is pre-determined based on the classification’s date and is automatically populated by the system. Got to step 12.

The timeline view is shown with your new classification. In order to add programs and collections to your classification, you need to define a start date (mandatory for both genre and highlights classifications) and, depending on the type of classification you are creating, and end date (mandatory for a highlights classification but optional for a genre classification) before you are able to search for content. Either use the **Start Date** and **End Date** fields to enter the required time frame, or right click on the classification in the timeline and choose **Snap Time slider** from the context popup menu. This automatically adds a pair of vertical black lines (time sliders) at the start and end of your classification and populates the Start Date and End Date fields. You can move the time sliders to alter the dates between which programs and collections will be associated with the classification, as long as they remain within the classification’s life time. The Start and End Date fields reflect the dates

shown by the time sliders and allow you to add collections and programs to a classification for a precise period of time.

> **Note** A drop down list is provided at the top of the panel so that, if you are creating a classification type that includes both highlights and A-Z genre child classifications, you can choose which classification you are viewing. By choosing a child classification, you can work on one child at a time.

8. To add content to your classification, either right click on the timeline and select **Add Programs/Collections** from the popup context menu, or choose Add Programs/Collections from the Action Selector at the bottom of the screen. You are taken to the advanced search screen to find the content that you want to add to your classification.

> **Note** If you are creating a leaf classification that the EPG populates automatically, you cannot add programs and collections to it manually.

9. You can add both individual programs and collections to your classification. For example, if you are creating a “Family” classification, you may want to add a collection for a season of Harry Potter films to be available for a defined period of time. At the same time, you may also want to add one of the films as an individual program which would be available outside of the lifetime of the collection, but which would still be associated with the “Family” classification. The search screen has certain initial context filters loaded, so by default you are only searching for programs and collections that fit the criteria of your classification. The availability fields are pre-populated with the dates defined by the time sliders on the Classification Programs and Collections panel, so you will only be returned results that are valid for this period. If you have not defined an end date, for example if you are creating a genre classification, then the end date field is blank and is assumed to be the inherited end date of the parent classification. Enter any further required search criteria and click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.
10. Your search results are returned in a grid format. Drag and drop the programs or collections you want to include in your classification from the Search Results grid to the lower Selected Results grid. If you need to run another search to find more programs or collections, click **Search Again**. If you have all the content you want in your classification, click **Add to Classification**.

> **Note** When you drag and drop your search results, there are differences depending on whether you are populating a highlights or genre classification.
>
> For editorially controlled highlights classifications, you have a certain number of program slots that you can populate. The number limit is set on the Classification Details screen and is a multiple of 5, as 5 is the number of thumbnails that can be displayed on the EPG at any one time. The minimum number is 5 and the maximum is 195. Within these slots, you have full control over the order of the programs, so you are able to populate your selected results in any order.
>
> For genre classifications, your selected results are automatically ordered alphabetically, and are shuffled accordingly as you drop more results in. Only a set number of results are shown in the grid per page, so you may need to scroll through the selected results pages to view all of your selected content.

11. You are returned to the **Classification Programs and Collections** panel and your selected content is now shown in the timeline under your newly created classification. You are able to manage the availability and placement of these programs and collections within the classification; see How to Manage Programs and Collections Within a Classification for details.
12. Click the **Classification Media** panel. You need to define a thumbnail for your classification. Without adding a thumbnail, which is used to promote the classification visually on the EPG, you cannot save your classification.

The duration of your classification is shown at the top of the panel. Click **Add Thumbnail**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the images are stored that you want to use as thumbnails for your classification. Either double click the image you need or select it and click **Open**.

13. Your imported thumbnail image is displayed in the **Thumbnail schedule association to classification** area of the panel. Each image is shown with a start date field underneath and the file name. The start date field is disabled; the image you add is used to represent the classification on the EPG until you upload a new thumbnail.

Note Depending on the configuration of your system, you may not need to add a physical image file as a thumbnail and can instead provide a URL at which the thumbnail is stored on the CDN so that it can be retrieved by the EPG as required. The Merchandiser UI provides the ability for you to define multiple thumbnail URLs per classification, so you are able to use different thumbnails for different languages, or for focused or unfocused images in the EPG. If thumbnail URLs are enabled in your version of the Merchandiser UI, then instead of the thumbnail schedule area which is used to upload thumbnail images, you see an **Image Metadata** area on the **Classification Media** panel. To add thumbnail image metadata to your classification:

1. Click the add icon in the **Image Metadata** area. This enables the next available row in the **Classification Media Metadata** table.

2. Click in the relevant cell in the **Image Type** column to enable the list of available image types. Select the appropriate one for your classification:

Service Logo (Highlighted) is for images shown on the EPG when the subscriber has selected a classification.

Service Logo is for images shown on the EPG when the subscriber is browsing the available classifications and hasn't yet selected one.

ARR Filter is for Automated Recommended Recording, representing classifications containing content that should be automatically recorded by the CPE.

3. Click in the corresponding **Image URL** field and enter the URL at which the thumbnail image is stored.

4. In the **Image Height** and **Image Width** fields, define the size for the thumbnail in pixels as it needs to appear in the EPG.

> This ability to define image metadata rather than uploading a physical thumbnail image is set on the **Admin** tab of the Merchandiser UI. In the **System Configuration** panel, one of the configuration values is SYSTEM_CONFIG_UI_IMAGE_METADATA_ONLY_MODE. If this is set to true, then you need to define the thumbnail URLs rather than uploading the image itself.

14. In the **Provider Branding** area, you are able to specify a particular branded skin for the classification if, for example, the classification's content has come from a particular provider. Click the **Media URL** field and enter the URL at which the branded skin can be found.

15. Click **Save** to commit the details of your new leaf classification.
16. Click **Close** to return to the main visualiser view. Your classification is now shown in both the View Catalogue tree and in the timeline view.

7.5.1 Fields on the Leaf Classification Details Panel

The fields on the Classification Details panel for the different types of leaf classification need to be completed as follows:

Table 14 STB Generated A-Z List (No toggle)

Field	Description
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.

Field	Description
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Classification ID	A unique identifier for the classification. The field is empty and disabled on entry to the panel. When you save the classification, the ID is generated automatically by the system and will be populated in the UI. When you return to view or edit the details of a classification, the Classification ID is populated with the field being disabled as it cannot be edited.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG.

Field	Description
	A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.

Table 15 Merchandiser Managed A-Z List (No toggle)

Field	Description
Display details - before selection	
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail. This is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.

Field	Description
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Hide If Empty	Radio buttons labelled Yes and No. If the classification doesn't have any content, this option can hide the classification from view on the EPG. Select Yes to hide an empty classification. This option cascades down the catalogue, so if a parent classification is hidden when empty, then its children will be hidden too.
Usage Type	Determines whether the classification is for Archive or Catch up content. Archive is selected by default.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.
Merchandiser Managed A-Z List View	
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG.

Field	Description
	A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button . A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button .

Table 16 5 Thumbnail Editorial Controlled (No toggle)

Field	Description
Display details - before selection	
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail. This is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.

Field	Description
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Hide If Empty	Radio buttons labelled Yes and No. If the classification doesn't have any content, this option can hide the classification from view on the EPG. Select Yes to hide an empty classification. This option cascades down the catalogue, so if a parent classification is hidden when empty, then its children will be hidden too.
Usage Type	Determines whether the classification is for Archive or Catch up content. Archive is selected by default.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.
5 Thumbnail Editorially Controlled List	
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.
Maximum number of items	The maximum number of items of content that can be added to the classification.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.

Table 17 5 Thumbnail Editorial -> Merchandiser Manage A-Z List Toggle

Field	Description
Display details - before selection	
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail. This is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.

Field	Description
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Hide If Empty	Radio buttons labelled Yes and No. If the classification doesn't have any content, this option can hide the classification from view on the EPG. Select Yes to hide an empty classification. This option cascades down the catalogue, so if a parent classification is hidden when empty, then its children will be hidden too.
Usage Type	Determines whether the classification is for Archive or Catch up content. Archive is selected by default.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.
5 Thumbnail Editorially Controlled List	
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.

Field	Description
Toggle label	The toggle function enables the subscriber to change views between related classifications on the EPG. For example, a classification of “Entertainment” may have both “Highlights” and “A-Z” classifications associated with it. The toggle can be applied to change the view between these two associated classifications by the user clicking a specified button on the remote control. In the **Toggle label** field, enter the label for the toggle control.
Maximum number of items	The maximum number of items of content that can be added to the classification.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button . A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button .

Field	Description
Merchandiser Managed A-Z List Toggle	
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.
Toggle label	The toggle function enables the subscriber to change views between related classifications on the EPG. For example, a classification of “Entertainment” may have both “Highlights” and “A-Z” classifications associated with it. The toggle can be applied to change the view between these two associated classifications by the user clicking a specified button on the remote control. In the **Toggle label** field, enter the label for the toggle control.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.

Table 18 5 Thumbnail Editorial -> STB Generated A-Z List Toggle

Field	Description
Display details - before selection	
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail. This is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.

Field	Description
Short Name	The short form of the classification name that will be displayed on the tab ribbon of the EPG when another classification is selected and in focus. For example, a classification of "Entertainment" may have a short name of "Ent". Shorter classification names, such as "Movies", may have the same name entered in both the Name and Short Name fields. This is a mandatory field and is only shown if you are creating your classification directly under the main label classification.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Start Date	The start date for the classification. Use the calendar control provided to choose the start date and time. This is a mandatory field.
End Date	An optional field in which you can enter an end date for the classification. If you need to enter an end date and time, use the calendar control provided. If you do not enter an end date, then the classification is bound by the end date of its parent classification as it cannot exist beyond the duration of its parent.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Hide If Empty	Radio buttons labelled Yes and No. If the classification doesn't have any content, this option can hide the classification from view on the EPG. Select Yes to hide an empty classification. This option cascades down the catalogue, so if a parent classification is hidden when empty, then its children will be hidden too.
Usage Type	Determines whether the classification is for Archive or Catch up content. Archive is selected by default.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.
5 Thumbnail Editorially Controlled List	
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.

Field	Description
Toggle label	The toggle function enables the subscriber to change views between related classifications on the EPG. For example, a classification of “Entertainment” may have both “Highlights” and “A-Z” classifications associated with it. The toggle can be applied to change the view between these two associated classifications by the user clicking a specified button on the remote control. In the **Toggle label** field, enter the label for the toggle control.
Maximum number of items	The maximum number of items of content that can be added to the classification.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button . A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button .

Field	Description
STB Generated A-Z List Toggle	
Name	The classification name that will be displayed on the Merchandiser tree. This will not appear on the EPG and is a mandatory field.
Toggle label	The toggle function enables the subscriber to change views between related classifications on the EPG. For example, a classification of “Entertainment” may have both “Highlights” and “A-Z” classifications associated with it. The toggle can be applied to change the view between these two associated classifications by the user clicking a specified button on the remote control. In the **Toggle label** field, enter the label for the toggle control.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button . A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation.

Field	Description
	To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button ✖.

Table 19 STB Managed Catchup Day

Field	Description
Name	This field is pre-populated based on the day/date for which the classification is being created. For catch up TV, today = 0, yesterday = 1 and so on up to a maximum of 7 or 14 days in the past, depending on how your system is configured. This is because catch up TV classifications and content are only available to subscribers for a duration of one or two weeks. The name of the catch up day classification (numbered 0-14) is automatically calculated based on the broadcast date. The connection between this number and a day of the week is a consequence of assets being assigned to catch up day classifications according to the rule: Number = julianDay (day of transmission) MOD L Where L is a multiple of 7. JulianDay 0 (zero) is a Wednesday. The assignment of assets to a particular catch up day classification is done by downstream components using the original broadcast date and time.
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Start Date	The start date is entered by default and cannot be changed as it is based on the dates of the parent catch up branch classification.
End Date	The end date is entered by default and cannot be changed as it is based on the dates of the parent catch up branch classification.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.

Field	Description
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button. A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list. A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button.

Table 20 Curated Feed

Field	Description
Name	The name of the classification that will be displayed throughout the EPG; on the tab ribbon when the classification is selected, in the synopsis area and in the breadcrumb trail. This is a mandatory field.
Hide Name	If selected, this option hides the classification label on the EPG.

Field	Description
Synopsis	A description of the type of content contained in the classification. This is a mandatory field.
Start Date	The start date is entered by default and cannot be changed as it is based on the dates of the parent catch up branch classification.
End Date	The end date is entered by default and cannot be changed as it is based on the dates of the parent catch up branch classification.
Field Trial	Determines if the classification is being used in a field trial and is only being made available to a limited population of subscribers. If the classification is part of a field trial, select the appropriate trial entry from the drop down menu. If it is not part of a trial, leave at the default entry of Not in trial.
Restrict To	A drop down list that can be used to prevent the classification from being made available in certain geographic areas or STB populations. The list is populated with predefined regional entries. Select the required region(s) to restrict the classification's availability. There is also an entry of Not Applicable in the list if you do not need to restrict the availability of the classification.
Contains Adult Content	Radio buttons labelled Yes and No. Select the appropriate one depending on whether your classification contains adult content. Set to No by default.
Filter By	This is used to determine if the classification is to be used for archive or catch up TV content. Makes the end user device filter content by either channel or provider. Set to Provider by default.
Attributes	The **Attributes** area enables you to apply term attributes to your classification. A term attribute provides a classification with additional behaviour, such as applying bookmarks or dynamic display in the EPG. A bookmark is a permanent link to the classification you are creating. It is used to automatically assign content to the classification, so when an asset is ingested, the bookmark is used to direct it to the appropriate classification. Because bookmarks are constant, static identifiers that are associated with a specific classification, even if the classification is moved in the classification hierarchy, they ensure that content is still associated with the correct classification. To add an attribute to your classification, click the **Add** button . A new row is added to the table. Click in the **Type** column to select the kind of attribute you want to apply from the drop down list.

Field	Description
	A **CMS Bookmark** is used internally by the CMS and CFP ingest, mapping individual assets to particular classifications. Alternatively, a **Bookmark** is used by the EPG to provide a short cut to a classification for the subscribers, enabling them to navigate quickly to the classification. The **Dynamic Second Level Menu** attribute tells the EPG to automatically display any child classifications and assets when the classification is selected. The **Service Key** attribute applies filtering for catch up assets, so for a given catch up classification, subscribers will only see programs for that particular service key. This can filter out repeats and regional programming. Click the **Value** field and enter a value for your attribute. If you are applying a bookmark attribute and the value you enter is unique, then ingested assets using that bookmark will only be associated with that particular classification. If you enter the same bookmark value in multiple classifications, then assets are associated with all of the classifications that share that bookmark. However, if classifications are going to share a bookmark, they need to have non-overlapping placements. If the classification placements overlap and they share a bookmark, they will fail validation. To remove an attribute, click on the relevant entry in the Attributes table and click the **Remove** button .

7.6 How to Modify the Details of a Classification

There may be occasions when you want to change the basic details of a classification, such as if you want to change the classification's title.

The extent of the changes you are able to make to a classification depend on whether the classification is live. If a classification has not yet started, so is not yet available to subscribers, you can change most details. If it is already live, then you can only adjust the end date, either extending or shortening the life of the classification. If the classification has already ended, then you cannot change any details.

> **Note** You cannot edit the Classification Key field of a label classification under any circumstances.

To modify the details of a classification:

1. Expand the tree in the **View Catalogue** panel to show the classification you want to edit. Click on the classification, either in the tree or the timeline, and choose **Edit Classification** from the Action Selector or context menu.

2. The **Classification Details** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by:
> - Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu. The **Classification Details** panel is shown but in read only mode. Click the padlock icon to unlock the classification for editing.
> - Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode. Click the padlock icon to unlock the classification for editing.

3. The existing classification details are shown. The exact range of fields and the details they contain depend on the type of classification you are editing; see Fields on the Branch Classification Details Panel or Fields on the Leaf Classification Details Panel for an explanation of the various fields for the branch and leaf classification types. The classification's start and end dates can only be changed if they are in the future; you are not able to change historic data. For example, if a classification is currently available to subscribers, you cannot change the start date but you could extend or shorten the end date.

> **Note** If you are editing a leaf catch up TV day classification, you can only change the field trial, hide if empty and media thumbnail options. All other details are read only as names, dates, placements, etc. are all derived from the parent branch catch up classification.

4. Click **Save** to commit your changes and **Close** to return to the main visualiser view. If you click **Cancel** or click on the padlock icon while editing details of a classification, your changes are lost and the screen reverts to read only mode.

7.7 How to Clone a Classification

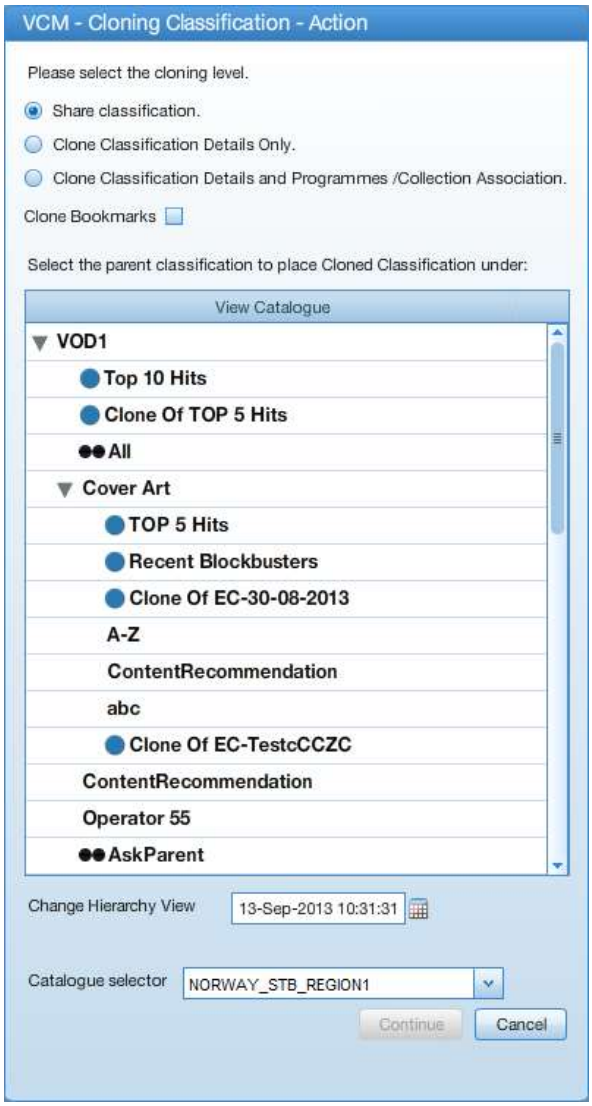
There may be occasions when you want to create a classification that has similar details to an existing classification, or that contains a large proportion of the same content associations. Rather than creating the classification from scratch, it is easier and quicker to make an exact copy of an existing classification and then adjust the details and content of the clone to suit your needs.

You can also use the clone classification function to share classifications across different sections of the hierarchy. This means that you can copy pieces

of the hierarchy to multiple catalogues rather than having to re-create classifications multiple times in different places.

To create a clone classification:

1. Expand the tree in the **View Catalogue** panel to show the classification you want to clone. Click on the classification, either in the tree or the timeline, and choose **Clone Classification** from the Action Selector or context menu.
2. The **Cloning Classification** dialog is displayed.



Select the level of detail to be inherited by the clone classification from the original. If you want to share the classification across different sections of the hierarchy, choose **Share classification**. You then specify

where you want the shared classification to be located. All metadata and content associations from the original classification are also shared.

> **Note**
>
> While the classification may appear in multiple locations, you control the content and configuration of the classification in a single place. Any changes you make to one instance of a shared classification are replicated across all other instances of that classification. This enables you to share pieces of the hierarchy across multiple catalogues, but manage them in a single place. For example, you could copy a movies classification from one regional catalogue to another, but with all the same metadata and content associations.
>
> You can also share classifications across different positions within the same hierarchy, but the classification you are sharing cannot be a sibling or child of the original, which avoids parent-to-child and child-to-parent circular referencing.
>
> This sharing of classification terms is configured on the Admin tab of the Merchandiser UI. In the System Configuration panel, one of the configuration values is TERM_SHARING_WITHIN_HIERARCHY. If this parameter is set to “true”, then your system allows classification term sharing.
>
> This is possible in UHE systems, but not in SSR configurations.

Alternatively, you can choose to either clone only the classification’s details, or you can copy the details plus the classification’s program and collection associations as well. Select the radio button for your required option. The classification details that are cloned include any term attributes associated with the classification. The exception to this are any classification bookmarks. These are a special case as they are used to either identify a particular place in the hierarchy or to automatically assign content to the classification, so it may not be appropriate to clone them.

> **Note** If you are cloning a branch classification, only the Clone Classification Details option is available. If you are cloning a leaf classification, then you have the option of cloning either just the classification details or the program and collection associations as well.

3. You have the option of cloning the original classification's bookmarks, so that ingested content is automatically assigned to the clone classification or a particular place in the hierarchy is identified. Select the **Clone Bookmarks** checkbox if required.

4. The catalogue tree view is shown in the **View Catalogue** area of the dialog. This displays the same tree view available in the main visualiser screen and enables you to select the parent classification under which to place your new clone classification. Click on the required parent classification; your selected classification is highlighted in yellow. The parent classification for your new clone must be a branch classification.
5. A **date/time** field is available below the View Catalogue window. Use this field to change the classification tree display so that it shows the catalogue at a particular point in time as different classifications may have different availability dates. Classifications are only shown on the catalogue view if they are available at the specified time.

> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then you have additional options on the cloning dialog. A **Catalogue selector** is included at the bottom of the dialog containing a list of all the catalogues configured in your system. If you want to clone your classification into a different catalogue, select the required destination catalogue from this list. If you select a different catalogue, then the **Share classification** radio button at the top of the dialog is enabled. Select this option to share the cloned classification between both the classification from which it is being cloned and the one into which the clone is to be added. If your system only has a single catalogue, these additional fields are hidden.

6. When you have chosen your cloning level and a parent classification for your new clone, click **Continue**.
7. The **Classification Details** panel is shown for your new clone. The details shown here are copied from the original classification you chose to clone, with the exception of the classification's name and start/end date. The name has a default entry in the form "Clone of <cloned classification name>". Replace this with a name for your new classification. The start date defaults to the one selected in the Cloning Classification dialog. Change the start date/time if required. If you are adding a cloned classification to a parent classification with a defined end date, the End Date field is pre-populated with the inherited end date of the parent classification. Change the end date/time if required.
8. The other details fields can be updated from the cloned information if required. See Fields on the Branch Classification Details Panel or Fields on the Leaf Classification Details Panel for further information, depending on the type of classification you have cloned.

9. Click the **Classification Placement** panel. This shows the classification on the timeline. The exact display will depend on the type of classification you have cloned, whether it's a branch or leaf classification and if it's a leaf, whether it has associated child classifications. Place the classification in the timeline as required. See How to Manage Programs and Collections Within a Classification for details.
10. If you have cloned a branch classification, the **Classification Programs and Collections** panel is unavailable as you can't add content to a branch classification. If you cloned a leaf classification, use this panel to add programs and collections to your classification. Depending on your choices when you cloned your classification, it may already contain content inherited from the original classification. You can either leave this content in the new classification or adjust it if required. Content will only have been inherited if the associated dates overlap with the selected dates for your cloned classification. If content has been inherited that you want to remove from your new classification, remove these associations as required. See How to Remove a Program from a Classification for details.
11. In order to add programs and collections to your classification, you need to define a start date before you are able to search for content. In the case of an editorially controlled highlights classification, you also need to define an end date. Either use the **Start Date** and **End Date** fields to enter the required time frame, or right click on the classification in the timeline and choose **Snap Time slider** from the context popup menu. This automatically adds a pair of vertical black lines and time sliders at the start and end of your classification and populates the Start Date and End Date fields. You can move the time sliders to alter the dates between which programs and collections will be associated with the classification, as long as they remain within the classification's life time. The Start and End Date fields reflect the dates shown by the time sliders and allow you to add collections and programs to a classification for a precise period of time.

    > **Note** If you are creating a classification type that includes both highlights and A-Z genre child classifications, a drop down list is provided at the top of the panel so that you can choose which classification you are viewing. By choosing a child classification, you can work on one child at a time.

12. To add content to your classification, either right click on the timeline and select **Add Programs/Collections** from the popup context menu, or choose Add Programs/Collections from the Action Selector at the bottom

of the screen. For editorially controlled highlights classifications, a message is shown listing the program and collection associations that already exist for your classification. You are taken to the advanced search screen to find the content that you want to add to your classification.

> **Note** If you are creating a leaf classification that the EPG populates automatically, you cannot add programs and collections to it manually.

13. You can add both individual programs and collections to your classification. For example, if you are creating a “Family” classification, you may want to add a collection for a season of Harry Potter films to be available for a defined period of time. At the same time, you may also want to add one of the films as an individual program which would be available outside of the lifetime of the collection, but which would still be associated with the “Family” classification. The search screen has certain initial context filters loaded, so by default you are only searching for programs and collections that fit the criteria of your classification. The availability fields are pre-populated with the dates defined by the time sliders on the Classification Programs and Collections panel, so you will only be returned results that are valid for this period. If you have not defined an end date, for example if you are creating a genre classification, then the end date field is blank and is assumed to be the inherited end date of the parent classification. Enter any further required search criteria and click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.
14. Your search results are returned in a grid format. Drag and drop the programs or collections you want to include in your classification from the Search Results grid to the lower Selected Results grid. If you need to run another search to find more programs or collections, click **Search Again**. If you have all the content you want in your classification, click **Add to Classification**.

> **Note** When you drag and drop your search results, there are differences depending on whether you are populating a highlights or genre classification.
>
> For editorially controlled highlights classifications, you have a certain number of program slots that you can populate. The number limit is set on the Classification Details screen and is a multiple of 5, as 5 is the number of thumbnails that can be displayed on the EPG at any one time. The minimum number is 5 and the maximum is 195. Within these slots, you have full control over the order of the programs, so you are able to populate your selected results in any order.

> For genre classifications, your selected results are automatically ordered alphabetically, and are shuffled accordingly as you drop more results in. Only a set number of results are shown in the grid per page, so you may need to scroll through the selected results pages to view all of your selected content.

15. You are returned to the **Classification Programs and Collections** panel and your selected content is now shown in the timeline under your newly created classification. You are able to manage the availability and placement of these programs and collections within the classification; see How to Manage Programs and Collections Within a Classification for details.
16. Click the **Classification Media** panel.

Your cloned classification will have inherited a thumbnail from the original classification. This is used to promote the classification visually on the EPG. You can either keep this existing thumbnail, or upload another one to replace it. The duration of your classification is shown at the top of the panel. Click **Add Thumbnail**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the images are stored that you want to use as thumbnails for your classification. Either double click the image you need or select it and click **Open**.

17. Your imported thumbnail image is displayed in the **Thumbnail schedule association to classification** area of the panel. Each image is shown with a start date field underneath and the file name. The start date field is disabled; the image you add is used to represent the classification on the EPG until you upload a new thumbnail.

Note Depending on the configuration of your system, you may not need to add a physical image file as a thumbnail and can instead provide a URL at which the thumbnail is stored on the CDN so that it can be retrieved by the EPG as required. The Merchandiser UI provides the ability for you to define multiple thumbnail URLs per classification, so you are able to use different thumbnails for different languages, or for focused or unfocused images in the EPG. If thumbnail URLs are enabled in your version of the Merchandiser UI, then instead of the thumbnail schedule area which is used to upload thumbnail images, you see an **Image Metadata** area on the **Classification Media** panel. To add thumbnail image metadata to your classification:

1. Click the add icon in the **Image Metadata** area. This enables the next available row in the **Classification Media Metadata** table.

2. Click in the relevant cell in the **Image Type** column to enable the list of available image types. Select the appropriate one for your classification:

Service Logo (Highlighted) is for images shown on the EPG when the subscriber has selected a classification.

Service Logo is for images shown on the EPG when the subscriber is browsing the available classifications and hasn't yet selected one.

ARR Filter is for Automated Recommended Recording, representing classifications containing content that should be automatically recorded by the CPE.

3. Click in the corresponding **Image URL** field and enter the URL at which the thumbnail image is stored.

> 4. In the **Image Height** and **Image Width** fields, define the size for the thumbnail in pixels as it needs to appear in the EPG.
>
> This ability to define image metadata rather than uploading a physical thumbnail image is set on the **Admin** tab of the Merchandiser UI. In the **System Configuration** panel, one of the configuration values is SYSTEM_CONFIG_UI_IMAGE_METADATA_ONLY_MODE. If this is set to true, then you need to define the thumbnail URLs rather than uploading the image itself.

18. Click **Save** to commit the details of your new classification.
19. Click **Close** to return to the main visualiser view. Your classification is now shown in both the View Catalogue tree and in the timeline view.

7.8 How to Delete a Classification

There may be occasions when you want to delete a classification, for example if a future classification is no longer required and can be removed from the catalogue before it goes live.

> **Note** You cannot delete a label classification if any child classifications have been created under it.

To delete a classification:

1. Expand the tree in the **View Catalogue** panel to show the classification you want to delete. Click on the classification, either in the tree or the timeline, and choose **Delete Classification** from the Action Selector or context menu.

   > **Note** You could also choose to edit a classification, select it on the Classification Placement panel, and choose Delete Classification from the Action Selector.

2. A confirmation message is shown asking if you are sure you want to delete the classification. Click **Yes**.
3. You are returned to the main visualiser view and your selected classification has been removed from both the timeline view and the classification tree shown in the View Catalogue panel.

> **Note** You are only able to delete a classification that is scheduled for the future. If a classification has already ended, or if it is currently available, you are not able to delete it. If you try, you will be shown an error message and returned to the visualiser view. If you want to end an existing classification, change the end date to the current date/time.

7.9 How to View a Classification

You are able to view the details of an historic, existing or future classification at any time to review information regarding name and date details, program and collection associations, placement, scheduling and thumbnails. While the process for viewing a classification displays the information in read only format, it is easy to then unlock the relevant panels for editing if required, as long as the classification is either current or scheduled for the future; you cannot edit a classification that has already ended.

To view a classification:

1. Expand the tree in the **View Catalogue** panel to show the classification you want to view. Click on the classification, either in the tree or the timeline, and choose **View Classification** from the Action Selector or context menu.
2. The **Classification Details** panel is displayed in read only mode, indicated by the closed padlock at the bottom of the screen.

   > **Note** You are also able to reach this point by:
   > - Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu.
   > - Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode.
   > - Double clicking the classification in the Catalogue View or visualiser.

3. You are able to review the existing classification details. The exact range of fields and the details they contain depend on the type of classification you are viewing; see Fields on the Branch Classification Details Panel or Fields on the Leaf Classification Details Panel for an explanation of the various fields for the branch and leaf classification types. The **Classification Placement**, **Programs and Collections** and **Media** panels are also available to view, although Programs and Collections is only relevant for leaf classifications.
4. Click **Close** to return to the main visualiser view.

7.10 How to Add a Program or Collection to a Classification

There will be occasions when you need to add programs or collections to a classification, such as when you create a classification, or when new content is ingested that needs to be associated with a classification so that it can be made available to subscribers.

> **Note** You are not able to manage the content of a catch up TV classification. The content for these classifications is determined automatically based on the schedule and cannot be altered.

To add a program or collection to a classification:

1. Expand the tree in the **View Catalogue** panel to show the classification to which you want to add content. Click on the classification, either in the tree or on the timeline, and choose **Edit Classification** from the Action Selector.
2. The **Classification Details** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

   > **Note** You are also able to reach this point by:
   > - Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu. The **Classification Details** panel is shown but in read only mode. Click the padlock icon to unlock the classification for editing.
   > - Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode. Click the padlock icon to unlock the classification for editing.

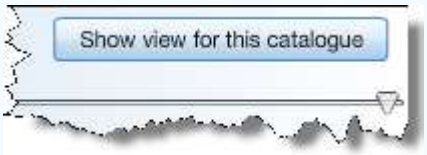
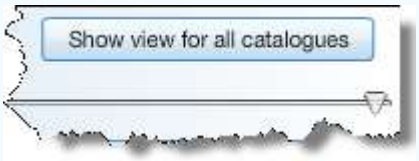
3. Click the **Classification Programs and Collections** panel. This shows the classification on the timeline with the collections and programs that are included in the classification listed below.
4. Either right click on the timeline and select **Add Programs/Collections** from the popup context menu, or choose Add Programs/Collections from the Action Selector at the bottom of the screen. You are taken to the advanced search screen to find the content that you want to add to your classification. If you are adding content to an editorially controlled highlights classification, you are presented with a popup detailing the existing content associations.
5. The search screen has certain initial context filters loaded depending on whether it is a highlights or genre classification you are adding content to. This means that you are only searching for content that fits the criteria of

your classification. The availability fields are pre-populated with the dates defined by the time sliders on the Classification Programs and Collections panel. For genre classifications, the Available To field is left blank if an end date has not been defined on the classification details panel. In this way, you will only be returned results that are valid for this period. Enter any further required search criteria and click **View Results**. See the Searches section for further details on how to perform searches in the Merchandiser UI.

6. Your search results are returned in a grid format. Drag and drop the programs and collections you want to include in your classification from the Search Results grid to the lower Selected Results grid. If you need to run another search to find more content, click **Search Again**. If you have all the content you want in your classification, click **Add to Classification**.

> **Note** When you drag and drop your search results, there are differences depending on whether you are populating a highlights or genre classification.
>
> For editorially controlled highlights classifications, you have a certain number of program slots that you can populate. The number limit is set on the Classification Details screen and is a multiple of 5, as 5 is the number of thumbnails that can be displayed on the EPG at any one time. The minimum number is 5 and the maximum is 195. Within these slots, you have full control over the order of the programs, so you are able to populate your selected results in any order.
>
> For genre classifications, your selected results are automatically ordered alphabetically, and are shuffled accordingly as you drop more results in. Only a set number of results are shown in the grid per page, so you may need to scroll through the selected results pages to view all of your selected content.

7. You are returned to the **Classification Programs and Collections** panel and your selected content is now shown in the timeline under your classification. You are able to manage the availability and placement of these programs and collections within the classification; see How to Manage Programs and Collections Within a Classification for details.

> **Note** If your implementation of the Merchandiser includes support for multiple catalogues, then an additional button is shown on the Classification Programs and Collections panel. This button enables you to see the classification's availability in either the particular catalogue in which you created it, or across all catalogues held in the system. The label on the button toggles between **Show view for this catalogue** and **Show view for all catalogues**, depending on which view you currently have open:
>
> 
>
> 
>
>
> If your Merchandiser is configured with a single catalogue, this button is hidden.

8. Click **Save** and your revised program listing is committed. Click **Close** to return to the main visualiser view. If you click **Cancel** or click on the padlock icon while editing details of a classification, your changes are lost and the screen reverts to read only mode.

7.11 How to Remove a Program from a Classification

There may be occasions on which you need to remove a program from a classification, for example if you realise that an unsuitable program has been added to a classification by mistake.

> **Note** You can only remove a program's association from a classification if the start date of the association has not yet been reached. If a program is already available to subscribers as part of a classification, then you cannot remove it, but should change the end date of the association instead so that the program is no longer available.
>
> Equally, you cannot remove associations between a program and an ask parent classification.
>
> You are not able to manage the content of a catch up TV classification. The content for these classifications is determined automatically based on the schedule and cannot be altered.

To remove a program from a classification:

1. Expand the tree in the **View Catalogue** panel to show the classification from which you want to remove a program. Click on the classification,

either in the tree or on the timeline, and choose **Edit Classification** from the Action Selector or context menu.

2. The **Classification Details** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by:
>
> - Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu. The **Classification Details** panel is shown but in read only mode. Click the padlock icon to unlock the classification for editing.
> - Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode. Click the padlock icon to unlock the classification for editing.

3. Click the **Classification Programs and Collections** panel. This shows the classification on the timeline with the collections and programs that are included in the classification listed below.
4. Click the program you want to remove from the classification and choose **Remove Association** from the Action Selector. The program's association to the classification is removed and the program bar is deleted from the timeline. This action doesn't delete the program, it just removes its association with this particular classification.

> **Note** You can also right click on a program and choose **Remove Association** from the context menu.
>
> An alternative method to remove a program from a classification is to use the search facility to find content to add to the classification. On the search results screen, the content currently associated with the classification is shown in the **Selected Search Results** grid. Choose the program you want to remove from the classification and drag it up to the Search Results grid. Click **Add to Classification** to confirm your change.

5. Click **Save** and your revised program listing is committed. Click **Close** to return to the main visualiser view.
6. If you click either the open padlock icon or **Cancel** at any stage during this process, the screen returns to read only mode and your changes are lost.

7.12 How to Manage Programs and Collections Within a Classification

Once a classification has been created and populated with programs and collections, you are able to manage that content in the **Classification Programs and Collections** panel. For example, a Family film classification may

contain a collection of Harry Potter films, but also feature those films as individual programs as well. For the period when the collection is made available to subscribers, you may want to split the program associations of the individual films with the classification so that they are not available at the same time as the collection.

You cannot edit the association between a program and an ask parent classification.

> **Note** You are not able to manage the content of a catch up TV classification. The content for these classifications is determined automatically based on the schedule and cannot be altered.

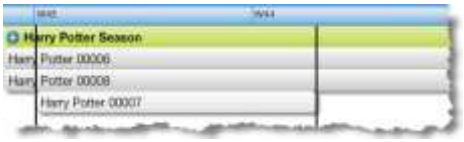
To manage programs and collections within a classification:

1. Expand the tree in the **View Catalogue** panel to show the classification for which you want to manage the programs and collections. Click on the classification, either in the tree or timeline, and choose **Edit Classification** from the Action Selector or context menu.
2. The **Classification Details** panel is displayed in edit mode, indicated by the open padlock at the bottom of the screen.

   > **Note** You are also able to reach this point by:
   > - Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu. The **Classification Details** panel is shown but in read only mode. Click the padlock icon to unlock the classification for editing.
   > - Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode. Click the padlock icon to unlock the classification for editing.

3. Click the **Classification Programs and Collections** panel. This shows the classification on the timeline with the collections and programs that are included in the classification listed below.
4. Right click on the program or collection whose association with the classification you want to change. A range of options are presented in the context menu. Select the operation you need according to the table below:

Table 21 Manage programs and collections context menu options

Menu Option	Description	Illustration
Place time selector	Places the green timeline at a particular point in the classification so you are able to see which programs and collections are scheduled at a specific date and time.	N/A
Add Programs/ Collections	Enables you to add programs and collections to the classification. See How to Add a Program or Collection to a Classification for details.	N/A
Split Association	Splits the association of the selected program/collection with the classification. The program/ collection bar is split in two, and each section can now have association dates and times defined. You may want to use this option to make a program or collection available for a defined period, then to withdraw it for a period, and then make it available again.	
Set Association Dates	Opens a **Set Duration** dialog in which you can define start and end dates and times for the program/collection within the classification. Enter the dates and times required and click **OK**. The program or collection bar's length and position is changed to represent the revised dates and duration of availability within the classification.	
Remove Association	Enables you to remove a program or collection's association from a classification. See How to Remove a Program from a Classification and How to Remove a Collection from a Classification for details.	N/A
Snap Timeslider	If you have changed the duration or placement of a program or collection within a classification, use this option to snap the time sliders to the start and end of the updated program or collection, rather than their default position.	

Menu Option	Description	Illustration
In addition, the following options are available for editorially controlled highlights classifications:		
Delete In Date Range	Deletes the association between the content and the classification for the period defined by the start and end time sliders. If there is a portion of the association outside this date range, this remains.	N/A
Extend bar left	Use this option to extend the content bar so that it is flush left to the time slider. This helps you to make scheduling precise without overlaps or under runs.	N/A
Extend bar right	Use this option to extend the content bar so that it is flush right to the time slider. This helps you to make scheduling precise without overlaps or under runs.	N/A
Copy	Copies the selected content so that you can paste it to another slot in the classification. Copied content cannot be pasted into a time slot already occupied by the original.	N/A
Cut	Cuts the selected content so that you can paste it to another slot in the classification.	N/A
Paste inside time sliders	This option is only available if you have copied or cut content first so there is something available to paste. This option pastes the content in the classification, but if the content bar extends beyond the start or end dates as defined by the time sliders, it is automatically truncated to fit the period defined by the time sliders. This helps to make scheduling precise without overlaps or under runs.	N/A
Paste retaining start/end date	This option is only available if you have cut content first so there is something available to paste. Pastes the content while maintaining the content's original start and end dates. This helps to make scheduling precise without overlaps or under runs.	N/A

Menu Option	Description	Illustration
Move one row up	Shuffles the selected content one row up in the classification. This operation can only be performed if there is an empty row for the content to be moved into.	N/A
Move one row down	Shuffles the selected content one row down in the classification. This operation can only be performed if there is an empty row for the content to be moved into.	N/A
Move all one row up	Only available for highlights classifications. Shuffles the selected content, and any content listed above it, up one row in the classification. This operation can only be performed if there is an empty row for the content to be moved into.	N/A
Move all one row down	Only available for highlights classifications. Shuffles the selected content, and any content listed below it, one row down in the classification. This operation can only be performed if there is an empty row for the content to be moved into.	N/A

In addition to these context menu options, you can also use the mouse to drag and drop programs and collections within a classification, and to change the start and end dates by moving the left and right ends of a program or collection bar which become dragable when you move your cursor over them.

5. Click **Save** to commit your changes and **Close** to return to the main visualiser view.

7.13 How to Edit a Classification Schedule

There may be occasions when you need to change the existing schedule for a classification, perhaps extending the availability of a highlights classification,

or delaying the start date of a scheduled classification that isn't yet available to subscribers.

To edit a classification schedule:

1. Expand the tree in the **View Catalogue** panel to show the classification for which you want to change the schedule. Click on the classification, either in the tree or on the timeline, and choose **Edit Classification** from the Action Selector or context menu.
2. The **Classification Details** panel is displayed in edit mode, indicated by the open padlock at the bottom of the screen.

> **Note** You are also able to reach this point by:
> - Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu. The **Classification Details** panel is shown but in read only mode. Click the padlock icon to unlock the classification for editing.
> - Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode. Click the padlock icon to unlock the classification for editing.

3. Click the **Classification Placement** panel. Select the classification bar for which you want to change the schedule and choose **Set association dates** from the Action Selector. The **Set Duration** dialog is displayed.

4. Change the dates and times for the classification as required and click **OK** to close the dialog. Your revised classification schedule is now shown on the Classification Placement panel.

> **Note** You could also click and drag the ends of the classification bar, or drag and drop the bar to a new date, to change the scheduled availability. However, the Set Duration dialog enables you to be more precise with your dates and times.

5. You are also able to split the classification, dividing the classification bar in two so that each section can have separate dates and times defined.

You may want to use this option to make a classification available for a defined period, then to withdraw it for a period, and then make it available again. To do this, select the classification bar you want to change, right click and choose **Split Association** from the popup menu. The bar is divided in two and you can now define the availability of each section, either by using the Set Duration dialog as described above, or by clicking and dragging the ends of the relevant classification bar.

6. Depending on whether you are changing the schedule of a branch or leaf classification, different principles apply to the changes you make:
   - If you change a leaf classification's schedule where multiple leaf classifications exist in the same leaf classification block, the same changes are applied to all the leaf classifications in that block.
   - You cannot change a classification bar to have a start date earlier than the start date defined in the **Classification Details** panel.
   - You cannot change a classification's scheduled start date if that start date is in the past (i.e. if the classification is already available to subscribers).
   - You cannot change any classification bar to have a start date/time that is earlier than the start date/time of its parent classification.
   - You cannot change any classification bar to have an end date/time that is later than the end date/time of its parent classification.
   - If you change the scheduled start date of a parent classification so that it starts at a later date than previously, any child classifications that were scheduled to start at the earlier date are automatically changed in line with the new date.
   - If you change the scheduled start date of a parent classification so that it starts earlier than previously, no changes are made to the start dates of the associated child classifications.
   - If you change the scheduled end date of a parent classification so that it ends earlier than previously, any child classifications that were scheduled to end at the later date are automatically changed in line with the new date.
   - If you change the scheduled end date of a parent classification so that it ends later than previously, no changes are made to the end dates of the associated child classifications.
   - If the changes you have made to a parent classification's schedule mean that a child classification falls completely outside of the new placement dates, the association with the child classification is automatically removed by Merchandiser.

- If you change the schedule of a classification so that program and collection placements now overlap the revised dates, Merchandiser truncates the program and collection associations to fit with the revised dates.
- If you change the schedule of a classification so that program and collection placements fall completely outside of the revised dates, Merchandiser removes these program and collection associations.
- If you clear the end date of a child classification whose parent still has a defined start and end date, you are shown a message stating that the end date is still constrained by the date set for the end of the parent classification.
- You cannot change the start or end date of a child classification so that there is no scheduled placement for the new dates. If you try, you are shown an information message and your change is reverted back to the original dates.

7. Click **Save** to commit your schedule changes and **Close** to return to the main visualiser view.

7.14 How to Add a Thumbnail to a Classification

Thumbnails are images from programs, such as posters, box covers or stills from the programs themselves, that are used to promote content to subscribers on the set top box. Each classification created using the Merchandiser UI has to have at least one thumbnail associated with it so that the classification can be advertised visually on the EPG.

The instructions below describe how to add a thumbnail to an existing classification from either your machine or network. To add thumbnails to a new classification as you are creating it, see How to Create a Generic Classification, How to Create a Branch Classification, or How to Create a Leaf Classification, depending on the type of classification you are creating.

To add a thumbnail to an existing classification:

1. Expand the tree in the **View Catalogue** panel to show the classification to which you want to add a thumbnail. Click on the classification, either in the tree or the timeline, and choose **Edit Classification** from the Action Selector or context menu.
2. The **Classification Details** panel is displayed in edit mode, indicated by the open padlock icon at the bottom of the screen.

> **Note** You are also able to reach this point by:

- Right clicking on the classification in the Catalogue View and choosing **View Classification** from the context menu. The **Classification Details** panel is shown but in read only mode. Click the padlock icon to unlock the classification for editing.
- Searching for the classification using either the quick or advanced search facility. Double click the returned search result to open the classification's details in read only mode. Click the padlock icon to unlock the classification for editing.

3. Click the **Classification Media** panel. This shows the start and end dates of the classification and the thumbnail currently associated with it. You are only able to add a thumbnail from now into the future; you are unable to make changes to historic thumbnails that have already expired. If there have been a number of historic thumbnails, you may need to scroll to the right to see the current image; the current thumbnail is highlighted.
4. Click **Add Thumbnail**. This opens a standard Windows browse dialog in which you should navigate to the local or network location where the image is stored that you want to use as the new thumbnail for the classification. Either double click the image you need or select it and click **Open**.
5. Your imported thumbnail image is added to the **Thumbnail schedule** area of the panel. Each image is shown with a start date field underneath and the file name. Your imported image is associated with the classification from now onwards. If you subsequently upload a further image, then this becomes the thumbnail for the classification, superseding previous images.

Note Depending on the configuration of your system, you may not need to add a physical image file as a thumbnail and can instead provide a URL at which the thumbnail is stored on the CDN so that it can be retrieved by the EPG as required. The Merchandiser UI provides the ability for you to define multiple thumbnail URLs per classification, so you are able to use different thumbnails for different languages, or for focused or unfocused images in the EPG. If thumbnail URLs are enabled in your version of the Merchandiser UI, then instead of the thumbnail schedule area which is used to upload thumbnail images, you see an **Image Metadata** area on the **Classification Media** panel. To add thumbnail image metadata to your classification:

1. Click the add icon in the **Image Metadata** area. This enables the next available row in the **Classification Media Metadata** table.

2. Click in the relevant cell in the **Image Type** column to enable the list of available image types. Select the appropriate one for your classification:

Service Logo (Highlighted) is for images shown on the EPG when the subscriber has selected a classification.

Service Logo is for images shown on the EPG when the subscriber is browsing the available classifications and hasn't yet selected one.

ARR Filter is for Automated Recommended Recording, representing classifications containing content that should be automatically recorded by the CPE.

3. Click in the corresponding **Image URL** field and enter the URL at which the thumbnail image is stored.
4. In the **Image Height** and **Image Width** fields, define the size for the thumbnail in pixels as it needs to appear in the EPG.

This ability to define image metadata rather than uploading a physical thumbnail image is set on the **Admin** tab of the Merchandiser UI. In the **System Configuration** panel, one of the configuration values is SYSTEM_CONFIG_UI_IMAGE_METADATA_ONLY_MODE. If this is set to true, then you need to define the thumbnail URLs rather than uploading the image itself.

6. Click **Save** and your new thumbnail is committed to the classification. Click **Close** to return to the main visualiser view.

7.15 How to Move a Classification

Once a classification has been created, there may be times when you want to move it within the catalogue hierarchy, such as assigning a classification containing movies to a different button classification.

However, it is not possible to actually move a live classification while it is available to subscribers as they may be accessing that classification's content at any time. Instead, you can use the clone classification function to make it appear that the classification has been moved in the EPG, whereas in reality, it has been stopped, cloned and the new clone has been started at the new location in the catalogue.

To move a classification:

1. Expand the tree in the View Catalogue panel to show the classification you want to move. Right click on the classification, either in the tree or the timeline, and choose **Edit Classification** to open the **Classification Details** panel.
2. Change the **End Date** field to the date and time at which you want the classification to stop being available in its current catalogue location.
3. Click **Save**.
4. In the visualiser, right click on the classification again and choose **Clone Classification**. Follow the steps described in How to Clone a Classification to create an identical copy of the classification, including the classification's details, program and collection associations and bookmarks, and select the position in the catalogue in which it should now appear.
5. In the **Classification Details** panel of the new clone classification, enter a **Start Date** when you want the classification to be available at its new location. To give the appearance in the EPG that the classification has simply been moved, enter a start date and time just after the end date and time you entered in step 2.
6. Place the cloned classification as required in the **Classification Placement** panel and click **Save**.
7. The cloned classification now appears in its designated position in the visualiser, but as far as the subscriber's EPG is concerned, it will look like the old classification has been moved to a new location.

7.16 How to Change Classification Order

The Merchandiser UI provides you with the capability to re-order classifications so that the hierarchy is structured to your specific needs. You do this by dragging and dropping the relevant classification bars in the Classification Placement accordion panel, so it is easy to achieve without needing to change the dates and associations of each classification impacted by the change.

To change the classification order:

1. Expand the tree in the View Catalogue panel to show the classification you want to re-order. Right click on the classification, either in the tree or the timeline, and choose **Edit Classification** to open the Classification Details panel.
2. Click the **Classification Placement** accordion panel.

3. On the timeline, click on your selected classification and drag it to where you want it to appear in the classification order. You are only able to drag and drop the classification you chose in step 1; you are not able to re-order any other classification.
4. If the classification you are re-ordering is live, the schedule is split from the current date so that the existing schedule ends and the new schedule is created featuring the revised classification order. If the classification has sibling classifications, the schedules of these siblings are moved up or down in the revised classification order in response to where you have placed your changed classification.
5. Click **Undo** and the classifications revert to their previous order.
6. Click **Close** to return to the visualiser view.

Appendix A Glossary

Table 22 provides a short glossary of any terms crucial to the understanding of this document, and lists the acronyms and abbreviations used in the document.

Table 22 Terminology

Term	Definition
Accordion Panel	Contains the fields and information needed for a particular aspect of a workflow or functional area. Several panels may be present on a screen and they can be displayed or hidden depending on the task you are performing.
Action Selector	The UI control that enables you to select an action to perform on the current screen.
ADI	Asset Distribution Interface. Assets are ingested into the CMS in ADI format.
Asset Source	The sources that provide the assets to be ingested into the CMS.
Bookmark	A permanent link to a classification used to automatically assign content to the classification on ingest.
CA	Conditional Access, the set of parameters applied to content so that only subscribers with the correct entitlements can view it.
CDN	Content Delivery Network, which delivers processed assets to subscribers.
CIV	Content Instance Version, the identifier for a particular instance of a piece of content from the UI's perspective.
Classification	An identifiable group of assets with a common theme. Programs can be assigned to classifications automatically or they can be grouped manually by an operator.
Classification Tree	Contains a listing of all the classifications and programs currently held in the catalogue. Displayed in the View Catalogue panel on the Catalogue tab.
CMS	Content Management System, consisting of the VAM and Merchandiser.
Collection	A grouping of related programs that has a defined lifetime. Used to promote content to subscribers, such as special seasons of related films.
Curated Feed	A feed for broadcast catchup TV traffic provided by a third party.
FTP	File Transfer Protocol, a method for transferring asset files between network locations.

Term	Definition
Fuzzy matching	A search method applied by Merchandiser to return results that are a possible, but not exact, match for your entered search keyword.
Parental Rating	An age-based rating applied to content to indicate the suitability of the content for the potential audience, considering the levels of violence, bad language, sexual content and other elements that may be deemed unsuitable.
Program	A single item of long form content. May also be referred to as a movie, an item or an asset.
Scoring	A search method applied by Merchandiser to ensure that only relevant results are returned for your search.
STB	Set Top Box.
Stemming	A search method applied by Merchandiser to return results that are related to your entered search keyword, but which don't match it exactly.
Tabs	The UI device that enables you to move between different functional areas of the UI. Each tab contains a particular set of fields and data that control an area of operational functionality.
Term Attribute	A term attribute is applied to a classification to provide it with additional behaviour, such as providing a shortcut to the classification on the EPG (a “bookmark”) or to instruct the EPG to automatically display any child classifications and assets when the classification is selected.
Timeline	Shown in the visualiser on the Catalogue tab, the timeline is a graphical representation of the classifications and programs available in the classification tree.
VAM	Video Asset Manager, forms the CMS along with the Merchandiser.
VCM	VoD Catalogue Manager, the former name of the Merchandiser which forms the CMS along with the VAM.
Visualiser	Found on the Catalogue tab, the visualiser shows a graphical timeline of the classification tree, including the programs the classifications contain and when they are scheduled to be available.
VoD	Video On Demand, a business model where subscribers are able to order, pay for and view video assets from a content library at a time that suits them.
XTV-E	XTV Encryptor, the software that optionally encrypts and generates the content files in NFF format to be uploaded to the CDN.

Appendix B Search Filters

When you perform a quick or advanced search in the Merchandiser UI, the search screen provides a variety of filters that you can use to refine your search criteria to provide more accurate and relevant results.

These filters are arranged into logical groups, with different groups of filters being applicable depending on whether you are searching for a program, collection or classification.

The table below shows which groups of filters are relevant for each search category.

Table 23 Search Filter Groups

Filter Group	Search Category		
	Program	**Collection**	**Classification**
Program Status	Y		
Program Usage Type	Y		
Collection Status		Y	
Classification Status			Y
Classification Usage Type			Y
Classifications	Y	Y	
BSS Genre/Sub Genre	Y		
List of Providers	Y	Y	
Studio Code	Y		
Time Conditions	Y		
Warnings	Y		
Ratings	Y		
Format	Y		

You can select as many individual filters as you like, both within a filter group and across multiple groups.

Within a filter group, the search works on an “OR” principle. For example, if you are searching for a program and select both the HD and SD filters from the Format filter group, your results will show programs that are in either HD or SD format.

Across different filter groups, the search works on an “AND” principle. For example, if you are searching for a program and you select the HD filter from

the Format group and the 15 filter from the Ratings group, your results will show programs that are both in HD format and have a 15 rating.

Appendix C Classification Types

The range of classification types available in the Merchandiser are:

Table 24 Classification Types

Classification Type	Description
Label	The label classification is the highest level in the classification hierarchy and so appears at the top of the tree view in the Merchandiser UI. All other classifications are created and ordered below the original label classification. You cannot associate content with a label classification through the Merchandiser UI; it is only possible to build the rest of the classification hierarchy under it. An example of a label classification would be “PullVOD” with other classifications representing buttons on the EPG, genres of content, etc. being built under it. See How to Create a Label Classification for further details.
Label under label	You can create a second label classification under your original label classification to specify different hierarchies under the top level label. For example, if you have different catalogues that you want to make available to different subscriber regions, you can use a second label classification as the starting point for your alternative catalogue while still creating your original hierarchy under the main label classification.
Button	Classifications that are associated with particular buttons on the EPG, such as Movies. Button classifications can only lead to other classifications and cannot contain content.
Listing	Used to indicate that on selection by the subscriber, the EPG should display the programs associated with the first child classification. Examples of a listing classification would be Action, Crime and Sci Fi, all of which would be located under a parent button classification of Movies.
Genre	This classification is a leaf node of the hierarchy and is used to indicate to the EPG that all the programs associated with the parent listing classification should be displayed as an A-Z list.
Editorially Controlled	Also called a highlights classification. These are used to construct a list of content controlled through the Merchandiser UI to promote particular programs from the parent listing classification. The content associated with editorially controlled classifications can change regularly and is displayed on the EPG in a special 5 thumbnail template to give them visual impact and prominence.
Rank	A leaf node of the hierarchy that is used to order the display of editorially controlled classifications.

Classification Type	Description
Ask Parent	This classification type is used to instruct the EPG to display all assets that are assigned to the child classifications that belong to the same parent classification one level up the hierarchy. For example, in a classification tree with a hierarchy as follows: Movies ├─ Action ├─ Crime └─ Sci Fi An ask parent classification at the same level as Action, Crime and Sci Fi would mean that all assets in all the classifications below Movies would be returned.
Catch Up Day	This is a classification that contains content from a specific day within the last one or two weeks that is available for selection as catch up TV. A catch up leaf classification (child) should belong to a catch up branch classification (parent). A catch up branch classification can only contain up to 7 or 14 catch up leaf classifications, one for each day of the last one or two weeks.
Catch Up TV Sort	
Curated Feed	This classification type contains content references provided by a third party as a curated feed, and is usually used for catch up TV. For example, a selection of programs may be made available within the classification by a third party, such as a channel provider or broadcaster, as a single feed which has been constructed by that third party with the explicit intention of using it as a catch up service.
Content Recommendation	A classification used by the operator to promote particular content being recommended to subscribers.
Personalized Recommendation	A classification used by the operator to promote particular content recommended to subscribers based on their viewing history and habits.
Promotion	A classification containing content being promoted by the operator to all subscribers, such as the latest movie releases or sports events.
A-Z	
A-Z Leaf	
Date Time Sort	A classification in which the content is ordered based on the date and time on which the programs are scheduled to be broadcast.
Filter	

Classification Type	Description
Barker	A barker classification contains promotional channels that advertise the features available on the platform. There is no program content available on these channels.
Channel Group	
Unentitled Click Through	A type of click through classification. These enable the subscriber to click through to additional content held at a specified URL. “Unentitled” means that any viewer is granted access to the click through content.
Entitled Click Through	A type of click through classification. These enable the subscriber to click through to additional content held at a specified URL. “Entitled” means that only subscribers with the necessary level of subscription are granted access to the click through link.

Appendix D Change History

Issue 7.00

Issue date: 18 June 2014

Location	Change
Entire document	Issue 7.00 for Merchandiser UI v3.56.0. Further branding updates. Full product title of “Cisco Media Suite Merchandiser” applied as appropriate. Sections 1.1, Purpose of this Document, and 2.2, What is the Merchandiser?, updated to reflect both product name and position in the Media Suite product line. Section 2.3, What’s New in this Release?, updated with an overview of the new functionality in v3.56.0. Sections 4.6 & 4.7, How to Perform a Media ID Search and How to Perform an Asset ID Search, updated with revised fields on the advanced search screen. Show ADI button functionality added to section 5.2, How to View Program Details. 5.2.1, Fields on the Program Details Panel, updated. Genre/Sub Genre is now a single field, rather than two separate ones. Offering ID field has been added. Section 5.5, How to View Program Offers, added. Addition of Group ID and Genre/Sub Genre fields on the Collection Details accordion panel, sections 6.2.1, 6.2.2 and 6.3. Section 6.9, How to View Collection Offers, added. Description of the new Classification ID field added to sections 7.2.1, 7.3.1, 7.4.1 and 7.5.1. Section 7.16, How to Change Classification Order, added.

Issue 6.00

Issue date: 13 March 2014

Location	Change
Entire document	Issue 6.00 for Merchandiser UI v3.50.0. Branding update. VCM (Video on Demand Catalogue Manager) changed to Merchandiser throughout.

Issue 5.00

Issue date: 08 January 2014

Location	Change
Entire document	Issue 5.00 for VCM UI v3.50.0. Screenshots updated throughout with revised Cisco branding and change of product name from NDS Console to Cisco VCS Console. CDN selector and Cover art entries added to section 2.3, What's New in This Release? Description of Advanced Admin tab added to section 3.2, Tab Structure. Option of displaying either box cover or cover art image views added to section 3.4.1, Toolbar Controls. Details of cover art image added to section 5.4, How to View Program Media. Explanatory text updated in section 6.1, Collection Overview. Details for adding box cover and cover art images added to sections 6.2.1 (How to Create a Collection and Search for Programs), 6.2.2 (How to Search for Programs and Create a Collection) & 6.9 (How to Add Thumbnail Images to a Collection). Section 7.1.1, Classification Types, moved to appendix C. Section 7.1.2, Sharing Classification Terms in the Hierarchy, incorporated into section 7.7, How to Clone a Classification. 7.1.2 removed. Section 7.1.1, Classification Keys, added. Step 14 for click through classifications added to section 7.3, How to Create a Generic Classification. Note regarding metadata only images for classifications added to sections 7.3 (How to Create a Generic Classification), 7.4 (How to Create a Branch Classification), 7.5 (How to Create a Leaf Classification), 7.6 (How to Create a Click Through Classification), 7.8 (How to Clone a Classification) & 7.15 (How to Add a Thumbnail to a Classification). Section 8, VCM Config UI, re-named Admin Tab. Introductory text added. Section 9, Advanced Admin, added. CIV added to Glossary (Appendix A).

Issue 4.00

Issue date: 15 August 2013

Location	Change
Entire document	Issue 4.00 for VCM UI v3.41.5. Screenshots with highlighted areas updated throughout. Section 2.3, What's New in this Release, added. Section subsequently updated with Term Attributes and Search Mechanics information. Additional context added to overview descriptions of new functionality.

Location	Change
	Addition of catalogue filter (to support multi-catalogue) added to section 2.3, What's New in this Release, and section 4.4, How to Perform an Advanced Search.
	Multiple Language and Multiple Catalogue support added to section 3.1, Introduction to the VCM UI.
	Explanation of available functionality on Admin tab expanded in section 3.2, Tab Structure.
	Additional information about text appearance on the classification tree, SD/HD/3D program icons and curated feed classification icon added to Section 3.3, Classification Tree. Also added additional details about when empty slots may be seen in the catalogue view and a description of the Expand All and Collapse All functionality. "Incomplete collection" icon and description removed.
	Language Selector and Catalogue Selector fields added to section 3.4.1, Toolbar Controls.
	Section 3.5, Multiple Language Support, added. Further information added including an explanation of multiple language displays in workflows.
	Section 3.6, Multiple Catalogue Support, added.
	Screenshot updated in section 3.7, Action Selector.
	Screenshots updated in section 3.9, Mandatory Fields.
	Sections 4.2.4, Stop Word List, and 4.2.5, Punctuation, added. Table of search syntax operators moved to section 4.2.5 from 4.4, How to Perform an Advanced Search.
	Added section 4.4, Search Results.
	Screenshot updated in section 4.5, How to Perform an Advanced Search. Details of default "Available To" date added.
	Series Number label changed to Series Info in section 5.2.1, Fields on the Program Details Panel, and description updated. Media ID, VAM Asset ID and Format fields removed from the Editorial Comments Group.
	Screenshot of program popup updated in section 5.3, How to View Program and CA Placement.
	"Set Duration" step removed from section 5.5, How to Add a Genre Classification Association.
	Notes added to section 6.2.1 (Create a Collection and Search for Programs), 6.2.2 (Search for Programs and Create a Collection) and 6.3 (How to Modify the Details of a Collection) and 6.6 (How to Add Programs to a Collection) to describe changes for multiple catalogue support.
	Definition of classifications updated in section 7.1, Classification Overview.
	Section 7.2, How to Create a Label Classification, and section 7.2.1, Fields on the Label Classification Details Panel, added. Name of "Available In" field updated.
	Section 7.3, How to Create a Generic Classification, and Section 7.3.1, Fields on the Generic Classification Details Panel, added.

Location	Change
	Description of Term Attributes table in Classification Details panel added to sections 7.3, How to Create a Generic Classification, 7.4, How to Create a Branch Classification and 7.5, How to Create a Leaf Classification. Screenshot of Provider Branding area of Classification Media panel updated in sections 7.3 (How to Create a Generic Classification), 7.4 (How to Create a Branch Classification) and 7.5 (How to Create a Leaf Classification). Description of Attributes field updated in tables in sections 7.2.1, 7.3.1, 7.4.1 & 7.5.1. Explanation of Restrict To field added to classification sections (7.4.1, Fields on the Branch Classification Details Panel and 7.5.1, Fields on the Leaf Classification Details Panel). Synopsis field details added to table 16, STB Managed Catchup Day, in section 7.5.1, Fields on the Leaf Classification Details Panel. Note added to section 7.6, How to Clone a Classification, to describe changes for multiple catalogue support. Note added to section 7.9, How to Add a Program or Collection to a Classification, to describe changes for multiple catalogue support. Screenshot updated in section 8.1.4, How to Edit the Content Location. Section 8.3, System Configuration, added. Section 8.4, Term Attributes, added. “Term Attribute” added to Appendix A, Glossary. Appendix B, Search Filters, added.

Issue 3.00

Revision date: 16 October 2012

Location	Change
Entire document	Issue 3.00. Revised throughout to document catch up TV functionality. Section 4.4, How to Perform an Advanced Search, updated to include details about different numbers of search results in Search and Search Results screens to allow for content already present in the appropriate collection/classification. Addition of sections 6.4 and 6.5, How to View a Collection and How to Delete a Collection. Addition of classification bookmark functionality throughout section 7, Classifications, including updates to 7.5, How to Clone a Classification. Changes in Classification section to reflect UI screen changes. Addition of Curated Feed classification type in section 7, Classifications. Addition of section 7.13, How to Move a Classification. “Bookmark” and “Curated Feed” added as glossary terms in Appendix A.

Issue 2.00 Revised

Revision date: 20 February 2012

Location	Change
Entire document	Revised issue 2.00 for release of R1. Sections 3 (Understanding the User Interface), 4 (Searches), 5 (Programs), 6 (Collections) and 7 (Classifications) updated with new screenshots and text following review.

Issue 2.00

Revision date: 02 February 2012

Location	Change
Entire document	Issue 2.00 for release of R1. Added: ■ Section 4, Searches ■ Section 5, Programs ■ Section 6, Collections ■ Section 7, Classifications Glossary entries added for: ■ Collection ■ Program ■ Fuzzy matching ■ Scoring ■ Stemming

Issue 1.00 Revised

Revision date: 02 November 2011

Location	Change
Entire Document	Revised issue 1.00 for R0; edited following QC review. “CA model rules assigned” icon removed from table in section 3.3, Classification Tree. Print option added to section 3.4.1, Toolbar Controls.

Issue 1.00 Revised

Revision date: 14 October 2011

Location	Change
Entire Document	Revised issue 1.00 for R0; edited following QC review. Screenshots replaced to reflect changes in the VCM UI. Root Classification Prefix panel removed. Section 2.1, Welcome to the VCM UI, updated with revised bullets to reflect available functionality in R0. References to Manage Still Image Configuration action removed. Step 5 of section 4.2.3, How To… Delete an Asset Source, updated to reflect internal checks made when an asset source is selected for deletion.

Issue 1.00

Revision date: 29 July 2011

Location	Change
Entire Document	First release for R0.