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Connections and registration, and a top-level overview of the primary features of your live production system.
This manual tells you everything you need to know to perform common operations with your NewTek live production system. It attempts to convey this essential information in a friendly yet concise way, while also providing a deeper reference section you can turn to when you really need more detail.

Even if you are the hands-on, 'I never-ask-directions!' type, please peruse this page. If questions about your live production system arise later, you may find that the information here allows you to jump directly to the details you need with a minimum of reading.

➢ **PART I – GETTING STARTED**
  Introduction – connecting devices (cameras, monitors, etc.) and registration, ending with Chapter 4, Web Features, which among other things includes an overview of online resources to help familiarize you with common operations and features.

➢ **PART II – REFERENCE**
  This section covers the fine details of using your system (for those who need it, or who simply like to know everything about everything).

➢ **PART III – APPENDICES**
  Certain topics which benefit from a more in-depth review are located in this section, along with cross-references to relevant information elsewhere in the manual, and concluding with a keyword index. Appendix E: lists all shortcut keys.
Thank you for purchasing this NewTek product. As a company, NewTek is extremely proud of its record of innovation and its commitment to excellence in design, manufacture, and product support. This version of our most advanced live production system software raises the bar again. You will find it exceptionally powerful and versatile. This chapter provides a tour of its components and features.

SECTION 2.1 OVERVIEW

Time and again, NewTek’s innovative live production systems have redefined broadcast workflows, provided new creative possibilities, and delivered significant cost benefits. Our products include the most complete, reliable, and efficient integrated systems available for live production and web streaming, with capabilities suited to almost any broadcast need. You can produce and distribute live video programs from diverse sources in ultra-high definition formats (up to 2160/59.94p).

As well, support for NewTek’s innovative NDI® (Network Device Interface) protocol places your new system squarely in the forefront of IP solutions for the video broadcast and production industries. And, thanks to NDI’s versatile architecture, this does not isolate you in a proprietary ‘walled garden’. NDI’s widespread third-party adoption, support for interchange with other IP standards, and extensibility ensure your investment will expand your production horizons, rather than limit you to restrictive alternatives.

SECTION 2.2 LAUNCH SCREEN

The Launch Screen appears shortly after you power up your NewTek TC2 Elite. This is the command center where your production projects are configured and launched.
The *Home page* of the *Launch Screen* provides a number of important functions, notably allowing you to create (and re-open) *sessions*. Sessions are an important concept – essentially a custom preset prepared for an individual production or other purpose. Later, when you re-enter an existing session, all of its assets, settings, and even control states are remembered.

Selecting a session takes you ‘into’ the session. TC2 Elite will show you the *Session Page* next, where you can prepare *Graphics* (title pages), *Manage* content, and more – or launch the *Live Desktop* to begin production.

---

**SECTION 2.3 LIVE DESKTOP**

Your system’s live production features are all available from the *Live Desktop*, which in many ways mimics familiar video production equipment. However, the *Live Desktop* provides far more functionality in its integrated environment than similar single-purpose devices.

The various features, controls and modules comprising the *Live Desktop* are arranged in horizontal bands, as seen in Figure 2.

*FIGURE 2*

- The top-most band comprises a convenient and powerful *Dashboard*.
- The area just below the *Dashboard* is *normally* devoted to a multi-pane monitoring display, providing source and output views.

  * This pane can be re-sized, even completely hidden; or the display can be customized to complement external *Multiview(s)*, or for numerous other purposes.
• The central Live Control section is home to the Switcher, Transition, DSKs (overlay channels) and M/E controls (Mix Effect panes can be minimized, and are hidden from view in Figure 2).

• By default, the bottom third of the Live Desktop is home to tabbed control modules, including Media Players, Buffers, and the Audio Mixer.

SECTION 2.4 FEATURES

Let's take time for a brief overview of just some of the key features of your system.

2.4.1 PHYSICAL

• 3RU rack mountable chassis with 650W redundant power supply.
• Backplane audio and video, monitoring and network connectors for convenient installation in industry standard mounting.

2.4.2 MULTI-TIER FAILSAFE

‘Always on Air’ features provide multi-tiered redundant failsafe mechanisms in both hardware and software. To name just a few of these:

• Multiple software failsafe systems continually monitor and safeguard the live performance. Any recoverable software error conditions are quickly and unobtrusively dealt with.
• Video pass-through option ensures that as long there is power, audio and video from the highest numbered hardware input are routed to Output 1 in a case of catastrophic software condition.
• If at all possible, streaming output and recording also continue even if all else fails.
• Your live production system also has a comprehensive integrated system restore feature. You can quickly reset the system to factory defaults or create and use a custom drive image on an external volume to restore the system to a more recent configuration.
• If a control panel connection fails, the system attempts to reconnect automatically.

2.4.3 A/V INPUT AND OUTPUT

It’s worth taking a moment to consider that each and every NDI output potentially substitutes for multiple traditional outputs. For example – it is not unusual to need multiple physical outputs from a traditional video switcher for a single source – one for recording, another to broadcast, one for local monitoring and so on, with each destination consuming precious hardware connections. This is not the case with NewTek live production systems, which allows multiple downstream connections to a single NDI output.

Thus, it requires no hyperbole to state that your NewTek system provides virtually unlimited outputs, without expensive additional hardware.

And if you do require more standard SDI outputs than the eight provided, the system is easily extended using any number of rack-mountable output modules.

• Support for up to 32 external inputs, in resolutions up to UHD 60p with alpha channel, and up to 48 output signals over IP (including two streaming outputs), all independently configurable through software.
• Flexible, multi-destination delivery with multi-format video outputs, including 8 configurable mix outputs in HD or 2 in UHD delivered simultaneously over IP and SDI.
• Freely mix multiple video formats, and output UHD and HD sessions simultaneously.
• Create non-standard aspect sessions like square, vertical, or double-wide, and discretely output specified video segments (with optional overlap).
• Multiple Media Player modules allow you to insert pre-recorded video, music, sounds and imagery into your live presentations.
• Select Microsoft Windows® or Apple Macintosh® computers on the same network as Switcher inputs for your live productions using NewTek's NDI® Scan Converter clients.
• Update Buffers in ‘watch folders’ from networked graphic workstations, even while these are displayed live.
• Transmit output to other NDI-enabled systems across the network.
• Integrated LiveSet™ technology with scores of virtual set and box effects included.
• Support for up to 32 simultaneous Pan-Tilt-Zoom (PTZ) robotic cameras via serial and network protocols, including RS232, RS422 and IP, with integrated controls and preset system.
• Unlimited creative potential for visual storytelling with re-entrant M/Es and 9 easily accessible preset configurations for each M/E bus.
• Use switcher row color groups to automatically harmonize video sources for multiple M/E s, etc.
• Comprehensive audio integration, including 16 external audio mixer inputs, each supporting 8-channel audio and multi-channel routing to four audio mix outputs, plus an additional four supplemental NDI audio outputs.
• Bring DSK’s on and off screen independently or with background sources using combined layering and transition effects.

2.4.4 LIVE CALL CONNECT – CONFERENCING & MORE

• Flexible and powerful integrated support for a wealth of popular remote calling and conferencing applications, plus supported web browsers.
  
  o Install popular applications like Microsoft® Teams, Zoom, Google Chrome and many others, and assign their individual audio and video outputs directly to TriCaster's Switcher and Audio Mixer inputs.

  o Use TriCaster’s unique TalkBack feature to provide private direction to callers.

  o Use TriCaster’s native Innovative Skype TX support with Microsoft's powerful Skype TX™ platform to connect Skype™ calls directly to the Switcher, with automatic handling of return audio and video (including mix minus).

2.4.5 TIMECODE

• Default Quicktime® recording format includes full ‘per frame’ time-code.
• IsoCorder™ recorded clips from multiple sources are easily aligned for synchronized post show editing using embedded timecode.
2.4.6 MONITORING

- The Live Desktop includes a large monitoring pane with multiple and easily customized Workspaces. By default, this area includes Program output and Look Ahead Preview monitors with associated controls, along with the most commonly used Switcher inputs; but many alternatives are available.
- TriCaster 2 Elite provides three more multiviewer outputs to drive local displays, with configurable workspace layouts and viewports to permit directors and operators to customize the control environment to their preferences.
- Beyond centralizing, organizing, and observing your choice of video signals with tally, you can calibrate monitor color characteristics and display visuals such as audio VU meters, production clocks, and waveform and vectorscope, for comprehensive management of your live operations.
- Monitor sources on both Live Desktop and external Multiviews are configurable, and include Media Player clip timecode counters, safe area overlays, custom logo display and more.
- Waveform and Vectorscope monitors help you calibrate your signal to ensure your output meets broadcast standards and looks great.

2.4.7 VIDEO PROCESSING

- Full 4:4:4:4 32-bit floating point internal processing of all video sources.
- Proc Amps and White Balance controls for every source preserve pristine image and color fidelity.

2.4.8 THE SWITCHER

The powerful Switcher module, which provides native support for popular professional video routers and NewTek’s unbelievable NDI® (Network Device Interface) protocol, puts countless sources at your fingertips in a familiar Program/Preview row control interface.
For less complex productions, the Switcher’s convenient Express mode simplifies the process (Figure 6). This one-button operating mode will be especially welcome in environments where volunteers or less experienced operators are involved.

Additionally, support for switching using a touchscreen has been provided. See something interesting on a viewport in the monitoring section? Just tap the corresponding viewport to instantly send that source to Program output, using the current background transition (if any).

**Video Layers and Transitions**

The Transition section of the Live Desktop provides powerful tools for arranging and displaying the numerous video and graphic layers contributing to your ultimate program output.

- Freely hot-punch or transition between external sources, internal Media Players and M/E effects.
- Latch selected Switcher and M/E source rows in color groups to synchronize switching operations.
- Multiple DSK (Downstream Key) Switcher channels and independent KEY channels for each M/E, permit endless creative possibilities.
- DSK and KEY sources are always represented in small full motion ‘confidence monitors.’
- Use any of the hundreds of transitions supplied to reveal either Background or DSK/Key channels with animated wipes, trajectories and dissolves, or select colorful and dynamic Animation Store transitions with overlays, sound and TransWarp™ effects.
- Create an unlimited number of custom transition effects with embedded sounds, dynamic cloth effects, and full color overlays using the integrated Animation Store Creator application.
- Create eye-popping animated graphics using your favorite software (e.g., Adobe After Effects®), and convert them to animated Buffer effects that you can display without tying up a Media Player.
- Reveal video layers individually or in combination with one T-bar, Take or Auto operation.
• Select individual transition effects for any layer and adjust *Speed, Reverse* and *Ping Pong* options.

**DSK Channels**

- **FIGURE 7**

DSK layers support downstream overlays (*M/E Keys* are upstream overlays, i.e., ahead of the main *Switcher*).

- Display DSK/Key channels independently and swap them during a switch with custom transitions.
- Use *Media* Players to overlay title pages, including scrolls, crawls and lower-thirds, or assign a *Camera* feed or *Network* source to an overlay channel.
- Alternatively, use the *Buffer* channels to assign a specific title, still image or animation effect to any overlay channel.
- Independent *Crop, Position, 3D Rotation*, and *Scale* controls for each DSK channel permit you (for example) to configure multiple sources as ‘Picture in Picture’ elements, revealing them with individual custom effects.

**2.4.9 M/ES**

- **FIGURE 8**

Color-coded *M/E* (Mix/Effect) banks provide stunning effects.

These include secondary video mixing capabilities, switching (with traditional wipes or *Animation Store* transitions with *TransWarp* capabilities), full alpha channel support and best in class *LiveMatte™* chroma and luma keying technology on all source channels and M/E buses.

Each *M/E* bank supports:

- Up to eight primary video sources per effect.
- *KEY* (overlay) channels with individual transition capabilities.
- Sub-mix functionality, with individual transitions for A/B *Background* layers and *KEY* channels.
- Individual *Scale, Position, Crop* and *Rotation* controls and motion *Tracker* support for all channels.
- Integrated video composition engine on the switcher and each *M/E* bus to create, store, and apply layer configurations and DVE-style motion sequences
- Powerful *Comp* (composition) preset features let you animate layer and overlay position, rotation and other attributes in full motion.
- Convenient *MEM* system allows instant access to pre-configured *M/E* setups.
2.4.10 VIRTUAL SETS

- Achieve the look of large, sophisticated studio sets in a very small space with NewTek's LiveSet™ virtual set technology.
- Virtual sets support up to four keyable video sources.
- Zoom and pan the virtual ‘camera’ during live production (without touching the physical camera).
- Or use a Holographic LiveSet to freely rotate and zoom the camera view.
- Set up custom virtual set animation targets even while live.

2.4.11 RECORD AND STREAM

- Record your live-switched production at full resolution to a high-quality QuickTime® format.
- Recorded files include embedded timecode.
- IsoCorder™ technology supports up to eight internal a/v recordings at once, chosen from among local hardware camera inputs and all four outputs.
- Easily grab still images from Switcher input sources, or batch capture selected outputs.
- Simultaneous outputs for broadcast, projectors and live web streams.
- Stream live to multiple Internet destinations for redistribution, and archive your stream locally.
- Perform instant replays with custom transitions and playback speed with just one click.
- Or use NewTek’s TimeWarp™ instant replay control surface to mark, replay and manage highlights.

2.4.12 MEDIA EXPORT

Export support makes it easy to distribute content to multiple targets in one pass. This module stores credentials for social media and upload sites, and provides a queue for uploading and file conversion.

Clips and stills from live sessions can easily be added to the Export queue without interrupting production, for distribution to multiple hosting services and social media sites (including Twitter®, Facebook®, YouTube®, and more) all with a single click – even when live production recording is still underway.

This is great for concerts, galas, sport events, game shows and more. The Export feature directly addresses FTP sites and network locations too; transfer media to multiple locations at the same time to meet post-production needs or other collaborative and archival requirements.
2.4.13 AUTOMATION

Record, edit, and play back macros, whether a simple operation or more involved series of events at the touch of a button. Use powerful integrated automation systems to trigger these, simplifying complex tasks and ensuring consistent operations.

*Hint: See also LiveStory™ in the Appendix on Elite Features.*

2.4.14 HOTSPOTS, TRIGGERS AND TRACKERS

Define multiple onscreen Hotspots for different (chromakeyed) sources, and trigger macros automatically whenever something opaque enters the hotspot. This live interactivity opens up countless creative applications.

Trackers provide motion data from selected color regions as they move about the frame in real-time. Lock other video sources to Tracker output using Position tools in M/Es banks and DSKs and they will follow obediently.

2.4.15 IMPORT

**IMPORT MEDIA**

The integrated Import Media feature provides a convenient one-stop approach to gathering productions assets.

- Batch import media files for use in Media Players.
- Imported files are automatically categorized as stills or clips, and can be pre-assigned to the specific players, making them easy to find and use during live productions.
- When necessary, imported files are transcoded to formats that ensure smooth playback.

2.4.16 AUDIO MIXER

The integrated Audio Mixer provides extensive multi-channel control and management.

- Adjust numerous internal and external audio sources, and introduce them into your program manually or automatically.
- Control output levels for program, headphones, auxiliary outputs, recorders, and stream separately.
- Convenient Audio Mixer MEM system allows single-click access to prepared setups.
- Automation features include complex ‘video follow audio’ options and ‘threshold macros’.
- Exclusive or latched Solo controls
- Independent 7-band EQ, Compressor/Limiter and Noise Gate for each source and output.
- Complete multi-bus matrix routing options.
- Configurable VU meters: Show calibration on digital (dBFS) or analog (dBVU or dBu) scales.
**Media Players** and title system serve up graphics, titles, video clips and audio files quickly and easily during your live productions.

**FIGURE 10**

- Add a/v clips, sound or still images to *Media Player* playlists.
- Trim and re-order playlist entries.
- Add colorful transitions between clips.
- Flexible playback controls include variable *Speed* and *Loop* options.
- Each *Media Player* has its own volume and other advanced audio controls in the *Audio Mixer*.
- Convenient ‘per clip’ audio level and playback *Speed* control.
- *Autoplay* feature starts and stops playback automatically based on *Switcher* activity.
- Control *Media Players* with *macros* triggered by other events.
- Assign titles, graphics, clips or buffers to multiple *DSK* or *M/E Key* channels.
- Edit titles live, even while ‘on air’.
- Transition a clip to the *Main Switcher* or an *M/E* with a custom effect, play it, and then restore the target’s original source with a single click using the *Show On* feature.
- Store playlists and player configurations in *MEM slots* for easy recall.

**2.4.18 BUFFERS**

The *Buffers* module provides quick review and management of the internal media buffer system, providing combined playback and asset management tools, and is fully supported by the *Macro* system.
Buffers can be applied in any video channel, including all main Switcher and M/E rows, or as overlays in the countless DSK/KEY channels.

Buffers can contain animated effects (compiled from your own clips using the supplied Animation Store Creator application), still graphics or title pages, or dynamic LiveGraphics™ – all with full alpha channel support.

Buffer effects are resident in reserved Switcher Memory, making it possible to use them all at once without tying up Media Players. Thus, Buffers effectively substitute for many additional DDrs.

---

2.4.19 TITLES AND GRAPHICS

An extensive set of live-editable title pages in various theme packs are supplied, all ready for immediate use in your productions.

Also included in the software suite is a special ‘offline’ version of LiveText™, NewTek's professional titling and graphics application. This allows you to create your own great-looking custom title pages and motion graphics, including scrolls and crawls that can be played back in DDrs.

Hint: See also LiveGraphics in Appendix A: Elite Features.

---

2.4.20 OPTIONAL CONTROL SURFACES

A number of different control surface options have been designed to complement to your system, making your live production operations even more convenient. Once you get your hands on one, you'll never want to let go. In addition to primary control surfaces, NewTek offers an optional instant replay control system called TimeWarp™. See your local reseller for a demonstration of these powerful extensions to your system.

In summary, your NewTek live production system gives you more combined production power than any other single broadcast appliance. Let’s jump in now. First, we’ll get you connected; following that, we’ll explore some of the system’s foremost features.
Chapter 3  SETTING UP

This chapter explains how to connect power, monitors and audio visual sources, and external control devices to your NewTek TC2 Elite. After completing this short section, you’ll be all set to begin using your new unit.

To begin, let’s review ‘what came in the box’:

- Your NewTek TC2 Elite
- A/C power cabling
- NewTek mouse and keyboard

SECTION 3.1 COMMAND AND CONTROL

**Hint:** The user interface requires a minimum monitor resolution of 1920x1080.

1. Connect an external computer monitor to a video output port on TC2 Elite’s backplane.

   **Note:** The user interface runs on the monitor selected as the “main display” in the Windows control panel Display applet. Section 3.7.2 discusses supplemental monitor connections.

2. Connect the mouse and keyboard to USB ports.
3. Connect the power cord to an A/C power receptacle.
4. Turn on the computer monitor.
5. Press the Power switch, located behind the flip-down front door on rack-mount systems.

At this point, the blue Power LED will illuminate, and the device will boot up. (If this does not happen, check your connections and retry).

Though not a requirement, we do strongly recommend that you use an uninterruptable power supply (UPS), as for any ‘mission critical’ system.

Likewise, consider A/C “power conditioning”, especially in situations where local power is unreliable or ‘noisy’. Surge protection is especially important in some locales.

Power conditioners can reduce wear on power supplies and other electronics, and provide a further measure of protection from surges, spikes, lightning and high voltage.

A word about UPS devices:

‘Modified sine wave’ UPS devices are popular due to low manufacturing costs. However, such units should generally be viewed as being of low quality and possibly inadequate to fully protect the system from abnormal power events.

For a modest added cost, consider a "pure sine wave" UPS. These units can be relied on to supply very clean power, eliminating potential problems, and are recommended for applications demanding high reliability.
SECTION 3.2 WINDOWS LOGIN

Although the system can be operated without a password, it is recommended to use one to secure your system from unwanted use or intrusion. In particular, use of a password is required if you intend to use the system’s support for Skype TX™ a/v sources. Thus, a password is required by default.

Important note: The default password for new (or ‘newly restored’) systems is simply “newtek”, entered without the quotation marks, of course.

SECTION 3.3 LICENSE AND REGISTRATION

On first launch, your system will present an End User License Agreement dialog. After you accept this, one or more Registration dialogs are presented. If requested, enter the unique Serial Number and Product ID for your system.

Hint: If the Serial number doesn’t appear automatically and you can’t find it on your unit, contact NewTek’s Support center – see https://www.newtek.com/support/get-support/

You can register and obtain your registration code directly on the local system, or on another system connected to the Internet, or using the telephone. If the system is connected to the Internet, the registration process guides you through the necessary steps.

Hint: Information on connecting to a network can be found in Section 3.14.

After registering, enter the resulting registration code into the field provided in the Registration dialog.

3.3.1 REGISTERING BY TELEPHONE

NewTek’s Support center can also handle registration requests by telephone, if that is more convenient (you should still visit the website as discussed above to check for software updates when possible).

Please have your serial number (from the Registration dialog mentioned earlier) handy when you call. The phone numbers for Customer Support follow:

Telephone:

- (US) 1-800-862-7837
- (Outside US) +1-210-370-8452
- (Western Europe and South Africa) +33 (0) 557-262-262

Hint: It’s a good idea to record the login name and password you choose when creating your website profile, and keep them in a safe place. Jot down the registration code too; it could come in handy if you ever need to restore the system’s software to as-shipped state when you don’t have access to the Internet.

UPDATES

It’s a great idea to check for recent free software updates for your system at this time, too – visit https://www.newtek.com/downloads/ to do so.
**Enhanced Support (ProTek)**

NewTek’s optional ProTek™ service programs offer renewable (and transferable) coverage and enhanced support service features extending well beyond the standard warranty period. Please see [https://www.newtek.com/support/protek/](https://www.newtek.com/support/protek/) or your local authorized NewTek reseller for more details regarding ProTek plan options.

**SECTION 3.4 Rack Mounting**

NewTek’s TC2 Elite is designed for convenient mounting in standard 19” racks (mounting rails are available separately from NewTek Sales). Please keep in mind that adequate cooling is a very important requirement for virtually all electronic and digital equipment.

We recommend allowing 1.5 to 2 inches of space on all sides for cool (i.e., comfortable ‘room temperature’) air to circulate around the chassis. Good ventilation at the front and rear panel is important, and the system also requires ventilated space above the unit (1RU minimum is recommended).

*Hint: When operating your system in a ‘road case’ for mobile production, it’s best to do so with both the front and back covers (of the road case) removed.*

When designing enclosures or mounting the unit, supplying good free air movement around the chassis as discussed above should be viewed as a critical design consideration. This is especially true in fixed installations where the unit is installed inside furniture-style enclosures. See Appendix E for more detail.

**SECTION 3.5 Input Connections**

3.5.1 Connect A/V Sources

*Figure 12*

- Analog audio inputs: 1-4
- Analog audio outputs: Master, AUX 1, and Phones jack
- SDI Video Inputs 1-8 and Genlock input.
- SDI Video Outputs 1-8 and Tally connector
1. Connect local SDI video sources to BNC connectors in the SDI IN section.

Note: SDI video sources with embedded audio do not necessarily require separate audio connections.

3.5.2 CONNECTING A CONTROL SURFACE

Please refer to Section 22.1 for a discussion of connecting and configuring control surfaces.

3.5.3 CONNECTING A VIDEO ROUTER

With the appropriate software installed, TC2 Elite can control and access output from router models supporting the popular Grass Valley® Native Protocol, as well as Black Magic Design® Video Hub routers.

The implementation offers a number of configuration options; a basic setup would be as follows:

- Connect the router to the system by Ethernet cable, and then connect one (or more) of the router’s video outputs to SDI inputs with matching numbers, using suitable video cables.
  (For example, by default router output number 3 would be connected to Input 3 for control communication between the devices to be properly linked.)
- Click the Shutdown icon on the Home page (Launch Screen), and click the Administrator Mode at right.
- In the Administrator Mode panel, click Exit to Windows.
- Navigate to the appropriate folder below:
  - C:\ProgramData\NewTek\TriCaster\Configuration
- And open the file named router_setup.xml by double-clicking it (it will launch in Notepad).

This file is where you add the routers you wish to connect. Each router is identified by an entry you insert between the starting and closing “config” tags, as explained in the file comments.

A typical entry might be as follows:

```xml
<grassvalley ip="10.28.1.128" port="12345" name="AJA KUMO"/>
```

- Save the file after editing, and re-launch the system.

Note: The system communicates with routers using individual IP address and port numbers, allowing multiple routers to be connected simultaneously. File comments explain how you can bypass the default 1:1 mapping of router outputs to inputs when required, or prevent accidental changes to inputs that are displayed on Program output, along with other extended configuration options. If you assign names to router inputs or outputs in this file, make sure the names for each are unique.

Some routers allow each router input to be provided with a unique name. In such a case, the NewTek system may be able to access that name and use it for Switcher buttons as appropriate.
To enable this behavior, checkmark the *Use External* (name) switch in the *Input Configuration* panel (Figure 13) – see Section 8.1.1 for more detail.

**Black Magic Design® Auto-Detection**

For backwards compatibility reasons, these routers are auto-detected by default. (Black Magic® routers may use a USB control connection, rather than a network connection. The router’s firmware should be up to date. If detection fails, please contact BMD support for assistance.)

You can, if you wish, disable auto detection by editing the XML configuration file discussed above. (You might do this to avil yourself of the extended configuration options that are provided by doing so.) To do this, simply add the line below to the `<config>` section of the file.

```xml
<blackmagic_config discovery="false"/>
```

**SECTION 3.6 GENLOCK CONNECTION**

The *Genlock* input on the backplane is for a ‘house sync’ or *reference signal* (often a ‘black burst’ signal intended specifically for this purpose). Many studios use this method to synchronize equipment in the video chain. Genlocking is commonplace in higher-end production environments, and genlock connections are typically provided on professional gear.

*If your equipment allows you to do so, you *should* genlock all cameras and TC2*. To connect the genlock source, supply the reference signal from the ‘house sync generator’ to the *Genlock In* connector. (See Section 3.13 regarding genlock configuration.)

**SECTION 3.7 OUTPUT CONNECTIONS**

Next, we’ll discuss the audio and video output connectors along with relevant settings. We’ll start with video output, not only so you can view your results but because certain items are best considered before beginning a live production session.

---

**3.7.1 A/V OUTPUT**

TC2 Elite provides multiple video and audio output connector groups, and very flexible display options. Here are some of the possibilities:

- TC2 can output a huge number of different sources – including as many as eight different mixed compositions, forty more diverse NDI and streaming outputs, multiple internal recorders, and three additional local multiview monitors.
• All hardware inputs and all outputs are always presented to your local network as NDI sources, ready for varied utilization at any convenient place where your network extends.

• Send program output, secondary mixes, or custom ‘monitor bridge’ layouts to as many as three supplemental monitors.

• Stream two different outputs to multiple Content Delivery Networks via a suitable network connection. Each of the primary outputs (Mix 1-8) can be configured independently. Video format settings for these outputs are provided in the Live Desktop’s Output Configuration panel.

1. Connect downstream video production devices to the connectors in the SDI (or HDMI) OUT section as desired.

2. NDI and Internet Streaming outputs obviously require a network connection, and in the latter case, an Internet connection.

3. Connect audio outputs.

   a. Analog audio – Connect external audio devices to the connectors in the AUDIO OUT section.

      The backplane provides two pairs of analog audio output connectors:

      i. OUT 1 XLR connectors provide (balanced, line level) sound from the Master mix.
      ii. OUT 2 connectors provide sound from the mix assigned to the AUX 1 audio bus.

   b. Digital audio – A separate digital audio connection is not necessary for SDI or NDI output.

3.7.2 SUPPLEMENTAL VIDEO OUTPUTS

As mentioned back in Section 3.1, there are multiple monitor ports on the system’s backplane. The operating system will have set one of these as the “main display”, and this is where the Live Desktop (the primary user interface and Multiview on the same screen) appears.

**Hint: You can choose which monitor is the “main display” by choosing Administrator Mode, then clicking Display under the Settings heading.**

Three monitor ports located left of the SDI inputs on the backplane are available to connect more monitors or projection devices (etc.) for various broadcast or IMAG (Image Magnification) installations.
These supplemental monitors are referred to as *Multiview* outputs, and can display a variety of optional layouts that can be selected and configured at any time in the *Live Desktop*.

*Note: A mismatch of output format and connection type is possible at times. For example, imagery in a Graphics player may not match the current output resolution or the selected connection type. Display mismatches can often be handled, but in rare cases the source may simply not be shown.*

**SECTION 3.8 TALLY LIGHTS**

TriCaster TC2 Elite provides *Tally Light* support to allow you to connect external tally lights and similar devices.

These typically provide a red LED for a video input selected on the Switcher’s *Program* row. (NDI outputs also natively support tally over the network, without a separate connection.)

*Note: Some third party tally solutions are listed at: [https://www.newtek.com/solutions/newtek-developer-network/](https://www.newtek.com/solutions/newtek-developer-network/)*

Below is a pin-out listing for the HD15 Tally connector:
### Engineering Notes

- Pins 1-8 are 'hot' when the LED should be illuminated.
- Each LED pin 1 (4 or 8) has a 200-ohm current limiting resistor.
- With no load (open circuit) the LED pins can reach 5V. With a typical LED load, they can be expected to reach about 3V.
- GPI stands for General Purpose Interface. Pins 11 and 12 are assigned for possible future use as GPI1 and GPI2 connections, but software support for GPI triggers has not been implemented at this time.
- To prevent damage to internal components when making connections to the tally light jacks, care should be taken that connection to Pins designated GND (Ground) are always at ground potential.

### SECTION 3.9 STARTING A SESSION

If your system is not already running, power it up now to reveal the Launch Screen. (If it is already running, but is in the Live Desktop, you will need to exit, then click the large triangular Back button at left on the Session Page to return to the Home Page.)

The Launch Screen consists of two similar pages labeled Home and Session. Among other things, the Home Page is where you choose basic session settings (see Section 5.1 for a discussion of sessions).

### The Home Page

When no previously created sessions exist, the icon ring dominating the Home Page defaults to New, inviting you to create a new session.
A link containing the text “Enter Session Name” is shown at the top of the right-hand pane when the New Session link is selected at left. Click to type in this text box to replace the default name if you like (otherwise, the session will use the current date as its name).

**Note:** A variety of optional session configurations are provided for your live production needs. You can choose either 4K (UHD), HD (High Definition), or SD (Standard Definition) operating modes. SD options include both 4:3 and 16:9 (widescreen) image aspects. You can also select between different video Standards according to your locale, choosing NSTC or PAL.

Continue with session creation by designating the video Standard used in your locale. For the moment, let’s click the HD 3G button in the Preset list, which establishes 1080/59.94i as the session format, then click the Start Session link below. By default, new sessions are created on the D: (Media) drive (see Section 5.2.1 for a discussion of session Volume options).

**The Session Page**

Clicking Start Session opens the Session Page, providing access to a number of other possibilities. For now, as our intention is to configure our connections in the Live Desktop), please click the Live link at left.

**FIGURE 17**

Simply click the link labeled Start Live Production to launch the Live Desktop, which is where you will spend all of your time during live production.

**The Live Desktop**

**FIGURE 18**
Initially, as you have yet to configure input devices or add content, the *Live Desktop* will look a bit barren (Figure 18). Take a quick look around, but then let’s continue to configure your devices. (We had a brief glimpse at the *Live Desktop* back in Section 2.3, but we’ll examine it further in Chapter 4, Web Features, coming up soon.)

**SECTION 3.10 CONFIGURE A/V OUTPUT**

**3.10.1 PRIMARY OUTPUTS**

Complete video monitoring is provided right on the *Live Desktop* in a multiview occupying the upper section of the screen. This lets you operate without even connecting downstream video monitors or devices. (For facilities using NDI-enabled broadcast devices and systems, there would be no necessity to bother with *any* traditional connections.)

Often, though, you will want to connect external monitors or other downstream devices to the *SDI OUT* connectors of the unit. (see Section 3.7). In either case, you will be faced with decisions about the output formats, and audio and video sources provided to downstream systems.

The primary ‘mixed’ a/v outputs offer connection options as depicted in the following table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Video Output</th>
<th>Audio Output</th>
<th>Audio Output</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Source</td>
<td>Format</td>
<td>SDI</td>
</tr>
<tr>
<td>Mix 1</td>
<td>Selectable</td>
<td>Selectable</td>
<td>✓</td>
</tr>
<tr>
<td>Mix 2</td>
<td>Selectable</td>
<td>Selectable</td>
<td>✓</td>
</tr>
<tr>
<td>Mix 3-8</td>
<td>Selectable</td>
<td>Selectable</td>
<td>✓</td>
</tr>
</tbody>
</table>

*All audio channels can be mapped to *Supplemental Output Devices* including NDI audio-only outputs or supported third-party audio drivers (such as Audinate’s Dante™).*

**Hint:** There can be many additional outputs apart from these primary ones and the Stream outputs configured in the same pane. We’ll discuss supplemental outputs in Section 3.10.2.

Let’s take a closer look at output configuration options.

1. Move your mouse pointer to the large *Program Output* monitor on the *Live Desktop*.

2. Click the *Configure button* (gear) that appears at lower right over the viewport to open the *Output Configuration* panel (Figure 19).

**Hint:** If you are using a touch interface, tap two fingers together on any viewport to open the corresponding configuration panel.

This panel hosts tabbed panes, and the first one is labeled *Output*. This is where the signals sent to each of the video output busses designated *MIX 1-8* as well as the *Stream* output are configured. There are various decisions to make for each output:
• What video source will you assign to the output?
• What audio source will accompany it on digital connections that carry both signals?
• Which video format will be transmitted?

And so on ...

Hint: Resolution and color adjustments for devices connected to the various ‘monitor ports’ on the backplane are located in the Display Settings panel, accessible from the Workspaces menu in the main Dashboard.

OUTPUT CHANNEL OPTIONS

Let’s review video Source selection first. A drop-down menu by that name permits you to select sources for the primary video outputs.

The primary output connectors are identified by number in the SDI OUT group on the system backplane; these sources also appear on your network as NDI sources.

FIGURE 20

Hint: NDI sources are listed by supporting systems as machine_name (channel_name). So, if your system is named MyTC2, the 2nd output appears as “MyTC2(MIX 2)”.

Optional Source selections for MIX output channels include any of the following:

• Program output
  o A clean Program feed
• The ‘look ahead’ Preview
• The feed from any input
• Graphic or video output from a Media Player
• **Mix Effects**
  - Direct output from any M/E
  - Clean output from any M/E
• Output from any of the Buffers
• **Follow selected M/E Program or Preview, or a Switcher color group**
• **Black**

Audio menu options include any of the Master or Aux mixes or the sound from a selected audio input. The Resolution menu lets you independently configure the format for each output, while Transform permits rotation and selection of segments of the output image.

**Note: See Section 8.2 for detailed information on all output options.**

---

### 3.10.2 SUPPLEMENTAL OUTPUTS

The mixed outputs mentioned above are just the tip of the iceberg. Direct support for internet streaming, multiviews, and recorders drastically reduce the need for ‘outputs’ as traditionally defined in this space. But this is just the beginning: Extensive NDI (Network Device Interface) options provide NewTek systems with more powerful and plentiful output capabilities than almost any other video mixer on the market.

#### FULLTIME NDI OUTPUTS

First, in addition to all primary outputs being provided as network sources (NDI), rack-mount systems provide many secondary NDI outputs. Among NDI sources provided (automatically, without any configuration steps required) to outboard systems over the network are the following:

- **Local SDI sources** – all eight SDI inputs, if in use (rack-mount systems only).
- **Media Players** – audio and video from the four video Media Players
- **Buffers** – still image output from all buffers (animated buffers are treated as still frames)
- **Mix 1-8** – all mixed Switcher outputs
- **Out 1-8** – eight additional routed NDI outputs, easily controlled in the user interface
- **Multiviews** – with the NDI KVM feature enabled each monitor screen is available over NDI, with or without remote mouse and keyboard connection capabilities.
- **Teleprompter** – The Automation tab at right in the lower third of the Live Desktop provides a great teleprompter feature over NDI at no additional expense.

#### NDI OUTPUT MATRIX ROUTERS

TC2 Elite provides an additional eight NDI outputs, labeled OUT 1-8 on the Live Desktop.
Figure 21 highlights two tabs labeled OUTPUTS 1-4 and 5-8, located at right just above the main Switcher. Clicking a tab reveals one of two specialized crosspoint panels, which appear in the same place that M/E and PREVIZ modules are normally shown (Figure 22).

You would not be wrong to think of these panels and their associated NDI outputs as integrated Output Matrix Routers, in that their features are very similar to those normally provided by an external SDI matrix router.

We’ll discuss advanced aspects of these internal Output Matrix Routers later (Chapter 15). At this point, when discussing configuring your system, let’s simply note that you can assign many different sources to each of the 8 supplemental NDI outputs in these panes – so much so that the source option buttons occupy three banks of optional sources, similar to the Switcher source rows.

SECTION 3.11 CONFIGURE VIDEO INPUTS

Source selection settings for video inputs can be accessed in the Live Desktop’s monitoring section, so let’s spend a few moments there before continuing.

The individual monitor viewports on the Live Desktop can be flexibly assigned to different Switcher sources and outputs. Complete monitor layouts can be stored and recalled using tools located in the Workspace menu, located in the Dashboard across the top of the screen.

We’ll look into this in depth in the Reference Section of this manual, but for now let’s configure the video sources you connected earlier (Section 3.5.1).

1. Click Workspace in the Dashboard (at the top of the Live Desktop). Monitoring layout presets are listed at the top of the menu as Interface A through D. Select the layout labeled A under Multiview 1 (if it isn’t already check-marked).

2. By default, this default monitoring pane shows individual viewports for the various Switcher sources.
3. To continue to assign sources, you could select *Configure* from an input monitor’s (right-click) context menu, but let’s take a different approach.

Move your mouse over the viewport for *INPUT 1* and notice that a *Configure button* (gear icon) appears at lower right. Click this to open a tabbed settings panel (Figure 24).

*Hint: As a quicker way to access the Input configuration panel, simply double-click the viewport; or, for a touch-screen, tap the viewport with two fingers.*

4. Click the *Source* drop-down menu to see a list of sources you can select. SDI inputs and *Black*, along with *Skype TX Caller* connections are listed first under the *Local* heading. Additional NDI sources discovered on your network are grouped below under source device headings.

For NDI sources, simply making a selection completes the connection. If you choose an SDI source, further selections may be required.

![Figure 25](image)

5. The *Format* menu defaults to *Auto-Detect*. Generally, this option will suffice. Otherwise, for SDI sources you can manually select the correct *Format* (Figure 25).

6. Close the *Configuration* panel for now (click the *Close* button, or simply ‘click outside’ the panel to close it).

7. Continue to configure additional video sources in the same manner.

We’ll look at the other options and settings later, but at this point you should be able to view the video inputs you have configured on the *Live Desktop* multiview monitors.
3.11.1 CONFIGURE A VIDEO ROUTER INPUT

Right-click on the Switcher row button for the video input where the router is connected (see Section 3.5.2 for more detail) to select which router input will be transmitted to the Switcher input.

SECTION 3.12 CONFIGURE AUDIO

Click the Audio Mixer tab (centered in the lower third of the Live Desktop) to reveal audio features, including configuration controls for all internal and external audio sources and outputs, including streaming.

FIGURE 26

In addition to internal sources and outputs, the Audio Mixer supports up to sixteen external audio source connections, which can each be assigned to a nearly endless list of audio source types.

Each input and output has its own control column with Volume slider(s), VU meter(s), and other convenient features. An identifying label sits at the top of each control panel. Roll the mouse pointer over the label to reveal a Configuration button (gear) at right which, when clicked, opens the Configuration panel for the input (Figure 27).

In this latter panel, click the Connection menu to display options for an input. You will see the local hardware inputs listed in the Local group as “IN 1”, “IN 2”, etc.).

Local connections can be assigned to 'listen' to either an SDI embedded audio source connected to the corresponding video input, or analog audio inputs provided on the unit.

Choosing a local hardware audio source causes another menu to be displayed at right, which is where you can choose whether to connect to sound from the Embedded (SDI) or analog hardware input (at line or Mic level).

Note: Analog audio levels conform to SMPTE RP-155. The maximum input/output level is +24 dBu and the sample rate is 48 kHz.

Beyond this, you have the option of assigning the audio delivered over the network from any NDI or other supported network audio source (such as Audinate’s Dante™ sources) available on the system.
Returning to the audio Input Configuration panel, note that it holds both basic and advanced audio features.

In the former category, volume sliders are provided below VU meters for each audio source and output. Source sliders default to their 0dB gain setting on first launch. After adding audio sources, adjust these sliders as required.

**Hint:** Most numeric controls in the interface can be reset to their defaults using Shift + double-click on the control knob. The default value for Gain sliders is 0dBVU.

**Audio Headroom**

In digital audio systems, levels exceeding 'legal' values are 'clipped' (uniformly assigned the maximum value). This results in audible issues that cannot be easily corrected later. For this reason, it's customary to configure normal operating level (also referred to as the 'alignment level', and sometimes, 'nominal level') well below the clipping limit – sufficiently so that occasional excessively loud sounds (say, loud laughter or applause) can be accommodated without risk.

This range above between nominal level and the highest possible level is commonly referred to as 'audio headroom'. What is considered a suitable headroom allowance can vary from one locale to another, in different industry applications, and even in individual studios. NewTek systems follow well-established audio conventions, providing 20dB of headroom above nominal level (+4dBu at 0dB on the VU scale).

**Hint:** Confusion can sometimes arise because different calibration scales are common in various audio realms, and even for different device types and software.

For example, analog mixers commonly show levels on VU scales indexed as just described. In contrast, digital devices and editing software usually display levels in dB FS (Decibels Full Scale) with 0dBFS – the absolute maximum signal level that can be recorded – at the top. NewTek VU meters have selectable indexing, allowing you to view a traditional dB VU scale or dBFS as you please (see Section 16.9.1).

Whatever scale you choose, use Volume controls (and, for Mic connections, the Gain controls in the Configuration panel) to avoid over-modulation. The Compressor/Limiter feature (also located in the Audio Configuration panel) is another powerful tool to help you prevent clipping – see Section 16.10.

**SECTION 3.13 CONFIGURE GENLOCK**

Enable and configure this feature as follows:

1. If the Live Desktop isn’t already open, launch a live production session from TriCaster’s Home page.

2. Access the Output Configuration panel by double-clicking the (Live Desktop) PROGRAM viewport.

3. Click the Genlock tab (Figure 28).

4. The default Reference Type in the Genlock settings group is SD (Bi-level), as this is currently the most common reference signal type. However, if you supply an HD reference signal to the Genlock input, you may want to change the setting to HD (Tri-level).
5. With the aid of downstream *Waveform* and *Vector Scopes*, adjust *Horizontal* and *Vertical Position* and *Phase* settings in the *Genlock* section of the *I/O Configuration* panel.

![Output Configuration Panel](image)

**FIGURE 28**

Ideally both the cameras and your NewTek system’s output should be genlocked. If they are not genlocked to the same reference signal, by default the Switche will automatically apply a TBC (Time Base Correction) operation. (Time base correction may drop or insert frames as necessary to maintain sync, hence is a less desirable approach.)

When genlocking is active and properly configured, the timecode in the *titlebar* will display in green.

![Timecode Display](image)

**FIGURE 29**

*Note: For a deeper discussion of genlocking, please see Section 8.2.2.*

**SECTION 3.14 NETWORKING**

Of course, the system provides extensive support for NDI sources and outputs across a network. Few will be surprised to find that this next generation feature requires your system to be connected to the network. 😊

TC2 Elite provides two different network connections on its backplane – one Gigabit port, and the other a 10-Gigabit port. Generally, simply connecting a suitable cable from an Ethernet port on the backplane to your local network is all that is required to connect to a *local area network* (LAN). In some settings, additional steps may be required.

You can access the system *Network and Sharing* control panel to accomplish more extensive configuration tasks – see *Settings: Configure Network* under the heading *Administrator Mode* in Section 5.2.4. If further help connecting is required, please consult your system administrator.
Hint: Obviously, you will want to use the 10 Gigabit port whenever your outboard network allows, especially when you are using large numbers of NDI connections. For example, you may want to connect multiple NC1 I/O systems, each supplying 8 NDI sources to TC2. In this case, you might connect multiple Gigabit network outputs from the external modules to a 10 Gigabit network switch, in turn connecting that switch to your TC2’s 10-Gigabit connection.

The next section (Chapter 4, Web Features) will introduce you to online tutorials, training materials and other assets to guide you through your learning experience.
This chapter provides information meant to guide you to other resources that will introduce the major components and functions of your NewTek system. This includes extensive online training resources, friendly and helpful online communities, web-based external control, and more. More detailed reference material on all aspects follow in Part II (Reference).

Having made the essential external connections in the previous section, you’ll want to start your first practical live production session, and skim through some important fundamentals. This would be a good time for us to introduce you to a special feature of your system: Your TriCaster has its very own local webpage. TriCaster Elite Features also includes a browser-based control system, referred to as LivePanel™.

SECTION 4.1 PASSWORD PROTECTION

First though, let’s note that (for security reasons) features that can control your production over the network are under password protection by default. Initially, the username and password are both set to “admin.”

To enable or disable this security feature, or to modify the password, select Administrator Mode from the Shutdown menu on the Home Page main menu in the Launch Screen.
SECTION 4.2 RESOURCES

The basic webpage system provided by all TriCasters primarily features a Resources page, discussed shortly in the context of the more sophisticated LivePanel implementation. In addition to the Resources page, you will find pages listing system keystroke shortcuts, as well as a reference to system

SECTION 4.3 LIVEPANEL™

Having launched a session (refer to Section 3.9 if you need a refresher), click the Notification button at extreme upper-right in the Dashboard at the top of the Live Desktop.

Click this to open the Notification Pane, and then click the Web Browser button in the footer of that panel to view the webpage in a local browser.

FIGURE 31

IMPORTANT NOTE: This view is provided so you can preview the NewTek LivePanel features. It is not intended that you use the NewTek LivePanel web apps in a browser running on the local system.

To view the LivePanel webpages externally instead, simply connect any suitable device (be it a laptop, tablet, or desktop computer) to the same network, open this external device’s web browser and navigate to the URL shown beside the Web Browser button.

Hint: Access to LivePanel does not require an external Internet connection, though some of the links provided on the Resources page will fail without one.

The Resources page is always available, and – by virtue of links to online documentation and assets – and thus is also always up to date and relevant. You can, for example, access the Resources page from a tablet or other mobile device to follow along with the steps outlined in an online video tutorial, or view details of a feature in the User Guide while operating live.
4.3.1 VALUABLE CONTENT

You’ll notice different types of content including the following linked on the Resources page:

- **The NewTek DataLink™ web browser extension.**
- **Documentation**
  - *User Guide* – the document you are reading
  - Macro and keyboard shortcut listings, and more
- **NewTek University** – online video classes and Operator Certification programs.
- **Extras** – download updates, codecs, and utilities
- **Communities** – forums, blogs, YouTube™ videos, Facebook®, and more ...
- **Support** – Customer Service (including live chat) and product protection programs.

The 'hamburger' menu at left in the titlebar of TriCaster's web page provides access to additional web assets, including:

- **Preview Presets** – which among other things provides a very convenient extension to TriCaster's PTZ control features.
- **Shortcut Commands** – a categorized listing of shortcut commands for use in macros or custom network control systems.

SECTION 4.4 VIDEO TRAINING

NewTek is in the video production business, and it couldn’t be more appropriate for us to provide online classes to help you get the most out of your system. NewTek University [https://www.newtek.com/newtek-u/](https://www.newtek.com/newtek-u/) provides an opportunity to gain the skills and knowledge you or your team need to succeed. Classes range from 3Play Operation to Live Production with TriCaster to NDI and Performance Media Networking. Also included are a sample of NewTek University online classes with several free courses.

Visit our webpage to find more, or see our YouTube channel [https://www.youtube.com/user/NewTekInc](https://www.youtube.com/user/NewTekInc) for a long list of tutorials for NewTek products designed for all users, novice or adept. From initial product registration to live production, streaming and exporting to social media services, to advanced topics such as M/Es, Tracking, Hotspots and Automation, you’ll find it illustrated and explained here.

It’s very likely that you will be able to easily learn the basics of live production with NewTek systems by viewing these videos. When you need deeper knowledge, you will find Part II of this guide, the Reference section, helpful.

SECTION 4.5 OPERATOR CERTIFICATION

NewTek's official Operator Certification program ([see](https://newtek.learnupon.com/store)) might interest you too, both as a way to obtain relevant skills and knowledge as well as to assure potential clients that your attainments have been validated and recognized.
A thorough examination of the various aspects of your TC2 Elite. Every button, menu item, feature and control is considered in this section, so you can take full advantage of your system.
Chapter 5  THE LAUNCH SCREEN

The Launch Screen is the gateway to a suite of applications as well as maintenance and management features for both sessions and the system. We’ll discuss each of these in the pages that follow, beginning with a review of the concept of sessions.

The Launch Screen’s Home Page appears whenever you launch your TriCaster. From this screen you will create and launch sessions, then choose what sort of operations you wish to perform within it by selecting a link on the (similar) Session Page.

![Session Page](image)

**FIGURE 32**

Your intention may be to begin a new live production, or to produce another episode of a live series. Perhaps you wish to prepare title pages for an upcoming event, or perform system maintenance. We’ll look into each of these in turn, but first let’s consider a fundamental production concept, the session. What is a session, and why are sessions both important and valuable to you?

**SECTION 5.1 INTRODUCTION TO SESSIONS**

Any production involves a specific operating environment. The session is where TriCaster stores the details of that environment. Obviously, then, configuring session settings properly is important:

- What broadcast standard is used in your locale? Is it PAL, common in Europe among other places, or perhaps NTSC, standard throughout North American?
- If your task includes SDI cameras or similar SDI sources, what video format do these sources supply?
• Are cameras connected using hardware inputs, NDI, or a mixture of both connection types?

As you continue, you may make other adjustments relevant to your current production requirements:

• You might adjust cameras using the Proc Amps provided in Input Configuration panels.

• If your production plans include the use of greenscreen staging, you will doubtless adjust the LiveMatte settings for one or more cameras to provide optimal keying.

• Perhaps you will use Workspace Display Settings to adjust the preview monitor color characteristics.

• What are your output device connection preferences?
  
  o What video mixes and other internal sources do you want to route to which outputs?
  
  o Do you intend to configure a connection for a projection system? What external audio connections and adjustments are required?

• You might create a playlist of custom title pages in a Media Player, along with additional graphic elements for the Buffers.

During the course of the actual live production you may perform further fine-tuning, and also add to the media content used in the presentation:

• You might grab a series of still images from Program Output.
• Or record video clips from the production for replay.
• And capture the network Stream output as a file.

The list of adjustments, activities and assets involved in a specific production goes on, but the main point to grasp is that the session is comprised of all of the above collectively. If you do not deliberately delete the session, all of your session media and all of your session settings are ready for immediate recall and re-use.

When you re-open an existing session, it’s just as if you were continuing an earlier event. Thus, if you return to the same venue another day under similar conditions, simply re-open your prior session and you are virtually ready to go. (Of course, it’s the professional course of wisdom to test everything before beginning any event.)

Naturally, you can store multiple sessions and re-open them freely. This greatly simplifies management of files associated with producing unique programs, and easily accommodates different users with their own individual requirements and preferences.

Finding your files – automatically.

Typical sessions include many media clips, along with graphics, titles and buffers. Naturally, users must ensure make sure that all of media required is on hand for the session.

To help with this task, the system will automatically locate the necessary media, even when drive settings have been changed on the system (as, for example, when a session backup has been restored onto different drives compared to the original setup).
SECTION 5.2 THE HOME PAGE

Having discussed sessions, let’s go on to consider how sessions are created, and how you choose which one to work on. These items, along with a few other top level functions, are found in the Home Page.

This primary screen is the first thing you encounter after launch. It is dominated by the main menu shown in Figure 33.

Choosing a link from the menu updates the right-hand pane of the Home Page to provide options and controls related to your choice.

For example, the first thing you will likely do on launching a brand new unit is create a session.

In anticipation of this, the New icon is pre-selected automatically whenever there are no existing sessions. This results in the relevant session options being displayed at right, as shown in Figure 34.

5.2.1 NEW (SESSION)

As just mentioned, clicking New on the link populates the pane at right with related options.

Principally, for each session you must designate (by selecting switches) your local video standard.

- Select NTSC or PAL
- Select a session format, whether by clicking one of the convenient Preset buttons, or making a manual selection at right (such as 1080/59.94i)

**SESSION NAME**

You will see a name field for your session listed above the options pane at right. You can click in this field to modify the default name (which will be the current date) using the keyboard.

**TEMPLATE**

The Template drop-down menu lists all sessions currently available on the system. If you select an entry, the session you create subsequently retains all settings of the source session.
A menu labeled Volume appears just right of the Session name. This selection designates a primary hard drive for the session (and its associated content) to be created and stored on.

Note: When using internal IsoCorder™ capture modules to record multiple sources, you may assign more than one volume to capture duties. Sessions track recorded clips too, providing easy access to them for live use.

Suitable storage volumes that are detected are listed in a drop-down menu when you click on the Volume control. You can select any volume shown as the session drive, though external drives are not recommended for active use as session drives.

**Format and Output Considerations**

Remember that for live production, you can simultaneously supply both SD and HD output for either SD or HD sessions. The session setting does have some significant ramifications, though. For example, if your session format is SD 4:3, this is the file format captured by the Record function when capturing Program output – even when the video cameras supplying your inputs are HD; and the opposite is also true.

Note: See Section 8.2 for more information on Video Output configurations.

Having made your selections, you would normally click the Start Session button at lower right to launch the Live Desktop – but first, let’s explore a few other features of the Home Page.

5.2.2 TitleBar Tools

**Eject**

An Eject button at the top-right corner of the page allows you to safely disconnect external drives. (Drives can also be ejected from the Live Desktop.)

Note: Media configured as Read Only is not shown for the New or Open (session) features, since they cannot be used for sessions. However, Read Only media can be used for import purposes.

5.2.3 NDI KVM

KVM is an abbreviation for "keyboard, video and mouse". You will notice an NDI KVM menu just left of the Eject button. This feature leverages NewTek's NDI® protocol to provide superb KVM functionality, giving you complete control your system from anywhere on the network where you can run the Windows version of NDI Studio Monitor.

See Appendix A: (Elite Features) for more detail about this feature.
OPEN (SESSION)

If there are existing sessions on the system, the main menu at left on the Home Page will default to Open (Figure 36). Clicking Open causes the Sessions List to appear at right. This pane lists all sessions stored on currently mounted storage media.

Available sessions are grouped under the names of the storage volume they are located on (Figure 37). The listing shows the Session Name and Format for each session, on each drive. Let’s look at the Sessions List briefly before we open a session.

AUTO-LAUNCH SESSION

Normally, a few seconds after launch, TriCaster automatically reloads the last session you were in, allowing you to basically power up into the last session unattended. You can, of course, interrupt this process by selecting another session or pressing any key. Advanced users can modify this behavior, either by designating a specific session to auto-launch irrespective of the most recent manual selection, or by disabling the feature entirely.

Important Note: Modifying this feature requires changes to the Windows® registry. We strongly recommend that edits to the registry be performed only by experienced persons, as the system can be rendered inoperable if this is done improperly.

To do this, add a new value named auto_launch_session to:

HKEY_LOCAL_MACHINE\SOFTWARE\NewTek\XD\Admin Screen
Set its value data to the name of an existing session, and that session will auto-open on launch (instead of the 'last open' session). If the specified session does not exist, the auto-launch feature will not proceed, by setting auto_launch_session to "Disabled" (or some other suitable string) rather than a real session name you can effectively disable auto-launch.

**CONTEXT MENU**

Right-click a session name to open a context menu with two items listed in it: Rename and Delete. Be aware that the Delete function should be used thoughtfully, as it cannot be undone.

All content stored in the named session's folders will be deleted, including imported clips, images and titles, any clips captured to the default session folders, and even LiveText project files created within the session (unless you have deliberately saved the projects and related files to locations outside the session folders).

> **Note:** Content that is not local to the session but which was used in it is not deleted. For example, you may have added still images to your playlist directly from a USB thumb-drive, doing so without actually importing the files into the session. Those external files will not be deleted.

**RESTORE SESSION BACKUP**

In another section of the Launch Screen (Session Page>Manage) there is a feature that allows you to back up the current session to another storage volume.

The Restore Session Backup link at the bottom of the Session List (for each drive) is provided to compliment this feature. To restore a session you have previously archived, click Restore Backup Session (Figure 37), and use the file explorer provided to select a Session Backup file.

Click Open, and a progress gauge will track the restoration process. In due course, the newly restored session will be added to the Session List for the specified drive.

> **Hint:** Restoring a session that has a lot of content can take considerable time. Be judicious, then, if considering a restoration shortly before a scheduled live production.

**OPENING A SESSION**

Click or tap a name in the Session List to launch that session and display the Sessions Screen.

---

**Administrator Mode – the DMZ...**

It’s worth considering why this mode is provided. Your NewTek system plays a central role in your video productions. Though technically 'a computer', it is un-wise to expect it to serve 'dual-duty' as both a live production system and a general purpose computer.

Administrator Mode serves as a demilitarized zone between the live production system and host operating system.

It is important not to burden your system with software or accessories that compromise its performance or reliability. The Administrator Mode screen provides access to key settings and options, while limiting exposure to system options that could have that sort of negative impact.
This selection provides Restart, Shutdown, and Administrator Mode links. The first two options are presumably self-explanatory, but the latter deserves a bit more discussion.

**Administrator Mode**

Selecting Administrator Mode from the Shutdown menu on the Home Page icon ring exits the live production environment, and takes you to a new screen (Figure 38) that offers various functions and settings having to do with system maintenance and management.

![Administrator Mode](image)

**FIGURE 38**

*Administrator Mode* options are grouped under several headings, as discussed next.

**Browse**

- *Web* – Opens the default system Internet browser.
- *Files on Disk* – Opens a system file window.

**System Utilities**

- *Register System* – The registration process was outlined back in Section 3.2.
- *Enter Feature Key* – This link allows you to enable optional features.
- *Display Serial and Hardware ID*
• **Update** – NewTek may periodically provide software updates. Updates can enhance performance, security or even add useful new features. If the unit is connected to the Internet, clicking **Update** takes you to the *Updates and Downloads webpage* where you can locate the most recent software version.

Having done so, you can download and run the **Auto Updater** for the new version, or use the **Download Tool** option, which allows you to store the related files on another system for later transfer to your NewTek live production system.

• **Defragment all Drives**

Over the course of lengthy use, data on hard drives devoted to audio and video storage tends to become fragmented, which degrades playback performance. Defragmenting will correct this condition.

You could think of your hard drive as being like a shelf in your library. As time goes along, the shelf fills with books. Some are quite large, others smaller – just as media files may be larger or smaller.

As time goes along, you decide to remove books you have finished using from the shelf, in order to make room for new additions. You remove a book here, another there, opening up gaps between the remaining books.

This makes some shelf space available by creating gaps between the remaining books. Sadly, another large new book may be too big to fit in any one of the gaps.

A foolish librarian might tear the new book into smaller sections, just big enough to fit into the open spaces on the shelf. This would obviously be unwise. When you wish to refer to the book later, you will waste a lot of time locating and assembling its sections before you can access it.

How much better it would be to slide the remaining books closer together, combining all the free space first. Unfortunately, computers are ‘foolish librarians’. They tend to want to fill in all the gaps in their storage areas, even if this requires literally shredding your ‘book’ (in reality large video files from your sessions) into tiny fragments.

Defragmenting the storage volume has the same effect as sliding the books together, resulting in one or more larger gaps. The end result is that the system doesn’t have to frantically search in many different places to assemble the video streams from your recorded session.

*Hint: Defragmentation can sometimes take considerable time, so it’s not something you want to begin just before an important event.*

• **Backup or Restore System** – A complete set of **Backup** and **Restore** features are available to help in the event of an unforeseen problem. We strongly encourage you to protect against any unforeseen occurrence by using the **Backup** feature soon after registering. See Appendix I: Restore Factory Defaults.
• **Set Live Panel Password** – Configure the password for access to the web pages and network control features provided by the unit.

• **Command Window** – Open a system command line window, allowing you (among other things) to use advanced commands to manage your system and network settings.

• **Swap Primary Monitor** – The *Live Desktop* will appear on the monitor designated as primary.

**Settings**

• **Regions and Language** – Open the system language control panel.

• **Advanced Keyboard** – Open the system keyboard controls panel.

• **Date and time** – Open the system keyboard controls panel.

• **Configure Network** – Open the system network controls panel.

• **Display** – Open the system display controls panel (useful for configuring multiple monitors, among other things).

• **Fonts** – Open the system font management console, allowing you to add that new font your client wants you to use for their title pages.

• **System Name** – It can be very useful to modify the default name by which your system is identified on the network. This is especially true when more than one unit might be on the same network. The **System Name** feature opens the System Properties console’s Computer Name tab. Click the **Change** button to modify the current name.

**Shutdown**

• **Exit to Windows** – Leave the *Administration Mode* screen and display the standard system desktop.

• **Back to (TriCaster)** – Exit *Administration Mode*, and return to the *Launch Screen*. 
Select the Help icon to reveal links to open manuals and other information.

The primary User Guide is found here, as well as documentation for other software (such as the LiveText™ manual).

Click the License Agreement link to review the end user license requirements, or the About link to list software version information, credits and acknowledgments.
NewTek offers additional software tools to expand the power of your NewTek system. The icon labeled *Add-Ons* on the *Home Page* provides access to some of these tools.

![Add-Ons interface](image)

**FIGURE 42**

When you select the *Add-Ons* icon, links are displayed at right for installed software applications, allowing you to launch them.

For example, you will see links to the included *Animation Store Creator* utility as well as a demo version of the optional *Virtual Set Editor™* program, the very useful *DataLink Configuration* applet (see also Section 5.3.2; please refer to the accompanying *Automation and Integration Guide* for full details on DataLink's many powerful source options), and much more.

**SECTION 5.3 THE SESSION PAGE**

![Session Page interface](image)

**FIGURE 43**

Opening a session from the *Home Page* (whether using *Open* or *New*) takes you to the *Session Page*, providing a new set of selections on the main menu.
The name of the current session is shown in the top-left corner of the screen. The current session is displayed in the form “Home/session name”. If you wish to leave the current session and return to the Home Page, you can click the large Back Arrow displayed at left, or the word “Home” in the session name label.

The main menu on the Session Page offers three selections. These are discussed next.

5.3.1 LIVE

![Live Icon](image)

**FIGURE 44**

The icon labeled Live represents the Live Desktop, your live production center. Selecting it (by clicking or tapping the link), presents a Start Live Production link button in the Session Page’s right-hand pane; click this link to launch the Live Desktop.

5.3.2 MANAGE

![Manage Icon](image)

**FIGURE 45**

Various internal production modules provide filebins to permit you to manually administer files related to their projects, playlists, and so on. The Manage icon in the Session Page provides an alternative approach to file management.

At times you may find it useful to be able to quickly access the various files associated with specific sessions. Selecting Manage refreshes the options pane on the right-hand side of the Session Page with a number of convenient items.

**BROWSE**

Under the label Browse, you will see direct links to the Clips, Still, and other content associated with the current session. Clicking one of these links (or selecting it with the up/down arrow keys and pressing Enter) opens a system file explorer.

You can use the familiar features and shortcut keystrokes in these windows (Cut, Copy, Paste, Rename, Delete and so-on) to manage the session content.
Hint: Of course, you can open several of these folders simultaneously, and navigate these file windows to other locations as well. For example, you might copy the title page (.cgxml) files from the Titles folder of one session into the Titles folder of a different one before deleting the first session.

Several other important features are contained in the *Manage* group, discussed next.

**Configure DataLink Keys**

DataLink™ is an astonishingly useful NewTek exclusive, allowing the handling and updating of text and image data from both internal and external source for use in title pages in real-time, as well as other purposes. Briefly, *DataLink* tracks variables (called *DataLink keys*) and their values, and updates these values on-the-fly when used as entries in title pages.

*FIGURE 47*

**Hint:** *DataLink keys can serve in other ways, too, as for example to automatically insert information such as time or scores into labels and comments of social media uploads, or as instant replay clip metadata.*

Since *DataLink* falls into the general realm of automation and also has access to external sources, complete coverage of its features and capabilities is found in the companion *Automation and Integration Guide* included with this product; but we’ll mention a few highlights as we go along as well.

**Hint:** If not today, we urge you to make definite plans to read the DataLink chapter in the Automation and Integration Guide. Without exaggeration, DataLink is a game-changer. It can save you a great deal of time, prevent embarrassing and potentially costly mistakes, and lift your productions to new heights.

The *Manage* group link labeled *Configure DataLink Keys* opens a dialog that allows you to pre-assign values to three special *DataLink keys*. 
These *session keys* serve as the default first and second line text inserts and image used by many of the supplied template title pages. (By taking a moment to populate these keys with, for example, a company name, motto, and logo, you will find much of the included graphic content ready to use for a given production without ever having to type another line.)

**Backup Session**

Clicking the *Backup Session* button opens a system file explorer that you can use to assign a storage location for the backup files. A progress gauge is displayed during processing, and if necessary you may *Cancel* the operation. Of course, the session to be backed up is the current session (to back up a different session, return to the *Home Page* and *Open* a different session.

*Note: The backup operation feature does not ‘gather’ media files in the backup, but it does store Media Player playlists. Provided the media files are still available, they will appear as expected when the session you backed up is restored.*
The Live Desktop is the control center for all your live production work. It provides control over switching, transitions and overlays, titles and graphics, audio mixing, playback of digitized content, and much more. In addition, streaming and recording features are located here, along with keying and virtual set tools.

The Live Desktop is launched by creating (or opening) a session in the Launch Screen’s Home Page, then selecting the LIVE icon and clicking Start Live Production.

SECTION 6.1 DISPLAY REQUIREMENTS

The Live Desktop requires a minimum screen resolution of 1920x1080.

SECTION 6.2 OVERVIEW

The Live Desktop provides visual feedback for operations, including monitoring, live switching, and so on. While it is seldom necessary for it to appear as heavily populated as seen in Figure 48, we display it this way to illustrate that it can be logically divided into five horizontal bands, described from top to bottom in the following table.
SECTION 6.3 CONTROL TYPES

You will find various control types used repeatedly in the *Live Desktop*. Some examples are shown in the table below.

<table>
<thead>
<tr>
<th>Control Type</th>
<th>Type</th>
<th>Examples</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Numeric Slider</td>
<td>Gain, Pan</td>
<td>Drag in line with the control’s orientation to raise or lower the current value.</td>
</tr>
</tbody>
</table>
Rotary slider

Position, Size, Rotate

Drag up-down to adjust one value, left-right to adjust the other value, diagonally to adjust two different values simultaneously.

Hold down Alt while dragging vertically to modify the third value (Z) when provided.

Rotary Knob (single-value)

Audio Gain

Drag left-right to adjust the current value.

Combo-Slider

Transition, Zoom Duration

- Drag left/right to raise or lower the current value.
- Click the digits to type in a new value.
- Or click the triangle to open a drop-down menu.

To make very fine adjustments to slider values, hold down the Ctrl key while dragging the mouse (this increases accuracy by 10x). Hold down the Shift key and double-click most controls to reset them to their default values.

SECTION 6.4 CUSTOMIZING THE DESKTOP

The Live Desktop layout can be adapted to many different scenarios, and provides a number of customization options that can be of benefit in your workflow. In this section, we’ll touch on several of these.

6.4.1 RENAMING INPUTS

As charming as descriptive names like Camera 1, DDR 2 and M/E 5 are, you may wish to change these labels to something more appropriate for your local needs.

To do so, you will need to open the Input Configuration pane for the Switcher source in question. There are several ways to open this pane. You can use any of the methods described below to do so.

- Right-click a viewport in the Live Desktop or external Multiview, or a Switcher button, and select Configure from the context menu.

- Roll the mouse pointer over the viewport for the source, and click the configuration (gear) icon shown at lower right.

- ‘Two finger tap’ the viewport.
Expand the Name/Comment group in the Input tab of the Input Configuration pane, by clicking the twirl-down triangle at left. This group contains several editable text fields, including Video (the label shown under monitors), a shorter Switcher Button label, and the longer Comment field.

*Hint: The Comment entry is more than just memory aid. NewTek’s DataLink feature can automatically update title pages as inputs are displayed by drawing on the information you enter here.*

### 6.4.2 WORKSPACES

Various layouts and custom monitoring options for the Live Desktop and Multiviews are provided in the Workspace menu.

When one or more Multiviews monitor is in use, Workspace preset options can be combined with great flexibility, letting you see what you want to see where you want to see it.

It’s easy to set up complementary displays. Each connected monitor, including the Live Desktop screen (listed in the Workspaces menu as Multiview 1) has four unique presets, labeled A-D. (Figure 50 displays presets A-B only due to having additional monitors connected). You can load a different viewport layout into each of these presets, and recall them easily using this menu, or perhaps using Macros assigned to keystrokes.

In addition, each individual viewport can be assigned to any Switcher input source or output using its own context menu. So, for example, even if you initially use Load Default to assign identical viewport layouts to preset A and preset B for a given screen, you can configure each viewport differently in the two presets.

Switching between presets, then, will allow you to view different sources. Even the overlays (such as Safe Area display) for each viewport are fully independent.

*Hint: See Section 6.4.3, The App Desktop, for information on this special, powerful Workspace option.*
SCREEN DIVIDERS

Notice too that, when the lower tabbed modules are visible, you can also drag the horizontal divider between the Live Desktop monitor pane and the Switcher up or down to modify its position.

You can even move the horizontal divider all the way up to the bottom of the Dashboard, thus hiding the Desktop monitor pane entirely (Figure 52), providing much more room for other modules in the process.

Hint: Reset the horizontal divider to its default locations by double-clicking it. Also, note that a vertical drag bar is provided just left of the Program and Preview viewports in some Workspaces.

Neither is it necessary to display modules you don’t access frequently (say, for a simpler production) at all times. For example, the M/E pane is hidden by default; click the Mix Effects label or an M/E tab above the Switcher to toggle display of the M/E pane – or press the keyboard shortcut “m”.

FIGURE 51

FIGURE 52
6.4.3 THE APP DESKTOP

The Application Desktop option (available for all Workspaces other than the primary Live Desktop) is a special case, and clears the designated to provide screen real estate for supported desktop applications.

This special workspace lets you run selected applications inside TriCaster. A custom taskbar running across the bottom of this screen bears icons you can use to launch (or minimize) the various applications supported. The best part is that you can capture video from selected browsers, video conferencing applications, and their audio output and send it to TriCaster’s Switcher and Audio Mixer.

![Supported applications taskbar](image)

**Figure 53**

Supported applications you install will appear along the taskbar, as shown here.

**Supported Applications**

Microsoft® Edge Chromium is installed on your TriCaster 2 Elite; however, if you prefer a different browser, Google Chrome or another Chromium™ based browser can be installed. A number of popular video conferencing applications are also supported, such as Microsoft® Teams, VooV™ Meeting, Slack, Discord, and Zoom.

*Note: For much more about the Live Call Connect features supported in the App Desktop workspace, see Section A.2, Live Call Connect™ (in Appendix A: Elite Features).*

6.4.4 EXPRESS SWITCHER MODE

TriCaster’s alternative Switcher interface provides new opportunities to customize both the interface and workflow. The Switcher’s Express mode is very compact, freeing valuable Live Desktop space. Viewports in the multiview area above are significantly larger than in the more familiar two row (Program/Preview) Switcher mode.
FIGURE 54

Too, Express mode (Figure 55) provides a simple ‘single-click’ workflow, ideal for less complex productions, when a control panel is in use, or in environments involving student or volunteer operators who may struggle with traditional switcher workflows.

FIGURE 55

You can easily switch between the standard Switcher mode and Express operating modes by clicking their eponymous tabs at right in the horizontal bar just above the DSK controls.

For more information on these two modes of operation, see Chapter 9, Switcher, Transitions and Overlay. Several additional workflow and interface options are hosted in the Options menu, which we will discuss shortly (in Section 7.2).
The Dashboard groups important production features along with configuration and display controls in one convenient place for quick access and review. As well, the Dashboard serves to provide information on the current session, status updates and storage usage, along with timecode and the Macros and Options menus.

The Dashboard is home to several important displays, tools and controls. Prominently located at the very top of the Live Desktop, it occupies the full width of the screen.

Initially, to avoid overwhelming us, the left end of the Dashboard simply shows the name of the current session. Moving the mouse pointer to the top of the screen reveals the set of menus shown in Figure 56.

The right half of the Dashboard (Figure 57) contains additional features and tools that are more frequently accessed, for which reason they are displayed full-time. The various elements comprising the entire Dashboard are listed below (starting from the left):

1. File menu – see Chapter 7
2. Options menu - see Chapter 7
3. Macros menu – see Chapter 17
4. Workspaces menu – see Chapter 10
5. EXPORT button and Configuration (gear) – see Chapter 19
6. STREAM/ENCODE button and Configuration (gear) – see Chapter 18
7. RECORD/REPLAY buttons and Configuration (gear) – see Chapter 20
8. GRAB button and Configuration (gear) – see Chapter 20
9. Clock(s) and Configuration (gear) – see Chapter 7
10. Notification List – see Chapter 7
Some of these items are so important that they rate their own chapters. Others are detailed in various sections of this guide (cross references to the relevant sections of the manual are provided above). In this chapter, we’ll focus on those Dashboard features not discussed in greater depth elsewhere.

SECTION 7.1 FILE MENU

This menu drops down to reveal the following items:

- **Eject** – opens a sub-menu that lets you safely disconnect selected storage volumes
- **Import Media** – easily add media files from external sources to the appropriate session folders, and automatically transcode them to friendly formats for optimal playback if necessary. (*Import Bin* features are similar to those of the *Publish Bin.* )
- **Share Media Folders and Buffers** (see Section 11.3)
- **Exit** – close your live production session, and return to the Session page of the Launch Screen (all session settings are stored on exiting)

SECTION 7.2 OPTIONS MENU

A number of very useful interface and workflow options are presented in the *Options* menu.

- **Tabs Follow**
  
  o Enable *Follow Preview Row for All Inputs* to display the tabbed pane for a Preview row source automatically on selection changes (for M/E selections, the M/E pane must be maximized in order to see the M/E tab update).
  
  o When *Tabs Follow Preview for M/Es* is checked, only the M/E pane selection updates (when you select an M/E as source on Preview).
  
  o *Tabs Follow All Delegates* updates the Desktop in sync with control panel delegate changes.

*Hint: Control panel delegate operations can sometimes result in a tabbed module that you want to view being obscured when certain options are enabled. When this happens, press the control panel Delegate button again to re-display the tabbed pane you are interest in.*

![FIGURE 58](image)
• Default Media File Level – the default ‘per-clip’ audio level applied to imported media files is controlled by this option.

• The Macro Triggers menu offers the following options:
  o Tally – Enables State Change macros configured in the Automation tab (Input Configuration panel) for any video source.
  o Audio Levels – Enables the Run Macro at (threshold dB) feature for Audio Mixer sources.
  o Disable Hotspots – Disable macro triggering based on Hotspot activity (see Section 8.1.4).
  o Disable Hotspots on M/Es – When this is on, Hotspot macros are only triggered if the source is visible on Program output (including via an M/E shown on Program output, or a DSK).

• AutoPlay
  o Enable Autoplay Out on M/Es – Enables Autoplay’s transition-out behavior for M/E’s (Mix mode) displayed on Program out (off by default).
  o Extend Play – When enabled along with Autoplay in the DDR ...
    ▪ Playback will extend past any marked out point, up to the last frame of the file – even if the operator manually removes the DDR from output.
    ▪ After the last frame is displayed, the playhead advances to the next playlist item.

• Click Viewport to Show on PGM – When this feature is enabled, clicking a viewport (or, on a touchscreen, tapping a viewport) selects the corresponding video source on the main Switcher’s Preview row and performs the current Background transition to display it on Program output.

• Show Tally on Skype Return – The return video sent to remote Skype TX callers shows a tally overlay.

SECTION 7.3 MACROS

Macros provide extremely important production benefits – sufficiently so that we have not only have given them a place of their own in the User Guide (Chapter 17), but they are also discussed in greater detail in the accompanying Automation and Integration Guide. Also, note that the Shortcut Commands used in macros are listed on your TriCaster’s locally served Resources web page.

SECTION 7.4 WORKSPACES

The Workspaces menu opens when clicked to reveal control groups for each detected screen. These control the monitor viewport layouts shown on the Live Desktop and external Multiview displays. Workspace features are discussed in Section 10.3.
SECTION 7.5 CLOCK

The Dashboard also hosts a clock which, in addition to showing the current time, can display countdowns to event start and end times when enabled.

To access time features, click the small gear icon next to the timecode display at right in Live Desktop’s Dashboard.

Hint: You can set the system clock, as for any computer; simply exit to the Windows® Desktop to do so.

7.5.1 LTC TIMECODE

Linear timecode has long served as a method of sharing an external timecode reference in video production. Output from an external timecode generator is supplied to devices in the video pipeline using a standard audio connection.

Choose an LTC source in the Timecode Configuration panel, and the feature will decode time stamps from the audible signal, using the values for clock displays as well as embedded timecode when recording video (if the file format supports this). This is a great asset for post-production purposes.

Hint: The timecode display in the Live Desktop titlebar is tinted blue when external timecode is in use. If the external connection is lost for any reason, the display changes to white. TC2 will attempt to maintain continuous timecode from the interruption on, until a valid signal is restored (in which case the display turns blue once more).

7.5.2 EVENT TIME

Two switches under the label Indicate Event Time allow you to configure Start and End times for your upcoming show. Beside each of these is an editable time field. Enable the Start/End switches, then click inside the field to modify the time value by direct entry, or drag left right to raise or lower the current value.
During live production, the Dashboard and as well as monitor panes and default Multiview layouts offer Broadcast Clock displays based on the current timecode. Secondary clock displays show a useful countdown to the (production) Start and End times when the corresponding switches are enabled in the Timecode Configuration panel.

SECTION 7.6 *NOTIFICATIONS

The last item at right on the Dashboard is the Notification icon (Figure 63). A ‘number bubble’ indicates how many un-viewed entries have accumulated. Clicking the icon displays the Notification Pane, which provides both helpful information and also some very useful tools.

The Notification icon can be colored white, green, amber or red. The color indicates the type of messages available for review:

- A green icon denotes an informative message, as well as the availability of new media.

- An amber icon indicates a warning message has been received.

- Higher priority alert messages are denoted by a red icon.

The highest priority (un-viewed) item in the list at the moment determines the Notification icon color. After you open the panel to review the notifications in the list, the icon turns white.

Individual items can be cleared from the list using the context menu opened with the triangle gadget shown at right when you roll the mouse over an entry, or you can empty the list with one click using the Clear All button in the footer of the panel.

Information appearing in the Notification Pane can include the following:

- Session name, format, and software build number (press Alt + b on the keyboard to update this item)

- Status messages pertaining to operations or system conditions; these may be benign notifications or cautionary. For example, a message indicating that the connection to a control panel has been lost is given an icon with an amber color. A higher priority warning triggers a message with a red icon.
A special message is added if a clip or still image is added to one of the Session’s media file locations (such as the session Clips and Stills folders). These entries show a thumbnail icon at left, along with the filename and path. In this case, the item’s context menu includes an Add to Media Player option (Figure 65), which lets you immediately append the new file to a selected Media Player playlist.

Hint: This last feature is particularly handy when adding files across the network, as perhaps when using the DataLink™ for TC2 Elite plugin to import images from the popular Chrome web browser.
Your NewTek system provides extensive control over video sources, along with endless creative features. Each source has Proc Amp, keyer (LiveMatte™) and Crop (a.k.a., ‘garbage matte’) features. Input Configuration panels are also home to real-time Hotspot and Tracker features. The number and flexibility of outputs supplied is astonishing, too, and we’ll discuss these fully in this chapter.

The addition of ND1® (Network Device Interface) support provides you with virtually unlimited input and output possibilities. Generally, an NDI source needs little if any configuration; other source types may require you to choose between optional connection methods and settings.

SECTION 8.1 INPUT CONFIGURATION

8.1.1 INPUT TAB

- Any external NDI source, Skype TX Caller, output from a video conferencing app on the App Desktop, or a local hardware source connected to one of the system’s hardware input connectors, can be flexibly assigned to any Switcher input.

- This also means that sources can be easily re-ordered on the Switcher.

(Likewise, default audio sources for Switcher inputs can be flexibly re-assigned in the Audio Mixer module. For example, audio Input 1 and video Input 1 are not inextricably linked.)

The assignment of one of the various types of source to a Switcher button (e.g., “Input 1” on the Switcher) is made in the Input Configuration panel (Figure 66), introduced to us back in Section 3.10.2.

Open Input Configuration by any of the following methods:

- Double-click the monitor viewport for a Switcher input.
- Click the Configuration (gear) icon shown at lower right when the mouse pointer is rolled over above the viewport.
- If you have a touch-screen, you can two-finger tap the viewport.
- Or, right-click a Switcher input button and select the Configure menu item.
SOURCE

Use the Source menu in this panel to assign one of the many sources available to the corresponding Switcher input. Available video sources are grouped under labels named for the device supplying them.

FIGURE 67

The Local group in the Source menu includes those sources connected locally to the system’s hardware inputs (e.g., SDI BNC connectors), any other local hardware sources detected (such as a webcam), video conference application, along with Skype TX Caller connections hosted by the local system (in contrast to externally hosted Skype TX sources, such as those supplied by a NewTek Talkshow® VS-4000 system), and Black.

* Please refer to Appendix B: Skype and Skype TX, for more on this useful source option.

SETUP

FORMAT

If you use the twirl-down triangle gadget at left to expand the Source>Setup control group (Figure 67), you will see that the Format for these diverse source types defaults to Auto. In the case of an NDI source (and often, for hardware sources too) no further settings are required.

For hardware video sources, additional Format options are provided in this menu, allowing you to choose a setting manually if the Auto option is unable to correctly identify the format. Let’s explore other features located in the Input Configuration panel.

DEVICE WEBPAGE

For network connected sources (such as NDI sources), a Device Webpage button may appear just right of the Source menu. Click this button to access the remote device’s own configuration webpage.

VIDEO DELAY

At times, typically due to upstream processing and architecture, video may arrive at the system’s inputs ahead of the corresponding audio. The Video Delay feature allows you to compensate for these issues to establish a/v sync.
**Frame Sync**

By default, *Frame Sync* is set to *Automatic* for all external source types, allowing you to work with a wide array of potential video sources without concerns about video timing.

This option (*Automatic*) enables the full array of timing correction tools available to achieve smooth and accurate frame timing in your productions, including features that correct for issues caused by 'less than ideal' networks.

The next menu option (*On*) enables full-time frame synchronization and may well suffice in some video pipelines. This alternative has the benefit of ensuring the lowest throughput latency possible on a video switcher using frame-sync (2-3 frames).

The final *Frame Sync* option is *Off*. Disabling *Frame Sync* altogether ensures the very lowest possible throughput latency for genlocked sources. Note that sources with *Frame Sync* disabled must be genlocked, and in phase (that is within 180° of the current Switcher output). Otherwise, video from the source will simply not be seen. In practice, disable *Frame Sync* for genlocked sources only, then adjust the *Phase* setting (see Section 8.2.2) until video is displayed and you should be all set.

**Premultiplied Alpha**

If you are supplying imagery (video sources, video clips, or still images) that support transparency by means of an embedded alpha channel, your choice here will be important. There are two ‘flavors’ alpha channel pixel encoding. The first is often called ‘straight’ or may be referred to as ‘non-premultiplied’. Unsurprisingly, the alternative is ‘premultiplied’.

The *Premultiplied Alpha* switch is off by default. Making the correct selection is necessary for correct compositing over other imagery.

**Low Bandwidth**

For NDI sources, a *Low Bandwidth* option is shown. This allows you to force the sending device to a lower quality video stream that may nevertheless be quite useable if the source is not intended to be displayed full screen. This option may be preferable in network settings with limited capacity (such as WiFi).
PTZ Control

FIGURE 71

For many source types, a **PTZ Control** menu is shown in the **Source** control group. The default control **Connection** type is **NDI** which, assuming you are configuring an NDI source, makes life a lot easier because there is nothing else to configure.

Otherwise, if you *must* select a ‘legacy’ control connection type like RS422, etc., or perhaps a non-NDI network connection, additional controls may be shown in this group to let you configure things like **Baud Rate**, **Com Port**, **IP Address**, and the like.

* We apologize that mankind has yet not completed its planet-wide upgrade to NDI (shouldn’t be much longer now, we hope). 😊

Name/Comment

FIGURE 72

Expanding the **Name/Comment** control group reveals text entry boxes that allow you to provide labels for your video sources – specifically, the **Video** entry will appear beneath viewports in multiviews and some menus (where space permits), and the short **Button** text will be used to label **Switcher** buttons.

Enable the **Use External** switch to automatically pass the channel name for a remote source such as an SDI router or NDI channel to the **Video** label field.

The **Comment** entry lets you enter memo text that can serve as memory aids, but or another very valuable purpose, too. Specifically, the values entered in these two fields supply the values for special **DataLink** keys.
Among other things, the values from these DataLink keys can be used to update text values in title pages, or to add information to the filename of recordings.

Hint: For example, you could use a macro to automatically display a title page briefly any time you switch cameras. The Name and Comment entries for inputs update the values assigned to DataLink Keys named %PGM Source Name% and %PGM Source Comment% base on Program row selections.

You might enter “Bill Jones, CEO” as the Video name for a camera, and “Megadyne Computronics, Inc.” as the Comment. Continue to give unique values to inputs in similar fashion. Then enter %PGM Source Name% on the first line of a title page, and %PGM Source Comment% on the second line. When you change cameras, your macro will display the page, correctly identifying the talent based on the input Name and Comment.

Capture

Each Switcher source has a Capture group in the Input tab. This control group shows settings and options for grabbing still images and, for appropriate sources, recording. These important capabilities are discussed in full in Chapter 20, Record, Grab, and Replay. The controls shown in Figure 73 are detailed in Section 20.1.2

8.1.2 PTZ/PAN AND SCAN PRESETS

Another control group appears on the lower part of the Input tab when appropriate. This group may be labeled either PTZ Presets or Pan and Scan Presets, depending on the source type.

In either case, the features and options presented in this group are similar. At the top, you will see 16 numbered preset slots. Rolling over these slots reveals two gadgets: Click the snapshot (camera) gadget to store or update a preset. Click the configuration (gear) gadget to show a Preset Properties panel (Figure 74), with two text boxes labeled Alias and Comment.
The entries in these two text boxes, like the *Name* and *Comment* values discussed earlier, provide the values for special *DataLink* keys that store the values from the last PTZ preset applied, as follows:

- PTZ PGM Alias
- PTZ PREV Alias
- PTZ PGM Comment
- PTZ PREV Comment

A set of controls located below the *preset bin* allows you to control connected PTZ cameras, or to affect sources supporting *Pan and Scan* features in similar fashion (you might think of these sources as providing a sort of ‘virtual PTZ’ functionality).

**FIGURE 75**

*SLOW, MEDIUM, and FAST* preset buttons complement the numeric *Speed* control slider at right. These affect the speed of the transition from the current position to that stored in a newly selected preset.

The *Options* group, when expanded, reveals *White Balance* options along with a menu that allows you to invert the operation of the *Joystick* on individual axes (both in the interface and on connected hardware control panels).
Note: Focus, Iris, and White Balance features are only shown when a PTZ cameras is connected to the input. However features in the Input Configuration panel’s Image tab, discussed next, can provide similar functionality to White Balance automation.

8.1.3 IMAGE TAB

The Image tab in the Input Configuration panel hosts a set of features that provide extensive color control processing, chromakeying, and cropping options for every video source.

**Auto Color**

Lighting conditions can change dramatically during many live events, especially those held outdoors. Adding to this problem, production usually involves multiple cameras and, all too often, these may not have uniform color characteristics. Ensuring consistent color when switching from one angle to another, avoiding unwelcome brightness or color shifts as evening falls or when a cloud obscures the sun briefly can be troublesome, and expensive.

*Auto Color*, a unique feature capable of dynamically adapting the color characteristics of your video sources as lighting conditions vary, can minimize these problems. For many productions, simply enabling *Auto Color* is all it takes to produce a show that looks amazingly consistent.
**Multicam**

By default, each camera with *Auto Color* enabled is processed uniquely – without reference to other sources. Often, though, even greater consistency can be achieved by treating sources in similar illumination environments as a group. Enable *Multicam* for several cameras causes *Auto Color* to evaluate and adjust these cameras in unison. You might, for example, enable *Multicam* for court-side cameras in an interior sports venue, while treating exterior or studio feeds individually.

**Listen Only**

The *Listen Only* switch allows you to include a source in the *Multicam* group without adding its own feed to the group evaluation. Thus, a camera trained on a giant purple dinosaur can be automatically corrected without disproportionately biasing the group evaluation and *Auto Color* correction. Alternatively, one might enable *Multicam* for a number of sources, turning *Listen Only* on for all but one camera – effectively making that camera the color reference all other cameras in the group will follow.

*Note: The Proc Amp, discussed next, is downstream of the Auto Color system. This allows you to apply further manual color adjustments to your individual sources, whether for fine tuning or to achieve a specific “look”.*

**Proc Amp**

A switch at the top of the *Proc Amp* control group toggles the feature on/off. Other controls operate as follows:

- **Brightness**: Adjustment range from -50 to +50 IRE (the default being 0).
  
  As reference, the full luminance range of the visible portion of a video signal can be thought of as ‘100 IRE units’ (named for the Institute of Radio Engineers) – ignoring minor regional variations.

- **Contrast**: Adjustment range from 25 - 400% (default 100%).

- **Hue**: Adjustment range between -180° and +180°. Adjusts the master color of the video signal from the attached source, swinging the entire image through the color wheel’s spectrum.

- **Saturation**: Adjustment range from 0-500%. Zero saturation results in a ‘black and white’ picture; increased saturation results in richer colors. High saturation values can exaggerate the color portion of the signal.
(Note that over-saturated colors are considered illegal for broadcast transmission and may result in display problems on some devices.)

**Hint:** Proc Amp adjustments are applied downstream of LiveMatte, which can help when composing greenscreen shots to match a background or LiveSet.

*White Balance* – to *automatically* white balance, click and hold the mouse button on the *Color* well, and then slide the ‘eyedropper’ pointer onto the monitor for the corresponding source. Release the mouse button over a part of the image that should appear as white after processing.

**Advanced Color Controls**

This secondary control group is revealed when you click the expander (triangle) beside its label.

In addition to per color channel (RGB) *Brightness* and *Saturation* sliders, it adds *U Offset* and *V Offset* controls.

- The *U* portion of the video signal carries blue and yellow color information. Rotating the *U Offset knob* clockwise shifts the signal toward blue, while a counter-clockwise twist shifts the signal toward yellow.

- The *V* portion of the video signal carries red and green color information. Rotate *V Offset* clockwise to shift the signal toward red and counter-clockwise to shift the signal toward green.

**Hint:** Your system provides Waveform/Vectorscope monitors, which are an invaluable aid to you for accurately calibrating your video sources.

**Keying**

The Keying control group in the *Image tab* hosts LiveMatte, a powerful real-time keying system for live production.

Keying is a popular and powerful method of compositing multiple images, whether photos, video clips or live camera streams.
The process involves eliminating a portion of the video image (effectively cutting a digital 'keyhole' in it) to reveal a user-defined background scene.

This feature also plays an important role in the workflow of LiveSet, NewTek’s powerful virtual set technology.

*LiveMatte*’s controls are deceptively simple, making a great deal of complex digital manipulations easy to use. Even so, much can be said about getting the best results. For that reason, we’ve devoted a whole chapter in this manual to discussing it – please see Chapter 13, LiveMatte.

**Hint:** When LiveMatte, Proc Amp, or Crop settings are active for a source, bright green, blue and yellow indicators are lit under its monitor.

**Crop Source**

It is very common for a source to be supplied with unintentional inclusions; these are often items that remain after chromakeying is applied, but which need to be removed along with the background. (Common examples include microphones or lighting fixtures dangling from above, or perhaps a harsh crease, blemish or tear in the background screen.) Or, as is frequently the case, the source video itself may have a few pixels of black or video ‘noise’ along one or more of its edges.

The settings in the Crop Source control group can be used to remove such unwanted ‘garbage’ from the scene, and other purposes, too – such as to isolate a portion of the screen for use as a ‘Picture in Picture’ overlay.
Numeric controls in this group let you define margins for each side of the frame. Drag left or right on the number fields to adjust the values interactively or click a field to enter an exact value using the keyboard. The region defined by these controls is completely removed. Use the Feather setting to soften the edges.

**Hint: For added convenience, similar cropping tools are available separately in the Position panels of DSKs, along with the Key and, for LiveSet Effects, each layer’s settings for MEs.**

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### 8.1.4 AUTOMATION TAB

Automation is one of those wonderful things that really transform your workflow. The Automation tab, located in the Input Configuration panels for all video sources is one of several places where related features can be found.

*Macros,* discussed in Chapter 17, might be viewed as the basic building blocks of automation. Macros can easily be recorded and edited, and equally easily they can be triggered by a keystroke shortcut, control panel button, or similar means; but that isn’t really ‘automation’, is it? It’s actually a manual operation.

Somewhat obviously, automation should happen automatically based on predetermined criteria. The automatic transmission in your car shifts all by itself when certain conditions are met. In similar fashion, the features of the Automation tab allow you to predetermine what will happen when certain conditions are met. Consider the State Change control group.

---

### STATE CHANGE

Click the [E] button next to a one of the ‘state’ options (see Figure 82) to assign macros that will be executed on specific Switcher operations that affect the specified state.

For example, the accompanying images depict macros that control the volume level of the SOUND player. Whenever Cam 1 is newly selected on the Switcher’s PGM row, the Active macro will run. Conversely, replacing Camera 1 with a different PGM row selection will execute the Inactive macro.

**Hint: The “E” on the button is short for “Event”.**
The *State Change* implementation thus allows you to automate all manner of operations based on such things as the following:

- *Program* or *Preview* row selection.
- Displaying/hiding the source in a *DSK* or *KEY* channel.
- Selecting/de-selecting it on an *M/E*’s *A* row, or any *M/E* row, or ...
- Showing or hiding a source on the *Program* or *Preview* output.

This is immensely powerful, and lends itself to endless applications, such as (to suggest just a few):

- Automatically fly in a title as you switch to remote sources, and remove it after a specified time
- Select a different *Audio Mixer* preset automatically when you switch from viewing a source in the B monitor of a virtual set on *Program* to displaying it full-screen
- Then change back to the original audio setup when you switch back to the anchor desk.

The possibilities are truly endless.

**Hint: More coverage of both macros and the larger topic of automation can be found in the accompanying Automation and Integration Guide.**

**HotSpots**

The next control group in the *Automation* tab is devoted to *Hotspots* – another powerful and interactive automation feature. A *Hotspot* is a user-defined region of the screen that (when active) detects opacity changes inside its boundaries (for which reason, *Hotspots* require *LiveMatte* to be enabled to work properly).

With *LiveMatte* properly configured, the *Hotspot* feature can trigger a macro when opaque pixels are newly detected in an active *Hotspot*.

For example, someone in a greenscreen set can trigger a macro by walking into a location in the frame where a hotspot has been defined. A second macro when all opaque pixels – i.e., the talent – moves out of the defined hotspot zone. All manner of creative implementations are possible.

*Hotspot* setup, options and use are further discussed in Chapter 5 of the supplemental *Automation and Integration Guide*.

**Tracker**

The *Tracker* control group provides real-time motion tracking features. This feature allows you to choose a colored region of the video frame using tools similar to those found in the *LiveMatte* tab (see Chapter 13).
The tracked region is defined by choosing a primary Color using the color picker tool. The Tracker follows this region as it moves and shifts within the frame over time, and outputs the motion data for downstream application. Tracker output from one source can be used to dynamically modify the positioning of other video sources, when configured to do so in their individual Position panels.

**Adjusting Tolerance**

Click the eyedropper, and, while holding the mouse button down, drag the pointer over top of the monitor for the source you want to track (see Figure 84). The Tracker’s color swatch updates as you drag, until you release the button to finalize your selection.

To assist you while making adjustments, a yellow rectangle is overlaid on the video to show the effect of the current Tracker settings. Watch how this overlay is affected by adjustments you make to the Tolerance value for the Tracker. Raise or lower the Tolerance value until the result is steady, not jittering or jumping about.

**Smoothness**

The Smoothness setting works just like the LiveMatte feature with the same name. Its impact on tracking data output may seem minimal, but it can be important when used with the Advanced Tracking effect in M/E panels (see Section 14.2.2).

**Lock**

At right are controls that permit you to Lock certain Tracker attributes, preventing them from changing in the scene.

- Lock Scale to prevent the Tracker from automatically compensating when the scale of the tracked region grows or shrinks during motion.
- Likewise, when Rotation is locked, the orientation of Tracker output is constrained.
- The Aspect Ratio lock forces the Tracker to conform to a square (1:1), or rectangular (4:3 or 16:9) shape.

**Hint:** Locking channels in this manner makes it easier to obtain a steady motion track; but often, your choices will be dictated by creative requirements.
**LIMIT TO REGION**

The *Tracker* is designed to follow the largest shape in a frame that meets the defined color criteria. At times, similar colored articles or inclusions in the frame can interfere with *Tracker* output.

The settings in this group allow you to limit the area of the frame the Tracker monitors, which can help you sidestep this issue. We’ll discuss the application of the *Tracker’s* data stream when discussing the *Positioner* tools.

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**SECTION 8.2 OUTPUT CONFIGURATION**

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**FIGURE 86**

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**FIGURE 87**

Roll the mouse pointer over the *Program* monitor to reveal a *Configure* button (Figure 87) at right in the titlebar below the display. Click it to open the *Output Configuration* panel.

*Hint:* As for other viewports, alternatively ‘two finger tap’ on a touchscreen or, if *Click Viewports to Show on PGM* is disabled in the Options menu, double-click the mouse on the viewport to open this panel.

---

**FIGURE 88**
The Output tab in this panel contains (Figure 88) controls governing the system’s primary outputs.

8.2.1 OUTPUT TAB

We discussed Primary and Secondary outputs back in Section 3.10. The first eight entries in this panel are primary outputs; typically, these are also ‘mixed’ outputs, hence their default labels – MIX 1, 2, etc. These video sources are sent to the corresponding SDI output connectors (when provided), and also as NDI® (Network Device Interface) outputs.

Video

The primary outputs support the largest number of optional video sources and, uniquely, can follow a delegated M/E, or a Switcher color group. All other outputs can be assigned to follow a primary output or show another designated Switcher source (excluding M/Es).

Audio

In similar fashion, you can choose which audio source accompanies any of the primary outputs. Choose any individual audio mixer input, or any of the mixed audio outputs, Master or Aux (audio mix options vary by model).

Resolution

The Resolution menu allows you to choose the video format for each output. Select the video format for downstream devices you intend to connect to the corresponding output here. The formats available are drawn from the list below (modes available vary according to session mode):

- 2160p
- 1080i and/or 1080p
- 720p
- 480p – progressive standard definition NTSC sessions only
- 480i (4:3) –interlaced standard definition NTSC sessions only
- 480i (16:9) –interlaced standard definition interlaced NTSC sessions only
- 576p – progressive standard definition PAL sessions
- 576i (4:3) –interlaced standard definition PAL sessions
- 576i (16:9) – interlaced standard definition PAL sessions

Note: Output 1 always transmits video in session format, thus shows a Resolution display only.

Generally, source formats that are inconsistent with the current output resolution setting are automatically conformed when possible. In some cases, such as non-standard format sources, the output format may be modified to provide a suitable display. That said, it’s best to avoid non-standard sources if possible.

Transform

Video Mix also support independent transform and flip controls, as well as Section options as seen in Figure 90 and Figure 89.
The **Stream** controls in the **Output** tab let you independently assign any of the primary mixes to one or two streaming encoders. Likewise, for models with multiple audio busses, you can send audio from the **Master** audio mix or any of the **Aux** busses to either streaming encoder.

**Figure 89**

The audio controls also include individual **VU** meters, **Gain** knobs, and an **AGC** (Automatic Gain Control) option. These allow you to modulate audio for the streams separately from your primary audio outputs.

**Hint: Streaming output is always de-interlaced.**

**Figure 90**

**Streaming Output** involves more options, too, since there are so many different ways to stream. In this panel, you simply configure the audio and video sources sent to the streaming output. All other options and settings relevant to streaming are discussed in Chapter 18.
FAILSAFE

NewTek’s multi-tiered ‘Always on Air’ hardware and software failsafe systems provide confidence that, short of a complete power failure, the show will go on. Video passthrough ensures that as long there is power, audio and video from hardware Input 4 is routed to Output 1 in case of a catastrophic software condition. If at all possible, streaming output and recording also continue even if all else fails.

In some studio settings, however, more elaborate hardware failsafe systems may be in use. Typically, such systems take over broadcast duties whenever the output signal fails. In this sort of pipeline, the native failsafe video passthrough mechanism can actually prevent the external system from engaging.

For this reason, a Failsafe control group has been added to the Output tab. This lets you disable the A/V passthrough when necessary. (Note that A/V passthrough is off by default and must be deliberately enabled to function.)

Hint: Only use fail-safe when a stable video source is connected to video Input 4.

8.2.2 RECORD TAB

FIGURE 93
Each MIX output source has a corresponding Record control group to provide settings and options for capture. These important capabilities are discussed in full in Chapter 20, Record, Grab, and Replay. The controls shown in Figure 93 are detailed in Section 20.1.2.

8.2.3 GENLOCK TAB

The Genlock feature allows your NewTek system to ‘lock’ its video output to a reference video signal supplied to its Genlock input connector.

This synchronizes system video output to external equipment locked to the same reference. Genlocking is not a requirement, but it is very beneficial, and you should definitely use it if you have the capability.

Miniscule local timing differences between these may force tiny delays during switching operations, which can contribute to throughput latency. Thus, serving i) the Genlock input and ii) other video devices in the chain with a single reference is the best approach.

You could think of it this way:

❖ Genlocking your cameras has the effect of locking their output together, ensuring optimal synchronization for live switching. This may result in throughput latency benefits.

❖ Supplying the same sync source to the Genlock input ensures a match between the system’s video output and any downstream video devices required to handle both it and other (genlocked) sources.

Note: Digital audio is less tolerant in certain respects than analog. Some devices require SDI sources to be genlocked when mixing digital audio (whether for recording or live production).

NewTek systems, however, include dynamic audio re-sampling for each input. Genlocking SDI audio/video sources is not a requirement. Still, genlocking sources and other production devices to a single house reference signal, or genlocking the cameras directly to the NewTek live production system’s output is encouraged (to genlock cameras, see your camera manual).

Genlock settings are hosted in a tab by the same name in the Output Configuration panel (Figure 94).
VERTICAL POSITION, HORIZONTAL POSITION AND PHASE

FIGURE 94

Locking all devices to house sync is important, but this alone does not actually ensure a perfect downstream match. Consider an army marching along: each step the soldiers take occurs at precisely the same moment, so we could say their timing is synchronized. Even so – problems result if one soldier leads with the left foot while everyone else is on the right. Or perhaps everyone is evenly spaced and perfectly aligned but for one misfit who ‘tailgates’ the soldier ahead of him and keeps stepping on his heels.

This is essentially why adjustable settings exist in the Genlock panel. The Horizontal and Vertical Position settings pin the image in the proper space in the frame, and in doing so could be likened to making sure each marching soldier is in position relative to his fellows (as viewed from above). The Phase setting ensures proper color alignment, corresponding to making sure everyone is on the left or right foot at the same time.

Together, the Vert Position, Horiz Position and Phase settings let you tweak synchronization to arrive at an optimum match between devices. Typically, these settings are fine-tuned with the aid of a downstream vectorscope and waveform monitor. (A discussion of these adjustments goes beyond the scope of this manual, but a quick online search for the keywords “genlock” and “adjust” turns up a number of excellent references).

REFERENCE TYPE

The ‘bi-level’ reference signal long used for standard definition television is often used for genlocking both SD and HD installations. However, the HD (Tri-level) reference sources are also supported by the Reference Type settings option.

Notes: Reference Type options do not appear for SD sessions.

CENTER FREQUENCY

This setting is applied when a genlock reference signal is not in use. To adjust the setting, supply color bars to an input and pass video output to a downstream vectorscope. The vectorscope display is completely stable when Center Frequency is properly adjusted.

Note: See also Section 8.1.1, Frame Sync.
Many Live Desktop features replicate traditional video switcher controls in an easy to comprehend and use fashion. The Live Desktop features powerful transition controls, downstream overlay channels, interactive layer monitors, and powerful automation features.

The central part of the Live Desktop (between the monitoring section and the tabbed modules) is taken up by the Switcher and related controls and features, including Layer Controls, which include main and DSK (Downstream Keyer) Transition controls and configuration features (Figure 95).

### SECTION 9.1 SWITCHER MODES

TC2 Elite support two different Switcher modes, allowing you to choose which one is best suited to your need for a given program and environment.

The standard Switcher interface (Figure 95) provides control over your main Program video output using the familiar Program/Preview row method.

For less complex productions, the Switcher’s convenient Express mode simplifies the process (Figure 96; see Section 9.11). This one-button operating mode will be especially welcome in environments where volunteers or less experienced operators are involved.

**Hint:** Additionally, support for switching using a touchscreen has been provided. Just tap a source’s viewport to instantly send that input to Program output using the current background transition (if any).

To select the current operating mode, simply click either the Switcher or Express tab provided at right in the horizontal bar immediately above the Switcher pane (Figure 97).
SECTION 9.2 SWITCHER ROW BANKS

In standard Switcher mode, two Switcher rows labeled PGM (Program) and PREV (Preview) are shown (Figure 98). Clicking a button in the Program or Preview row selects the active video source for that bus (note that audio sources can optionally be affected by Switcher activity – see Chapter 16 Audio).

TC2’s Program and Preview rows represent all available video source in “banks” of buttons. The number of banks vary according to the number of sources each model supports.

Bank 1 is shown by default. Holding down Alt on the keyboard reveals Bank 2. On releasing Alt, Bank 1 is re-displayed. Press ALT + CTRL to momentarily display Bank 3 when supported. It’s possible to ‘latch’ banks, either by clicking Bank buttons on the screen, or by pressing Tab to cycle the currently displayed bank.

Hint: The standard Switcher (and M/Es with transitions assigned) show ‘selection hint’ tags beneath their rows when the selected source is in another bank. Click a tag to jump to the bank the source is hosted in.

SECTION 9.3 PROGRAM/PREVIEW ROWS

The video source selections in the Switcher rows include all external inputs, including video router sources, internal sources (Media Players and Buffers), and the output from all M/Es.

The PGM (Program) row selection determines the dominant video stream of the Background (BKGD) video layer – that is the ‘rear-most’ layer of the composition sent to Program output.

Other sources may be mixed above the Background layer at times as you apply LiveMatte, or as portions of an incoming Preview row video source appear during a transition.

The Preview row appears in standard Switcher mode. Selections determine which source is queued up for display in the Background layer by a subsequent (BKGD) Take or Transition operation.
The concept of video layers is central to understanding how the Switcher, M/E and Transition controls relate to one another, and how they combine to form the video seen on Program output.

- The Background layer (often shortened to simply ‘BKGD’) is always the base for the video composition displayed on Program output.

- DSK (Down Stream Keyer, or ‘overlay’) layers may appear above (in front of) the Background.

DSK layers are typically used for overlaying graphics, titles, etc., though they may serve other purposes as well. In addition to BKGD, up to five additional ‘primary layers’ can contribute to the final Program output at any given moment:

- Overlay layers (DSKs) are composed above the BKGD layer on output. DSK 2 appears ‘in front of’ DSK 1 on Program Output – that is, closest to the viewer – and so on in order.

- FTB (Fade to Black) constitutes a final overlay layer – one that obscures all other layers when applied.

Recall, too, that the BKGD layer itself is often a composite of sub-layers:

- It may include mixed video from both the Program or Preview rows.

- Selecting an M/E as source on Program or Preview can add many sub-layers to the BKGD composition, including the M/E’s primary Inputs and dedicated KEY layers (which are similar to DSK layers but, being upstream of the main Switcher, appear composed in the background layer).

Note: Since M/Es are reentrant, the BKGD layer can at times reach very high numbers of sub-layers.

SECTION 9.5 SELECTING SOURCES

In standard Switcher mode, video sources for PGM (Program) and PVW (Preview) rows are selected individually by pressing buttons on those rows. By contrast, selecting a button on the single row in Express mode first places the designated source on the (unseen) Preview bus, then immediately switches it to Program output.

For DSK/Key layers, source selection is made using a drop-down menu above the integrated viewport located in the DSK/Key control group.

Hint: Right-click input buttons to select sources from video routers—see Section 3.11.1 (Configuring Routers).
SECTION 9.6 LINKING SWITCHER ROWS

It can be useful to link two (or more) Switcher or M/E source rows together, so cause them to operate synchronously. Program and Preview rows and M/E source rows all show a triangle beside the row label at left. Click it to open a menu that lets you set up linking.

As you’d expect, rows assigned to the same color groups are linked. A selection made in any linked row updates the selection of all other rows in the same color group to match. Thus Figure 99 shows the Input A row for an M/E linked to the PGM row of the main Switcher. The Ungroup menu item removes the current row from a group, while Clear this group removes all rows from the current group.

SECTION 9.7 TRANSITIONS AND EFFECTS

We discussed video layers in Section 9.4. With this in mind, it’s easy to comprehend the layout and use of the Transition controls. Let’s consider the Transition controls in the standard Switcher layout first.

9.7.1 STANDARD MODE

At left in this group are the main Transition controls, including the T-bar. The control groups right of the T-Bar provide configuration and control options for the individual DSK layers.

Background Layer Transitions | DSK Layer Transitions

Each DSK layer has a live video viewport showing the current source assigned to it (using the menu at right above the viewport) and its own transition effect.

Click the transition icon at lower left below the viewport (Figure 101) to reveal a palette of different transition presets provided for quick selection (Figure 103).

Click an entry in the palette to select it, or move the mouse pointer to the “+” sign that pops up for each icon and click to open the Custom Media Browser.
In the Media Browser, you can choose from the hundreds of transition effects, or even Animation Store effects that you prepared yourself with the supplied Animation Store Creator application. The selected effect will replace the current one in the palette. To display or hide the DSK video layer over the BKGD layer on Program output using the currently selected effect, click (or tap) the viewport or the effect name label just below.

**Hint:** You can halt an unfinished effect in progress by clicking again during the transition. Then click it once more to continue performing the effect.

### Transition Delegates

You can also control transition progress using the Switcher's T-Bar control, at left. The T-Bar operates on all delegated video layers. To delegate a DSK, click its label at upper left (Figure 102) to turn it blue. Clicking it a second time will un-delegate the layer.

The T-Bar acts on all delegated layers, including the Background video layer. For example, if DSK 1 is visible, but DSK 2 is not, when both DSKs and BKGD are delegated performing a T-Bar (or BKGD AUTO) operation reverses the visibility of the two DSKs on Program output when the BKGD transition occurs.

### Transition Timing

Per transition timing is set and stored in the effect palette, using the numeric duration control beside the effect icon.

Select transition speeds using the menu below the Transition Palette. You can also drag the mouse pointer over the numeric display to set a custom time, or click it to enable keyboard entry of the effect duration.

**Hint:** The direction of Transitions applied as DSK (and M/E KEY) layer effects automatically alternates. If the first click displays the layer using an effect, the next click removes it using the reverse effect. This 'Ping Pong' behavior is optional for BKGD (Background) layer transitions.

### Animation Store Transitions

You can also choose special transition effects called Animation Stores. These powerful effects normally include an embedded full color animated overlay, along with sounds for transitioning in and out (the audio level for Effects is controlled in the Audio Mixer tab below the Switcher).

These special Animation Store transitions are loaded into the Transition Palette in the same way as their less colorful cousins, using the Browse feature. A number of Animation Store transitions are supplied, but you can generate your own using the supplied Animation Store Creator application and custom animation content you have access to or create using art software.
**DSK Source Configuration**

Many more configuration options are available for DSKs (and their siblings, M/E key layers, too).

To access these settings and features, roll the mouse pointer over the DSK viewport, and click the configuration (gear) gadget that appears at lower right (Figure 104).

*Hint: Touchscreen users can ‘two-finger tap’ the viewport to open the Configuration panel.*

Doing so will open the Input Configuration panel for the source assigned to the DSK, but with the addition of a supplemental tab labeled DSK (1-4).

The control groups in this new tab expand to reveal Position, Use Source Tracker and Borders, Edges and Shadows settings.

**Position (and Crop)**

The Position control group includes Position, Zoom, Rotation, and Priority. Position settings can be toggled on and off together using the switch provided in the group header.

Click and drag on the Position button (diamond) to relocate the DSK layer vertically or horizontally within the frame.

Drag left or right on either of the two nearby numeric controls to adjust a single axis only.

Dragging the cursor on the Zoom button (magnifying glass) affects the apparent size of the overlay. Again, if you drag just one of the associated numeric gadgets you can adjust just one dimension of the corresponding DSK layer – width or height.

In similar fashion, drag the pointer over the Rotation button with the left mouse button depressed to turn the overlay source on three axes as follows:

- Drag left/right to rotate the source about the Y (vertical) axis.
- Drag up/down to rotate about the X (horizontal) axis.
• Drag while holding Alt down to rotate about the Z axis.

• Drag on a single numeric slider, or hold down Ctrl to constrain rotation to one axis.

**Hint:** If you click a numeric field (or right-click it), you can type a value into the gadget using the keyboard; press Enter to complete the editing action, or Esc to cancel it.

The *Crop DSK/KEY* controls in this group are similar to those found in the *Input tab*, as discussed back in Section 8.1.1. However, these settings are applied to the *DSK/KEY* layer, without any impact on the source itself as it may be displayed elsewhere in the Switcher.

**Z-Priority**

Normally, *KEY* and *DSK* layers appear in numeric order from 'back' (furthest from the viewer) to 'front'. This is if *DSK 1* and *DSK 2* are both displayed and occupy the same position in the frame, the content in *DSK 2* will occlude *DSK 1*.

![Z-Priority](image)

The *Priority* setting in *DSK* and *KEY* layer *Positioning* panels allows you to revise the default layer order on a selective basis. This feature was specially implemented to provide additional flexibility for use with the *Comps* feature.

For example, imagine an *M/E* set up with 4 *KEYs* supplying a quad-box setup for four remote interviewees over a background supplied by the *M/E*. You might want to use *Comps* to zoom the top-left input up to fill the screen while the moderator chats with that person. Normally, *KEYs 1-3* would always appear *behind* *KEY 4* – not what you want at all. The *Priority* feature lets you move any *KEY* to the front (and the setting is stored in your *Comps*).

The range of *Priority* settings runs from -10 to +10; the default is 0. A layer with a higher index is shown in front of those with lower indices. When two layers have the same layer priority, they are rendered in their natural (*DSK/KEY* layer) order.

**Apply with Comp**

![Apply with COMP](image)

We will discuss the powerful *Comp* system a bit later (Section 9.9), but we’ll mention it in passing here to highlight the *Apply with Comp* switch provided in the *Position* control group. At the lowest level, *Comps* can be thought of as presets that store complete *Switcher* or *M/E* setups.
By default, the settings stored in a Comp include the Position, Crop and visibility state for each DSK or KEY layer. Disable the Apply with Comp feature if you want to exclude a given DSK/KEY channel from Comp control, handling it manually instead.

*Hint: You might find this useful, for example, to ensure that a station ID ‘bug’ shown over output is not accidentally removed by application of a Comp.*

**Use Source Tracker**

We discussed the video Tracker back in Section 8.1.4). The Use Source Tracker feature lets you assign motion data output from the Tracker for any video source to modify the position of the current DSK or KEY layer by selecting it in this menu.

*Position* settings enabled above in the DSK/KEY tab continue in force but will be applied relative to Tracker output. (For example, X and Y Position settings entered in the upper part of the panel result in an offset from the co-ordinates supplied by the Tracker.)

**Borders, Edges and Shadows**

The Borders, Edges and Shadows group also provides each DSK, KEY and M/E layer with three quick access Border preset slots (Figure 109).

*Hint: Since these are per-layer Position effects and can be controlled – even animated – by Comps, you can use the Borders feature to create custom multi-box compositions in M/Es.*
These powerful effects can include full color overlays, backgrounds, matte layers for ‘keyhole’ effects, and shadows.

You can freely scale, position and rotate various Switcher sources, add custom borders, overlays, shadows, and so-on, over custom backgrounds or even live or animated sources – all without special skills or resorting to Virtual Set Editor.

In addition to hundreds of supplied borders, you can easily create elaborate custom effects using Photoshop. You need merely define a Photoshop format file with three (rasterized) layers. The uppermost layer contains foreground elements (such as a bezel). The next layer is treated as a mask based on opacity and defines the part of the source image that will appear in the result. The ‘bottom’ layer supplies a background to appear behind transparent parts of the source (as, for example, when LiveMatte is applied to a source).

A template PSD file is supplied to assist you to do this. You will find the multi-layer Photoshop file in the Borders folder at C:\ProgramData\NewTek\(TriCaster)\Effects\Borders.

**Hint:** Since the opacity of the mask layer can vary between fully opaque and fully transparent, you can easily prepare soft-edged effects such as vignettes. Also, as foreground and background layers can optionally be empty, a simple opaque shape in the mask layer can serve a variety of imaginative purposes.

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**TRANSPARENCY**

Sources assigned to DSKs are often partially transparent. This might be because they are drawn from a Media Player (DDR) file that includes an embedded alpha channel, or because LiveMatte or Crop options are enabled for the source, or perhaps because a Network source includes an alpha channel, or even all of these factors operating together.

In all of these cases, DSK layers automatically respect transparency when supplied by the source. The BKGD layer and all visible content in lower-numbered DSKs will appear through or around sources with transparency as appropriate.

**Important Note:** It’s best to use files with straight (a.k.a. “non-premultiplied”) alpha channels in TC2’s Media Players. Premultiplied files will generally not yield correct results when overlaid on other imagery.
DSK layers offer a lot of creative possibilities. You might use DSK channels to display a permanent station ID 'bug', superimpose a company logo onto a title page, perhaps to add a ‘spinning globe’ animation playing in the DDR to a lower-third, ‘frame’ a keyed source composed over a title (Figure 111), or set up many other elaborate effects in this manner.

9.7.2 BACKGROUND CONTROLS

**BACKGROUND TRANSITION GROUP**

Transition controls in this section apply to the Background video layer only. In most respects, these tools are identical to the DSK transition controls discussed earlier, but there is one difference worth mentioning.

The **Duration** menu for the Background transition offers two items not included in the similar DSK/KEY controls:

- *Reverse* – configures the current transition to run in reverse direction the next time it is applied.
- *Ping Pong* – when enabled, this option causes the direction of the transition to be automatically swapped after each time it is applied.

**FTB**

Let’s discuss the FTB feature next. The acronym stands for *Fade to Black*. The result of clicking the *FTB button* will not likely surprise you very much. 😊

*FTB* offers a convenient method of doing what its name implies – fading *Program output* completely to black. It might help to think of *FTB* as a final video layer added above all others before *Program* output, completely obscuring everything below it.

As a memory aid, the *FTB* button pulses during operation. *FTB*’s fade duration is drawn from the *BKGD* transition setting.

*Note:* Hold down Shift while pressing the FTB button on a control panel to initiate an FTB operation. Hiding or displaying FTB triggers both Autoplay and Audio Follow Video when enabled for Media Players. It also fades Master Audio to mute when displayed, and back up again when hidden.
**Take and Auto**

Clicking the *Background* layer's *Take* button (keyboard shortcut *Enter*) performs a straight cut for all video layers that are currently delegated.

Likewise, if you press *Auto* (or the keyboard *Spacebar*), the transitions assigned to all delegated video layers are performed.

*Hint:* You can halt an *Auto* operation partway by clicking the button a second time during the transition. The operation will be completed the next time you click the button.

**T-bar**

The *T-bar* mimics the similar control on a traditional video switcher and allows you to *manually* transition between selected video layers. To use the *T-bar*, pull it downward by dragging it with the mouse pointer. Drag it all the way to the bottom and release to complete a transition; the *T-bar* then pops back to the top. Naturally, when the *T-bar* is dragged part way, a partial transition occurs. With certain transitions this can be useful for split screen effects.

*Hint:* The QuickSelect button (marked with an 'eye' icon to associate it with visibility) is located in between *BKGD* and *FTB*. Clicking it updates the Switcher's *T-Bar* delegate and transition states so that the next *TAKE* or *AUTO* operation will remove all visible *DSK* or *KEY* layers from output. (On supporting control surfaces, press *ALT & BKGD* to trigger the QuickSelect feature.)

**SECTION 9.8 PREVIZ**

The *Look Ahead Preview* viewport above the *Switcher* shows the *outcome* of the currently configured transition before it is performed. *Previz* takes this capability further, allowing you to pre-visualize effects in motion, including *T-bar* operations.

You can preview any *Switcher* and *M/E* effects (including *DSK/KEY* layers) without fear of disrupting *Switcher* (or *M/E*) output. Create complex compositions in this mode and copy them back to the original *M/E* (or *Switcher*) or a different one.

You might use *Previz* to test your currently delegated transitions and sources before applying them. Alternatively, though, you can experiment to your heart's content. Freely change layer sources, modify *Positioner* settings, transitions or effects, layer delegates, test the result of *Take/Auto*, use *T-Bar* or *Zoom* controls with impunity.

Use the *PREVIZ* menu to copy the current settings of the source (*Switcher* or *M/E*) into the dedicated *Previz* pane, located with the *M/Es*, since it can be thought of as a specialized *M/E* – one *never* visible on output.

*Hint:* Use the “*M/E Follow*” Workspace to monitor your experiments in the *Previz* pane.

When you arrive at a composition you like, simply select the *Paste Previz* menu item in the desired destination (*Switcher* or *M/E* tab) to send it to the target.
Hint: This allows you to very easily transfer all of the settings for an M/E – say, the left camera angle for a virtual set complete with carefully positioned M/E and KEY layers – to one or more additional M/Es. Then you can simply swap the effect for the new M/Es to add different angles that match the original perfectly.

SECTION 9.9 COMPS AND MEMS

You’ll also notice a button labeled COMP immediately above the T-Bar. Clicking it opens the Comp Bin, which provides powerful layer and effect control features.

We’re going to discuss the Comp Bin in full soon (Section 14.8), but at this point we want to distinguish Comps from Switcher MEMs. Bumping the cursor at the left edge of the screen adjacent to the Switcher or an M/E reveals a MEM bin with features that are quite similar. The primary difference between MEMs and Comps is that the former retain (and apply) all settings in the Switcher – including source selection.

SECTION 9.10 UNDO/REDO

The Undo/Redo feature is a very useful innovation that stores multiple undo/redo states. You can easily revert to a prior Switcher state, providing another important ‘failsafe’ feature. Accidents happen.

Undo is great for those times when you’ve inadvertently changed something with unwanted results, but lack time to figure out what went wrong.

The system stores a fresh Undo state whenever the Program row selection is changed. If you encounter problems and don’t have time to think about what may have gone wrong, a click (or keyboard Ctrl + z) can quickly get you back to the prior state.

SECTION 9.11 EXPRESS MODE

As mentioned earlier in this chapter, the Switcher’s convenient Express mode simplifies the process for less complex productions.

To open the Express mode Switcher view, click or tap the EXPRESS tab at right above the Switcher.
9.11.1 BACKGROUND TRANSITION

![Figure 119](image)

Note the quad-selector located between the single Switcher row, and the DSK controls at right. **Cut** and **Crossfade** mode selectors top this control group. Simply click or tap the Cut or Crossfade buttons to activate the corresponding Background transition.

Just below you will see two selectable transition controls. Tap or click these to activate the effect represented by the icon as the current Background transition instead. To open a transition selector to choose a different transition for either of these slots, click the gear that appears at lower right when your mouse pointer is over the icon.

*Hint: Although the gear is not visible in a touchscreen scenario, you can still tap the lower right corner of the icon to open the transition bin.*

9.11.2 SWITCHING

Having selected the Background transition, simply click or tap the button for the source you wish to send to Program output. There is no need to make a Preview row selection first, as you would need to do in the standard (2-row) Switcher. The Background transition you chose will be applied to display the new source.

9.11.3 DSKS

The two DSK control groups at right work just like their siblings in the standard Switcher, but it is particularly handy that you need simply click or tap their viewport to show or hide the associated DSK layer.
As you would expect, your NewTek system provides extensive and versatile monitoring – just what is needed to control your live productions. Monitoring features can also warn you of conditions that might affect output quality, as well as providing access to adjustments providing quality control and creative alternatives.

Among others you will find Proc Amp, LiveMatte, Hotspot, Tracking and Edge controls. (To give some of these the attention they deserve, they are treated individually in Section 7.5 and elsewhere.)

**SECTION 10.1 INTERFACE AND MULTIVIEW**

Really, the Live Desktop provides a number of multiview monitor displays – one on the Live Desktop (a.k.a., the “Interface”), normally comprising its upper third, and the others consisting of fully independent displays presented on secondary monitor outputs on the rear connector panel.

**SECTION 10.2 LIVE DESKTOP MONITORS**

Because the Live Desktop provides various control features along with a multiview pane, and controls can consume a greater or lesser amount of the screen, the multiview on the Live Desktop is adaptive.
To put this another way, the viewport layout of the *Live Desktop’s* multiview pane re-arranges itself as required to make optimal use of the space available.

For example, when tabbed modules (such as the DDRs) at the bottom of the *Live Desktop* are fully expanded, the *Program* and *Preview* viewports above are stacked one above the other. On the other hand, if the tabbed modules are minimized, these viewports are side by side.

### SECTION 10.3 WORKSPACE PRESETS

The basic layout of all multiview monitoring areas is established by assigning a *Workspace* preset to the screen. To access these presets, move the mouse pointer over the left-hand end of the *Dashboard* at the top of the *Live Desktop* to reveal the *Workspaces* menu.

Four presets, labeled A-D, are normally provided for each connected *Multiview* screen. Select a preset and assign a layout to it using the *Load Default* menu point. Continue to customize the display options for the viewports, and recall the entire setup at a moment’s notice by reselecting it.

To reset a preset, select it again and reload the default layout.

Each viewport in any layout offers diverse input or output source options, as discussed in Section 10.5. The settings you select for individual monitors will be retained in the current *Workspace* preset.

Let’s further consider an important *Workspace* layout option - *Scopes*.

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**Note:** The *Display Settings* option in the *Workspaces* menu lets you choose the Resolution of connected monitors, and apply Proc Amp settings to them. Select the native resolution of external display devices for best results. Changing Resolution can cause frames to be dropped, so modifications during live production are discouraged.

### SECTION 10.4 SCOPES

Scopes represent a very useful monitoring option, providing *Waveform* and *Vectorscope* displays.
Among other things, these help you to judge Proc Amp and LiveMatte settings (see Appendix C, Video Calibration). To display the Scopes view, select that entry from the Load Default options for a Workspace.

By default, scopes and the associated monitor refer to the Look Ahead Preview composition (including delegated DSK channels, or FTB), shown at left for reference. Right-click a scope to change the monitored source to the source you wish to view. Adjust the Brightness controls in the scope footers, and the trace overlay in full or solid colors using the context menu.

**Hint:** To use Scopes to calibrate a DSK source independently, first select it as the Preview row source.

Double-click a monitor in this Workspace to access Proc Amp and LiveMatte™ controls for the current source.

### SECTION 10.5 VIEWPORT OPTIONS

Right-clicking an individual monitor viewport also opens a context menu. The first option group governs the monitor’s source.

In addition to external video inputs (including Network sources), you can assign the output of Media Players; M/Es; main Program output (including DSK channels and effects); Program (Clean) without; the main Switcher’s look ahead Preview; another Preview showing M/E source B output (Mix mode only); or any Output.

Several special displays are also available. Selecting the Clock item replaces the video display with Event Clocks showing current time along with countdown style Start and End clocks. The Custom Image feature lets you display a network logo.

A further display you may find useful is the Timecode Only option that appears at the bottom of the Media Players sub-menu. This displays a time counter showing the current position of the playhead in the Media Player (respecting the specified Player’s Warning Colors option, too).

Below the basic source selection options in the menu, you'll find another group that provides access to optional Overlays for the monitor port.

Available overlays include Checkerboard (shows a checked pattern wherever transparency exists in the source); Title Safe (note this is a 4:3 format safe margin); 4:3 Safe (a true 4:3 frame edge boundary), Center Cross to help with alignment, and Show Illegal and Show Alpha.

In addition, you may choose to display VU Meters with the source, Tracking Markers and Hot Spot Markers (see Section 8.1.4).
Long-standing practice when using color bars to calibrate video signal color attributes requires special video monitors with 'blue only' (or 'blue-gun') displays. The Blue Only viewport option means you can now use any color monitor for this purpose.

The final Overlay option flips the images horizontally, useful for a variety of studio requirements such as talent orientation in greenscreen applications (including Hotspot operations).

Note: Certain Overlay menu options are not suitable for all monitor sources hence are not listed when inappropriate, or may not appear on all models.

10.5.1 VIEWPORT PRESETS

From corporate video to reality TV, PTZ cameras are playing an expanded role in modern production. TC2 Elite gives top billing to your PTZ presets right in its Live Desktop or any connected Multiview.

The viewport context menu option Source Presets lets you assign preset controls to any viewport. Large, colorful thumbnail icons represent PTZ presets for robotic cameras, Pan and Scan presets (a.k.a. 'virtual PTZ', requires Elite Features), and M/E Comps (or zoom presets on systems lacking Comp support).

With a click, or better yet a tap on a touchscreen, your source will gracefully move to its new position (Pan and Scan sources can also be set to Cut). Using TC2’s Multiview workspace options you can create custom layouts providing one-click access to presets for multiple sources of different types.

10.5.2 CONFIGURE

One final item completes the monitor viewport options:

- Configure – opens the Input Configuration panel for the corresponding source.

Hint: Double-click a viewport to quickly open Input Configuration without using the gear or menu.
SECTION 10.6 VIEWPORT TOOLS

Viewport tools provide additional features when you move your mouse pointer over them.

As shown in Figure 127, when the VU meter overlay option is enabled, a volume knob (similar to those in the Audio Mixer) is shown. Drag this knob up or down to modify the audio source associated with this input.

**Hint:** When using a touchscreen with the Click Viewports to Show on PGM option enabled, swiping the monitor horizontally (rather than tapping it) will temporarily display viewport overlays.

Clicking the Configuration (gear) icon for a Switcher input, a Preview monitor, or Program, opens the corresponding Configuration panel. Notice, too, that a snapshot icon appears in the label below most viewports. Click this to quickly grab a still image (images grabbed in this manner will obey the Add grabs to option in the Grab Configuration panel; see Section 20.3).

The viewports for Media Players (Figure 128) show handy transport control in the label area – from left to right Previous, Play/Stop, and Next. In addition, a progress gauge is shown in the background to show the playhead position and warning colors as playback nears its end.

**Hint:** When LiveMatte, Proc Amp, or Crop settings are active for a source, the configuration gear gadget for a viewport is color coded and shown full-time.

SECTION 10.7 PROGRAM MONITOR

The Program Output monitor could hardly be more important, hence it’s prominent default location at upper-right on the Live Desktop.

Normally, this viewport shows what the Switcher is sending to Program output at any moment. The display includes the BKGD video layer as well as any other video layers (such as one or more DSKs, or FTB) displayed above it.
Note: By default, Program output is sent to the MIX 1 output, subject to assignments made in the Output Configuration pane. When you move your mouse pointer over the Program monitor, a Configure button (gear) appears at lower right. Clicking this button opens the Configuration panel (see Section 8.2).

SECTION 10.8 LOOK AHEAD PREVIEW

Again, by default, the Live Desktop also prominently displays the Look Ahead Preview monitor (labeled simply Preview).

The Look Ahead Preview is versatile and powerful. Instead of showing just one video source (the Preview row selection), it displays what the outcome of a Take operation applied to all currently delegated video layers would be.

- Delegating the BKGD layer indicates you intend the next transition to swap the Program and Preview layers. The Preview monitor will show the Preview row selection as its background.

- When the BKGD is not delegated, that layer will not change during a transition. Consequently, in this case the Preview and Program monitors share identical backgrounds.

- Delegated DSK layers are shown above the background on Preview according to their current state. That is, if a delegated DSK layer is currently displayed on Program output it does not appear on Preview – since the next transition would remove it.

In other words, ‘what you see is what you will get’ – after performing the next Take or Auto operation as currently configured. This lets you set up the next shot, check its composition (including titles and overlay positioning), and switch to it with sublime confidence.
Chapter 11 MEDIA PLAYERS & BUFFERS

Media Players permit you to integrate video, stills and title pages into your live presentation. Display media sequentially as a playlist, or on demand. Media Players can play, stop and advance automatically in response to Switcher operations. Animated buffer effects are perfect for many similar purposes, freeing up Media Players to be used for long form playback.

SECTION 11.1 MEDIA PLAYERS

NewTek live production systems includes a bevy of integrated Media Players, providing savings, convenience, and opportunities for automation. Media Player controls can be accessed in large tabbed panes found in the bottom third of the Live Desktop, or by in tabs with similar features that appear in the Input Configuration panels of Media Players.

TC2 Elite provides DDRs (clip players) and/or GFX (graphics) players and four DDRs in addition to Sound and Audio Mixer.

Media Players can handle numerous media types:

- **DDRs** can display:
  - *Video clips* – including effects, motion titles such as scrolls, transitions, LiveGFX support and longer format ‘movies’.
  - *Titles and still images* – editable title pages prepared for use in NewTek’s native titling system, CG pages prepared as image files, or other still imagery – photos, graphics, etc. (See also Chapter 21, Title Templates, for information on creating custom title pages.)
  - Both **Sound** players and **DDRs** can play standard .wav or .mp3 format audio files.
11.1.1 PLAYLISTS

The dominant feature of all Media Players is a storyboard-style playlist, used to organize content for use during live productions.

This arrangement offers easily visible thumbnail icons for each entry. A scrollbar at right accommodates long playlists when necessary. Icons in the playlist can be re-ordered quickly and easily using the familiar drag and drop workflow. The playlist can even be altered during playback (of course, if the currently playing item is removed, playback stops immediately).

An Alias (by default, the item’s filename) is displayed below the icon, along with the item’s duration.

Clicking an item selects it. The play position is automatically set to the In Point on selection. Standard Shift + click and Ctrl + click multi-selection operations are supported, and all selected items are denoted by a white border around their icon.

When a Media Player is stopped, its output to video monitors tracks selection and trimming operations. The current item is the Media Player’s output, and in consequence appears on monitors dedicated to the player, if any. Of course, only one item can be displayed on output at a time; the frame surrounding the thumbnail icon for the currently displayed item is illuminated. Double-clicking a thumbnail (or clicking the Play button) begins playback from the In Point of the current file.

Automatic Clip Trimming

Clips (but, for reasons that will become apparent, not still images or titles) in a playlist are automatically trimmed to accommodate the addition of transitions between clips when necessary.

(Otherwise, i.e., if there are no ‘unused’ frames to display during a transition, motion will appear ‘frozen’ during the transition, which is usually undesirable.)

To reset a clip to its full file-length boundaries, press the ‘g’ key (multi-selection is supported, too).

Hint: The duration shown is the play time after trimming, and thus may be less than the file length on disk. In such cases, the In and Out markers on the Scrub Bar (spanning the width of the playlist immediately below it) show the effect of trimming operations, while the full width of the Scrub Bar depicts the total length of the file on disk.

Hint: Double-clicking elsewhere in the playlist pane opens the Media Browser (hold down shift when clicking to open a system file explorer instead of the custom Media Browser).
Note that even still images and static title pages added to the playlist are given a play duration. The default duration for these items is five seconds. Duration can be adjusted on an item by item basis (or as noted earlier, en masse for multi-selected stills or title pages).

During playback, the footer of playlist items illuminates as each is played in turn. When necessary, the playlist pane scrolls to display the icon for the currently playing item. A progress bar is displayed beneath the currently playing thumbnail, and the Scrub-Bar knob also tracks playback progress.

*Hint: Selection status is independent of which clip is playing. Selected Items have a white border in the Playlist pane.*

11.1.2 FILE OPERATIONS

- Click the large + (Add Media) button at left beneath the playlist pane to open a custom Media Browser (see Section 11.1.8). Alternatively, double-click in an empty part of the Playlist pane.

*Note: Add Media also supports compatible third-party asset management systems. Hold down the keyboard Ctrl key when clicking the + sign to access these tools.*

- Newly-added files become selected items in the Playlist pane.
- Drag (appropriate type) file(s) from one module’s playlist to another module.
- Right-click in the playlist pane to show a menu with context-relevant items from the following list (operations affect selected playlist items):
  - Cut
  - Copy
  - Paste
  - Remove
  - Split at Current Frame
  - Audio Level (clips with sound and audio icons) – note that the default ‘per-clip’ audio level applied to imported media files can be set in the Dashboard Options menu.
  - Duration
  - Speed
  - Use Current Frame as Icon
  - Angle
  - Automation
  - Edit Title
  - Properties
  - Transcode
  - Add to Export Media – see Section 19.3.
  - Send to > Buffer n (Still image and title icons – see Section 11.3)

- Standard Cut, Copy, Paste and Delete keystrokes are supported for playlist entries.
- Un-playable (missing, corrupt, or unsupported) file icons are dimmed.
Most of the clip context menu items are self-explanatory, but let’s talk about a couple of them in just a bit more detail.

11.1.3 SPEED

The playlist context menu item Speed permits you to give each clip a custom playback speed. It’s important to realize that this Speed setting is separate from the Media Player’s primary Speed control, located in the footer, below the scrub bar. The latter setting applies to all playlist items.

Both Speed settings are applied during playback. So, for example, if you play a clip with both Speed values set to 50%, the actual playback rate will be just 25%.

11.1.4 MACRO TRIGGERS

We’ve discussed elsewhere in this Guide (Section 8.1.4) how you can assign macros to any Switcher source, including Media Player. Beyond this, though, the playlist context menu item Macro Triggers allows every item in a playlist – every clip, still image, audio file or title page – to control its own unique macros.

- Any macro you can record or create can be triggered automatically on either playback or end of play for any and every individual playlist item.
- Multi-selection support in the playlist makes it a breeze to assign macros to multiple items.

**Hint:** You can use this capability, for example, to automatically show titles for certain types of clips and not others, give them different title page types, selectively adjust Proc Amps or apply LiveMatte keying automatically when needed for only certain items.

11.1.5 TRANSCODE

When clips are added to the DDR playlist, their suitability for real-time playback is evaluated. When appropriate, a small (T) icon is added to the entry’s label, indicating that the item can be transcoded to a more suitable format.

To transcode the clip, select the Transcode option in the clip’s context menu. The process will proceed in the background, and the DDR’s link to the original file will automatically be replaced when it is complete. Note that transcoding operations support multi-selection.
### 11.1.6 PROPERTIES

**Display Name**

The *Properties panel* allows you to edit the *Display Name* of a file in the playlist.

The *Display Name* fields defaults to the filename, but is a local alias, or ‘nickname’.

Thus, editing the name does not change the name of the file on your hard drive. Roll the mouse over the icon *display name* to see the true filename and its path.

**Comment**

The *Comment* permits you to supply metadata with the file.

*Hint: Both the Display Name and Comment box content for the selected clip are available as DataLink keys, which can in turn be served to live title pages or supplied along with the file to the Publish module.*

### 11.1.7 TRIMMING CLIPS AND THE SCRUB BAR

Just beneath the *playlist* pane is a full-width *Scrub-Bar* (Figure 136). The width of the *scrub-bar* represents the full run time of the current clip or other media file. Drag the knob to change time position.

*FIGURE 136*

*In* and *Out Points* for newly added Media are automatically adjusted when necessary to accommodate motion when transitions you add require it.

- To reset the file to its full length, press the ‘g’ key.
- To trim a clip manually, move the knob to the desired frame and press ‘i’ or ‘o’ on the keyboard (to set the *In Point* or *Out Point*, respectively).

During playback, the *Scrub-Bar* knob traverses the span between the *In* and *Out Points*. The duration (taking into account trimming operations) is displayed as a countdown in the upper of two timecode fields at left (Figure 136). The lower time display shows embedded clip timecode.
Drag the knob to move quickly backward or forward in the clip. Audio is normally muted during scrubbing; hold down CTRL to unmute it. Also note that holding SHIFT while dragging the scrub bar knob increases precision.

**FIGURE 137**

It’s useful to note that (Quicktime only) clips that are still being captured continue to ‘grow’ even after addition to a DDR playlist (see Section 11.1.8). These growing clips, featuring the red ‘recording’ overlay (Figure 137) can be freely extended beyond the bounds of the ‘in’ and ‘out’ points they were given when initially added.

It can be very useful to recall that you can easily split clips using either the corresponding context menu item, or the “/” key.

**ALPHA CHANNEL SUPPORT**

For files with transparency such as 32bit image files, use non-premultiplied (or ‘straight’) alpha channels in Media Players (premultiplied files will not give correct results when overlaid on other imagery).

*Hint: Monitors can optionally show a checkerboard pattern behind transparent content.*

**11.1.8 Media Browser**

The custom Media Browser provides easy navigation and selection of content on your NewTek live production system or on the local network.

The Media Browser appears anywhere in the Live Desktop that you might wish to select content, transitions or effects for use in your project (such as the Media Players, LiveSet and Transitions sections).

Its layout is principally comprised of two panes at left and right that we’ll refer to as the Location List and File Pane.
**Location List**

The *Location List* is a column of favorite “locations”, grouped under headings such as LiveSets, Clips, Titles, Stills, and so on.

**Session and Recent Locations**

The *Media Browser* is context sensitive, so the headings shown are generally appropriate for the purpose for which they were opened.

A list of sub-headings appears under these main headings in the *Location List*. These may correspond to named sessions, or groups of content. When you select a sub-heading, the right-hand pane – the *File Pane* – is populated.

In addition to locations named for your stored sessions, the *Location List* includes two notable special entries. The *Recent* location provides quick access to newly-captured or imported files, saving you time hunting through a hierarchy to find them. The *Session* location (named for the current session) shows you all files captured in the current session.

*Hint: Clips that are being actively captured are marked with a red ‘record’ overlay. These clips continue to ‘grow’, and can be re-trimmed after their addition to DDR playlists or the Publish Queue.*

**Add Media Location & Browse**

Clicking *Browse* opens a standard system file explorer, rather than the custom *Media Browser*.

*Hint: To jump to the standard system file explorer (rather than the custom Media Browser) from a Media Player, hold keyboard Shift while clicking the Add button.*

**File Pane**

Icons appearing in the *File Pane* represent content located inside the sub-heading selected at left in the *Locations List*. These are grouped under horizontal dividers named for sub-folders, which allows related content to be organized conveniently.

**File Filters**

The *File Pane* view is filtered to show only relevant content. For example, when selecting *LiveSets*, the browser only shows *LiveSet* files (.vsfx).

*FIGURE 139*

*FIGURE 140*
An additional filter appears above the *File Pane* (Figure 140). This filter quickly locates files matching criteria you enter, doing so even as you type. For example, if you enter “wav” into the filter field, the *File Pane* displays all content at the current location with that string as part of its filename. This would include any file with the extension “.wav” (WAVE audio file format), but also “wavingman.jpg” or “lightwave_render.avi”.

**FILE CONTEXT MENU**

Right-click on a file icon in the right-hand pane to show a menu providing *Rename* and *Delete* options. Be aware that *Delete* really does remove content from your hard drive. This menu is not shown if the item clicked is write-protected.

Transport controls and playback settings are located directly below the *Playlist* and *Scrub-Bar*.

**FIGURE 141**

**TIME DISPLAY**

During playback, the uppermost timecode field beside the transport controls displays the current countdown time for active playlist item or for the entire playlist when the *Playlist* mode button is enabled. (As mentioned earlier, the time show below is the embedded clip timecode.) Left-click the field to type in a timecode, then press *Enter* to jump to that point in the file (or playlist).

*Hint:* The time display and scrub bar color provides visual indication that the playback is nearing its end. Ten seconds before the end of play for the current item, the digits in the time display and the scrub bar background turn amber. With only five seconds left, the color changes to red.

**PLAYLIST MODE**

Normally, *Media Player* playback stops when the *Out Point* of the current playlist item is reached (unless *Loop* is also enabled, in which case playback of the current item repeats until manually interrupted).

Clicking the *Playlist* mode button (Figure 142) tells the *Media Player* to operate in continuous play mode, advancing through the playlist items until the last one has played.

**FIGURE 142**

**TRANSPORT CONTROLS**

A simple set of controls beneath the playlist pane provides all playback-related functions:

- *Previous* button – go to previous playlist entry
- *Stop* (clicking Stop when already stopped goes to the first frame)
- *Play*
• *Next button – go to next playlist entry

• (Not shown) – *Double-click an entry in the playlist pane to begin playback at the start of that playlist entry

**Previous, Next and Presentations**

It’s extremely useful to realize that, since transitions can be added between playlist items, pressing *Previous* or *Next* likewise employs transitions. Whether playback is underway or stopped, and whether the items are clips or stills, you can use *Previous* and *Next* to transition backward and forward between items.

![Figure 143](image)

This provides a perfect way to manage presentations using *Media Players*, hence our inclination to refer to this as the “Presentation workflow”. With macros (and perhaps MIDI buttons) driving the presentation, this makes it easy to handle control graphics and video for seminars, to update weather graphics, and more.

*Hint:* In addition, since transitions support transparency, you can queue up a series of titles in a playlist, display it in a DSK, and transition backward and forward between titles interactively simply using *Previous* and *Next*.

**Speed**

The *DDR* supports variable speed playback between 25% and 400% of the normal rate (100%). Speed can even be adjusted *during* playback.

![Figure 144](image)

*Note:* Certain highly compressed video file formats cannot successfully be played back at rates beyond 200%, even though *Speed* value is set to a higher value.

As is common for numeric input controls in the interface, drag left or right to adjust the *Speed* value, or click the slider to access a direct entry field allowing you to type a value using the keyboard.

*Hint:* Press Shift while double-clicking *Speed* to quickly reset to the 100% default.

**Loop**

Enabling *Loop* repeats playback continuously (respecting the *Single* switch state).

**Autoplay**

When enabled, the *Autoplay* switch has several important effects. First, it initiates playback automatically when the associated *Media Player* is placed on *Program Out* by a *Switcher* *Take* or *Transition* operation either directly (as a *Switcher* row selection) or indirectly – such as by being displayed via an *M/E* channel or *DSK* operation.

Second, if player output is displayed on *Program* the reverse *Switcher transition* occurs automatically as the end of play approaches, whether the *Out Point* of the current item for *Single* play or the end of the playlist. (This behavior is optional for *M/Es* – see *Options* in Section 14.2 and Section 7.1)

*Note:* Unlike *Switcher transitions*, the *DSK* ‘out’ effect does not occur automatically as the end of play approaches.
In either case, when the Media Player is in standard operating mode (as opposed to Playlist mode), the current play position advances to the next item after playback is automatically stopped.

11.1.10 SHOW ON (...)

Another extremely powerful feature is nestled beside just to the left of Autoplay in the footer of each Media Player.

Labeled ▶ PGM by default this feature can target M/Es as well (Figure 146) as the Program row of the main Switcher. It provides unique playback and display abilities that make instant replay a thing of joy, as well as serving other purposes. Click the configuration button (gear) beside the SHOW ON button to display the panel seen in Figure 146.

![Figure 146: Panel with transition bins for custom In and Out transitions.](image)

The largest part of this panel contains transition bins for custom In and Out transitions which will be used to display the current clip. Select Custom from the Transition In/Out menus to activate these bins. Otherwise, you can select Cut or Current options.

Note that the bin content displayed is synced with the Background transition bin for the target video bus, be it PGM or a designated M/E. Selecting Current uses the current selection in the Background transition bin of the target bus.

**Hint:** Unlike other transition bins, these icons do not show a “+” sign gadget on rolling the mouse over them. To replace the effect in slot, modify the content of the Background transition bin of the target you have selected for SHOW ON.

Once configured, clicking the SHOW ON (...) button will do the following:

- Swap the current BG transition for the main Switcher or a designated M/E for a custom Animation Store (such as "Replay!") or other specified transition.
- Transition the current DDR selection in on the main Switcher's PGM row, or the A row of an M/E
- Play the clip (overriding the DDR's own Autoplay setting, if necessary)
- Transition back to the original program using a custom transition (such as "Live!") when done
- Swap the background transition back to the original selection
Hint: Using Replay complementary features, SHOW ON functionality can be triggered by simply adding a clip (with custom length and speed defined in the Replay menu) from any source being captured to a DDR. Thus a single button click or numberpad key press can trigger all of this.

**M/E ON PGM**

In a variation on this operation, the *On PGM* switch, which is available whenever the target is an M/E, provides a different mode of operation. In this case, the output of the Media Player is immediately selected as the top row source of the target M/E, and the M/E is transitioned in on the main Switcher’s PGM (Program) row.

This unique feature allows you to use the main *Switcher* to display the *Media Player* output – including instant replays – with *KEY* layers (such as ‘scorebugs’) composed above it.

**11.1.11 MEMS**

Another very useful feature of *Media Players* is the **MEM Bin**, which provides quick and convenient access to stored playlists. **MEM slots** also store the state of various *Media Player* controls.

To display the bin, roll the mouse pointer to the (nearest) side of the screen in a tabbed *Media Player* or the *Audio Mixer* tab (for *Sound* and *Audio, MEM slots* are presented on the left side of the screen only).

When you change playlists by selecting another **MEM slot**, it’s almost as though you are accessing another *Media Player*. Use **MEM slots** for quick access to different categories of content for use during a live presentation, playlists prepared for different clients, or for completely different programs you produce.

**MEM slots** can be named and can also display a small representative image (taken from the first entry in the playlist). As you move the mouse over a **MEM slot** icon it expands, providing an enlarged view of that playlist item’s first frame. To populate a new **MEM slot**, simply click a blank icon.

To name a **MEM slot**, right-click it to open a context menu, and select *Rename*. Other menu options include *Delete*, *Export* and *Import* (the file will be saved with the extension ‘.pst’).

**PREVIEWING MEM SLOTS**

At times you may wish to preview the contents of a different *Media Player** MEM slot without disrupting playback of the current playlist. When a clip is playing, a small white ‘play indicator’ is shown over the icon for the currently selected entry in the fly-out **MEM slot bin**.

If you select a different **MEM slot** while the current clip continues to play, the playlist bin view updates, but the original item continues to play. The transport controls (*Play, Stop, etc.*) at the bottom of the tab remain *dedicated to the active playlist – that is, the one actually playing, rather than the one currently being previewed in the tab.

To change to the *previewed* **MEM slot** immediately – ending playback and display of the current item – you can do so by any of the following means:

- Double-click an icon in the *previewed* playlist.
• Or press *Stop twice, and then Play (playback of the active item ends with the first Stop command; the second sets the playhead to the start of the current item in the new playlist).

* Normally, pressing Stop a second time when a clip is playing resets the playhead to the start frame in the same clip. The exception above occurs only when you are previewing the content of a different MEM slot during playback.

11.1.12 NETWORK SHARING

Default media file folders (Clips, Stills, etc.) are maintained for each session. This approach makes it easy to locate items using the Custom File Browser, and is also convenient for other file management purposes.

The default media locations for the active session can be made accessible across your local network. Share Media Folders and Buffers in the File menu is on by default, and allows network clients to update media in the active session, even while live. The following session media locations are dynamically shared:

• Audio
• Clips
• Stills
• Titles
• Buffers

Note: Several ‘non-session dependent’ locations in the main application folder are also shared. This allows applications such as NewTek’s Virtual Set Editor, etc., running on external systems to export directly to the local system. These network shares are unaffected by the Share Media Folders and Buffers setting.

When suitable content is added to these shared folders, the Media Browser provides immediate access to it. Simply select the session name (under Clips, Stills, etc.) in the Location List at left to reveal the updated files in the File Pane at right.

This is wonderfully convenient but should be approached with a measure of common sense. Network bandwidth has fixed limits. Be judicious when transferring large files while ‘live’. You may be using the network for many purposes – including streaming, or NDI video feeds from a 3Play®, LiveText™ and third party software, as well as any unrelated traffic on the network.
SECTION 11.2 EDITING TITLE PAGES

On mouse-over, title page icons display a text edit gadget in their lower-left corner (Figure 148).

Click this button (or select Edit Title in the icon context menu) to open the pop-up Title Page Editor.

Opening the Title Page Editor during playback is permitted, so that Title Page content can be edited even during display (changes are detected and shown immediately).

**Hint:** The panel can be re-sized by dragging its lower-right corner, and re-positioned by dragging its titlebar.

When you move the mouse over text in the Title Page Editor’s preview pane, a white bounding-box appears. If you click once inside the box it turns yellow (Figure 149), indicating the text object is selected, and a text edit field opens.

**Hint:** When the box is yellow the text can be nudge either a pixel at a time using ALT + the arrow keys or five pixels at a time using SHIFT+ALT+ the arrow keys.

Press Enter or click outside the box to complete editing operations or press Tab to advance to next entry field (press Shift + Tab instead to jump to the prior text field).

Note that the cursor keys – that is, the left/right and up/down arrows – allow you to navigate between text fields on the current title page. (If the text edit box is open, left/right arrows change the edit point as usual, but up/down closes the edit box, and subsequent cursor key actions move to the next object.)

**Hint:** A red line under a character or word indicates the spell-checker is questioning its spelling. Right click the word to open a menu suggesting alternatives. Click any entries shown if you wish to update the original.

11.2.1 HEADER TOOLS

The header of the Title Page Editor holds an assortment of text attribute controls. These include a Font selector menu, numeric Size control, and Bold, Italic, Underline and ‘ALLCAPS’ switches.
11.2.2 FOOTER TOOLS

FIGURE 151

You can click Close when finished with the current edit, but often you’ll find the Save and Duplicate feature handy. Click it to store your edits to the current title page, create a clone of item in the playlist, and load the new page for editing. This is a great way to quickly produce a number of matching pages.

*Hint: Press Ctrl + s on the keyboard to perform this ‘save and duplicate’ operation without using the mouse. Similarly, PageUp and PageDown keys perform Previous and Next operations.*

The Prev and Next Title buttons let you store your changes and move to another title page in the playlist without the tedium of closing the Title Edit pane.

**STAND-IN IMAGES**

Images embedded in Title Pages may be locked, or they may be editable stand-ins. When you roll the mouse over an embedded image and a white border is displayed around the image, the image is a stand-in. Click a stand-in to open the Media Browser and select a replacement image file (hold Shift while clicking to use the system file explorer instead).

FIGURE 152

If, instead, you right-click a stand-in image, a context menu lets you select one of several optional methods of fitting the source image to its frame. Choosing Stretch causes the image to completely fill the frame. Fill Area retains the interested image’s original aspect, cropping if necessary to fit inside the frame.

Show All Image also retains the original image aspect but fits the entire source image inside the frame (which may result in 'pillar-boxing' or 'letter-boxing'). This menu also allows you to open the Image Properties panel (Figure 153). It provides the same set of Fill Mode options but adds an Image Source box supporting direct entry. The Image Source box comes into play in connection with the next (extremely important) topic – DataLink.
11.2.3 **DATALINK**

Since *DataLink* falls into the general realm of automation and also has access to external sources, complete coverage of its features and capabilities is found in the companion *Automation and Integration Guide* included with this product. We’ll mention here, though, that both text and images on title pages accept *DataLink keys* as input.

The Title Editor tells you which entry boxes accept *DataLink keys* by showing a custom mouse pointer, in the form %DL, as shown in Figure 153.

Making key entry even faster and easier to use, all available *DataLink keys* are shown in the drop-down menu as soon as you enter a % sign into an entry box (*key names* are in the format %key name%). If you continue typing, the list shown is filtered to show only relevant key names (Figure 154).

A line of text or image on a title page that has been set to a key name will be automatically replaced by the current value assigned to that key when the page is displayed.

There are endless uses for *DataLink*, and many ways to supply and update values assigned to *DataLink keys*.

For just one example, refer to the heading Configure DataLink Keys in Section 5.3.2. And do not fail to take advantage of the power and convenience of the DataLink™ web browser extension, which makes it easy to populate your title pages over the network from a web browser running on virtually any platform.

**SECTION 11.3 **BUFFERS**

The system’s powerful *Buffer* implementation provides a large number of alternative graphics and animation sources for *M/Es* (including their associated *KEY* channels), the main *Switcher* and its *DSK* channels. *Buffers* are sometimes even more useful than similar imagery supplied from *Media Players*. The tabbed *Buffers* module (Figure 155) shows icons and controls for fifteen *Buffers*. 
Buffers are retained in Switcher Memory for immediate recall and display. Using a buffer for a specific DSK or M/E channel (rather than a Media Player) eliminates the risk of accidentally displaying the wrong graphic, as might otherwise happen if the current Media Player item selection was not the one intended.

### 11.3.1 BUFFER TYPES

Buffers support the following media types:

#### Animation effects

These are short duration full-motion video effects created in your favorite graphics or video applications and compiled using the add-on Animation Store Creator application.

- **Looping effects** – These animations play repeating endlessly, making them ideal for station ID ‘bugs’ and the like.
- **Auto-run effects** – These effects auto-run on display following a Take or Auto. Playback runs once and then holds the last frame.

#### Graphics

- **Images** – 24 bit or 32 bit (with embedded alpha channel) images.
- **Title pages** – editable title pages, identical to those served up by the various Media Players.
- **LiveGraphics™** – animated graphics and titles.

Selection and display of Buffers is controlled by buttons on main Switcher source rows, M/E rows, and similar options in DSK and M/E KEY source menus. The top ten buffer slots support all animated effect types, titles and graphics, while the remaining five slots support still image files or title pages. The remaining buffer slots are restricted to graphics content, including popular image formats along with title pages (i.e., .cgxml files).
11.3.2 SELECTING CONTENT

An Add Media [+] button appears at upper-right when you move the mouse over a Buffer icon. Click this to display the Media Browser, and then pick a suitable file to populate that Buffer. Alternatively, drag an item from a Media Player onto a Buffer slot.

Or, right-click a still image or title page icon in a Media Player and choose Send to from the context menu (select a specific buffer slot using the hierarchical menu). Note that, this Media Player menu item only appears for still image formats and title pages. Animation effects must be complied using the Animation Store Creator™ add-on application before they can be loaded into buffers.

Note: Generally, Buffers are linked to the original source file on disk. Having added a file to a buffer using the “Send to (Buffer x)” menu, the item can be removed from the Media Player. The buffer link will only fail if the original file is moved or deleted from the hard drive, with one exception: editable title page buffers are fully independent of their original source files.

11.3.3 BUFFERS MENU

Right-click a thumbnail icon in the Buffers pane to open a menu offering two items:

- **Rename** allows you to assign a custom name to the buffer. The name will also be visible in menus (such as DSK source menus).
- **Configure** opens the standard configuration options, including cropping, color processing, and even LiveMatte keying.
- The **Unload** option clears the effect, freeing Switcher Memory reserved for effects.

When the mouse pointer is over a Buffer icon, the small [x] gadget shown the upper-left corner provides another method of unloading an effect. Likewise, the Configuration (gear) icon that appears at lower right opens the Input Configuration panel for the Buffer.

11.3.4 ANIMATION FEATURES

The thumbnail icon for a buffer with an animated effect created in the Animation Store Creator application assigned to it provides several additional features. As mentioned earlier, animation effects can be of either looping or auto-run type (the type determination is made in the Animation Store Creator utility when the effect is generated).
Loading either class of effect into a buffer results in a time control being displayed at right in the buffer label.

*Hint: Select a Slow, Medium or Fast preset value from the drop-down menu, drag the mouse left or right over the time to change the current value, or click to enter a number directly using the keyboard.*

For auto-run animation effects, a further control is added to the thumbnail icon when you move the cursor over it. The *Rehearse* button appears at the top-center (Figure 158). Clicking it plays the animation from its first frame through to the last and holds that image.

*Hint: In addition to providing a way to preview the effect (by displaying it on the Preview monitor, for example), *Rehearse* offers a handy way to re-run animated alerts and similar overlays at will. Remember, too, that the Macros feature provides a great deal of useful functionality in connection with Buffers and their display.*

Still image *Buffers* have another very valuable ability, discussed next.

---

## 11.3.5 BUFFER WATCH FOLDERS

If you wish, you can share the *Frame Buffer* folder, which contains any *still images* used in *Buffers*, across a network. The *Share Media Folders and Buffers* is easily enabled even during a live production using the *File* menu at the left-hand end of the *Dashboard*.

The files which serve individual *still image* buffers are located in clearly named sub-folders of the *Frame Buffer* folder for each session. These folders are arranged as follows:

```
Sessiondrive:\Sessions\sessionname\Frame Buffer\Buffer (#)
```

e.g., D:\Sessions\MySession\Frame Buffer\Buffer 3

The *Frame Buffer* folder for the current session is accessible on the network when sharing is enabled. This allows *still image* buffers to be updated across a network using suitable graphics application (such as Photoshop®).

*Note: This special share name assignment is dynamic. Network sharing is activated, and the current Buffer path is automatically updated whenever you enter a session with the option enabled. This ensures that applications on networked systems can remotely access and update buffer graphics for the current production session.*

The *Frame Buffer* folder is a “watch folder”. When you save an image for a given buffer, the buffer updates even if it is currently displayed, allowing you to refresh overlays instantly across the network.
- Still image Buffers are normally stored using the popular 32 bit PNG (Portable Network Graphics) format, but other formats are also supported.

- Specific filenames are not important in the buffer workflow. Actually, multiple media files with different names can reside in buffer folders.

- The Buffer always shows the ‘newest’ file – that is, the one with the most recent modification date.

11.3.6 USING BUFFERS

Creative uses for buffers abound. You’ll notice that the sample media content supplied with your system includes a number of different styles of animated buffers – some full screen, suitable for looping backgrounds or similar applications, and others that are suited to overlay, bug, or alert tasks.

Buffers of all sorts can be displayed in the following locations:

- Main Switcher
  - Program/Preview) rows – all 15 buffers are directly accessible in the Switcher
  - DSK channels – choose a specific buffer using the DSK’s drop-down source menu.

- M/E banks
  - Select a Buffer on an M/E row just as you would for the main Switcher.
  - KEY channels – choose a buffer for any KEY channel using its drop-down source menu.

Buffers allow abundant use of animation throughout your productions – as virtual set elements, layered graphics overlays, etc., all without tying up precious Media Players. (Consider that in addition to the Buffer cross-points in the main Switcher, M/E’s also support Buffers). Given that M/E’s are re-entrant, layering possibilities are nearly endless.

11.3.7 KEYING, PROC AMPS AND MORE

It’s worth noting that you can apply LiveMatte, Proc Amp and Edge (cropping and feathering, when supported) settings to individual Buffers by opening its Input Configuration panel. Of course, you can also apply Position settings, including Rotation and Scale, in DSK, M/E and KEY channels.

11.3.8 EDITING TITLES

When a title page (.cgxml file) is loaded into a buffer, the Edit Title panel (see Section 11.2) can be opened by clicking the Edit gadget (AA) that appears at lower-left when you move the mouse over the icon. Changes made in the Edit Title pane take effect immediately.
When a standard title page is loaded into a Buffer, clicking its thumbnail icon reveals a list of Data Preset slots. Each preset stores the text data and (replaceable) image content link for the title page. A single click recalls a complete data set and immediately updates the page.

This is incredibly useful, of course, because you can (for example) store the names, player numbers, images and the like for the members of a sports team and recall these immediately with a click (or by executing a macro). And because the text values can include DataLink™ key names, it’s even possible for statistics on a title page for a given player to be updated in real-time from external sources or text, xml or CSV files in a watch folder.

Hint: If the Buffer contains a LiveGraphics effect, a set of thumbnail icons depicting Layer Presets is also shown. Selecting a preset allows you to dynamically change from the current animated state to another. More information about LiveGraphics usage is provided in Appendix A: Elite Features.
Once primarily used in security applications, robotic or ‘PTZ’ (pan, tilt, zoom) cameras are appearing on the video production scene in ever-increasing numbers. The PTZ implementation in your TriCaster makes it easy to operate multiple (supported) cameras from the Live Desktop or a hardware control surface.

Any external Switcher input can be configured as a PTZ cam, controlled directly from the Live Desktop or using a NewTek™ control surface. In addition to pan, tilt, and zoom control, you can adjust White Balance settings, Focus, Iris (or ‘brightness’), and Animation Speed (‘travel speed’) settings for your PTZ cameras. A convenient visual PTZ preset system is included, too, allowing you to 'lock in' shots and access them quickly.

SECTION 12.1 INPUT CONFIGURATION, PTZ TAB

Connection and configuration settings for PTZ cameras are located in the Input Configuration panel, specifically its first tab, labeled simply Input (Figure 160 and Figure 161).

12.1.1 CONNECTING

A few steps are required before you can control a PTZ camera.
1. First, connect the camera’s output to a *Switcher* input – see Section 8.1.

2. Next you must configure the control connection to the camera by selecting its type.
   
   - Since the default *Connection* type in this group is *NDI*, you can skip this step for an NDI camera, which eliminates all of the settings you would otherwise need to configure.
   
   ![FIGURE 162](image)

   - For non-NDI sources, use the *Connection* menu to choose the correct PTZ protocol for your device, and enter other data as required for that protocol.

Having performed these steps, you are ready to expand and use the *PTZ Presets* control group in the next tab, labeled *PTZ*.

---

### 12.1.2 PTZ OPERATIONS

In the *PTZ* tab, a set of manual *Pan/Tilt*, *Zoom*, *Focus* and *Iris* controls sits just beneath a large *Presets* bin. Drag the mouse on these controls to make manual adjustments.

Speed controls, including *SLOW*, *MEDIUM* and *FAST* presets along with a numeric speed control allow you to modify the speed with which presets are applied.

![FIGURE 163](image)
Expand the *Options* control below the PTZ speed group to access *White Balance* options (which may vary based on the camera model connected) and an Invert menu that lets you reverse the effect of joystick operations.

*Note: Invert settings affect the related controls both in the Live Desktop and on hardware control panels.*

### 12.1.3 PRESETS

The *Preset Bin* shows sixteen thumbnail icons for the currently *PTZ camera*. Click a preset to select it, and the camera automatically begins moving to the new position.

To configure and store a preset:

1. Use the *Position, Zoom* and *Focus* controls mentioned in the previous section to navigate to the desired camera angle, etc.

2. Then move the mouse over the preset icon you wish to store (or update), and click the *Snapshot* (camera) gadget that pops up at upper-right corner of the icon.

*Hint: Hold Shift when clicking the Snapshot icon to update the representative thumbnail image without modifying the preset already stored in that slot.*

3. (Optional) Click the *Configuration gadget* (gear) to open a Properties dialog that lets you assign a different *Alias* and *Comment* to each preset. (These entries also provide values for *DataLink* keys that can be used in the usual ways.)

*Hint: See also Section 10.5.1, Viewport Presets, to learn how to display and use presets in your multiviews.*

### 12.1.4 PTZ AND THE CONTROL PANEL

Pan, tilt, zoom control, and preset selection for connected robotic cameras are also directly supported on some NewTek hardware control panels. See Chapter 22 for details.
Chapter 13  LIVEMATTE

Although its controls are deceptively simple, the LiveMatte™ feature employs powerful chromakeying technology capable of extremely high-quality results. Used alone or in conjunction with DSKs, M/E Overlays and LiveSet features, you will find LiveMatte can play a ‘key’ role in your live productions.

As we mentioned earlier, chromakeying – or simply “keying” – is used to combine images by eliminating a portion of a foreground image (effectively cutting a digital ‘keyhole’ in it) to reveal another background. This method is also used to insert talent seamlessly into virtual sets via LiveSet™.

LiveMatte™ controls are located in an expandable group in the Image tab of the Input Configuration panel for each Switcher source. To access them, click the Configure button (gear) that appears above an onscreen monitor in the All Monitors tab.

The method by which part of the image is defined as transparent is generically referred to as chromakeying, for its dependence on the color values (chrominance) of the video stream. (LiveMatte’s mature algorithms far exceed typical chromakeying techniques to provide real-time results, but for our discussion it’s not necessary to get into all of the details; suffice to say it works very well, and is easy to configure.)

**Hint:** Crop controls in the Input Settings tab can serve as a ‘garbage matte’ tool for chromakey sources.

SECTION 13.1 UNDERSTANDING KEYING

Chromakeying has become an essential tool in video and film production. Typically, foreground footage is shot in front of a blue or green screen, and then that background color – the key color – is treated as transparent, allowing another image to be inserted.

For example, when you see a tv meteorologist in front of a weather map, that person is almost certainly posed in front of a green screen. The background is ‘keyed out’, to be replaced by computer generated imagery.
Of course, if you choose poor settings, foreground areas may inadvertently be cut away as well. Or, some areas that should be transparent may be only partially keyed. Good keying often requires judicious balance between 'too much' and 'too little'. Let's consider the tools provided to help you achieve a great result.

**SECTION 13.2 MATTE**

The term *Matte* refers to a black and white representation defining the transparent (background) and opaque (foreground) parts of an image during compositing. Portions of the matte that are grey are treated as semi-transparent, which is very useful in progressively smoothing edges between foreground source material and inserted background imagery.

*LiveMatte* supplies a digital version of this traditional tool. As you would expect, controls in this group allow you to define and adjust the matte for the corresponding video input.

### 13.2.1 LIVEMATTE MODES

The *Mode* menu in the Keying control group lists several optional keying methods. Each has its advantages, and their controls differ as we will discuss next.

### 13.2.2 COLOR

All LiveMatte modes provide this control. Basically, you can think of *LiveMatte* as removing a specific color from the foreground image. The base color removed is chosen using the *Color* button. Click on the *Color* sample box, and keep the mouse button depressed. Then drag the *eyedropper* tool (mouse pointer) over one a video monitor to choose the color you wish to remove and release it. The neighboring ‘color well’ is updated to show the color selected.

*Hint: Enable the Lumakey mode to disregard hue and base the effect solely on luminance.*
13.2.3 TOLERANCE

No physical greenscreen is perfectly comprised of one color. Wrinkles, folds and shadows along with the seemingly inevitable uneven lighting result in difference. For this reason, when you choose the classic LiveMatte mode, a numeric slider labeled Tolerance is provided.

The Tolerance setting allows you to broaden the range considered as the key color, including more 'near-neighbor' colors to be included in the matte. A low tolerance removes only color values close to the primary or key color. As you raise the tolerance, you extend the range of values on either side of the primary color that will be treated as transparent. This allows you to deal with those imperfections we mentioned. On the other hand, it may be that there is (usually unplanned for) detail in the foreground that is somewhat similar to the key color. Reducing Tolerance may allow you to prevent unwanted holes appearing when the subject opts to wear his St. Patrick’s Day tie.

13.2.4 SMOOTHNESS

In the classic LiveMatte mode, Smoothness defines a further tolerance factor (LiveMatte ULTRA mode handles this automatically). We want our keyed foreground to blend smoothly into the background – rather than to stand out in hard relief like a postage stamp or decal. Smoothness serves this purpose, by defining a falloff zone of partial transparency. Don't overdo it though, as aggressive settings can cause the foreground to become unnecessarily 'muddy'.

13.2.5 LUMA LIMIT

When working with poorly-lit backgrounds (or poor-quality footage), the color Tolerance range separating the foreground (talent) from the background can be extremely narrow. This problem can be aggravated by the subject’s choice of clothing, or when there are harsh shadows. There is often a strong chroma component (and associated chroma noise) in dark foreground areas. The ‘noise’ may be partially or completely transparent when tolerances are critical. Because the noise varies over time, 'holes' in the foreground can result, and even worse these may flicker on and off from one frame to another.

Classic LiveMatte’s Luma Limit control makes it possible to overcome this issue. In essence, it restricts the chroma key operation based on luminance (brightness) values. Dark foreground areas which typically cause the problems just described normally have quite different luminance values from the background color, which is usually brightly illuminated. In simplest terms, problem areas of this type can be decisively 'pulled' back into the foreground by pre-filtering the chroma key effect around a luminance threshold.

Generally, try to set up the best key you can before raising the Luma Limit from its default value of zero (no effect). Then gradually raise the limit until you are pleased with the result.

13.2.6 STRENGTH

LiveMatteULTRA uses a different method to define its matte, basically discriminating between background and foreground regions. Raising the Strength value can loosely be thought of as more aggressively defining imagery as background. As with 'tolerance' in the classic LiveMatte, the lowest effective value is what you’re after with this setting.
13.2.7 OFFSET

The Offset setting is unique to LiveMatte Ultra, and can be thought of as boosting the opacity level of partially transparent areas in your scene. Raise this value judiciously to solve problems with transparency in ‘borderline’ foreground regions.

SECTION 13.3 SPILL SUPPRESSION

The term ‘Spill’ refers to key color unintentionally reflected or ‘spilled’ onto the foreground subject. For example, a little green spill often appears on the shoulders of someone in a greenscreen shot. Both variants of LiveMatte offer Spill Suppression, with

![Spill Suppression controls](image)

The Spill Suppression controls let you remove key color spill in your scene by reducing the amount of that color in the foreground, where it doesn’t belong. The net result is that the impression of spill color is eliminated, or at least reduced to the point where it is not objectionable. Use the Tolerance and Smoothness controls (or, for LiveMatte Ultra, the Strength setting) in the Spill Suppression group in similar fashion to the controls by the same name discussed earlier. Endeavor to subdue spill without overdoing it, which can sometimes produce an unwanted gray fringe around foreground edges.

SECTION 13.4 COMPOSITING

When you enable (and configure) LiveMatte for an input, the onscreen monitor for that input shows the source keyed over a checkerboard pattern (when the Checkerboard option is selected in Overlays for the monitor.)

If you select the (LiveMatte-enabled) input as Input A in an M/E tab in LiveMatte mode, the keyed source is overlaid on sources in lower input rows. You will see the composite result when the output is assigned to either the PGM or Preview row.

SECTION 13.5 FINE TUNING

You’ll find LiveMatte easy to configure with a little experimentation – but a few handy workflow tips follow below. You may find it useful initially to turn Smoothness off or nearly so. Likewise begin with a low value for Tolerance – perhaps just 5-10, or so. Put the video source on Preview or Program Output before you do so, to provide a larger view to help you assess your settings.

Pick your primary Color, but – before releasing the mouse button – slide the eyedropper around to different parts the background. Watch the monitor as you do so to see how the area of transparency is affected by different Color choices. Release the mouse when you find the color that produces maximum results.
It’s often preferable to pick an ‘average’ color from a location fairly close to the boundary between the background and foreground regions. Now you can start to ramp up Tolerance. Bring it up slowly until most of the background color has been eliminated, cutting away most of the background to within a few pixels of the foreground/background boundary. Now raise Smoothness to fine tune that edge region, and you’re nearly done.

Before considering your settings final, make sure to test the result using a moving source. This will sometimes reveal that overly aggressive settings cause small ‘blocks’ of pixels in the edge region to appear to snap on and off during motion - as they either qualify or disqualify for inclusion in the resulting matte. (A little reduction in Tolerance and increase in Smoothness will usually resolve this problem.)

Hint: It can be useful to zoom in using Position controls when fine tuning LiveMatte.

SECTION 13.6 LIGHTING FOR LIVE MATTE

We’d like to offer a few suggestions here to guide you in preparing your set. The single most important aspect of ‘pulling a clean key’ is lighting. The lighting should be even and diffuse. Bright ‘hotspots’ and shadows create different shades on the wall, and overexposed areas lack sufficient color for clean keying. (It is not how much light you have on the key wall, but how evenly lit that wall is.) Naturally, you want to keep your green (or blue) screen clean and free of wrinkles, ripples, folds, tears, or other blemishes, as well.

The distance from your talent to the wall behind can make a big difference. When the subject stands too close to the key colored background, the key color reflects back onto the subject, creating a green or blue fringe that is difficult to remove. If you have available space, move your subject farther away from the wall.

When good distance is out of the question, you can improve things somewhat by placing lights above and behind the talent, lighting them from behind with a complimentary color filter over the light to ‘cancel out’ unwanted reflection (for green use a magenta filter; for blue, orange or amber. Don’t overdo back (or top) lighting, however. The limited dynamic range of the camera means there will be little useful color data in badly over-exposed highlights. This can make it next to impossible to separate fringe zones (such as hair detail) from the background (especially when this is also overexposed).

SECTION 13.7 CROP SOURCE

We discussed this feature earlier, but wanted to bring it up again in our discussion of LiveMatte. It is common for unwanted items to remain after chromakeying. Common examples include microphones or lighting fixtures dangling from above, or perhaps a harsh crease, blemish or tear in the background screen. Crop Source, located in the Image tab just below LiveMatte, can serve as a ‘garbage matte’ to remove this sort of intrusion.
Chapter 14 MIX/EFFECT (M/E) TOOLS

Mix/Effect (M/E) banks provide truly awesome production power and convenience. Pre-configure multi-layered compositions and switch them as easily as you would to any single input, or use an M/E to control a special purpose sub-mix. This is also where NewTek’s real-time virtual set technology, called LiveSet™, is located.

We introduced M/Es (Mix/Effect banks) way back in Section 2.4.9, but it’s time for us to look at these extremely powerful tools in greater depth.

SECTION 14.1 OVERVIEW

The Mix Effects, labeled M/E 1, 2, and so on, sit just above the main Switcher on the Live Desktop. Click an M/E tab (label) to expand or collapse the corresponding M/E. When expanded, M/Es occupy the area of the Live Desktop between the monitors and the main Switcher.

M/Es are presented individually in tabbed panes, each corresponding to a button in the main Switcher. Eight M/Es are available to fulfill your diverse requirements.

As you would expect, selecting an M/E button on the (main Switcher) Program row displays the output from the corresponding M/E on Program Output. Likewise, punching an M/E button on the Preview row cues up that M/E bank’s output for an upcoming Take or Auto operation. This makes it easy to Take or Auto directly to, from, or even between M/Es with a single click.

M/Es are re-entrant, meaning M/E buttons also appear on source selection rows and KEY channel source menus inside the M/E panels themselves. This is an exceptionally powerful feature, and one offering endless creative possibilities.

Note: Self-referential reentrancy (i.e., re-assigning a given M/E as one of its own sources) is not supported. However you can often mimic effects of this sort by using multiple channels in another M/E.

SECTION 14.2 M/E MODES

At first glance, an M/E panel in its default operating mode (‘mix’, or transition) is scarcely distinguishable from the main Switcher. However, each M/E actually offers two different operating modes:
1. **Mix** (the default mode): A secondary switcher layout, with controls and options that are very similar to the main Switcher.

2. **Effect** mode: The M/E is configured for effects, including virtual set operations.

The M/E mode applied is automatically established based on the type of effect you load as its Background effect.

Effect selection is done in the usual way using the Media Browser.

Click the + sign gadget that appears at upper right when the mouse is over the thumbnail icon for the Background effect.

For the most part, you will initially see very little difference in the M/E panel when you change modes.

- In either mode, source button rows labeled A through (B or D) are arranged at left.
  
  The number of layers shown varies according the effect selection you make, from two effect layers to four.

- At right are four KEY control groups. In most respects these are identical in appearance and practice to the DSK controls located in the main Switcher.

- Even the central control group mimics the main Switcher, with its Transition controls and options, T-bar and so on.

14.2.1 **MIX MODE**

Really, an M/E in Mix mode is a switcher:

- Input rows labeled A and B behave just like the main Switcher’s Program and Preview rows
- Transition controls work in the usual manner
- KEY channels stand-in for DSKs and behave similarly
- M/E output can be routed to primary outputs and Record module

**Autoplay and the M/E**

One notable difference from an M/E in Mix mode and the main Switcher involves the Autoplay feature (see Section 11.1.9).

To avoid undesirable consequences for Media Player content aired on the all-important main Program output, M/E’s in Mix mode trigger Autoplay operations within the same M/E only.

As well, a switch in the Dashboard Options menu toggles Autoplay’s triggering of ‘Auto out’ transitions.
14.2.2 EFFECT MODE

Even casual scrutiny reveals some (outwardly) subtle differences in the M/E control configuration when a LiveSet is loaded as the Background effect selection (Figure 176), as follows:

- The Take/Auto buttons located beneath the T-bar and Transition icon are replaced by a Position button.
- As required, as many as 4 input rows (A, B, C, and D) may be shown in Effect mode.
- Position controls appear for these input layers.

Let’s consider the reasons behind these changes in the interface. An M/E in Effect mode allows preparation of a composite of two or more video sources, whether for direct output, or as a source for the main Switcher, or as an input for other downstream channels (including other M/Es).

Even in Mix mode, an M/E provides access to effects – including Position and transition effects (including Animation Stores), and animating KEY layers via the Comps feature. In Effect mode, however, an M/E asserts its real-time compositing and effects prowess more aggressively.

SECTION 14.3 THE T-BAR

In a mix effect, the T-Bar and associated controls match the main Switcher. It’s different in an M/E displaying a LiveSet effect, however. In this mode, dragging the T-bar vertically adjusts the virtual ‘camera distance’ for the active LiveSet between 0% and 100%.

The Duration control works like similar numeric fields elsewhere in the Live Desktop: drag to adjust the value, click to type directly into the field using the keyboard, or press (keyboard) Shift and double-click to restore the default value. The drop-down Duration menu offers several convenient presets as well as a Cut option.

Hint: The maximum duration for an animated zoom is 30 seconds.

SECTION 14.4 INPUT POSITION CONTROLS

Position controls for all appear to the left of all input rows. Click this button to open the input’s Position panel. These controls replicate those discussed previously, under the sub-heading DSK Controls in Section 9.7.1.

FIGURE 176

FIGURE 177
As mentioned, in Effect mode an M/E may support up to four input layers. The M/E doesn’t transition between A and B in Effect mode. Instead, effects of various types are applied to the selected video inputs.

Let’s consider the effects in the Default group as examples:

Click the + sign shown when you move the mouse to the effect icon located beside the effect duration. This opens the Media Browser. Select the effect group labeled Default under the LiveSet location at left. With the exception of Advanced Tracking effects, these effects are straightforward compositing effects involving multiple video layers. Effect output (i.e., the background prior to KEY overlays) is the sum of all input layers.

If the source assigned to input A is fully opaque, any content in the layers below is hidden. When input A is at partially transparent, the source assigned to input B is blended into the M/E background layer, and so on.

Hint: Don’t overlook the fact that the input Position controls, including Borders, let you create very elaborate compositions even with these ‘simple’ compositing effects.

The output of active KEY layers is then added to the effect output before passing the combined result onward as the final M/E output.

**Advanced Tracker**

As we mentioned, effects can be ‘simple’ compositing effects, like most of the Default group, or more advanced. Before considering NewTek’s virtual set system (a.k.a, LiveSet™), let’s talk about some of the other effect types. Effects can vary widely in their types, from relatively simple utilities effects to image processing and advanced compositing effects.

For example, we mentioned that one member of the Default group is unique.

The Advanced Tracking effect takes three video sources to produce a result that would otherwise require the use of an additional M/E.

Set up this effect as follows:

1. Click the label above the Effect icon and use the Media Browser to select the Advanced Tracking effect from the Default group.

2. Add the clip named Tracking Example.mov (NewTek>Green Screen group) to the playlist for DDR 1.

3. Enable Loop mode for DDR 1.

4. Add the clip named "Bumper Cars.mov" (NewTek>Clips group) to DDR 2, set it to Loop as well.

5. Add an attractive full frame graphic to the DDR 3 player.

6. Select M/E 1 on the main Switcher’s Program row, to make it easy to view the result of the following steps.
7. In the M/E 1 tab, select DDR 1 on the input A row.

8. Select DDR 2 as input B.

9. Select DDR 3 as input C.

10. Double-click the monitor for DDR 1 to open its Input Configuration panel.

11. Continue to configure both LiveMatte and the Tracker for the video clip in DDR 1:

12. In the LiveMatte tab, click Reset to update the keyer settings to their defaults, and enable the LiveMatte switch at upper-left.

13. Use the Scrub bar under the playlist in DDR 1 to advance through the clip until the colored card is visible in the frame.

14. Switch to the Tracker tab, click the Color picker (eyedropper) keep the mouse button held down, and drag the pointer over the color card and release to assign that color to the Tracker for DDR 1.

15. Boost the Tolerance setting to 34%.

16. Press Play for both DDrs.

Let's take a moment to review our progress, before completing setup steps:

On the Program monitor, you should see the talent clip overlaid on the image from DDR 3 (LiveMatte is turning the green pixels in the DDR 1 clip transparent). You'll also see imagery from DDR 2 displayed wherever the (originally) orange card appears in the frame.

What's happening is that the Advanced Tracking effect is applying the values from the (DDR 1) Tracker for a secondary iteration of LiveMatte. Our LiveMatte settings cut away the green, revealing the C layer behind. Afterward, the orange color range is also keyed out, revealing the B source through the transparent region.

Up to this point, the effect takes advantage of the Tracker color values, applying them as a secondary keyer – but we haven't yet done anything with the actual motion data the Tracker is supplying. Let's do so now.

17. Click the Position button for input B to open the Position Panel for that layer.

18. Select DDR 1 in the Use source Tracker menu.

19. Enable Follow Tracker (Figure 179).
The result on your Program monitor should look much like Figure 180; full motion video appears wherever the orange card appears in the foreground clip. This is the standard setup for the Advanced Tracking effect, though it's possible to use it in different ways too.

Further Notes: Advanced Tracker 2 provides much improved compositing. (The original effect is provided for legacy purposes, but might also produce a better result in rare cases where a source has embedded transparency). Among other benefits, the newer effect performs spill suppression at the edges of the tracked region. Using the size (etc.) parameters of the tracker, the region being tracked can be made slightly larger to taste, to moderate this effect.

Now would be a good time to test the effect of the Scale, Rotation, and Aspect controls in the Tracker tab for DDR 1 (remember you can double-click the DDR 1 monitor to open this panel).

Utilities

Effects can take other forms as well. We've looked at the Default effects group; now let's consider Utility effects.

If you were following along in the previous section, replace the current effect in M/E 1 with the Show Alpha effect from the Utilities group.

Applying this effect immediately causes the display on the Program monitor to update, showing the content of the alpha channel for input A (Input B is ignored).

The current input A source is keyed, so the effect displays black on Program out wherever transparency exists in the foreground, white for full opacity, and shades of gray for in-between blends.

With this in mind, it won't be hard to guess what Show Inverse Alpha does.
In contrast, the *Show Color* effect in this group passes the full color output of *LiveMatte prior* to being multiplied by the alpha channel. (It might seem as though this would be identical to the original source, but you may notice subtle differences. This is because of the *Spill Suppression* processing.)

Let’s look at another of the effects in the *Utilities* group, *Color Correction*. Replace the current effect with the *Color Correction* effect. You’ll notice that M/E 1’s output on the *Program* monitor is now rendered in monochromatic grayscale. Drag the T-Bar down to affect the M/E’s color saturation. Click the mouse on the *Position button* below the T-Bar and drag to modify *Hue*.

Finally, the *Make Legal* effect ensures the output of an M/E is within broadcast signal tolerances.

**3D**

The *Anaglyph (Red, Cyan)* effect found in the *3D* category is a special purpose tool.

The anaglyph method of displaying 3D imagery depends on stereo video inputs that are filtered and composited into a single output stream.

In turn, this combined stream resolves into 3D when viewed through special glasses with red and cyan (blue-green) filters for left and right eyes respectively.

TriCaster provides easy access to anaglyphic technology by means of the *Anaglyph* effect. The effect combines 2 video inputs selected in an M/E. 3D output can then be switched easily like any other source. No complex configuration steps or tricky control panel operations are required.

**Photoshop Blend**

The effects in the Photoshop Blend folder apply well-known blending modes to the A layer in the M/E as these are blended with the B layer. The resulting compositions can serve many purposes, such as adding animated ‘bokeh’ style overlays using DDR clips or adding interest to still overlays such as vignettes or titles.

**SECTION 14.6 VIRTUAL SETS**

We’ve considered the *Default* and *Utility* effects. Let’s move on to a more glamorous species, the *virtual set*, presented as *LiveSet™* effects.
LiveSet is one of NewTek live production system’s most powerful tools and can dramatically enhance a production. With it you can achieve the look of a large, sophisticated studio setting (Figure 184) within a very small studio space, all without the need for external equipment.

Broadly speaking, setup of a LiveSet effect is much like the Default effects previously considered (see Default Effects, Section 14.2.2). A typical LiveSet consists of a greenscreen shot (usually input A) with LiveMatte applied composited into a virtual set. LiveSet adds the foreground and background for the scene, and additional video inputs may add to the effect in various ways.

*Hint: Most virtual sets require LiveMatte settings to be applied to Input A. Other inputs may also require keying, depending on the design of the virtual set.*

To select a LiveSet, click the effect icon in the M/E’s BKGD at lower-left control group to open the Media Browser (Section 11.1.8).

![Media Browser](image)

**FIGURE 185**

The Location List of the Media Browser lists any installed LiveSet groups under the heading “LiveSets”. Select an entry beneath to show thumbnail icons in the Browser’s File Pane (Figure 185 shows the content of the NewTek location under the LiveSets heading).

**INPUT POSITION**

We discussed Positioning controls for M/E video inputs previously (Section 14.4). It’s worth adding here that Position options do affect the scale, rotation and position for LiveSet video inputs. You can often use Positioning controls to achieve a ‘good fit’ and natural appearance of talent or another source appearing in your virtual sets (greatly reducing the need to fuss with physical camera positions).

*Hint: The Align group of LiveSet effects is specially provided to make it easier for you to adjust cameras and position talent on your physical set to suit the design of typical virtual sets.*
A special variant of LiveSet effects are referred to as ‘holographic’. These effects can be amazingly lifelike and convincing, and are relatively easy to create.

**FIGURE 187**

_Holographic LiveSet effects_ are loaded into an M/E in the same manner as any other effect. Simply move the cursor over the effect icon and click the + sign (_Add Media_ button) that appears to open a _Media Browser_, then choose the effect you wish to load (several examples are included with your system). Adjust the current view for holographic _LiveSets_ in similar fashion to standard effects using the _T-Bar (Zoom)_ and associated _Positioner_ controls.

The _Comp Bin_, discussed shortly, allows you to store and apply your favorite compositions.

Preset adjustments made using the mouse vary slightly for holographic effects. For a standard LiveSet effect, dragging the mouse left, right, up or down changes the camera position in the frame. The right-mouse button zooms in or out. In a holographic LiveSet, right-mouse operations are the same. However dragging the mouse on the canvas modifies camera _rotation_, rather than position.

_Hint:_ New holographic effects, like standard LiveSets, can be created using the optional Virtual Set Editor application. A demo version of this utility is installed on your system, and its instruction manual can be located using the Help link on the Home page TC2 Elite’s Launch screen.

---

### SECTION 14.7 KEY CHANNELS

*PREVIZ*  |  *COMP*  |  *KEY 1*  |  *BFR 1*  |  *KEY 2*  |  *BFR 2*  |  *KEY 3*  |  *BFR 3*  |  *KEY 4*  |  *BFR 4*  |
---|---|---|---|---|---|---|---|---|---|
*POSITION*  |  *A*  |  *B*  |  *C*  |  *D*  |  *E*  |  *F*  |  *G*  |  *H*  |  *I*  |

_Figure 188_
In almost all respects, the *KEY* channels in *M/E* panes match the *DSK* channels found in the *Switcher’s main Transition* section. Unlike the *DSKs*, though, they constitute a ‘pre-main Switcher’ sub-layer. This means that *

*KEY* channels are applied before the composition is sent to the *Switcher* (or another *M/E*). Thus, content in a *KEY* channel appears beneath anything displayed via the (Switcher) *DSK* channels.

Likewise, *KEY* channel selection and *Position* controls largely work just like their *DSK* cousins, discussed earlier, with two notable exceptions. We’ll consider these exceptions next.

---

### 14.7.1 KEY LAYERS AND AUTOPLAY

It’s worth noting that the behavior of *Autoplay* for *Media Players* selected as sources for *KEY* channels conforms to the way it works for other *M/E* sources. That is, newly displaying a *Media Player* with *Autoplay* enabled in the *A layer* or a *KEY* layer for an *M/E* will trigger playback, but – by default – at the end of play the ‘out’ transition (and subsequent advance to the next playlist item) does not occur.

This default behavior can be overridden by checking the *Options* menu item *Enable Autoplay Out on M/Es*.

---

### 14.7.2 AUGMENTED REALITY

In one other unique and powerful departure from *DSK* features, the *Positioner* for *KEY* layers has an added feature labeled *Augmented Reality* (Figure 189).

**Note:** The *Augmented Reality* feature is for use in *M/Es* that are assigned to effects (such as LiveSets), and has no effect when a *Mix effect* (transition) is loaded as the Background effect for the *M/E*.

Any *KEY* layer with the *Augmented Reality* switch enabled is treated differently from a normal *KEY* layer in several respects:
First, it does not merely appear *above* the main M/E layer composition you configure at left, as a typical KEY channel would. Instead, it is treated like another main layer added above the standard M/E layer rows.

Thus when you zoom or pan the M/E, the KEY layer zooms and pans right along with it, making its content appear as though it were embedded in the scene (Figure 190).

(This lets you effectively add one or more virtual layers to a LiveSet composition at any time, with complete control over positioning within the composition.)

With the associated Parallax setting at 0%, the KEY source is locked to the background formed by the layers below it in a 1:1 relationship. When the 'camera viewpoint' changes, the KEY layer moves in exactly the same amount and direction as the background.

*Hint: You can use this ability to ‘pin’ a graphic element into a LiveSet.*

Raising the Parallax value modifies the motion and of the Augmented Reality KEY layer during panning and zooming, making it appear closer to the camera than subject matter behind it. This enhances the impression of three dimensional depth.

Finally, note that the Tracker feature can also be used along with Augmented Reality and Parallax to produce uniquely dynamic motion graphic compositions.

**SECTION 14.8 COMPS**

![Figure 191](image1.png)

Different ‘virtual camera’ positions, along with other M/E attributes, can be stored in the Comp Bin associated with each M/E. In particular, T-Bar and most Positioner attributes for all layers in the module are stored in a Comp and are re-applied when you click the Comp icon later.

This includes such things as cropping and edge-feathering performed using Positioner settings (layer source selections are not stored, nor are Border or Tracking settings.)
14.8.1 MANAGING COMPS

Having prepared a composition you wish to keep, storing a corresponding Comp is simply a matter of clicking the COMP button above the T-Bar to open the Comp Bin, and clicking an empty position. An image grabbed from output of the module is displayed to represent the Comp.

If you later wish to revise a Comp, you can do so either by rolling the mouse over it and clicking the ‘snapshot’ icon shown at upper-right (Figure 192) or by right-clicking the icon and selecting Update in the context menu that appears (Figure 193).

The context menu also allows you to Rename a Comp, update it, or clear it entirely.

14.8.2 ANIMATION

Making a selection in a Comp Bin changes the current composition of layers displayed by the module to the new one. Changes can be immediate or animated over time. The timing controls in the footer of the Comp Bin determine the duration of the move from one position to another, while transition effects for layers are governed by their individual effect durations.

Hint: The main Switcher also hosts a Comp Bin. However, LiveSet effects are not supported in this case.

It’s worth noting that, since T-Bar states are stored and applied by Comps, transition effects can be applied by selecting a Comp.

Let’s discuss an example:

- Suppose KEY 1 is a lower third type title overlay and has a ‘fly on’ type transition assigned to it.
- Comp 1 was stored with KEY 1 not visible.
- Comp 2 was stored with KEY 1 hidden.
- Click Comp 1, then – a moment later - Comp 2.
The result is that *KEY 1* will animate in and out according to the state stored in each *Comp*.

Actually, *Comps* can apply transitions to multiple layers at one time with a single click. Animation between the current layer states and settings is not limited to the effects provided by transitions, however. Let’s consider a different example.

- Select *Comp 2*, ensuring that *KEY 1* is visible.
- Use the *Positioner* controls for *KEY 1* to slide the lower third title off the page, completely hiding it from view.
- Store a new *Comp*.

Switch back and forth between these two *Comps* and you’ll notice that animating the layer’s position of the layer has effectively allowed you to create a custom transition. Experiment with other settings, such a Z or Y axis rotation and you’ll begin to see just how much power *Comps* give you.

Using these and other settings to animate the various video layers, very complex compositions can be introduced into your production with a single click in the *Comp Bin*. 
In video production, outputs are a BIG deal, typically in scant supply, and expensive. Imagine a system where you could have a nearly endless supply of outputs. NDI makes this dream a near reality. TC2 Elite supports virtually unlimited expansibility in this respect, and even provides direct and convenient control over your output sources.

TC2 provides eight special NDI outputs, beyond the already large number of SDI and NDI outputs available. These latter outputs are labeled OUT 1-8.

Figure 195 highlights two tabs labeled OUTPUTS 1-4 and 5-8, situated just beneath the main PROGRAM output viewport. Clicking a tab reveals one of these two specialized crosspoint panels, which appear in the same place that M/E and PREVIZ modules are normally shown.

The features of these panels are very similar to those normally provided by an expensive external matrix routers. Each row in these tabs determines the source sent to the output named at left. The monitors at right show the video from the currently selected source.

You can assign many different sources to each of these 8 NDI outputs. As elsewhere, the source buttons occupy three banks, similar to the Switcher source rows (the same Bank buttons used for the Switcher change the banks shown in the NDI Output Router panels, although their content is somewhat different). Outputs can be individually renamed by editing the labels shown at left (Figure 196).
Output source options include the displays and audio assigned to any of the four primary outputs, but also any other Switcher source with the exception of M/Es and animated Buffers (a Buffer holding an animated source will output a still image, which may nevertheless 'still' be useful for some purposes).

SECTION 15.1 APPLICATIONS

This means you can simply assign one of these outputs to a suitable downstream system or device, and 'hot-punch' them at will. Downstream NDI-enabled devices connected to one of these outputs can thus be effectively re-configured directly from TC2’s Live Desktop or Control panel, which provides special support for this feature.

The potential uses of these outputs is nearly unlimited:

- Supply external NDI monitoring solutions (such as the NDI Studio Monitor application included in the free NDI Tools Pack).

- Recorded them anywhere your network runs using NDI IsoCorder.

- Convert them to SDI for connection to traditional (non-IP) studio systems, using either NewTek’s optional NC1 IO systems, NewTek Connect, or Spark hardware.

*Note: Each NC1 IO unit supports up to 4 SDI output channels and a full suite of production tools including per-channel overlays (which can be still images, animated clips, or even other NDI sources), allowing you to re-combine and re-brand your video endlessly.*
Less than 100 years ago, movies were silent. We’ve come a very long way since “The Jazz Singer” (1927, Warner Bros.), and great audio now plays a huge role in video production. NewTek live production systems provide an extensive set of professional quality audio tools, which we’ll explore in this chapter.

External audio connections and basic configuration were touched on back in Sections 3.5.1 and 3.7.1. A tabbed pane labeled Audio Mixer, found just below the main Switcher presents more precise control over individual audio sources and outputs.

Compact sub-panels in this pane provide configuration and control for individual audio sources and also audio outputs as follows, from left to right:

- **External** audio sources (audio INPUTS 1-15)
  - **APPS** – a special input provided for use with Live Call Connect.
  - **TALKBACK** – a special input provided for use with Skype TX inputs.
- **Internal** sources – Media Players, and Effects (sound embedded in Animation Store transitions).
- **Aux 1 to 3** – controls for Aux audio busses.
- **Phones** – volume control for the system’s headphone output.
- **Master** – controls the primary audio bus.

(Audio level controls for output recorders and streaming are located in the Output Configuration pane.)

**NOTE:** Backplane analog outputs carry the first two channels assigned to Master and Aux 1.
SECTION 16.1 AUDIO SPECIFICATIONS

Analog audio conforms to SMPTE RP-155. The maximum input/output level is +24 dBu. Nominal input level is +4 dBu (-20 dBFS), and the sample rate is 48 kHz. Levels above 0 dBVU are shown in red in the VU meters, to caution you that overly high levels can result in clipping in recordings.

SECTION 16.2 HEADPHONES

By default, headphones connected to the ¼” stereo Phones jack carry the first two channels of the audio signal from the bus designated Master 1 – that is, the same audio carried by analog output connectors marked as Ch. 1 and Ch. 2 in the OUT 1 group on the system’s backplane.

The Headphone output is also affected by Solo switches located at the bottom of each control group in the Audio Mixer. When Solo is enabled for one or more sources – or outputs – only the soloed sources are sent to the connector. (See Solo in Section 16.7.2 for more information on this feature.)

SECTION 16.3 VU METER CALIBRATION

VU (Volume Unit) meters are located right above the Volume control sliders throughout the Mixer. The calibration of the VU meters can be changed to suit your preference. A menu at left beside the Input labels opens a small menu (Figure 198) offering three options as follows:

- dBVU – most familiar to users of typical analog audio mixers
- dBFS – dB ‘Full Scale’ – the digital standard; see the heading Audio Headroom in Section 3.12
- dBu – based on a voltage of 0.775 VRMS (a shy scale rarely seen in public, supplied for completeness, comparison, and the amusement of audiophiles)

SECTION 16.4 EXTERNAL SOURCES

Columns in the first set of control groups are numbered as Input 1-16. Each of these can be assigned to any available audio source – whether analog (line level) sound supplied to rear panel connectors, SDI embedded audio from one of the four SDI inputs, available NDI source, or other system audio source (including network audio sources like Audinate’s Dante™, with appropriate drivers.

*Note: Dante support requires an inexpensive user license from Audinate™.

You may choose to think of these audio sources as being associated with the same-numbered video inputs in the nearby rows on the rear connector panel. This linkage, though the default, is not strictly enforced, however. You can connect directly to any external audio source in the Advanced Configuration panel (see Section 16.10).

Also, for reasons of your own, you may well prefer to treat various audio sources as independent of the nominally associated video input. The Follow (audio follows video) features play an important role in this context – see the sub-heading Follow Program Video in Section 16.10.2.
16.4.1 CONNECTION TYPE

Naturally, only one connection can be active for a given audio input at any moment. To access the Connection menu, move the cursor into the label of an input, and click the Configure (gear) button that appears just at right. The Advanced Audio Configuration panel will be shown.

The drop-down Connection menu at the top of this pane allows you to assign any one of the supported sources connected to the system to this Audio Mixer control column.

![Figure 199](image.png)

- **Local**
  - Physical inputs on the system’s backplane or faceplate listed, usually as Input #, but in some cases as “Mic” or “Line”.
    
    Local sources support different connection types, as determined by a menu at right in the same group. This option typically defaults to Auto-detect, but depending on model may include Line, Mic, or Embedded (which is the correct setting for audio included with an SDI or NDI video connection).
  
  - Network audio from supported protocols (such as Dante; may require third-party drivers).
  
  - **Skype TX Caller 1, 2** (sound from these two special input types, further discussed in the next sub-heading).

- **Follow (Video Source)** – this is the default selection, and causes the control column to follow the same numbered video Switcher input.

- All available NDI audio sources.

**Note:** Channels 1 and 2 from Master and Aux 1 are always placed on Dante output channels 1-4, respectively.

SECTION 16.5 LOCAL SKYPE TX CALLERS AND MIX MINUS

The default Connection option for external Audio Mixer inputs is Follow Video Source. When an audio input set this way is assigned to a Local>Skype TX Caller channel, the audio control group is automatically assigned to govern incoming audio from that remote Skype caller.
It is not necessary to use an Aux audio bus to configure a special audio ‘mix minus’ to return to the remote Skype caller in this case. The return audio for Skype TX is handled automatically, ensuring that (except when the TalkBack feature is engaged) the remote caller will receive a special mix comprised of the Master mix with the remote caller’s sound removed.

**Note:** These special a/v inputs are based on the professional Skype TX broadcast platform and require the use of its dedicated control application. Alternatively, you can connect directly to NDI a/v output from a dedicated NewTek TalkShow Skype TX unit, or the standard ‘consumer’ Skype client configured for NDI output using any Switcher input. See Appendix B: Skype and Skype TX for more information.

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### SECTION 16.6 TALKBACK

The Audio Mixer input labeled TALKBACK serves a special purpose, providing a way to converse with remote Skype callers off-air (i.e., without intruding into your live program). You can choose what audio source to supply for TalkBack purposes from a variety of input types, as discussed in the previous sections.

As mentioned earlier, by default the Connection option for an external Audio Mixer input assigned to a Skype TX™ channel allows the corresponding control group to govern incoming audio from that remote Skype caller. In this case (that is, when an audio control is ‘listening’ to incoming audio from a Skype TX channel), a new button labeled TALK appears beside the group’s SOLO button.

When the TALK button is lit, audio you supply via the TALKBACK input (typically a microphone connected to one of the inputs on the system’s backplane, or perhaps the system Stereo Mix supplying audio with sound from a 1/8” motherboard audio input) is sent to the remote caller, temporarily replacing the normal mix-minus sound that remote caller would otherwise hear.

At the same time, the Mixer sends incoming sound from the remote Skype caller to its Headphone output, enabling you to have a two-way conversation off-air.

**Hint:** You’ll want to take steps (such as by enabling Mute, or perhaps Follow Program Video) to prevent sound from the Skype caller being sent to your live audio mix during TalkBack conversations.

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### SECTION 16.7 COMMON CONTROLS

Many important features and optional settings are common to most source types, and some even appear for outputs. Let’s review these before continuing.

---

#### 16.7.1 MUTE

**Mute** switches for inputs and outputs appear as speaker icons located just above in the main Mixer panel. A single switch controls multiple channels, as appropriate for that source.

Enabling Mute removes the sound from that source from all downstream audio mixes and outputs.

**Hint:** Muted sources still show signal activity on the VU meters, but levels are drawn in gray rather than full color. This is also true for sources with Follow set that are not currently audible on output.
One important exception to *Mute* operation involves recording. The IsoCorder™ feature lets you capture any MIX a/v output - i.e., the primary output or outputs, or directly from hardware audio and video inputs with matching numbers. That is, the audio recorded with the video is taken from the audio input having the same number as the video input. In this latter case, the captured audio is routed directly to the recording module *prior* to most adjustments in the *Audio Mixer* – including *Mute*.

---

**16.7.2 SOLO**

*Solo* implementations and options vary widely in the audio industry, but broadly speaking, all variants provide very useful functions. The *Solo* feature offers remarkable flexibility without overly confusing complexity.

Consider a few basic design concepts:

- Enabling *Solo* for a source sends its (post-fader) sound to the *Headphones* output and removes all other sources from that output.
- *Solo* has no impact on audio mix(es) sent to any other output.
- This *Solo* feature is normally what it called 'exclusive Solo' (or 'X-Or' type). This means that enabling *Solo* for a given source disables all other *Solo* buttons.
- It is possible to use what is called 'Solo latching', ganging multiple sources for *Solo* output. Hold down the Ctrl key and click additional *Solo* buttons to add or remove their respective audio contributions from the latched *Solo* group.

**AUDITING AN AUDIO SOURCE**

It can be very useful to be able to preview one or more audio sources, doing so *without* allowing the test sound to be audible on *Program* output. Typically, this need arises in connection with testing microphones or other audio sources that will be used in the production.

To audition an audio source in this manner:

1. First *Mute* the source, removing it from primary outputs.
2. Then enable *Solo* to hear it on the *Headphones* output.

---

**SECTION 16.8 INTERNAL SOURCES**

Besides external audio sources, sounds played from internal storage volumes (including removable media such as external hard drives or ‘thumb’ drives) via the *Media Players* (*DDRs*, etc.) can be added to the output mix.

---

**16.8.1 MEDIA PLAYERS**

Video and audio-only files in *DDR* playlists, along with audio files in the *Sounds* player, may contain one or more audio channels. At most, *Media Players* output the first four audio channels of multiple channels; additional embedded channels are ignored. Other options and controls in these sub-panels are similar to those provided for external audio sources.
This control group governs the sound embedded in *Animation Store Transitions*. The remaining control groups in the *Audio Mixer* are dedicated to various audio outputs. We'll come back to them in Section 16.9, but before we do so, let's drill further down into more advanced audio options and tools.

### SECTION 16.9 OUTPUT AND PRIMARY BUS CONTROLS

As has been discussed, the *Mixer* supports four primary audio busses – *MASTER* and *AUX 1-3*. Each of these is represented by its own control group in the *Audio Mixer* output section, and regulates sound sent to physical connectors or to 'logical outputs'.

**Hint: Shift + double click Volume knobs to restore their default values (0dB).**

Settings in all of the control groups in this section take effect downstream from all audio sources, further modulating and processing audio sent to outputs as the *AUX* and *MASTER* mixes, for recording, and for Internet streaming.

#### 16.9.1 HEADROOM NOTES

In digital audio systems, signal levels that exceed maximum values are uniformly assigned the maximum value, a condition known as "clipping". Clipping inevitably results in annoying audible issues.

Worse, over-modulation that may not be apparent while listening during live production may nonetheless appear in recorded files. This is often true even when levels appear to be below the ceiling level (0dBFS, the maximum allowable digital level).

**Hint: When clipping has occurred, the label for the problem channel turns red briefly, as seen in Figure 201.**

Due to this problem, digital audio system designs customarily allow substantial ‘headroom’ above the benchmark ‘alignment level’, making over-modulation much less likely. Often this allowance seems high to those familiar with analog audio systems; headroom levels between 18 and 24dB are not uncommon in professional digital audio realms.

You can apply level control to suit your own preference in this regard, using the separate *Record* (and *Stream*) level controls discussed shortly. For example, levels set at -20dBFS in the *Record Configuration* panel approximate typical professional practice. This has no impact on levels at the system’s audio outputs, and all but ensures clipping in recorded files will be avoided.
Advanced users can thus record files conforming to regional standards or personal preference, substantially reduce the possibility of audio clipping in recorded files, and even adjust the level on the fly if necessary.

The main point to remember from all of this is that for digital audio recording “less is often more”. When it comes to levels, by all means go as high as necessary – but it’s equally practical to go no higher than necessary.

Hint: The Audio Mixer also provides Compressor/Limiters for each input and output. These can also be invaluable in defeating clipping due to over-modulation.

16.9.2 STREAM

Level controls for the stereo audio that accompanies Streaming outputs are provided in the Output Configuration panel (see Section 8.2).

SECTION 16.10 ADVANCED CONFIGURATION

The controls for all inputs (including internal audio sources) as well as the Effects, Stream, Aux and Master output groups include a configuration button shown when you move the mouse over the input label.

The familiar ‘gear’ icon opens the advanced Audio Configuration panel. We touched on this panel briefly when we discussed selecting and configuring Connections for external audio inputs. The Audio Configuration panel (Figure 202) offers many more important features and controls, however. Let’s explore these now.

16.10.1 INPUT TAB

Audio Delay

Audio and video arriving at inputs in sync will maintain sync throughout the system to output or recording.

However, you should note that upstream issues can cause video to arrive at system later than the corresponding sound.

To mitigate this sort of external problem, the Audio Mixer provides an adjustable Audio Delay feature.

E.g., many cameras support simultaneous digital and analog audio output. In-camera processing can delay digital a/v output, resulting in analog audio output actually leading the digital output by a meaningful measure.
For sources set to Mic input type, Gain knobs may appear in the Input Settings tab to allow you to compensate for microphone variances.

The Audio Configuration panel also provides Pan controls. Pan is a very useful feature; it adjusts placement of sound from source audio channels on the stereo channels comprising the audio mix(es). Using Pan, you can place all or part of channel 1 onto channel 2, and vice versa.

- When Pan is set to the extreme left position for channel 1, its audio is sent exclusively to the first channel for the Input 1 group.
- Centering the Pan 1 knob splits the sound from Input 1 equally onto channels 1 and 2.
- Sliding Pan for channel 1 fully clockwise results in that source only being audible on channel 2.

Pan also modulates the sound levels on the left and right channels so that the overall volume neither rises nor drops as a result of adjustments.

Hint: “Pan” is not the same as “Balance”. The balance control in a stereo system varies the relative level of the left and right channels, but sound from the left channel will never come out of the right speaker, or vice versa (Pan does permit this).

16.10.2 PROCESSING TAB

The second tab in Audio Configuration is named Processing, and likewise holds very valuable features.

Equalizer

The seven-band equalizer allows you to ‘shape’ sound to taste, accommodate sources with different acoustic characteristics (say, mismatched mics), minimize feedback or roll off unwanted parts of the audio spectrum. Enable or disable the Equalizer using the switch beside the label above its control group.

The vertical sliders attenuate or boost the tonal range centered on the frequency shown at the top. The effect applied falls off gradually as sound draws closer to neighboring frequencies on either side. Click Reset to return all sliders to 0dB.

Hint: Naturally, reducing or increasing the level of one or more tonal bands affects the overall output level as well. This may call for you to trim the main level setting for the affected input or output.
COMPRESSOR LIMITER

The Compressor/Limiter is capable of preventing clipping (see Section 16.9.1) from unexpected peaks or transients, and making talent sound better than they do in real life, bringing voices, music and other audio sources into an optimal dynamic range.

Being able to do this independently for each output too is icing on the cake, especially for Internet streaming, as it ensures correct levels at any time.

THRESHOLD

Sound above the set Threshold level will be compressed; the amount of compression and the manner in which it is applied are both dictated by the other settings.

RATIO

A Ratio of 4:1 means that if input level is 4 dB over the threshold, the output signal level after compression will be just 1 dB over the threshold. The gain (level) is reduced by 3dB. Very high ratio settings are the reason the word “limiter” is part of the title for this feature.

The highest ratio setting will effectively reduce any signal that would rise above the threshold all the way down to the threshold level (with the exception of a brief period during a sudden increase in source loudness, as dictated by the Attack setting).

ATTACK

Attack is also in milliseconds. The setting represents the amount of time it takes for the gain to change by a specified amount.

It would not be grossly incorrect to think of this setting as changing the slope of a graph depicting how aggressively the compressor pursues the target value (defined by applying the Ratio setting to the amount the signal surpasses the Threshold). Shorter values are more aggressive, while longer values are more subtle (and tend to be less noticeable to the audience).

RELEASE

Release is like Attack in many ways but refers instead to the speed with which the compression effect is removed as a source signal falls back on its own so that it no longer exceeds the Threshold.

GAIN

Naturally, compression impacts the overall output level of the source or output. The Gain control allows you to compensate, bringing the post-compressor/limiter signal back to a comfortable nominal range.
Hint: Different circumstances call for different Attack and Release strategies. For example, much less aggressive settings could work nicely for vocals, but fail badly when applied to a snare drum. Many websites provide suggestions on establishing the best compressor/limiter settings for different environments.

NOISE GATE

The Audio Mixer’s advanced options panel also include a configurable Noise Gate for each audio source, as well as all outputs. This lets you ensure that unwanted low-level sounds are prevented from inadvertently intruding into the mix.

TRIGGERS

Several different per-input trigger (automation) features are found in the Processing tab.

FOLLOW PROGRAM VIDEO

Enabling Follow Program Video options for an audio source directs it to track switcher operations affecting the related video source.

Audio for sources with Follow Program video enabled in the Audio Configuration panel is automatically removed from mixed outputs until one or more specified video sources are actually displayed on Program Output.

Hint: When the corresponding video source is not displayed on output, the audio source’s VU meter level is displayed as a grayscale.

RUN MACRO AT

The nearby Run Macro at (value in dB VU) is part of the Audio Mixer’s powerful automation toolset. Click the E (Event) button to assign macros to run when the sound level for the input passes the threshold audio level (transients such as a brief cough are filtered out).

In this manner you could, for example, automatically perform a ‘hands-free’ camera switch to show someone who begins speaking, and then automatically switch back again when he stops.

Note: Not included on some models.

16.10.3 ROUTING TAB

A main tab labeled Routing appears in the Configuration panel for all sources (Figure 205). The controls in this group determine output routing of the various channels supplied as inputs to the various output mix busses (MASTER, AUX 1, etc.) Let’s discuss what an audio bus is and its uses before proceeding.

BUSSES AND OUTPUTS
Consider a very basic audio mixer. Its main audio signal path, from input to output, is properly called the ‘master bus.’ Sound supplied to one or more inputs is placed on this master bus (in the jargon of audio processing, this is called a ‘send’), which ultimately flows to output connectors.

Slightly more advanced mixers often provide more than one ‘send’ for individual inputs. For example, the sound from all inputs may be sent to the master bus, comprising the ‘master mix’. A different mix, sometimes called a ‘sub-mix’, might also be created by sending certain signals to a secondary ('auxiliary', or ‘Aux’) bus.

*Hint: A secondary mix, prepared on an Aux bus, can serve many purposes. For example, you might wish to record a mix with all sound from talent microphones but that excludes any sound effects or music.*

Let’s summarize what we have learned so far: A ‘send’ pipes audio signals from an input to a discrete pathway called a ‘bus’. Multiple sends can be used to place sound from a given source onto one or more internal busses.

What else should we know?

Each audio bus is discrete. Each can be directed along different output paths. And even when the blend of signals it carries is otherwise identical to another bus, it can be processed separately. Thus its levels, equalization, and compressor/limiter settings can be unique.

The *Audio Mixer* provides four primary *audio busses*. These are identified in the *Audio Mixer* as:

- **MASTER**
- **AUX 1, 2 and 3**

The *Audio Mixer* provides controls for each of these busses, allowing you to manage levels and signal processing. It is important to understand the distinction between *busses* and *outputs*. Now that we understand the former, let’s consider the latter.

An *output* may be physical, or virtual – i.e., it may involve a connector on the rear panel, or not. For example, audio recorded internally does not require an output connector. Likewise, it may initially be analog or digital.

*Note: Analog outputs 1 and 2 are permanently assigned to MASTER and AUX 1, respectively. In contrast, digital (or ‘embedded’) outputs are configurable in the Output Configuration panel.*

**Sub-Mixes and ‘Mix Minus’**

At times you may require specially configured audio mixes. For instance – some installations call for sending audio from one or more internal sources (such as a DDR or the Sounds player) to a secondary distribution system. Alternatively, you may want a ‘clean’ output from one or more sources for use apart from the main primary output mix.
Specialized sub-mixes of this latter sort are often referred to as ‘mix-minus,’ since one or more sources are deliberately subtracted from the main program. Mix-minus capabilities can be invaluable for productions like ‘phone-in’ shows. The remote caller needs to be able to hear the interviewer; but if you simply send the primary mix back to him, he is forced to endure a late-arriving echo of his own voice. Needless to say, this would be confusing and undesirable.

Suppose your interviewer is speaking into a microphone connected to channel 1 of Input 1. The audio from your interviewee is routed into Channel 2. You could easily supply both to your Master bus for your program output needs, but remove channel 1 from Aux 1, and remove channel 2 from Aux 2 to provide mix minuses to send back to the interviewee.

This approach eliminates annoying echoing, feedback and the like. Meanwhile, both participants can be heard on the main Program output. Also important, independent control and signal processing is provided for each part of the pipeline.

**Mix Minus for External TalkShow® Devices**

The Routing tab provides four 8x8 matrix routing panels for each input, allowing for more sophisticated mixes than the example above. TC2 supports 8 channel NDI output, so it’s actually possible to route a unique mono mix-minus on each channel for a single Aux bus. A single NDI output can thus provide all of the mix-minus needs for two Talkshow VS4000 systems.

Let’s consider a simpler example – configuring unique mix minus audio for return to a single VS 4000.

The example assumes that you have assigned Switcher inputs 13-16 to receive the four individual TalkShow sources. We will use video MIX 2 to supply Program video for return to each TalkShow caller. And we will assign AUX 1 as the Audio source for MIX 2, assigning a unique (mono) mix minus to each of its four channels to supply return audio for each caller.

- In the Output Configuration panel, assign Aux 1 as the Audio source for MIX 2.
- In the Audio Mixer, open the audio configuration pane for Input 13.
- Access the Routing tab, and click the Clear button above the Aux 1 routing matrix.

![Routing Matrix](image)

**FIGURE 206**

- Checkmark channels 2, 3 and 4 in the column below In 1 (see Figure 206). This routes sound from the first incoming Skype caller to all Aux 1 output channels except channel 1.
- Open the audio configuration pane Input 14 and, in the Routing tab, clear the Aux 1 matrix.
This time, checkmark channels 1, 3 and 4 in the column below *In 1*. This routes sound from the second incoming Skype caller to all *Aux 1* output channels *except* channel 2.

Repeat the steps above for audio inputs 15 and 16, omitting the *Aux 1* checkmarks under *In 1* for channels 3 and 4, respectively.

That’s it – you’ve got the perfect mix minus configuration for return to your four Skype callers, using a single NDI output.

**SECTION 16.11 SUPPLEMENTAL OUTPUT DEVICES**

TC2 Elite features two additional menus are provided at the bottom of the *Routing* tab, under the heading *Supplemental Output Device*.

The left-most menu in this group lists any add-on output devices detected by the system, and also a list of multichannel audio-only NDI outputs options.

For example, ‘transmit’ channels from Audinate’s Dante network audio protocol will be listed here if you have installed Dante Virtual Sound Card software. Or, in similar fashion, you may have installed AES67 drivers.

The audio connections on the motherboard are also listed here.

Making a selection results in the sound from source being sent to the corresponding audio channels of the designated output.

*Note: Apart from the AUX and Master mixes, routing or mixing is not applied to supplemental outputs. Each source channel is mapped to the corresponding output channel in 1:1 fashion, limited by the number of channels the output supports (e.g., a stereo output will always transmit channels 1 and 2 from the source).*

**SECTION 16.12 MEMS**

Roll the mouse to the left edge of the screen in the *Audio Mixer* to show its *MEM* bin. Audio *MEMs* work just like their counterparts in the *Media Players* (see Section 11.1.11). *MEMs* are a convenient way to quickly store and recall audio steps and settings for different venues, productions, and users.
Chapter 17  MACROS AND AUTOMATION

Macros smooth out your workflow, reduce complex operations to a single button press, and make it easier to produce sophisticated programs. They provide many opportunities for both workflow streamlining and creative applications. (As well, macros can reduce or eliminate embarrassing operator errors.)

One of the hardest things about live switching is keeping up with the action. We’re only human, limited as to how fast our fingers can move, recall and perform important sequential steps, and so on. Macros are the answer to that dilemma. Record any sequence of events as a macro and play it back with one click. Alternatively, trigger it with a keystroke, control panel operation, or HotSpot.

FIGURE 209

Macros can do almost anything; Preload and play content, modify audio settings, automate complex switcher sequences or perform synchronous operations. The compelling usefulness of macros justifies the prominent Macros menu placement in the Dashboard at the top of the Live Desktop.

FIGURE 210
Click *Macros* to show a menu containing a *Configure Macros* item. This opens a large panel that allows you to create, organize, and even edit macros.

**SECTION 17.1 CREATING MACROS**

Creating a new macro is simple. Select a folder in the *Folders* column at left to contain the new entry (or add one, using the *New Folder* button below), then click the *New Macro* button below the *Macros Bin* at right.

Continue to define the macro by clicking the *Record* button at the bottom of the panel, and then just go ahead and perform the sequence of operations you wish to include in the macro. You can use mouse, keyboard, and *Control panel* operations when doing so.

When finished, click the *Stop* button to complete recording. Test the new macro by clicking the *Play* button. You’ll notice that an animated bar in the background of the macro entry in the list tracks playback progress. Of course, you can modify the playback rate using the menu next to the *Record* button. You can even set macros to loop using the button at extreme right.

### 17.1.1 SPEED AND SNAPSHOT MODE

The Speed menu lets you modify the playback rate of your macro. One option in the *Speed* menu bears explanation: When you choose *Snapshot* as the macro’s speed, you essentially force it to jump to its end result as fast as the system can get there. *Snapshot* mode is very useful for macros that configure the system to a particular state.
One example would be when you want to instantly reconfigure M/Es with different virtual sets for a scene change; or perhaps you want to quickly disable LiveMatte for all Media Players at once. The possibilities are endless.

*Hint: You can record a macro that includes other macros. Depending on your order of operations, you may need to re-highlight the newly recorded macro in the list to show its Stop control (to end macro recording).*

17.1.2 TRIGGERS

![External Triggers control panel](image)

*Figure 213*

The External Triggers controls located near the bottom of the Macro Configuration panel allow you to configure one or more ways to launch macros. For example, select a macro, click in one of the Trigger boxes, and then press a suitable keyboard shortcut to assign it to that macro.

SECTION 17.2 MANAGING MACROS

The Macro Configuration panel has management features such as folders, rename, clone, and hotkey assignment, as well as Import and Export (use these to copy macros to other units, and for backup).

*Hint: TriCaster includes additional and very useful import/export file format options for macros, including JSON, Excel (.XLSX), and even a working Javascript (.js) example.*

17.2.1 SESSION MACROS

It’s easy to keep macros designed for use with a specific production organized and accessible, thanks to the Session Macros folder in the Macro Configuration panel. Macros in this group are exposed within that session only (or new ones based on it, if the operator uses template sessions).

SECTION 17.3 AUTOMATION

We have discussed automation features elsewhere in this Guide, notably in Sections 8.1.4, and 11.1.1. Please refer to the accompanying Automation and Integration Guide for additional discussion of these powerful features.
Chapter 18  STREAM/ENCODE

Live webcasting has dramatically altered the broadcast landscape. Information can now be shared among audiences around the world with very small transmission costs. The live streaming market provides many creative and profitable opportunities. When it comes to taking advantage of this new medium, your NewTek live production system places you in the forefront of all the excitement.

SECTION 18.1 INTRODUCTION

Encoding for a/v streaming and other purposes involves a wide variety of attributes. At times, too, account login details are required for your streaming service or CDN (Content Delivery Network). Further, you may maintain multiple streaming service accounts for different purposes, as well. In addition, you may capture encoded video files for other purposes.

FIGURE 214

TC2’s Streaming Configuration panel supports the creation and configuration of all of the information and settings you are likely to need in this context.
SECTION 18.2 CONFIGURATION

To open the *Streaming Configuration* panel (Figure 215), click the *Configure* button (gear) at right of the *Dashboard*’s large *STREAM/ENCODE* button.

18.2.1 SOURCE SETUP

To assign video and audio sources to either of the two streaming encoders, click the *SOURCE SETUP* button in the header of the *Streaming Configuration* panel (Figure 216). Doing so opens the *Output Configuration* dialog, where you can continue to choose audio and video sources, and adjust audio volume.
18.2.2 THE WEB BROWSER

The **Web Browser** button in the header of the **Streaming Configuration** panel does what you would expect, opening a web browser. This feature is provided for your convenience when working with web streams or your content delivery network account. We do not recommend general purpose web surfing during live operations.

*Hint: If the web browser is hidden from view because a Live Desktop operation took precedence, you can reuse this button to bring the browser window to the front again.*

18.2.3 CONFIGURING ENCODERS

*FIGURE 218*

*FIGURE 219*
Settings for the two encoders are configured in the *Configure Encoder* dialog (Figure 218). Open this dialog by clicking the configuration (gear) icon for either encoder at left in the header of the *Streaming Configuration* panel. Select an encoder *Preset* (such as *Medium* or *High*), or manually configure custom settings using controls in the *Video* and *Audio* control groups below, and click *OK*.

*Note: the Codec menu in this panel allows you to select from a number of H.264 profiles as well as HEVC.*

### SECTION 18.3 DESTINATION PRESETS

The information for a given CDN or other encoder target is also retained in a *preset* (e.g., Facebook, YouTube Live, etc.) you can add these presets as needed to the *Streaming Configuration* panel using the *New Preset menu* at left in the footer of the panel.

*Hint: A default File Capture preset allows you to capture output from either encoder to a file.*

At left in this panel are two columns of checkboxes; these allow you to send the output from either *Encoder 1* or *2* to the presets at right.

![Streaming/Record Configuration](image)

*FIGURE 220*

If you move the mouse pointer over a *Preset*, two new gadgets are shown at right (Figure 220). Click the familiar *Configure* gear to open a suitable dialog. It may invite you to enter your account credentials for a site and *Sign In*, or provide suitable controls for other relevant settings that are required. Or, for a *File Capture* preset, you can choose the path for encoded file output.

Not surprisingly, clicking the little (x) gadget instead will delete the *Preset*.
In addition to the many recognizable names listed in the New Preset menu, you will observe a menu item labeled Custom. The dialog this selection opens allows you to enter the details typically required by generic streaming services.

In some cases, a CDN (Content Delivery Network) service may provide you with an XML file containing the recommended configuration settings related to your streaming account. (The Import Settings button in the Custom Connection dialog can be used to load this file, from which it will extract suitable values for streaming via the service automatically.)

SECTION 18.4 INITIATING THE STREAM

When you are ready, initiate streaming to the Preset targets you have check-marked in the Streaming Configuration panel by clicking the STREAM/ENCODE button in the Dashboard at the top of the Live Desktop panel. (The button will display elapsed time during streaming/encoding.) Once streaming has started, clicking the presets will start or stop that individual preset independently from the others.

**Note:** It should be noted that you cannot click a Preset streaming on one encoder and expect it to switch to the other encoder. You must stop the first encoder, then select the other encoder.

SECTION 18.5 CAPTURING THE STREAM

To archive a live stream file as it is created by an encoder, simply configure and check-mark a File Capture preset for that encoder.

SECTION 18.6 STREAMING STRATEGIES

One of the best approaches when beginning (to stream your productions) is to establish a relationship with a commercial streaming media provider. A good provider can guide you past firewalls, provide public addresses for everyone to view your stream, and provide no end of valuable guidance.

And it may not be as expensive as you think (costs vary based on considerations such as how many viewers you expect, how much web bandwidth you use each month, and so-on). Some services based on an advertising model will even host your stream free.

**18.6.1 ON DEMAND OR LIVE STREAMING?**

Not all ‘streaming’ is ‘live streaming.’ The difference is similar to i) watching a television program you previously recorded at a time convenient for you, or ii) watching a live event.

On demand streams are stored on a server (often supplied by an external service provider), ready to be transmitted whenever a viewer wishes. Live streams are available at the time they are broadcast, such as during a live concert or event.
ON DEMAND HOSTING

The Record module permits you to capture your productions to a local hard drive. The resulting files can be hosted on a network later, so viewers can connect whenever they like. If you have the resources available, you can host the video yourself – but if many people will likely want to view your production, you will likely avail yourself of a service to stream it on your behalf.

Ideally, ‘on demand’ streaming video begins to play on request after a few moments. (Letting the stream get a bit ahead of the client playback device is called ‘buffering’, and helps ensure smooth playback). This stands in contrast to other types of online video distribution which requires the viewer to completely download the video file before he can begin play. Given a sufficiently high-speed connection between host and viewer, they may well be able to enjoy a seamless viewing experience without stuttering or other issues.

LIVE STREAMING

Live streaming is a growing international market, and one you may well wish to serve. This form of streaming is a somewhat more demanding implementation. Rather than record a file and deal with it later, live video is transmitted over the network (effectively in real-time, give or take a little ‘time in the pipe’ as it were.)

Delivering a good quality stream requires that you consider both your network connection capabilities and that of your viewers. As well, to ensure reliable delivery, you will ideally have some idea of the size of your audience. Naturally, streaming video is highly compressed to reduce bandwidth demands and make it available to a wider group. You may need to make decisions as to which encoding protocol to use for your live stream, but this is commonly dictated by your streaming service nowadays. Generally, the destination preset you choose in the Configuration panel will handle this decision for you. (The Custom preset allows you to deal with most destinations for which a specific preset is not provided.)

In addition, TriCaster offers an “SRT Stream” preset. Secure Reliable Transport (SRT) is relatively recent open source protocol managed by the SRT Alliance, and is garnering some attention. (For more detailed information on setting up, operation and application examples, visit our SRT Ingest Whitepaper.)

BANDWIDTH CONSIDERATIONS

You’ll often hear the term ‘bitrate’ in connection with streaming. This expression refers to data throughput per second (generally measured in Kilobits per second, or Kbps.) You could think of this as being like water flowing through a hose. You control the ‘faucet’, because you get to choose the streaming Profile setting in the system’s Configuration panels. However, you don’t own the ‘hose’ – or, at least, not the entire hose.

Once the stream leaves your immediate environment, even if you can supply good throughput locally, bandwidth may be constricted elsewhere along the transmission path. The level of Internet traffic can impose limits, but another major factor is the sort of connections your viewing audience may have.

Consider an example scenario: Even though you know that most of your audience is going to connect to your program using (relatively slow) wireless devices, you use a very high outgoing bitrate – thinking that this will surely be enough to fill the need. The fact is, though, a high bitrate actually ensures their experience will be poor. The client player tries to play at the specified bitrate, but (in this example) the wireless bottleneck impedes flow. It is as if you connected a fire hose on your end, giving them a suitable high capacity nozzle for their end – but in the last stage of flow, the stream must pass through a small garden hose. Sadly, the stream will be quite insufficient, and output from the ‘nozzle’ (the client player) will falter badly.
For reliable performance, try to ensure the potential upload bandwidth from your system to the net is around twice the bitrate you choose. You can broadcast at a rate closer to your actual ceiling, but reliable performance cherishes headroom.

Also consider the expected download abilities of your viewers. Ideally, a safety margin 1.5 times the stream’s bitrate is desirable. This may mean you need to consider using a lower resolution, or lower framerate for your stream – but doing so when required will generally deliver a smooth result, and is the wise course. (Nothing inclines viewers to turn away quicker than a stuttering, start and stop stream. See “Speed Tests” in Section 18.8.1 for some useful resources.)

18.6.2 STREAMING MEDIA PROVIDERS

Using a commercial streaming media provider (sometimes referred to as a Content Delivery Network, or simply ‘CDN’) bypasses otherwise high-bandwidth requirements for the encoding computer. When you have made arrangements for a streaming media provider to distribute your stream, the encoder only needs enough bandwidth to get a single a/v stream to the provider. All end users connect to the provider to view the stream.

Most streaming providers have access to massive bandwidth (and often, with very little notice, they can scale up your allotment to meet a temporary need.) Since your local bandwidth is really only used for uploading a single stream, you can send a high-quality stream, secure in the knowledge that it will not degrade as soon as a second viewer attempts to see it.

Hint: A helpful way to find a good streaming service provider is to ask other members for recommendations in NewTek’s online discussion forums.

SECTION 18.7 PRODUCTION AND CAPTURE CONSIDERATIONS

If you’re not intent on live streaming, but wish to capture a live switching session, you would likely record at full resolution using the Record button (rather than Stream). The high-quality captured files can then be used later in a DDR, or perhaps be transferred to another computer (even on a different platform) for external processing or editing.

Hint: Use a portable hard drive to transfer the files between systems, or simply move them across a network.

You can always convert these files to a streaming file format if you later decide you’d like to supply them for ‘on demand’ Internet viewing. This lets you retain best quality right through to final output. When you eventually encode for streaming, you can choose settings that best suit the intended audience and streaming environment.

At the very least, if (perhaps to save conversion time) you capture video for web distribution using an encoder, it’s best to capture it at least at the size that you intend for final output. This helps ensure satisfactory video quality for your viewers. When video is compressed (as it invariably is for web viewing) you can lose important detail; compressing a full-screen video down to a quarter or a sixteenth of its size is a lesson in humility!
Other Factors

Other variables to keep in mind when you’re creating video for the web are contrast and motion. During video encoding for web distribution, a fair amount of video information and detail can be lost. For this reason, good lighting of your source video is essential.

Also, web streaming doesn’t handle detail, transitions and motion all that well -- so your best shots should be close up, and without a lot of movement. Too, audio from cameras and camcorders is rarely as good as that from external microphones. You should at least use a clip-on lavaliere microphone, if not a directional or shotgun microphone to be sure you record only the audio you really want.

SECTION 18.8 DIAGNOSTICS AND TROUBLESHOOTING

Video streaming is becoming commonplace, but there are still a lot of things to consider. You have the necessary tools, but problems can occur. This section will point you in the right direction to overcome them.

18.8.1 TESTING YOUR STREAM

When it comes to using your system in a professional live production environment (i.e., your bread and butter depends on getting it right, and now - not tomorrow), failure to test beforehand is not merely unwise - it can be professional suicide.

You should already be aware of the need for redundancy in a professional environment (you didn’t bring just one camera, did you?) As reliable as any device may be, Murphy’s Law has not been repealed ... so you plan for this, bringing the appropriate equipment, such as uninterruptable power supplies, backup recording devices (there’s no shame in having a VCR backing up your digital record – ‘low tech’ still has a place in the grand scheme.)

But you also need to perform onsite testing, to ensure your live stream is working well before ‘zero hour.’ No-one will thank you for excuses, no matter how brilliantly they point the finger at forces beyond your control.

1. Set up and enable a test stream.

2. You can use the integrated web browser to scrutinize the stream, but you should probably confirm using an external system, too.

Success at this point does not necessarily mean you’re done. You may be able to see the stream locally, but can someone outside the local environment connect to it over the Internet? The best way to find out is to have someone at a remote location verify that your stream is streaming properly. If it is, great! Otherwise, keep reading...

Testing with Ping

Before your stream can be seen - whether on a local intranet or the Internet - client computers (or your service provider) need to be able to establish a network connection with your local system and it’s encoder.

Ping is a humble but effective tool to ensure the basic connection exists, thus it can help you with streaming, iVGA™ and LiveText™ connection issues, too (and it works just fine in a multi-platform environment!)
Ping sends a small set of data packets to the target host (IP number), then 'listens' for an echo response in return. Ping estimates the round-trip time in milliseconds, records any data losses, and displays a summary when finished.

Bottom line, if you can't ‘ping’ your target, your connection has problems (the problem might be as simple as a bad cable connection). To issue a ping, you need know the IP number of the target computer.

**Finding the target IP number**

For Windows XP®

1. Select Run from the Windows® Start Menu (look in the Settings sub-menu if it is not listed at the top level).
2. Type “cmd” (without the quotation marks) into the dialog, and press Enter on the keyboard.
3. In the command shell that opens, type “ipconfig” (without the quotation marks) and press Enter again.
4. The IP Address for the system will be reported in the window, along with other data.

For Windows Vista® (or later)

1. Type “run” (without the quotation marks) into the Search field, then press Enter on the keyboard.
2. Type “cmd” (without the quotation marks) into the dialog, and press Enter on the keyboard.
3. In the command shell that opens, type “ipconfig” (without the quotation marks) and press Enter again.
4. The IP Address for the system will be reported in the window (listed next to “IPv4 Address”), along with other data.

To find the IP Address for a system running OS X®

1. Click the Apple icon at upper left on the Desktop, and select About This Mac.
2. Click More info ... in the panel which opens.
3. Click Network in the Contents column at left.
4. The IP number for the system will be listed in the right hand pane.

**Issuing a Ping**

Ping is a command line program, and must be run from a command shell on the issuing computer. To open a command shell and send a ping, follow the procedure below that applies.

**Windows®**

1. Repeat the steps you performed above to re-open a command shell.
2. Type “ping” (without quotes) followed by a space and the target IP number, as in the image below – then press Enter.

*FIGURE 221*

3. Ping will go to work, and in a moment or two begin reporting results. A ping failure (indicating a network problem) will look like Figure 222. A success ping will display a report like Figure 223.

*FIGURE 222*

*FIGURE 223*

Apple OS X®

For a system running Apple’s OS X®:

1. Double-click Terminal in the Applications\Utilities folder.

2. Type the following command into the Terminal (without quotations) and then add the IP number, and press Enter:

   “ping –c 4 ipnumber.”

   (So, for example, you might type: ping –c 4 192.168.1.101)

The response will be similar to the Windows® example described above. Again, a ping failure indicates a problem with the network connection.
18.8.2 SPEED TESTS

Are you sure your upload bandwidth is adequate to the bitrate you’ve set for your stream? Why not test and make sure. Again, a number of websites provide free speed testing. These will give you a basic idea of what your local bandwidth really is. One site which provides a list of online speed test resources is: http://www.dslreports.com/speedtest?more=1

18.8.3 WHERE IS THE PROBLEM?

With regard to streaming issues, don’t overlook the fact that your NewTek live production system is just one of the pieces of the puzzle. There are many others that are just as important. One useful thing to try is to check the streaming file. Archive the streaming output file locally, and then examine it to see if it has any problems. This file corresponds exactly to what the encoder is sending the downstream server. In cases of sync problems, low frame-rate problems, audio popping problems, etc., if it’s an encoding issue, the problem will be seen in this file. On the other hand (if the file looks good), then the issue has to be after the encoder (perhaps a network problem or CDN configuration mismatch).
Chapter 19 EXPORT

The Export feature allows you to publish clips and stills from events like sports, entertainment, seminars, or news programming to social media sites, even while the live action and capture continues uninterrupted. Networks, corporate users and others with sophisticated website and distribution needs can deliver content moments after events occur for all manner of timely applications.

SECTION 19.1 OVERVIEW

In today's broadcasting world, a single program feed is often inadequate. Many viewers ingest media from multiple sources, even simultaneously. A live (and lively) online presence is critical for many productions with little or no traditional broadcast following. Publishing backstage feeds, locker room interviews, pre and post-game chatter, etc.), to popular Internet sites can provide many opportunities for brand extension and monetization. In addition, the Export feature supports both transcoding and distribution to local or networked storage for archival or post production purposes.

Briefly, once you configure presets for your social media accounts and other publishing targets, the Export tools in the Live Desktop make it quick and easy to distribute selected content to multiple sites even while production and recording is still underway – just perfect for concerts, galas and sport events.

SECTION 19.2 EXPORT MENU

The Export feature's user interface conforms in large measure to Stream, which we just discussed. Click the Configure gear next to the large Export button in the Dashboard at the top of the screen to open the menu (Figure 224).

At the top (where you would see Web Browser listed in the Stream menu), is an Export Media item. This opens the panel which allows you to manage media files you intend to export. We’ll discuss this panel soon.

19.2.1 PRESET LIST

Below the Export Media menu item is a list of any presets you have configured as Export targets. (Before you actually create any presets for yourself, this list shows only the default Export Media File entry, a transcoding preset which cannot be deleted.)

Notice that each preset listed in the menu can be checked or un-checked. When you add media files to the Export Bin (by any method), the check-marked entries determine which Export targets are automatically assigned to them (you can also manually modify the presets for each item in the Bin at any time).

Hint: When the mouse pointer is over a preset in the Export menu, two gadgets are shown at right; the familiar gear allows you to modify the preset, and the (x) will remove it from the list.
19.2.2 NEW PRESET

Let's consider the New Preset menu item. Click this to display a sub-menu listing various supported Export targets (such as Twitter™, or Facebook™). Select an item here to open a dialog that lets you create a custom preset that will then appear in the list discussed just above.

For most external sites (i.e., social media sites or ftp sites), the dialog requires you to enter account credentials. Typically you will need a user name and password for your social media accounts, as well as FTP servers (credentials are tested when you press OK, and will report an error if a problem exists).

19.2.3 SOCIAL MEDIA SITES

Export can publish media to Facebook, Twitter, YouTube, and many more sites and services. Other connections may be supported as it becomes possible to do so.

19.2.4 TRANSCODE, SMTP, AND FTP

The Transcode, FTP and SMTP options let you handle various file conversions and publishing to local (or networked) storage volumes, or even as email. These are very useful output alternatives, effectively providing live export methods that do not force you to wait until production ends. This can be invaluable for collaboration, whether local or remote.

Transcode exports provide options to re-encode video in different formats before sharing. Select suitable options for your target device or application. For SMTP, replace the dummy email server entries with those of your own mail service.

19.2.5 WATERMARKING

To avoid unauthorized use of private or copyrighted media, you may want to add a watermark before exporting it to public sites. The Watermark feature in the footer of the various Export preset configuration panels allows you to select a suitable overlay image.

The image you select will be composited onto exported video or still image files. It should normally be a 32bit still image file (supported formats include popular formats such as PNG and Targa) that positions the watermark correctly in the frame taking into account the resolution and aspect of exported files.

SECTION 19.3 EXPORT MEDIA

Having discussed configuration of export accounts, let's move on to look at live operations. In the Dashboard's File menu, select the Export Media item to open this panel (Figure 225), which allows you to manage the list of clips and still images you wish to export.
The features of the Export Media bin are powerful, but not hard to grasp. Click the Add button in the footer to open a Media Browser, which you can then use to select (and multi-select) content you wish to export. You can choose items from your current session or another location. These files will be added to the bin, but they will not be exported at this point. 

*Hint: You can Add and even Upload files that you are currently recording, even before pressing Stop. These files will be found in the virtual Session Recordings folder the Media Browser shows for the session.*

19.3.1 METADATA

Information is displayed for each media file added, including the file name (or ‘alias’, in the case of files added from a Media Player playlist, as we will discuss later), Duration, and Preset (depending on settings, multiple entries pointed at different destinations may be added in one operation).

The Comment column allows you to add remarks that will be sent along with the upload to sites that support this. Click in this column to enable keyboard entry, or navigate to it and simply start typing. Press Enter or click elsewhere to end editing. Similarly, type in the Title column entry to change the title supplied for the file to social media accounts, but note that this has no effect on FTP or Transcode preset operations.
19.3.2 PRESETS

The *Preset* column provides a menu allowing you to change the export preset or even add multiple targets for each individual item in the bin. A checkmark beside a preset indicates the target is active.

Of course, *Preset* selections can vary from one item in the *Bin* to the next. Obviously, if no checkmarks appear here, the entry on that row is not fully configured, and will be ignored by the *Export* processor.

19.3.3 LIST MANAGEMENT

*FIGURE 227*

We touched on the *Add* button in the previous section. Three other nearby features help you manage your *Bin* entries.

- *Remove*, as you'd expect, deletes entries from the *Bin*, doing so without any effect on the source files.

- *Duplicate* clones selected entries. You may prefer this way of publishing an item to multiple targets (over adding multiple checkmarks to the *Preset* column for a single entry) at times.

*FIGURE 228*

For example, the encoding settings for one target may involve longer processing than you want to allow at the moment. Using a duplicate entry, you can defer processing that entry until a more convenient opportunity.
Click the Trim button in the footer to open a trimmer pane (Figure 228) that allows you to set the In and Out Points for clips you plan to share (some file formats do not support trimming). Clips that are added while still being captured can be re-trimmed to take advantage of file ‘growth’.

Hint: Checkmark the Still Frame switch to select a frame and convert it to a JPEG image file on upload.

19.3.4 THE EXPORT BUTTON

Also located in the footer of the Export Bin, the Export button is a toggle; that is, like the light switch in your foyer, it has two states – on and off.

When lit, the Export processor is activated, and is either watching for qualified entries Bin entries to appear for exporting, or actively processing those that are ‘ready to go’. (Conversely, of course, no light, no go …)

Note: The footer Export button is linked to the Dashboard Export button, which does the exact same thing.

19.3.5 OTHER ‘ADD TO’ METHODS

Let’s handle the final details you need to become a social media maestro. It seems obvious that manually managing the minutiae of exporting could intrude into the already hectic life of a switcher operator. Live production already demands a lot of attention.

Using Add in the Export Bin panel, entering comments, etc., would be quite a distraction. For this reason, Export makes it as simple as possible to share your media, as follows

Once you have configured your Export presets, check-marked one or more in the Export menu, and decided whether to add checks to Stills, Clips, or both in the Auto Queue menu, you have eliminated a good deal of the fuss. But we can do better yet – in two ways:

- You can flexibly add both stills and clips to the Export Bin with a single click, keystroke or button press. You can also add items from the playlist of a Media Player, or directly from the Grab and Record features (see the heading File Operations in 11.1.1).

- Second, you can even automate the matter of adding custom titles and comments. Grab, Record as well as the Media Players all support individual custom Names and Comments, which will supply the corresponding metadata for your Export Media additions.

Better still, the Name and Comment fields in Grab and Record support DataLink (compare Section 11.2.3). This lets you automatically supply unique and meaningful information to social media sites along with your Export uploads. You can even mix DataLink keys with literal text, to produce comments that embed things like the current time, the current score of a game, or the name of the person on camera at the moment into coherent sentences.
You will often want to capture video clips from external sources, as well as to record your own live productions. Similarly, it can be quite useful to be able to grab stills from Program output for use in the current production. This chapter will provide everything you need to know about this topic.

SECTION 20.1 RECORD

NewTek™ live production systems provide a great deal of flexibility when it comes to capturing your program, selected elements of it, and a wide array of internal and external sources (with embedded timecode).

NewTek’s IsoCorder™ technology delivers powerful recording capabilities. As TC2’s primary outputs are configurable, you can use them to capture Program, Program (Clean), individual Switcher sources, M/Es, and more. You can record up to eight such “Mix” video sources simultaneously, and also capture Switcher input sources (recording capabilities are affected by your storage volume’s bandwidth and capacity).

Recording is easily enabled and disabled by clicking the large RECORD button in the Dashboard (Figure 231). During capture, a nearby time counter tracks the length of clips recorded with the current base filename, and a horizontal VU meter beneath the button assures you that you are capturing audio.

Note: It is not necessary to interrupt recording to add a clip that is being captured to a DDR playlist or the Publish Bin. Clip icons show a red ‘recording’ indicator on clips currently being captured in playlists, the Publish Bin, and in the Media Browser.

20.1.1 RECORD CONFIGURATION

Of course, before you begin recording, you’ll want to determine what to record, where to record it to, and so on. To support IsoCorder’s flexible ability to capture almost anything, settings and controls for recording are provided in the individual Input Configuration panels as well as the Output Configuration pane. Click the Configure button (gear) for the control panel of the source you wish to configure to access these settings.
Let’s review the features and settings found in these control groups.

20.1.2 CAPTURE CONTROLS

Whether you are setting up a recorder for a video input or output Mix, the Capture control group features are the same.

- A switch at the top is used to enable or disable the recorder
- Filename and path text boxes appear just below.
- A convenient Drive Speed Test button appears to the right of the Path field. Click it to open a utility that lets you evaluate the speed and capacity of your storage volumes.

*Note: The same source cannot be selected for multiple recordings. For example: “IN 1” cannot be selected as the source for two recorders.*

FILENAME AND COMMENT

IsoCorder uses the source name to supply the default filename for each recording (names are numerically incremented automatically as well), but these can be edited. Conveniently, NewTek’s DataLink key system allows you to insert dynamic values from real-time production sources into the filename.

For example, every recorded or grabbed file can automatically incorporate a date stamp, identify the input selected on the Program row at the time of capture, and so on. This is useful not only in locating files from specific sources later, but also when posting media to social media services using the Export feature.

*Note: IsoCorder captures a low resolution ‘preview’ file along with the high-quality recording. We do not recommend deleting or moving these supplemental files when using the recordings on a NewTek product, as doing so will result in higher resource usage during live production.*
FIGURE 234

The *Comment* entry can likewise use *DataLink* values, and in turn can be used to provide metadata to title pages that refer to the captured clip’s comment.

**PATH**

Click the three dots at right beside the *Path* field to select from available storage volumes as targets for the recording.

*Caution: It is recommended that any single drive be tasked to capture one or two video sources at most. A warning message is displayed if you exceed this number when assigning Destination settings. You are allowed to exceed this limit, however, when you are confident that very fast volumes are capable of handling the load.*

**AUDIO LEVEL**

The *Audio Level* control lets you set the volume independently for each source you capture, and feature a convenient AGC option (Automatic Gain Control).

**FILE FORMAT**

IsoCorder records a high-quality Quicktime file. (You can use the *Transcode* function in *Export* to supply files in a number of different formats, when necessary.)

*Hint: Download free NewTek codec packs for Windows® and Apple® computer platforms from the Downloads page on NewTek’s Support website. TriCaster TC2 Elite record format is also supported by the NDI file plugin for Adobe Premiere included with the free NDI Tools bundle.*

SECTION 20.2  REPLAY

Not too surprisingly, the *Replay* switch in each *Capture* control group enables instant replay features for individual recorders. Before considering how to perform a replay, let’s examine the *Dashboard* menu *Replay* options, which affect its playback settings.

FIGURE 235
- **Replay Duration** – determines the length of replay clips added to the DDRs
- **Replay Speed** – set the playback speed for clips added to the DDR using the replay workflow
- **Replay in DDR** – select a DDR as the target for replay clip playback

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### 20.2.1 INSTANT AND DEFERRED REPLAYS

The method of triggering a replay varies depending on whether you want to replay a clip captured from a *Mix* (output) or directly from a *Switcher* input.

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### 20.2.2 SWITCHER SOURCE

When the *Record* and *Replay* switches in the *Capture* control group for a *Switcher* source are both enabled, special replay controls are shown beneath its buttons on the *Program* and *Preview* rows of the *Switcher* (Figure 236).

Click the replay button beneath the *Program* row to trigger an instant replay using the DDR’s *Show On* (PGM) feature and settings. (Or, hold down CTRL and click the larger Switcher button itself to do the same thing.)

The similar button beneath the *Preview* row is even more useful; it adds the replay clip to the DDR, and leaves it selected, but does not play it on *Program Out* immediately. When you are ready to insert the replay clip into your program, press the keyboard *CTRL* key and the *Spacebar*. This will trigger the *Show On* (PGM) feature for the DDR currently assigned to replay duties. This workflow lets you defer replay playback until a more appropriate moment.

---

### 20.2.3 MIXED OUTPUT

Since outputs do not appear on the *Switcher* rows, the methods above do not apply. Instead, simply press a number pad key from 1-4 to trigger an instant replay from the corresponding output (Mix 1-4) recorder.

*Hint:* It’s possible to assign an NDI output from the system to one of its own inputs if you prefer to use the same method as described earlier for your output replays.

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### SECTION 20.3 GRAB

At times, all you really want to capture is a still image from the current *Program Output* video stream (or perhaps, an input). This is the purpose of the *Grab* function.

Grab is represented by a large button in the *Dashboard* at the top of the screen, and smaller grab (camera) icons which appear at upper-right on *Switcher* source viewports. The former grabs stills from MIX outputs (when enabled individually), while the latter grabs an image from specific *Switcher* sources.
**The Grab menu**

Click the *Configure* button (gear) next to *Grab* in the *Dashboard* at the top of the *Live Desktop* to choose a target *Media Player* for grabs. Otherwise, input and output grab configuration options are very similar to those described above for recording.

*Note: De-Interlacing is automatically applied to avoid a ‘comb’ effect caused by inter-frame motion in fielded sessions.*
Your TriCaster ships with a huge number of stylish title template pages that can be edited even while live, as discussed in Section 11.2. Many include replaceable images embedded in them. This chapter explains how you can create your own custom title template pages.

Of course, you can create static titles and graphics in Adobe Photoshop® or other popular graphics and paint applications, and display these as images in (for example) a DSK.

However, you will often find it useful to create, instead, an editable title page in Photoshop that, once loaded and compiled by TriCaster as a native CGXML file, works just like those supplied with your NewTek system. The text remains editable, and embedded images can be marked replaceable too.

To make an image replaceable, simply add the string “REPLACEABLE” to the layer’s label in Photoshop. You can even assign a DataLink key to the layer in the same fashion – naming the layer in the format “REPLACEABLE %twitterpic%”, for example (without the quotation marks, of course).

As mentioned above, when you load the PSD into a Media Player, then open it in the Title Editor, the text is editable, and placeholder images can be replaced. And it gets even better if you load the file into a Buffer.
In that case, the *Title Editor* will show both *Layer* and *Data* presets, just like when you load a *LiveGraphic* title page, and store the result in a preset. Having done this, you can selectively hide or display different layers (or layer groups) of your Photoshop composition with a click or tap using the *Buffer* preset system.

In this manner (using *Layer presets*), a single title page can actually be used to display a whole theme pack of CG elements, and likewise (using *Data Presets*) a single title page can be updated to show individual player statistics for a whole team, and so on – all with a single click.
This chapter introduces the control surfaces offered by NewTek for your TriCaster®, helping you to see how they complement your system and add ability to your production setup. We will also discuss connecting to the control panels from your live production system.

NewTek Systems provide unrivalled live production power. With a matching control Surface, all that power is right at your fingertips.

Two control surfaces have been prepared for varied requirements. In large measure the functionality provided, and workflow is identical, regardless of which you use. NewTek 4-Stripe control surface is a large and powerful ‘four-stripe’ unit, delivering precise control over your program, allowing you to quickly and confidently produce your show. NewTek 2-Stripe is its more compact sibling. You can find additional control surfaces on NewTek's website.

SECTION 22.1 CONNECTION AND CONFIGURATION

Simply connect the control surface unit to the same *network your TC2 Elite is on. Both control surfaces require a standard, 3-prong AC power connection.

* The control surface and your TC2 should be connected to the same subnet.

22.1.1 PAIRING SYSTEMS AND SURFACES

TC2 Elite automatically detects compatible control surfaces on the same network. Often there will only be one such surface, which makes setup easy. At other times, though, you may be in an environment with more than one surface, more than one live production system, or both of these conditions.
To allow you to manage these control connections, a *NewTek Control Surfaces* configuration utility has been included in the list of *Add-Ons*.

1. Click the *Add-Ons* button on the icon ring on the *Home page* in the *Launch* pane to show the list of installed complementary applications.

2. Click the *Add-Ons* button on the main menu on the *Home page* in the *Launch* pane to show the list of installed add-on applications.

3. The utility will automatically identify, and list qualified control surfaces it finds on the network.

4. Each surface discovered is listed in a numbered row. The ID number for the row is not permanently associated with a particular surface, and may change as surfaces are added to or removed from the network. The ID number does serve a very useful purpose, however.
5. Once you identify the surface you want to use, simply checkmark it in the list to claim it for the local system (the steps in the next sub-heading, Setting the Channel, will complete the communication connection to the surface).

6. You can also enter a brief description ("BillyBob’s 4-Stripe") into the Memo field, for later reference.

**Setting the Channel**

7. Finally, notice that a Local Channel menu is provided for each surface – or more accurately, for each echelon, or two stripe pair on the surface (see. Let’s discuss this detail a bit further.

![Figure 243](image)

The Channel menu controls just one of two related channel settings – this one (on the local host), and another channel used by the control surface itself. These combine to let you connect to and control alternate live production systems.

*Hint: You might think of the control and system channels as being like the channel settings of two ‘walkie talkies’ (2-way radios). For two-way radios to connect, both units must be on the same channel. Similarly, the channel selection displayed in this software pane tells the local unit to communicate with the selected (check-marked) control surface on the channel you choose. Of course the control surface must also be set to the same channel for successful communication.*

The NewTek Control Surface utility identifies the channel each control surface is on by a number from 1-8 after the colon in the Surface: (Channel) column. Normally, you can simply set the Local Channel to match this value (a ‘bang’ is shown if the channel the surface is set to does not match the Local Channel).
If you find it necessary to modify the channel the control surface is set to, proceed as follows:

8. Hold down the *SHIFT, CTRL and ALT buttons on the control surface at the same time for a couple of seconds to enable channel select mode. The left-most LCD display in the first stripe in the echelon updates to show channel selections, and a button in the PGM/A row lights to show the current channel. Tap another button in the row to change the selection.

*For the 4-Stripe Panel, you must repeat this operation in order to match the second echelon’s channel setting to that of the first. Press and hold the number pad buttons labeled 1, 2 and 3 in the third stripe (rather than SHIFT, CTRL and ALT) in this case; then make your channel selection using the A button in the PGM/A row of the third stripe.

With these settings you can, for example, set one system to listen a certain control surface on channel 1, and set a different unit to listen to the same control surface on channel 2 – then easily go from controlling one system to controlling the other by updating the surface channel setting.

SECTION 22.2 CONTROL SCHEMA

FIGURE 244

Generally, you can think of the various control groups provided as being organized into horizontal ‘stripes’. In turn, two stripes are paired together in upper and lower echelons, as shown above.

22.2.1 STRIPES AND ECHELONS

Broadly speaking, the control layout of the all stripes is quite similar, and the second echelon is nearly identical to the first. However, the first echelon is unique in providing several common controls (e.g., SHIFT, ALT, BANK, etc., conveniently locating these right under your hands at rest.)
This being so, it’s not hard to see that the first echelon – that is, the one nearest the operator – can be considered dominant, even vital, while the second echelon plays a supporting role.

We’ll cover the functions assigned to these controls in due course but, for now, let’s continue our exploration of the control surface topography by looking at stripe organization, and the distinctions between odd and even stripes.

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**22.2.2 CONTROL COLUMNS**

Controls in each horizontal stripe can be grouped into the following four columns:

1. **Selection**: choose video sources
2. **Command**: control operations and options
3. **Layers & Effects**: transitions and layer visibility
4. **Joystick & Media**: layer position and PTZ control, plus Media Player control

In the sections that follow, we’ll look at each the functions of controls in each of these columns more closely, but first, let’s sidestep briefly to talk about displays.
Both control surfaces feature helpful indicators and system feedback by means of illuminated displays.

1. An OLED display positioned just left of each stripe normally shows the delegate state for the associated stripe. For example it may show that the stripe has been delegated (or ‘assigned’) to control the Main switcher, one or more M/Es, or for TC2, one of its supplementary routed output.

2. The blue LCD surfaces spanning each stripe just below the KEY row show labels identifying the selection that would result from pressing a button in the same column.

*Hint: The numbers 1-24 are silkscreened above the LCD surfaces as a further aid when making selections.*

3. Another LCD strip appears in the Media Players group at right in the first stripe (and third, for 4-Stripe).

Item 1 above raises the question, “How do I delegate a stripe to control the desired module?” Let’s go on to talk about this, beginning by discussing what “delegating” means in the context of a control surface.
We saw earlier that the second column of buttons in each stripe provides access to important control operations and options.

The Command group in the first stripe (nearest the operator) has some unique features that actually govern other sections of the overall control surface. We’ll refer to this as the primary Command group. Among these special controls are several that we can describe as ‘delegate’ buttons.

For example, consider the four buttons labeled KEY in the top row of this group.

22.3.1 KEY

Pressing one of these buttons, labeled 1-4, ‘delegates’ or assigns the buttons in the 24-button KEY selection row at left in the same stripe to govern the active source assigned to one or more KEY (or DSK) layers.

**Hint:** Delegate buttons usually, though not always, support multi-selection.

22.3.2 DLGT STRIPE

The remaining button on the topmost row of the primary Command group is labeled DLGT STRIPE, which is an abbreviation of ‘delegate stripe’.

When you press and hold DLGT STRIPE, the LCD displays in each stripe update to show the names of the available switcher busses (MAIN, M/E 1, 2, etc.) and MIX 1-4. In this state, press one or more buttons in the PGM/A row beneath and release the DLGT STRIPE button to assign the stripe to the designated bus or busses.

**Hint:** The QuickSelect button (marked with an ‘eye’ icon to associate it with visibility) is located in between BKGD and FTB. Clicking it updates the Switcher’s T-Bar delegate and transition states so that the next TAKE or AUTO operation will remove all visible DSK or KEY layers from output. (On supporting control surfaces, press ALT & BKGD to trigger the QuickSelect feature.)
22.3.3 BANK

Another set of delegate buttons sits in the second row (counting from the top) of the primary Command group. This group is labeled BANK. As you know by now, the Switcher crosspoints are organized in banks comprising columns.

Similarly, Switcher sources are presented in banks on Stripe model control surfaces. (The constituent sources of Switcher banks on the surface may deviate from the interface because the button count is different.) Press the desired BANK button – 1, 2 or 3 – to determine which group of sources is currently delegated to the Switcher rows in all stripes. The displays above the selection rows will update accordingly.

Note: For reasons that should be obvious, Bank buttons do not support multi-selection.

SPLIT BANKS

Ordinarily, the Switcher and M/E row bank assignments for all stripes on the surface match. So, for example, if the Main Switcher is showing Bank 1, all other stripes likewise display Bank 1. It possible, however, to lock individual stripes to specified Banks.

To do so, hold down the ALT and CTRL buttons on the surface together, which will cause the LCD displays to list Banks 1, 2, and 3 in the first three Switcher columns. Press the KEY row button above the display for the desired stripe to select the Bank it will present thereafter.

Stripes delegated to a particular Bank in this manner do not update when you press the Bank (1-3) buttons in the Primary Command Group. To restore normal behavior, hold down ALT and CTRL again, and notice that the KEY row button for the currently assigned bank lights. Press this button again to extinguish it, and the stripe will once again follow the primary Bank button assignment.

22.3.4 PREVIZ

There are more delegate buttons, but before moving on to consider them, let’s complete our consideration of the second row of the primary Command group. This brings us to the PREVIZ group.

TriCaster’s powerful Previz feature was described earlier in this Guide (Section 9.8). We’ve also seen, in Section 22.3.2, that we can delegate a stripe to control the various features Previz provides.
TO AND FROM

Two buttons labeled TO and FROM in the PREVIZ group on the 2 or 4-Stripe control surfaces complete the support for this feature by providing access to the “Send to Previz” and “Copy from Previz” functions (presented in the Live Desktop interface by the PREVIZ and associated ‘clipboard’ buttons located just above T-Bars).

**Note: To and From (Previz) buttons are found in the Command groups for all stripes.**

- **TO** – Copies the selections and settings of the bus delegated to the corresponding stripe to Previz (for a stripe delegated to multiple switcher busses, TO uses the settings of the first delegate only).

- **FROM** – Copies the current Previz settings to back to the delegated busses for the corresponding stripe. Note that FROM does support multi-delegation, allowing you to copy the current Previz setup back to multiple busses). Finally, as a reminder, note that FROM will update the sources for DSK/KEY layers, but will not affect the main row source selections of the target busses.

### 22.3.5 UTILITY

MEM

When the MEM button is held down, the first 9 columns in the displays of all stripes update to list the names of MEMs for the busses delegated to the individual stripes. Punching a button in the selection row below a MEM name recalls the corresponding preset for the bus assigned to the stripe.

**Note: For multi-delegated stripes, only the first delegate is affected**

Holding CTRL+MEM then pressing and releasing a button in the PGM/A row beneath will store it into the corresponding MEM for the bus assigned to the stripe.

COMP

When the COMP button is held down, the first 16 columns in the displays of all stripes update to list the names of COMPs for the busses delegated to the individual stripes. Punching a button in the selection row below a COMP name applies the corresponding preset to the bus assigned to the stripe.

**NOTE: In the case of multi-delegated stripes the COMP names displayed represent the first delegate only.**
To store or update a COMP, hold down CTRL + COMP, then press a button in the selection row below the display for the desired stripe. To clear a COMP, hold down ALT + COMP, then press a button in the same selection row.

**MACRO**

To assign a macro to any button, first select the desired macro in the Macro Configuration pane in the user interface. Click a box in the Triggers control group at the bottom of the surface, to enable "Listen" mode, then hold down the MACRO button, punch the control surface button you want to use for the macro, and release the MACRO button. (See also Section 22.4.1, NUMBERPAD)

When the MACRO button is held down, the names for any macros assigned to buttons in the (PGM/A/C) row immediately beneath the selection area displays are shown. Punching the button below a macro name triggers the corresponding macro.

*Hint: To clear an assigned macro from a button, hold down Ctrl with the Macro button, the press the (lit) button you wish to clear.*

**SHIFT, CTRL, ALT**

These buttons provide support for extended features and future expansion.

*Note: Among other things, CTRL and SHIFT are used in connection with instant replays (see the Replay heading in Section 22.4.1) and Buffers (see Section 22.7).*

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**22.3.6 LAYER SELECT (A/C, B/D)**

TC2 Elite let you configure M/Es with effects supporting up to four primary sources (along with KEY layers). The control surfaces, however, offers just two primary source selection rows, PGM A/C and PREV B/D.

In cases where more than two selection rows are required for a given M/E, use the LAYER SELECT buttons to delegate the upper or lower selection rows to the layers you wish to control.

*Hint: If you reduce the number of layers required by an M/E (by loading a different effect) the control surface will automatically revise the LAYER SELECT delegate state to match.*
SECTION 22.4 SECONDARY COMMAND GROUP

The Command control group in the second stripe (counting from the stripe nearest the operator) also has unique functions, which is why we will refer to it as the secondary Command group.

While discussing the Primary Command Group in Section 22.3, we reviewed the functions of the KEY delegates, PREVIZ buttons, and the LAYER SELECT (A/C, B/D) buttons. Let’s now consider the remaining items in this section.

22.4.1 NUMBERPAD

Unlike the primary Command group, the secondary Command group includes a numberpad. We’ll discuss basic number input functions soon but, first, observe that certain buttons in the numberpads have labels below them identifying alternate functions.

**NUM LOCK**

This is why (in contrast to additional numberpads provided on the 4-Stripe surface in particular), the 0 button in this numberpad is replaced by NUM LOCK. Not surprisingly, when NUM LOCK is lit all numberpad buttons perform simple numeric input. When NUM LOCK is off however (as it is by default) number buttons with alternate labels perform their secondary operation. Let’s discuss these now.

**LOCK (7)**

With NUM LOCK off, this button lets you lock or unlock other control surface buttons. Pressing LOCK lights all currently locked buttons. While the LOCK button is lit, pressing any other control surface button toggles its locked/unlocked state, preventing unintentional changes.

**GRAB (8)**

Pressing this button (with NUM LOCK off) triggers the software’s main Dashboard GRAB button.

*Hint: The main GRAB feature grabs stills from selected primary (MIX) outputs, as configured in the interface. To grab other Switcher sources (excluding M/Es), hold down the CTRL button on the control surface while punching any KEY row button for the desired source.*

**RECORD (9)**

Pressing this button (with NUM LOCK off) triggers the main Dashboard RECORD function. You should be aware that, to prevent unintended interruptions in recordings, you must hold SHIFT while punching RECORD on the control surface to stop recording.

*Hint: To alert you to this safety measure, SHIFT flashes if you press RECORD alone during capture.*
REPLAY (1, 2, 3, 4)

Recent editions of TriCaster software provide powerful instant replay workflow for any source with a recorder assigned to it.

When a Recorder is assigned to a source in its Input Configuration surface, and you also enable the associated Instant Replay switch, special replay buttons appear below the corresponding Program and Preview row buttons in the Live Desktop Switcher.

Stripe control surfaces provide the same functionality as follows:

- To perform an instant replay from a Switcher source, hold down the CTRL button while punching the PGM A/C row button for the source. Double the length of the replay by holding down SHIFT along with CTRL.

- Or, defer playback of the instant replay as follows:
  
  o Simply add the replay clip to the DDR playlist by clicking the source’s PREV B/D row button (rather than the PGM row button) with CTRL (or CTRL + SHIFT) held down.
  
  o Then, when you’re ready to trigger the instant replay, press CTRL + AUTO to initiate the DDR’s Show On operation.

This powerful workflow is ideal for replays from individual Switcher inputs. However, the four MIX outputs (which typically includes Program output as MIX 1) do not appear on the Switcher button rows – so another method is required in this case:

- Press a button numbered 1-4 in the Secondary Command Group (with NUM LOCK off) to trigger a replay from the corresponding (MIX 1-4) recorder.
- Hold down CTRL when doing the above to defer playback of the replay clip.
- Add SHIFT to either of the above to double the length of the replay clip.

**Hint:** If you execute an instant replay operation while another replay is incomplete, the newer replay angle will replace the former one on output and the duration of the replay will be extended.
Having covered the alternate (NUM LOCK off) numberpad button functions, let’s consider the value of the Numberpad in connection with running macros.

Any macro can be triggered by pressing a three-digit number sequence on any of the Numberpads on the control surface. Simply open the Macro Configuration surface in TriCaster’s Live Desktop, and select a macro from the list; click a Listen box at the bottom of the surface, then type a three digit number, such as 123.

Each Numberpad on the control surface is treated independently. Thus the very same numeric entry can trigger different macros from the Numberpads in different stripes.

For 4-Stipe, which has three Numberpads, this means you have direct access to nearly 3000 different macros.

*Hint: If you start to enter a number, then change your mind, simply press any button outside the number pad to cancel the entry.*

---

### SECTION 22.5 LAYERS & EFFECTS

The controls in third column (all stripes) govern transitions and layer visibility for the various video busses.

---

### 22.5.1 BKGD AND KEY 1-4
These delegate buttons determine what video layers the main controls directly below *(TAKE, AUTO, T-Barrier, etc.)* will affect. Multi-selection is supported, so, for example, if you select both *BKGD* (Background) and *KEY 1*, then press *AUTO* for a stripe delegated to the *Main Switcher*, a transition is applied to both the *Background* layer and *DSK 1*.

### 22.5.2 FADE & TRANS

These two buttons provide a quick way to control the *Transition Bin* selection for the delegated switcher layer(s).

- Pushing *FADE* offers a quick and convenient way to select the standard *Crossfade* transition.
- Push the *TRANS* button to activate the last-used transition for a video layer (or layers).

*Hint: For new sessions, TRANS jumps to the transition following Fade in the effect preset bin.*

The *FADE* and *TRANS* (Transition) buttons are mutually exclusive; selecting either cancels the other, and only the currently active button remains lit.

### 22.5.3 FTB

To perform a *Fade to Black* operation, press *SHIFT* + the *FTB* button (the *SHIFT* button is required as a safety measure, since FTB is a somewhat dangerous operation). Revert to normal output by pressing *FTB* alone.

*Hint: The duration of the transition to and from black is derived from the BKGD transition duration setting.*

### 22.5.4 EFFCT (EFFECT)

Hold down the *EFFCT* button to cause LED display columns at left to show the names of effects currently assigned to presets in effect bin for the currently delegated layer of the *Switcher* bus assigned to the stripe.
In the case of multi-delegated busses or layers, the display lists the content of the first effect preset bin only, and selection will only affect that delegated layer.

22.5.5 RATE

Rotate the nearby RATE knob to modify the transition timing for delegated layers. Or press the knob to cycle through the standard Slow, Medium and Fast presets.

22.5.6 TAKE & AUTO

The TAKE and AUTO buttons perform a cut or transition respectively, affecting only the currently delegated video layers.

22.5.7 T-BAR

The T-Bar is perhaps the most recognizable component of a professional video control surface, and arguably one of the most important. Stripe surfaces provide standard functionality by this means, along with exceptional system feedback. Obviously, you can pull the T-Bar to manually modify the progress of a transition between delegated video layers. The T-Bar can also be used to zoom M/Es configured with LiveSet virtual sets.

ILLUMINATION

The T-Bar employs colorful illumination to provide feedback and status updates based on your control surface selections and operations. The lighting schemes applied to T-Bars controlling both M/Es and MAIN video layers reinforce traditional button illumination in a way that soon becomes instinctive, and which provides unparalleled confidence in use. The following tables provide a color code for your convenience.

M/E Transitions

1. For an M/E with a transition assigned as the Background effect, control surface T-Bar illumination conforms to the color scheme of the M/E tabs on the Live Desktop.

<table>
<thead>
<tr>
<th>M/E 1</th>
<th>M/E 2</th>
<th>M/E 3</th>
<th>M/E 4</th>
<th>M/E 5</th>
<th>M/E 6</th>
<th>M/E 7</th>
<th>M/E 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turquoise</td>
<td>Teal</td>
<td>Blush</td>
<td>Apricot</td>
<td>Sky Blue</td>
<td>Pink</td>
<td>Chartreuse</td>
<td>Hot Pink</td>
</tr>
</tbody>
</table>
2. If BKGD is delegated alone, the T-Bar color is as shown in the table above, identifying which M/E is delegated to the stripe. (When multiple M/Es are delegated, the first selected delegate determines the color.)
3. This color is at its brightest when the PGM/A source (effectively the Program row for a transition type effect) is fully displayed. As the T-Bar is moved (or AUTO is pressed) to begin a transition, the color gradually dims until the effect is complete. At that point, it pops back to full brightness, just as the onscreen T-Bar returns to the top of its stroke.
4. In a mixed delegate situation (BKGD along with one or more KEY layers) the T-Bar is lit it medium blue, and conforms to the BKGD behavior described above.
5. If one or more KEY layers are delegated without BKGD, the T-Bar color is purple. When the KEY layer (or, for multi-KEY selections, the first KEY layer) is fully displayed, T-Bar lighting is at its brightest. Removing the layer dims the illumination.

**Main Transitions**

1. Just as you would expect, the T-Bar uses industry-standard red/green color coding for Program and Preview rows.
2. DSK-only operations result in the T-Bar being lit in purple, similar to M/Es.
3. Mixed mode (BKGD plus DSK delegates) result in blue illumination, after the fashion of T-Bar behavior previously described for M/Es.

This brings us to the fourth and final column of the Stripe control surface – Joystick & Media control (see Section 22.2.2).

**SECTION 22.6 MEDIA PLAYERS**

Let’s explore the details of the MEDIA PLAYER control group (depending on your control surface model, there may be one or two such control groups).

![Figure 264](image_url)
22.6.1 DELEGATES

The MEDIA PLAYERS buttons determine which players are governed by operations in this group. Multi-selection is supported.

22.6.2 PREV PRESET/NEXT PRESET

![PREV PRESET/NEXT PRESET](image)

FIGURE 265

These two buttons let you cycle backwards or forwards respectively through existing presets for the delegated Media Player.

22.6.3 DISPLAY

The top line of the Media Player display shows the filename, countdown timer and if available, timecode for the current playlist selection. The lower line contains any comments you have attached to the file (using the clip context menu item, Properties).

22.6.4 MARK IN/OUT

![MARK IN/OUT](image)

FIGURE 266

Click these buttons to set the In point or Out point for the current playlist item in delegated players to the current frame.

*Hint: Press SHIFT with the button to reset the specified end point to its full limit.*

22.6.5 LOOP AND PLYLIST

![LOOP AND PLYLIST](image)

FIGURE 267

Click these buttons to toggle the Loop and Playlist modes for the delegated players.
22.6.6 TRANSPORT CONTROL

![Transport Control Buttons](image)

- ▼ (Previous Item) – Press this button to go to the previous playlist entry in delegated Media Players. (The selection cycles to the last playlist entry when necessary.)

- ■ (Stop) – Push once to end playback for delegated Media Players; push a second time to return to the start position (this operation respects the Single setting for individual Media Players)

- ▶ (Play) – Push to initiate playback for delegated Media Players.

- ▶| (Next Item) – Push this button to go to the next playlist entry in delegated Media Players. (The selection cycles to the first playlist entry when necessary.)

22.6.7 SHOW AND AUTOPLAY

The SHOW button triggers the matching SHOW ON feature in the footer of TC2’s Media Players. Likewise, the AUTOPLAY button toggles the eponymous Media Player option.

SECTION 22.7 BUFFERS AND TITLES

TriCaster supports both static title templates (.CGXML file format) and animated LiveGraphics (.livegfx file format) title pages in its Buffers module. In turn, these title pages respectively support one or both of two different types of presets – Data Presets and Layer Presets.

Data Presets store text strings and image file links, and allow you to quickly update those aspects of a title page on demand. Layer Presets are still more powerful, and allow you to hide or display layered various graphic elements comprising your LiveGraphics™ title page using predetermined per-layer animation (for more about LiveGraphics, including how to author your own dynamic title pages, please refer to Appendix A.5).

To access these features from your 4-Stripe control surface, you must first delegate a specific Buffer slot containing the target graphic you wish to control. To do so, hold down SHIFT + MEM and punch the button on the PGM A/C row at left corresponding to the desired Buffer.
Having delegated a Buffer as just described, hold down \textit{SHIFT + MACRO} and punch the button on the \textit{PGM A/C} row at left that corresponds to the \textit{Data Preset} you wish to recall. Or hold down \textit{SHIFT + COMP} instead, to invoke a \textit{Layer Preset} using the same selection method.

\textbf{SECTION 22.8 JOYSTICK}

The Stripe control surface joystick provides a very versatile input mechanism.

In considering its applications it is important to realize that, unlike the \textit{Layers and Effects} control groups at left, the \textit{Joystick(s)} located in the surface's right-most column can optionally operate completely independently from the stripes at left.

Thus, while \textit{T-Bar} operations (for example) are always directed to the video busses delegated to the stripe they are in, \textit{Joystick} manipulations can affect any \textit{M/E}, a \textit{PTZ} (Pan, Tilt & Zoom) camera, or even a \textit{Media Player}.

\textbf{FIGURE 269}

- The specific target of \textit{Joystick} operations at any moment is determined by a set of \textit{Joystick delegate} buttons, outlined in red above.
- As appropriate, this selection is further refined by buttons in the \textit{Layer} group at right, outlined in blue above.
- Finally, the nature of the operation performed on the target is determined by a set of \textit{Control Mode} buttons at lower left, outlined in green above.

Let's consider the primary \textit{delegates} first.
22.8.1 DELEGATES

FOLLOW PREVIEW

Probably the most useful joystick delegate mode is Follow Preview. You will probably not be surprised to learn that, when enabled (as is the default in new sessions) the joystick assignment tracks your Main > Preview (PREV) row selection.

Since the Live Desktop normally displays a large Preview monitor, this makes setting up exactly the shot you want for the upcoming source queued on Preview the proverbial 'no-brainer'. Or, to quickly modify the framing of a bunch of PTZ cameras, or a series of M/Es, just select them one after another on the PREV row and adjust to taste.

Hint: To open the Input Configuration surface for the source currently selected on the Preview row to adjust its settings, simply tap the * (asterisk) key in the keyboard numberpad.

Of course, the joystick has several other delegate modes, discussed next, but the default Follow Preview mode is very useful, and can be easily restored from any other mode by pressing the PTZ and RESET buttons together.

FOLLOW STRIPE

Pressing this Joystick delegate button restricts the behavior of the Joystick in a manner many are used to from using ‘traditional’ control surfaces. That is to say, Joystick operations will always be directed to the video bus(ses) assigned to the same stripe. As mentioned though, NewTek’s Stripe surfaces offer greater versatility and control options. It’s possible to quickly redirect control to any suitable target without interrupting Switcher operations on neighboring stripes.

M/E 1 – M/E 8

These buttons provide a quick and convenient way to delegate Joystick operations to one or more selected M/Es

MAIN

Punch MAIN to direct delegate Joystick operations to the Main Switcher.

PRVZ

This button delegates Joystick operations to TriCaster’s convenient PREVIZ video bus.

PTZ

SOURCE SELECT

PTZ (pan-tilt-zoom) style joystick operations are not limited to ‘real’ PTZ cameras. Static cameras, Media Players, and Buffers are among the different source types that may benefit from ‘virtual PTZ’ functionality. And of course, M/Es have similar capabilities courtesy of COMP and Positioner features.

For this reason, you can delegate any source that is qualified for Joystick control on your system as follows: Hold down the PTZ button and press the desired KEY row button at left in the same stripe as the Joystick.
Press an M/E button (1-8), MAIN, or FOLLOW STRIPE to reset the Joystick to the corresponding operating mode.

**Presets**

In addition to manually controlling the PTZ camera with the Joystick, of course, you will often want to store and recall PTZ presets.

- To store a new preset for the currently delegated camera, or to update an existing preset, hold down the PTZ button and press a button numbered from 1-16 in the A/C row at left in the same stripe.

- To recall a preset, hold down the PTZ button and press a button numbered from 1-16 in the B/D row at left in the same stripe.

**22.8.2 Layer Delegates**

As mentioned above, some Joystick delegate modes let you further refine the target for your manipulations. For example, when your primary delegate is MAIN, joystick operations can be applied to the DSK 1, DSK 2, DSK 3 or DSK 4 video layers. The LAYER delegate group determines which one will be affected.

Specifically, the KEY buttons labeled 1-4 direct joystick control to DSK 1-4 when MAIN is selected as the primary delegate, or KEY 1-4 for an M/E. Similarly, when an M/E with a LiveSet selected as the Background effect is delegated, the A, B, C and D buttons allow you to target the individual Positioners for the main M/E layers (A-D).

Finally, the LIVE SET button targets the position and zoom settings for a virtual set.

**22.8.3 Control Mode**

Let's turn now to buttons that govern the Joystick operating mode.

**POS/SCALE**

- Move the joystick horizontally, vertically or diagonally (as viewed from above) to move delegated video source(s) on its X and Y axes.
- Twist the joystick clockwise to scale delegated source(s) up, or counter-clockwise to scale down.

*Hint: When multi-delegate selections are active for the Positioner, adjustments are generally relative to the current state for individual delegates, as opposed to absolute.*
ROT (Rotate)
- Move the joystick horizontally (as viewed from above) to rotate delegated sources on the Y axis.
- Move the joystick vertically to rotate delegated sources on the X axis.
- Twist the joystick clockwise/counter-clockwise to rotate delegated sources on the Z axis.

CROP
- Twist the joystick clockwise (as viewed from above) to crop delegated sources inward on all four edges, maintaining the original aspect ratio.
- Twist the joystick counter-clockwise to reduce cropping of delegated sources on all 4 edges.
- Move the joystick horizontally to crop only the left edge of delegated sources.
- Move the joystick horizontally with the joystick button pressed to crop only the right edge of delegated sources.
- Move the joystick vertically to crop only the top edge of delegated sources.
- Move the joystick vertically with the joystick button pressed to crop only the bottom edge of delegated sources.

FOCUS
When the primary Joystick Delegate is PTZ, enable FOCUS to modify Joystick operations as follows:
- Pressing the Joystick button enables Autofocus.
- Rotate the joystick to adjust the camera's focus setting (which will naturally disable Autofocus).

SHTL (Shuttle)
Push SHTL (Shuttle) to delegate the joystick to shuttle the Media Player(s) currently selected in the MEDIA PLAYERS > DELEGATE group. (Again, the other joystick mode buttons cannot be multi-selected with SHTL.)
- To shuttle delegated Media Players, move the joystick horizontally (as viewed from above).

Note: You can zoom multiple LiveSets simultaneously when these are delegated together, just as you can also shuttle several delegated Media Players.

RESET
Despite its location, RESET is really an action button (not a Joystick mode). Press it to restore all position settings for currently delegated source(s) to their defaults. (This is also why RESET does not stay selected when pressed, nor does it change the current Joystick mode.

Hint: When SHUTTLE is delegated, delegated Media Players are reset to the starting point of the current item (or playlist). And when delegated to an M/E with LIVE SET enabled in the LAYERS group, the LiveSet is reset to its default positioning.
When the MEM button is held down, pressing a button between 1 and 9 in the selection rows at left causes corresponding operation in the MEM bin for the delegated M/E as follows:

- Pressing a button in the DSK/KEY row recalls the corresponding MEM.
- Pressing a button in the PGM/A row stores or updates the corresponding MEM.
- Pressing a button in the PREV/B row clears the corresponding MEM.

Chapter 23 **CONTROL SURFACE: TIMEWARP™**

This chapter describes the functionality supplied by the TimeWarp™ control surface offered by NewTek, helping you to see how it can deliver convenient replay and Media Player control to your production setup.

This chapter discusses the use of NewTek TimeWarp™ control surfaces (in two variants). TriCaster® 850 TW add convenient slow motion instant replay to the already potent capability of your TC2 Elite.

TriCaster 850 TW delivers precise control over TriCaster’s instant replay recording and live playback when used alone.

**SECTION 23.1 CONFIGURING TC2 ELITE**

1. Connect a suitable video source to a camera input on your TC2.
2. Select that source on the Switcher’s Program row.
3. Open TC2’s Record Configuration panel and set the Primary Source (typically to the Program option).
4. Select a suitable encoding format for the captured files.
5. Use the Add to menu in the Primary Recording controls to assign the recorded clips to either DDR 1 or 2.

**SECTION 23.2 OVERVIEW**

TriCaster 850 TW is quite straightforward to use, especially true if you are already familiar with common TriCaster controls and features. In this section, we’ll discuss each part of the control surface, explaining how the various controls operate and what effect they have, revealing a few little tricks that you may find helpful along the way.

TimeWarp provides convenient control over two Media Player’s as well as the recording of sources configured for capture.
For convenience, related controls and buttons are grouped together on the control surface. We will discuss the features and operations supported by each group in the pages that follow. The layout includes the control groups listed below (as shown in Figure 272):

- DDR Delegates
- Edit group (modify playlist content)
- Play Speed (T-bar and presets)
- Mark (replay clip creation buttons)
- ALT and Qualifiers (which modify the operation of other controls)
- Record toggle
- DDR options
- Preset (DDR Playlist)
- DDR Transport (clip playback and position controls)

Let's take a closer look at the members of each control group and their purpose.
SECTION 23.3 DDR DELEGATE

Much of the functionality of your TriCaster 850 TW relates to clip playback, navigation, and the like. These are essentially Media Player functions, controlling one or another of TriCaster’s DDRs.

The first two buttons in this group (DDR 1 and DDR 2) basically delegate the other controls to the service of the DDR named.

Note: These buttons only relate to TriCaster 850 TW operations, and do not interact with the Switcher delegate buttons.

The third button in this group button is not a delegate button (nor is it a radio button). The DDR 1/DDR 2 button is a toggle switch. When enabled, it tells the control surface to apply DDR Transport control group operations to both DDRs (see Section 23.11).

SECTION 23.4 EDIT GROUP

In general, these buttons operate on selected playlist content in the currently delegated DDR (see Section 23.3).

- Remove – Push to remove currently selected entries from the delegated DDR’s playlist (selected items are not deleted from the hard drive, however).

Hint: These four buttons are also ‘action buttons’ – that is, pushing one of them has an immediate effect (but unlike a radio button, the operation is complete on release, and does not remain in force).

SECTION 23.5 PLAY SPEED

As you would expect, the speed preset buttons in this group (marked 25%, 33%, 50%, 75% and 100%) govern the playback rate of the active DDR.
Speed preset buttons are mutually exclusive, and establish a playback *mode*. They do not initiate playback; rather, the playback speed you choose is applied when subsequently press *Play*.

(If a DDR is already playing, pushing a speed preset button alters the current playback speed immediately.)

*Hint: If you use an onscreen speed control to change to a new playback speed, the control Surface button selection state follows when possible (in cases where no button corresponds exactly to the newly established speed, no preset button will be illuminated).*

The speed *T-Bar* works in similar fashion to the preset buttons, but provides a smoothly variable approach to setting playback speed.

### SECTION 23.6 MARKING GROUP

The *IN* and *OUT* buttons in this group allow you to indicate the *In points* and *Out points* for events you wish to record for later replay.

#### 23.6.1 (MARK) IN

Pressing *IN* actually performs several related functions. First, remember that TC2 Elite must be in *Record* mode for any instant replay marking purpose.

For this reason, if you should happen to push the *IN* button before enabling recording, it is enabled automatically (illuminating the interface Record button just as if you had pressed it on the screen).

With *Record* active, an *In Point* is set for the current clip that will eventually be stored (when you press *OUT*) in the currently delegated DDR (see Section 23.3).

*Hint: Actually, the IN button can also be thought of as a ‘reset In Point’ function. Pressing it updates the In Point, discarding any incomplete clip (i.e., one for which an Out Point had not been set. The partially recorded data up to that time is simply dropped (and is not added to the DDR playlist).*

**ALT + IN**

A *different* operation results when you hold down *ALT* (see Section 23.7) at the same time as you push *IN*. This operation updates the *In Point* of the active clip in the currently delegated DDR to the frame currently displayed.
23.6.2 (MARK) OUT

Pushing the OUT button likewise performs a short series of several actions:

- An Out point is assigned to the primary clip
- If the Add to switch is enabled in the Record Configuration panel, the clips is added to any targets configured in the associated destination menu (new clips are added to the end of the playlist)

*Note: This is a non-destructive operation. Rather than actually chopping the file, recording continues without interruption, and an instance of the file is added to target playlists.*

ALT + OUT

A *different* operation results when you hold down ALT (see Section 23.7) at the same time as you push OUT. This operation updates the Out Point of the active clip in the currently delegated DDR to the frame currently displayed.

*Hint: This is a non-destructive edit of the playlist clip, equivalent to dragging the trim handle at right-hand end of the DDR scrub bar.*

23.6.3 ONE BUTTON MARKING

Another handy method of creating clips for instant replay is referred to as ‘one button marking’. With Record enabled, watch for notable events, and simply press OUT whenever one occurs (no need to press IN beforehand in this case). This creates a new clip with an Out Point at the current frame, automatically setting the In Point to achieve the Duration set in the Record Configuration > Replay tab.

SECTION 23.7 ALT AND QUALIFIERS

For ergonomic reasons, ALT is in a special location by itself just below the Play Speed control group. It, along with SHIFT and CTRL (Control) are what are termed ‘qualifiers buttons’, in that (like their keyboard equivalents) they qualify, or modify the outcome of operating some other control.
We’ve discussed one use of $ALT$ in Section 23.6; see also Section 23.8. At the time of writing $SHIFT$ and $CTRL$ are reserved for as yet unspecified future purposes.

**SECTION 23.8 RECORD**

It’s probably no surprise at all that pressing the $REC$ (Record) button enables TC2’s own $Record$ feature. It’s worth mentioning though, that $REC$ is not a simple toggle button (as it is on the user interface). Simply pressing $REC$ again does *not* turn $Record$ off.

Recording is such an important function, we are sure you agree you don’t want anyone to be able to accidentally disable it.

For this reason, you must use $ALT + REC$ (hold down $ALT$ while pushing $REC$) to turn recording off. This makes disabling recording a very deliberate operation, and not one that is at all likely to have been unintentional (as perhaps by some hapless passerby coming in contact with the control surface while looking over your shoulder).

Also, you can add a five second clip from the Primary record source to all current Add to targets by pressing $SHIFT + REC$.

**SECTION 23.9 DDR OPTIONS**

The $LOOP$, $SINGLE$ and $AUTOPLAY$ buttons toggle their namesake features for the currently delegated $DDR$.

**SECTION 23.10 PRESET (DDR PLAYLIST)**

“P” is for “preset” … or “playlist”, if you prefer. However, you choose to view it, the buttons labeled $P1 - P4$ allow you to quickly access any of the first four *playlist presets* for the currently selected $DDR$.

**SECTION 23.11 TRANSPORT (CLIP CONTROLS)**

This group of controls provides a variety of convenient clip transport and navigation tools. The dominant feature is a large, smoothly operating $Jog Wheel$.

This oversize knob permits you to traverse the current clip in the delegated $DDR$ in frame-accurate increments.

The $Jog Wheel$ can be a real boon when coupled with the $ALT + IN/OUT$ method of trimming already captured clips (Section 23.6), or can allow you to review an event by scrubbing through it manually even while it is displayed live.
The Jog Wheel is supplemented by the nearby Fast Jog button. Press this control to toggle a high-speed jog mode, which skims through the clip at eight times the normal rate.

The other buttons in this control group are labeled with familiar VCR-style icons, and work as follows:

- **Previous (Clip)** – Push to highlight the prior clip in the playlist of the delegated DDR.
- **Stop**
  - Push to end playback at the current frame.
  - When already stopped, push again to go to the first frame of the current clip (or playlist, when Single mode is off for the DDR).
  - Push Alt + Stop during playback to jump to the end of the current clip.
- **Play** – Push to play the current clip in delegated DDR, beginning at the current frame.
- **Next (Clip)** – highlights the next clip in the playlist of the delegated DDR.

### SECTION 23.12 TIPS AND TRICKS

- **Multi-angle capture** – TriCaster’s IsoCorder™ technology supports multi-source capture. Although TimeWarp initially adds and controls the first recording channel to the designated DDR, the clip context menu in the DDR playlist allows you to selectively display concurrent angles.

- **Audio Control** – Remember that you can reduce (or Mute) the audio for replays individually using the local playlist pane audio controls in a DDR, or with the DDR level controls provided in TriCaster’s Audio tab(s).

- **DSKs and LiveSets** - TriCaster provides a great deal of creative versatility in connection with instant replays. For example, a DDR with replay clips that is assigned to the Overlay channel of an M/E can be quickly displayed or hidden (with its own transition effect). And, of course, something similar can be achieved with DSK layers. Or, you could use a double-box LiveSet to show a replay alongside on-camera commentators.

- **Clip Organization** – It can be helpful, at times, to use the MEM slot options in the DDR to collate clips for different purposes.
Appendix A: ELITE FEATURES

TriCasters TC2 Elite Features is your ‘backstage pass’ to the latest power user tools and features from NewTek’s industry-leading developers. The benefits of TC2 Elite Features are already substantial and, best of all, will continue to accrue as further innovations are added to super-charge your workflow and take your productions to new heights of visual excellence.

A.1 INTRODUCTION

TC2 Elite Features gives you unlimited access to a growing list of cutting-edge tools and technology. Let’s consider them one by one beginning with one of the most exciting developments of all.

A.2 LIVE CALL CONNECT™

Conduct live video calls from virtually anywhere using TriCaster’s Live Call Connect functionality. This capability enhances your productions with high-quality video and audio, allowing you to flexibly present remote conversations, interviews, reports, and more—regardless of the caller’s device.

Supported Applications

Microsoft® Edge Chromium is pre-installed on your TriCaster 2 Elite. However, if you prefer a different web browser, Google Chrome (or another Chromium™ based browser) can be installed.

A number of popular video conferencing applications are also supported, such as Microsoft® Teams, VooV™ Meeting, Slack, Discord, and Zoom.

Note: Exit the TriCaster software to download and install the supported applications you wish to use.

Application Desktop Widget

A special Live Call Connect widget pins itself to the titlebar of your browser or conferencing app window when it has focus. The widget has the following components:

- The hamburger icon at left side collapses the widget to a tiny size, reducing the possibility of its obscuring any of the application’s video sources.

- The LIVE button performs several tasks, including detecting the caller’s video viewports, beginning video capture, and locking the mouse out of the application to prevent it intruding. (As seen in Figure 283, the LIVE button is highlighted in blue when active.)

- The gear on the right side of the widget opens a menu listing the following options:
<p>Color Group – After choosing a color corresponding to a color group in TriCaster’s Switcher, you can click a caller’s video viewport in the conferencing application to assign that caller to the color-linked Switcher channel.</p>

<p>Relearn caller positions – This selection triggers the relearn algorithm, including re-detecting the caller’s screens (useful if things change unexpectedly in ways that can’t be automatically detected).</p>

<p>Assign callers to inputs – Automatically assigns caller video output from an application to Switcher inputs 9-17.</p>

<p>Help – Opens a convenient Help applet to walk you through the use of the feature.</p>

**Setting Up a Call**

---

You need at least one secondary monitor to access the Application Desktop you assign to it using the Workspaces menu (as discussed in the earlier section on Workspaces).

Once you have selected the App Desktop from the Workspaces menu on the Live Desktop, it will appear on this monitor.

Your video conferencing application(s) and the system default browser will appear in your task bar. Click on your preferred app’s icon, and join a meeting or display a web page in the usual manner for that application.

<blockquote><p>Note: Shut down your TC2 Elite prior to installing additional monitors.</p></blockquote>

In our example (Figure 285), we use Microsoft® Teams Application for a Live Call Connect walkthrough. Notice the Live Call Connect widget in the application’s titlebar. You can either host or join a meeting.

Once all callers have joined, you can use the “Assign Callers to Inputs” menu item to automatically assign the number of inputs starting from input 9.

Or you can manually assign the callers to Switcher inputs using TriCaster’s standard Input Configuration dialog (Figure 286). After this, it’s time to take it live (by pressing the LIVE button).
Live Call Connect attempts to maintain callers at the Switcher input you assign them to, but should the need arise you can turn off LIVE and apply the **Relearn Caller Layout menu option**.

**Note:** Live Call Connect supports up to nine callers as individual TriCaster video inputs.

Liver Call Connect crops out static application tools and borders, and supplies the callers’ video to TC2 Elite’s Switcher as potential sources.

**Note:** Recording Switcher Inputs assigned to output from Live Call Connect is not supported.

**Input Configuration**

In the input configuration panel, (Figure 286) the conferencing or browser applications will appear along with other local sources. Each application will support up to a 9-user configuration in each applications layout.

**Hint:** Should you wish to capture the entire application interface, select Full Application. Web browsers offer just two options, Full Application and Page Area (which crops the browser’s toolbar at the top).

**Audio Configuration**

TC2 Elite takes the system audio output for the supported applications and makes it available as a input in TriCaster’s Audio Mixer (labeled APPS, by default - Figure 287). You will find System Audio listed as an optional selection in the Mixer’s Input Configuration panel’s Connection options.

**A/V Return to Caller**

TriCaster’s main video Mix 1 output is returned to the conferencing application, and thus passed to remote callers so those calling into the meeting can see it. The audio return to conferencing apps is a special mix minus signal comprised of the Master audio mix with System Audio removed.

**Hint:** See Section 16.6, TalkBack for details on using this Audio Mixer feature to give off-air audio direction to your callers.
This powerful Elite Feature delivers numerous and powerful benefits. At the lowest level, you might use it simply as a very convenient and useful teleprompter for your show’s talent. Coupled with the NDI Studio Monitor included in the free NDI Tools bundle, this is a great feature. There’s a great deal more to LiveStory, however: LiveStory is first and foremost a powerful natural language automation system.

**OVERVIEW**

When you first open the new Automation tab, located at right below the main Switcher (near Buffers), you’ll see the empty script pane and some (rather lonely looking) controls at right (Figure 289).

Click or tap the (+) plus sign gadget below and to the right of the tab to open a File Explorer. Here you can navigate to a location where you have previously stored a .docx file such as those created in Microsoft Word (or compatible software with similar features). Figure 290 illustrates the result. Let’s discuss a few of the LiveStory interface controls and features before continuing.

Examining the tabbed LiveStory panel from left to right, you’ll see:
• An (x) gadget at upper-left. Click this to unload the current script (.docx file).

• The eyeline control is a white caret (triangle) control that can be dragged up and down to adjust the position of the similar eyeline indicator on a teleprompter display.

• The script pane, or canvas, displays the content of the .docx document, as interpreted by LiveStory.
  
  ▪ Colors and font styles have special meaning:
    
    ▪ Generally, text shown as yellow and italicized is not meant to be read aloud.

      For example, in the image above, the first line ("Pre-show setup") is used to issue a command to TC2 to place Black on output before the show begins. The line has Word’s Subtitle style applied to it, indicating it is not intended to be read aloud. LiveStory shows this in yellow italics.

      You’ll notice, though that the word “setup” is blue in the script pane, despite also being in Subtitle style in the document. This is because the command we inserted to cause black to be shown on output is in a comment applied to this word in the document.

      Blue identifies commented text in the document, and comments can be used to issue commands (we’ll discuss all of this in more depth shortly).

      **Hint:** Move the mouse pointer over blue text in the script pane to see a tooltip showing how LiveStory has interpreted your comment.

      Notice that the show’s title ("Springdale Morning Mic") is displayed in yellow, too. LiveStory recognized this is as the SHOW TITLE because the Title style is applied to this text in the document.

    ▪ Document styles can trigger corresponding actions, too. For example, the Title style can automatically display a specially prepared LiveGraphic™ animation to introduce your show – all without any manual intervention.

      **Note:** The SHOW TITLE animations require the latest LiveGraphics content to be installed. The Broadcast templates in the updated content include a special Show Open preset specially prepared for this purpose.

      ![Springdale Morning Mic (06.09.2019)](image)

      **FIGURE 291**

      ▪ In similar fashion, the document style Heading 3 denotes a CUE, used to introduce someone who will be speaking next. CUEs are show in inverted color, black text on a white background (Figure 291).
Like the Title Style, CUEs can also automatically trigger TC2 operations. For example, if a Switcher input name matches a name in the CUE, that source will be placed on output, and a title identifying the newly introduced talent will be shown. (After a few moments, the title is automatically removed.)

- Text meant to be read aloud is shown in a large white typeface.
  - LiveStory’s operating controls are located in a small panel just right of the script pane (Figure 292).

  This Control Panel is dominated by a vertical Speed control. You can modify the scroll rate during playback or traverse the script backward or forward by dragging the Speed bar up or down.

  Transport controls below the Speed bar include Stop and Play, as well as Previous and Next Segment buttons.

  **Hint:** Divide your show into different segments identified by applying the Heading 2 style to lines in your .docx file.

  - Click the familiar gear gadget in the upper-right corner of the Control Panel to open LiveStory’s configuration panel (Figure 293).

    - The two switches in the Automation Triggers toggle automation in response to Comments or Headings (styles) applied in the .docx document.

      When both switches are off, LiveStory does not process automation commands, and is operates as a simple teleprompter.

    - Font controls let you adjust text display for legibility when you are using an external teleprompter device.

    - The Flip switches in the Image group likewise allow you to conform the teleprompter output to match your local devices, while the margin sliders let you move text confine teleprompter output to best suit your preference.
As discussed earlier, various styles applied in the .docx document serve different purposes in the LiveStory context, and some styles can even trigger automatic operation.

<table>
<thead>
<tr>
<th>Document Style</th>
<th>Applies to</th>
<th>Displayed on output</th>
<th>Description</th>
<th>Sets value for DataLink key</th>
<th>DataLink Key Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Show Title</td>
<td>No</td>
<td>e.g., “State of the Union Address”</td>
<td>%SCRIPT_ShowTitle%</td>
<td>Main show title</td>
</tr>
<tr>
<td>Heading 1</td>
<td>Show Descriptor</td>
<td>No</td>
<td>Sets value for a DataLink key</td>
<td>%SCRIPT_ShowDescription%</td>
<td>Main show descriptor</td>
</tr>
<tr>
<td>Heading 2</td>
<td>Segment</td>
<td>No</td>
<td>e.g., “Intro Package”, “Welcome Monologue”</td>
<td>%SCRIPT_ShowSegment%</td>
<td>Current show segment</td>
</tr>
<tr>
<td>Heading 3</td>
<td>Cue</td>
<td>Yes (inverse)</td>
<td>e.g., talent name: “Billy Bob”</td>
<td>%SCRIPT_CueName%</td>
<td>Name of speaker</td>
</tr>
<tr>
<td>Subtitle</td>
<td>Information text</td>
<td>Yes (yellow, italics)</td>
<td>Displayed but not meant to be read (e.g., “walk behind desk”)</td>
<td>%SCRIPT_Info%</td>
<td>Current/Last information text</td>
</tr>
<tr>
<td>Normal</td>
<td>Body text</td>
<td>Yes (white)</td>
<td>Text to be read by on-air talent.</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

The following styles automatically trigger TC2 operations when the Headings switch is enabled:

- **Title** – triggers automatic display of a LiveGraphics show opening title animation. This title uses the text from the *Title-style* line to populate the first line of the animated title, and takes (hidden) text from a line entered using the *Heading 1* style for its second line (when used).

- **Heading 3** – identifies a CUE. When the Headings switch is enabled, a lower-third title is automatically displayed for a short duration when the eyeline reaches a CUE for the first time in a segment. The first line of the title shows the full Switcher input name set in *Input Configuration* for that source. The second line of the title is drawn from the (Input Configuration) *Comment* entry for the source.

*Hint: Titles as discussed above default to a pre-selected LiveGraphics title, and transition in and out automatically. To display a different title page, preload the desired title into Buffer 1 beforehand. This can be done using a command entered as a Comment in the docx file. You can also use Comments to change the title’s transition effect, display duration, and so on.*)
COMMENT-BASED COMMANDS

While heading styles provide some useful automation possibilities, the use of Comments in the .docx file provide much more powerful and detailed options.

Note the Comment inserted into the text in Figure 294. You’ll see that it has two lines. The first is simply “Black”, which tells TC2 to select the input named “Black” on its Program row.

FUZZY LOGIC

Interestingly, the very same thing would occur if the command entered in the Comment had instead said “Show black”, “Put black on program”, “Send Black to Program”, or “Output black”. LiveStory uses “fuzzy logic” to try to find the best match to your entry.

Note: Extraneous text is typically ignored so, for example, you could instead write “Put black on program while I have lunch” and still be successful (assuming your lunch was satisfactory).

We mentioned earlier that you can move the mouse pointer over blue text in the script pane to see a tooltip showing how LiveStory interprets your comment. It’s helpful to know that LiveStory determines the probability that the interpretation is correct. If the wording of a Comment entry is ambiguous, and could be interpreted differently, the text color in the script pane is red rather than blue.

Hint: If a comment has multiple lines in it, LiveStory adds an asterisk to any ambiguous lines in the tooltip. The entry “Output black” would trigger this behavior, even though it is correctly interpreted, with the result that black is shown on output.

LIVESTORY VS. Macros

Let’s pause at this point to consider how LiveStory commands differ from the somewhat similar shortcuts used by macros.

Like LiveStory commands, a macro shortcut is entered on a single line, and may support arguments, or parameters. Macro shortcuts, however, require you to use very specific syntax. By contrast, though, LiveStory commands are entered using ‘natural language’ – the way you might normally speak or write.
Macro shortcut will generally fail with an error if your syntax isn't perfect, while, as mentioned previously, LiveStory uses fuzzy logic to try to find the best match for your command, and only fails 'reluctantly'.

*Hint:* LiveStory documents are evaluated on loading. When LiveStory determines its evaluation of a specific command in a Comment could be incorrect, it posts a message to TC2’s Notification panel to note the ambiguity, in addition to marking the commented text in red in the script pane.

Additionally, a single *Comment command* can do things that would otherwise require multiple commands entered on separate lines in a macro. Consider for example, when LiveStory encounters the simple *Comment* entry “fade tom slow”, it results in the following steps:

1. Select an input named “Tom” (or “tom”, or with a similar string, such as “Tommy” in the input Comment box) on the Switcher’s *Preview* row.
2. Set the Switcher’s *Background* transition effect to *Fade*
3. Set the effect speed to *Slow*
4. Perform an *Auto*.

To do something similar using a macro, you’d need to enter four separate lines, getting the syntax correct for each macro shortcut – and since macro commands require an input index parameter rather than a name, you’d need to know in advance which camera would be pointed at Tom. If Tom was moved to a different chair on your set at the last minute, the macro would need to be modified. Using LiveStory, you could simply rename the camera.

Better yet, continuing with the example above, if – rather than naming an input “Tom”, you prepared a PTZ preset (or Pan and Scan preset, for a non-PTZ source) and named it “Tom”, TC2 would automatically select that preset at step 1 above.

*Hint:* Imagine what this means if you are using a few PTZ cameras to cover a city council meeting, with PTZ presets prepared for different participants. If two people change seats at the last minute, all you need to do is update the PTZ presets and LiveStory will take care of everything else for you!

So, not only are LiveStory Comment commands easier to write, often performing multiple operations with a single entry, but they are ‘smarter’, and easier to maintain and update. Which brings us to another key feature.

**Live Updates**

As clever as LiveStory is, at times you will want to experiment, or need to tweak your wording to bring about the result you intend. As we mentioned, you don’t even need to press *Play* to test modifications, you can simply reload the .docx file and hover the mouse over commented text to see the way the embedded commands have been evaluated.
Making this exercise even better, LiveStory has a built-in Update feature, and monitors changes to the script file you loaded. Suppose you are using a laptop to edit your script in Microsoft Word. You might opt to save the file across a network connection to (for example) the shared Public\Documents folder on your TC2.

Then, when you modify the document and save it (which typically requires just a quick keyboard operation to perform - CTRL + s ) LiveStory will immediately show an Update icon at the top of the script pane (Figure 295). Click this to reload the .docx file with the changes you made.

Note: This will reset LiveStory’s eyeline indicator to the top of the script, so don’t do update when your talent is reading from the teleprompter you are quite confident that they will miss you with whatever they throw!

Default Behaviors

We mentioned that LiveStory’s Comment commands can perform compound operations, and are simpler to use than macros. Actually, they are designed to provide a useful result even when you don’t supply complete information. Let’s look at an example.

Figure 296 above illustrates the result of the Comment command “Fade Football Star on in PiP” (the simpler entry “PiP football star” would have produced the same result). We didn’t supply much detail about our intentions, so LiveStory produced a ‘default’ picture in picture effect, as shown.

But perhaps you want to make some changes. In Figure 297, we have edited the Comment command to read “PiP Football Star large top right”. Since we defined the position of the overlay, and specified a size, we achieved a more pleasing result.

The Comment command “title” provides another example of default operation. Add the simple entry “title brackets lower third” to a comment. LiveStory evaluates the comment when the eyeline indicator reaches it, and the predetermined defaults are used so you may not even need to add any more detail. The designated title page (Brackets Lower Third) is automatically i) loaded into a Buffer, ii) assigned to a DSK, iii) faded on, iv) held briefly, and then v) faded off).
In this example, you might kick things up just a bit by changing the effect used to introduce the title page. The *Comment command* “Show Title brackets lower third Edge LtoR(H)” works quite nicely for this purpose.

**Hint:** You might want a title to remain in view longer than the default time. To do this, add the word “hold” to the command you use to display the title. Then insert a new comment into your script at the point where you want to remove the title from view and enter the command “title off”.

Try different things – you can change effect speed (Fast, Medium, Slow), specify the DSK to use, and so on.

**More Comment Commands**

We can't provide an exhaustive listing of every possible command and combination of options, but we'll identify the main TC2 Elite features LiveStory currently supports and give some examples and a few alternatives that work just as well. The best way to learn is to just try typing in what you want to happen!

**Audio Mixer**

- “Set input 2 Volume to -5”; “volume input 2 5dB”; “input 2 9db”; “Set volume for input 2 to -20”
- “volume master 5dB”; “Set Saster Volume to 5”; “set volume to 5”
- “mute”; “mute on” – mute master output
- “unmute”; “mute off” – unmute master output
- “mute out 2”; “mute out 2”; “mute aux 2”; “mute aux 2 on”; “aux 2 mute on” – mute named output
- “aux 2 mute on”; (etc.)
- “mute input 3”; “mute input 3 on” – mute the named input
- “mute input 3 off”
- “solo input 6”; “solo input 6 on” – solo the named input
- “solo input 6 off”
- “unsolo input 6”; “solo input 6 off” – disable solo for the named input
- “follow input 6”; “follow input 6 on” – solo the named input
- “follow input 6 off”
- “input 4 eq”; “input 4 eq on”; “input 4 enable equalizer”
- “input 4 eq off”; “input 4 disable equalizer”; (etc.)
- “input 5 compressor on”; “input 5 enable compressor”
- “input 5 compressor off”; “input 5 disable compressor”; (etc.)
- “AudioMemName”; “select AudioMemName”; “recall AudioMemName”; “mixer AudioMemName”; “audio AudioMemName”; audio select AudioMemName”; “audio recall AudioMemName”
- “audio select MEM 3”; “audio select 3”; “audio recall 3”; “audio recall mem 3”; “mixer select 3”; “mixer select mem 3”; “mixer recall 3”; “mixer recall mem 3”

**Comps**

- “load MyComp”; “select MyComp”; “myComp” – loads the named main Switcher Comp.
- “comp 3”; “load Comp 3”; “select comp 3”; “go to comp 3”
- “m/e 1 comp 2”; “me1 comp 2”; “select comp 2”; “load main comp 2”; “go to myMEnemy myCompName”; (etc.) – loads the designated Comp into the main Switcher (default) or named M/E.
- “myComp medium”; “myComp normal”; “myComp 1.0”; “go to myComp slow”; (etc.) – loads a Comp using the designated speed.
MEDIA LAYERS

- “play lion”; “play lion on main”; “=take lion on m/e 1”; (etc.) – locates, loads and plays a clip named “lion” on the main Switcher (default) or named M/E; performs an auto or take when playback ends. The scrolling of the script pauses until playback is complete.
- “circle(h) lion” works as above but uses a Circle wipe to display and remove the clip.
- “play lion ddr2” forces the operation to use DDR 2 (rather than selecting a default DDR)
- “add lion to ddr 2; “load lion ddr 2” – adds the clip without displaying it

DSKs

- “Toggle DSK 1”
- “toggle DSK 1 slow”
- “auto on dsk 2 slow”; “auto on M/E 2 key 2 slow”;
- “Fade M/E 2 keyer 1 slow”; “fast auto off dsk3”
- “Set main dsk 1 as input 1”; “Set input 1 on main dsk 1”; “set DSK 1 to GFX 1”; “set M/E 1 Keyer 1 to GFX 1”; “assign GFX 1 to Me2 key 2”; (etc.)
- “Play lion in dsk2”; “Play lion on dsk2”; “Show lion in dsk2” – plays a clip named lion in DSK2, fading on and holding the last frame.
- “Play lion on key 2 in M/E 1 with slow circle(h)” – as above but uses a slow Circle wipe in M/E 1.
- “Show lion on dsk 3 with fast auto”; “Show lion on dsk 3 with take”
- “set main DSK 3 transition to circle(h)”; set circle(h) Me2 key 1”; “change transition on me4 for key 2 to circle(h)”;
- (etc.)

BUFFERS

- “Add globe to buffer 6”; “buffer 6 load globe” – loads the Globe Frame Buffer Animation effect to the target buffer
- “Add Hexagon lower third to buffer 6” – loads the named static title page into the target buffer
- “buffer 3 load Hexagon Broadcast” - loads the named LiveGraphic into the target buffer
- “Buffer 1 set speed medium”
- “Buffer 1 speed 2”; “Buffer 1 set speed 2x”; “Buffer 6 globe 200%” – set speed to 2x the default (Medium).
- “set buffer 1 to layer preset 2”; “set buffer 1 to index 2”; “set buffer 1 to preset 2”; “buffer 1 select preset 2”; “buffer 1 preset 2”; select buffer 1 index 2 (etc.) – select the designated Layer Preset for a LiveGraphics title page loaded in the buffer slot specified.
- “set buffer 1 to data preset 2”; etc.– select the designated Data Preset for a LiveGraphics title page loaded in the buffer slot specified.

See also dedicated PiP (Picture in Picture) commands)
### Macros
Of course at times you may want to run a more complex macro from within a script, using a Comment command. The commands below will let you do that.

- "macro_name"; "macro macro_name"; "run macro_name"; "play macro macro_name"; etc.
- "stop macro_name"; "stop macro macro_name"; macro macro_name halt”; macro_name end”; etc.
- "stop all macros"; "stop macros"; "halt macros”; etc.
- "Continue Paused Macro"

### PiP (Picture in Picture)

- “Input 5 pip”; “pip input 5”; “ots input 5” – assign input 5 to a default DSK and display it using default options
- "pip globe” – show the matching file (in the example, a Framebuffer Animation) using default PiP settings
- "pip globe center large”; "pip globe middle large”
- "pip me1 key 2 globe small bottom right”
- “pip input 5 large center” – assign input 5 to an unused DSK and display it large size at center screen
- “pip main dsk 3 input 5” – assign input 5 to DSK3 and display it using default options
- “pip me1 dsk 1 input 2” – assign input 2 to DSK1 in M/E 1, and display it using default options
- “pip input 5 fly in L” – assign input 5 to an unused DSK and fly it in from left
- “fade pip off”; “ots off” – remove the default PiP from output using a fade effect
- “pip main dsk 2 off” – remove the PiP in DSK 2 from output
- "pip myPtzPreset” – recall the named PTZ preset and show that source in a PiP
- "pip dsk1 myPtzPreset “; "pip me1 key1 myPtzPreset”; "take pip myPtzPreset ”; (etc.)

### PTZ
- "myPtzPreset ”; " myPtzPreset on program”; "put myPtzPreset on program”; "take myPtzPreset on program”; "select myPtzPreset on program”; "take to myPtzPreset”; (etc.) – locate a PTZ preset named “myPtzPreset” and display it on Program output.
- "put myPtzPreset on preview”; "select myPtzPreset on preview”; etc.
- " myPtzPreset on M/E 1 b row”; "me1 put myPtzPreset on b row”; "me1 select myPtzPreset on b row”;
- "set me1 b row to myPtzPreset”
- See also PiP-related PTZ preset commands.

### Record, Grab
- "record”; "record on”; "recording on”; "start record”; "begin record”; "start recording”; etc.
- "record off”; “recording off”; "stop recording”; "end recording”; etc.
- "Grab still”

### Stream
- "stream”; "stream on”; "streaming on”; "start stream”; "begin streaming”; etc.
- "stream off”; "streaming off”; "stop streaming”; "end stream”; etc.
Switcher

- “auto”; “transition” – perform a Background transition on the main Switcher
- “take”; “cut”
- “fade”; “crossfade”; fade slow; etc.
- "input 4"; "input 4 on program"; "put input 4 on program"
- "bob"; “take to Bob”; "take Bob on program"; “fade to Bob” – perform a Background (Take or Fade, respectively) transition to show a source (or PTZ preset) named “Bob” on the main Switcher.
- "input 4 on preview"; "put input 4 on preview"; "set preview to input 4"; "input 4 on b row"; "set layer b to input 4"; etc.
- "me1 put input 4 on preview"; "set M/E 1 preview to input 4"; etc.
- "set M/E 1 b row to input 6"; "set me1 layer b to input 6"; "input 6 on me1 b row"; etc.
- “auto to input 4”; "transition to input 4" etc.
- “fast auto to input 4”; etc.
- “auto to input 4”; "transition to input 4" etc.
- "M/E 3 bob"; me3 auto to input 4"; "transition me3 to input 4"; etc.
- “ftb”; “fade to black”; “ftb off”; etc.

DSK

- "DSK1 Auto"; "dsk 1 perform auto"; etc.
- "dsk2 take"; etc.

DataLink

- “set datalink key myVar to I’m a Yankee Doodle Dandy”
- "datalink key myVar equals 12"; "set datalink key myVar to value 12"; "set myVar to 12"; “myVar equals 12”

Titles

- "Aero Broadcast"; "Title Aero Broadcast" – for a LiveGraphic title, sets the default layer preset (10), then transitions the designated title in a default buffer assigned to a default DSK, removing it after 8 seconds;
- "Aero Broadcast hold"; "title Aero Broadcast hold" – as above but does not automatically removed the title
- "title Aero Broadcast Fly In L medium"; etc. – as above using the designated transition and speed
- See also title-related commands listed in the Buffers subheading.

Aliases and Comments

You can use these comment commands to eliminate the need to pre-configure Switcher source names. Instead, you can set them right in the .docx script. This also allows you to change the metadata associated with a Switcher inputs at various points in your show as you wish.

- "Sam Smith is on input 4"; “assign input 4 to Sam Smith”; “set input 4 to Sam Smith” - set an alias for the designated input’s name value
Hint: You’ll likely want to use the full name here, for use in connection with titling.

- "input 4’s description is CEO of Megadyne Inc."; "Input 4 memo is CEO of Megadyne Inc."; etc. – sets the descriptor for the input, which is used as the value for the second line of default lower third titles

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**TELEPROMPTER OUTPUT**

Even apart from all of the foregoing (for example, if you disabled both the Comments and Headings support), LiveStory would still be very useful as a native teleprompter. Coupled with file watcher functionality to easily update your script right up to ‘air-time’, this feature saves a setup time, expense, and provides exceptional output flexibility.

**CONTROL**

We discussed LiveStory’s onscreen teleprompter controls earlier in this section, but these primarily serve for use during setup.

For live use, most prefer a dedicated physical controller device, whether for use by the talent or another teleprompter operator in the studio. LiveStory natively supports the ShuttleXpress USB controller by Contour Design Inc. (Figure 299).

![ShuttleXpress Controller](image)

You will find this device provides common teleprompter controls in an easy to use and affordable manner.

**OUTPUT**

In order to support a wide array of external teleprompter hardware, LiveStory assigns the scrolling text output to the highest numbered Switcher output by default. You can then assign this signal to a video Mix output supplying a physical video output connector to feed an external device.

Of course, in an NDI® environment, you have other powerful options. TC2 automatically supplies the teleprompter output to your network as an NDI stream, offering many display options. (For example, the
Studio Monitor application included with the free NDI Tools bundle from NewTek can be used to display your teleprompter output on Windows® and OS X® platforms.

### A.4 FORMAT INDEPENDENT PRODUCTION

Did you ever need to compose a double-wide, vertical or square scene to fulfill projection systems, signage or social media requirements?

Elite Features and resolution-independent NDI make this all possible, providing precision aspect control at every stage of the process.

- Select from numerous non-traditional frame formats to work in when creating a session, including double-wide and many more
- Flip, rotate, scale and crop individual inputs
- Flip, rotate, and choose the resolution for individual outputs
  
  You can even send left/right or quarter screen segments, and optionally enable automatically blended Overlap

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### SESSION OPTIONS

You’ll first encounter these powerful features on the Home page of the Launch screen. Here you will notice a new group of buttons labeled Aspect (Figure 300), which allow you to choose between landscape (horizontal), square, or portrait (vertical) aspect modes.
In the resolution selector below, you will find that traditional video formats have been complemented by appropriate non-standard options including, for example, portrait aspect 1080x1920 and 1080x3840 options, and so on.

To complement non-traditional sessions and handle unusual Switcher sources (e.g., non-landscape mobile device output) each input now features a new Rotate menu, which also includes Flip options.
Extending these capabilities even further, all *Mix* outputs now support independent resolution selection, rotation and flip control, as well as *Section* options as seen in (Figure 303).
LiveGraphics® represents a revolutionary approach to title and CG page creation, combining the power of the most complete production systems on the planet and the world’s leading creative platform—Adobe® Creative Cloud®. Of all the Elite Features benefits, LiveGraphics is the one of those most likely to dramatically elevate your productions in ways that grab the attention of your viewers.

**FIGURE 304**

LiveGraphics comprises several key elements: It includes an extensive set of professionally prepared animated title templates and the interface to control and update these in your NewTek live production system, but this is just the beginning.

Imagine designing animated titles, motion graphics, and looping effects using popular Adobe® Creative Cloud® tools—then importing them directly into your NewTek live production system, which will then allow you to both animate and update them dynamically.

With the LiveGraphics Creator™ plugin to simplify authoring in After Effects® CC for users of all experience levels, enhanced real-time system functionality allowing powerful customization, playback, and even automation options, LiveGraphics lets you produce and present spectacular live graphics faster and easier than ever before.

**FIGURE 305**
USE LAYERED PSD FILES

Create individual graphics or an entire package in Adobe® Photoshop® CC, then bring the PSD files directly into your NewTek live production system.

LiveGraphics recognizes the layers automatically, allowing you to manage elements independently and store up 16 macro-ready variations per system buffer.

ANIMATE IN AFTER EFFECTS

Animate graphics faster and easier than ever before with the included LiveGraphics Creator plugin for Adobe® After Effects® CC.

With LiveGraphics Creator, AE novices can simply import a layered Photoshop® PSD file, drag and drop presets to apply motion to its different layers, then export the result ready for live use.

Or use the included SmartBuilder™ to have LiveGraphics analyze your content and add animations for you with a single click! Of course more advanced users can refine their creations using standard methods right in After Effects.

*Hint: The use of NewTek LiveGraphics Creator is documented in its own manual, installed with the plugin.*

USING LIVEGRAPHICS

Of course you can also simply load any of the 100+ production-ready LiveGraphics templates supplied with Elite Features into your system’s Buffer slots and get started right away.
The Title Editor lets you change text and images on the title pages, and hide or show layers using the Layers menu (Figure 307). Layers animate into place as you do so. Then, store the results as presets – display the Layer preset bin by clicking the Preset button at upper right (Figure 308).

To preserve the Layer and Data presets you generate for your LiveGraphics pages outside of the current live session, you can use the Export button at left in the Title Editor's footer. Afterward, load your creation into a Buffer slot, and use its preset bin to animate from one state to another at will – see Section 11.3.9, Buffer Presets for more detail.

LIVEGRAPHICS AND DATALINK

Naturally, LiveGraphics supports NewTek's DataLink system for dynamically updating title page details even during live display (information about DataLink appears in a number of places in this manual, but you might start your exploration at Section 11.2.3).

DataLink™ technology lets you use external hardware scoreboards, spreadsheets, and other remote data sources to populate and update your graphics automatically.

LiveGraphics templates even support text and images direct from the Web when with combined with the DataLink Web Browser extension.
In addition, the next *Elite Feature* we will discuss (LivePanel™) provides several powerful ways to update *DataLink* key value (such as its integrated *Scoreboard* control pages for various sports). And thanks to the included *Builder* web app, you can even build custom control pages capable of driving your motion graphics from any device on your network with a web browser.

### A.6 LIVEPANEL

![LivePanel](image)

**FIGURE 309**

LivePanel, included with your TC2 Elite Features, provides potent tools to extend your production workflow, and is also available for separate purchase.

Among other features, LivePanel lets you create custom control panels for your NewTek live production system accessible in web browser of a device on your network. LivePanel also provides a number of production-ready tools for remote video mixing, media playback, audio mixing, and macro automation.

### A.6.1 NETWORK ACCESS TO LIVEPANEL

To access LivePanel, click the *Notification icon* (see Section 7.6) at upper-right on your NewTek live production system’s *Live Desktop*, to open the Notification Panel.
Note the URL shown beside the *Web Browser* button at left in the footer of the *Notification Panel*.

Enter this into the address bar of a web browser on another device on the same network.

*Note: You may be asked for a username and password to access LivePanel – see Section 4.1.*

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### A.6.2 HOME PAGE

After entering security credentials (if necessary), Live Panel’s *Home* page is displayed in your web browser.

*Note: We recommend using a modern web browser (such as Chrome or Firefox) available for your platform for best results when using LivePanel.*

All of the existing LivePanel tools can be accessed from the Home page, either by using the ‘hamburger’ menu at left in the titlebar, or by clicking the large icons on the page.

*Hint: Click the (?) icon at right in the titlebar to view information about LivePanel tools on the current page.*

---

### A.6.3 AUDIO MIXER

LivePanel’s prepared web applets are easy to use. In many cases the controls mimic similar items in the main interface for your system. This can be seen in Figure 311, which shows LivePanel’s *Audio Mixer* applet.
A.6.4 DATALINK

The DataLink page lets you selectively review the values for all current DataLink keys, edit these, and even generate entirely new key-value pairs.

A.6.5 MEDIA

Likewise, LivePanel’s Media page provides you with remote access to the system’s Media Players, allowing you play, trim, add and remove media files in the playlist.

Toggle the Media Player’s Autoplay and List/Single playback modes, and trigger the Show On feature to push Media Player output to display on Program output or in a designated M/E.

You can even upload images from a local host device (such as a tablet or smart phone) to the playlist on your NewTek live production system.

A.6.6 SWITCHER

The LivePanel Switch applet is designed to make it easy to switch less demanding productions without a complex interface. Simply tap a viewport for a video input to Take it to Program output, or swipe it horizontally to do so with a transition.
Select transition effects for the Switcher, an M/E, DSK, or KEY layer, and – most powerful of all – select a Comp to change your composition entirely with a single tap.

Unquestionably the icing on the LivePanel cake, the Builder Applet allows you to easily create custom control panels to meet a virtually limitless number of needs.
Flexibly assign a macro to a button, or perhaps two – one to operate when the button is pressed, and another to be applied when you click it a second time. Give the button a color, or fill it with a still image of your choice.

The Builder applet lets you gang buttons together to give them more prominence, and you can even assign moving video from an external Switcher input, Media Player, or output to a button (effectively turning it into a monitor), and creating your own custom Switcher interface.

**Hint:** Each individual live production system hosts its own LivePanel instance, so Builder pages can be exported for use on additional systems.

---

### A.6.8 SCOREBOARD

As discussed elsewhere, DataLink can be directly connected to a number of popular scoreboard systems.

With the new Scoreboard applet included in LivePanel, however, you can be your own scorekeeper using the web browser in virtually any laptop or tablet. Better yet, Elite Features includes full motion LiveGraphics scoreboard title pages already configured to work with the Scoreboard applet.

Having chosen the Scoreboard for your sport, and a matching scoreboard title page, the applet lets you set the team names, supply individual team logos, and track goals, penalties, and more as play proceeds.

**Hint:** You can open the Switcher applet or a custom Builder page in another browser tab (or on another device) to display and removed the various elements of your animated LiveGraphics scoreboard, too.
A.7 ADVANCED AUDIO I/O

Elite Features software provides our most complete support for audio solutions such as Audinate’s Dante and AES-67 implementations (with required third-party drivers).

NewTek’s Advanced Audio support for ASIO drivers allows you to easily transmit or receive audio using these popular ‘audio over IP’ protocols.

Send selected channels from any Mixer input, Media Player or output bus and channels you wish to send and match these to the transmit channels provided by your third-party driver.

You can, for example, send your Media Player output to an external hardware mixer supporting the same protocol, and route that mixer’s output back into your NewTek system for output with your video.

Hint: Advanced NewTek systems also provide independent per input delays for both audio and video, for a perfect match every time.

A.8 NDI® KVM

As exciting as all of the foregoing is, the NDI KVM feature may change your life even more.

To enable this feature, go to the Launch screen’s Home page, and use the titlebar NDI KVM menu (Figure 319) to select which operating mode you wish to apply, choosing between Monitor Only or Full Control (which passes mouse and keyboard operations to the remote system).

Use the Security option in this menu to apply NDI Group control to limit who on your network can view the NDI KVM output from the host system. To view the output from the remote system and control it, select the machine’s NDI output in the Studio Monitor application supplied with the free NDI Tool pack, and enable the KVM button overlaid at upper-left when you move the mouse pointer over the screen.

Hint: Note that Studio Monitor’s KVM toggle button can be relocated to a more convenient spot by dragging.

You can select to view or control the User Interface or another Multiview, or both with multiple instances of Studio Monitor (Figure 320) open on the receiving unit.
Note, too, that this feature gives you a great way to multiple your Multiviews around your studio or campus. You can even use these displays as video sources for another NDI-enabled system. System audio will also pass to the receiver, and you can even copy and paste text between the two systems.

With the User Interface running full-screen in Studio Monitor on a receiving system, it’s really hard to remember that you’re actually controlling a remote system. Even touch is supported, meaning you can run the User Interface output on a Microsoft Surface™ system for portable touch control over your entire live production system.

(Actually, many of the interface screengrabs shown in this manual – including those in this section – were grabbed from NDI Studio Monitor while controlling the remote system in the manner described above.)
A.9 VIRTUAL PTZ

*Virtual PTZ*, also referred to as “pan and scan”, is a unique *Switcher* input feature applied to ‘standard’ video sources, i.e., those which are not actually connected to physical PTZ (Pan, Tilt, Zoom) cameras.

Naturally, the latter (real PTZ cameras), when connected and configured, show *Pan*, *Tilt*, and *Zoom* controls in their *Input* tab of the corresponding *Input Configuration* panels.

The *Virtual PTZ* feature adds similar controls to all *Switcher* sources (except M/Es, which already have similar capabilities thanks to *Comps*). This even includes *Media Players* and *Buffers*.

Since the *Virtual PTZ* implementation includes *Presets* and *Speed* controls, this means is that you can zoom in/out and pan around within the frame supplied by any source.

Of course this is a particularly attractive feature in the context of UHD video sources, but can also be used to mimic the so-called “Ken Burns effect” (a.k.a., ‘pan and scan’) when applied to imagery in *Media Players* (Figure 322).

A.10 VIRTUAL SET LIBRARY

Elite Features also provide you with the use of the entire NewTek collection of optional, LiveSet™ virtual sets, covering an array of useful broadcast, business and industrial applications. A sampling from this collection is shown below.
At the time of writing, the collection includes thirteen professionally designed multi-camera virtual set environments ready-to-use for your productions.

Note: You can also purchase this collection outright in NewTek’s online store, which has added benefit for Virtual Set Editor owners who will receive the corresponding customizable VSE projects with their purchase.

A.11  SOUND AND MUSIC

This 100-track bundle of songs includes a variety of license-free, full-length audio tracks to engage your audience and give you plenty of soundtrack options. The multiple musical genres in this bundle allow you to develop a theme or evoke specific emotions with background music for live content, or edit these unlimited-use music clips into pre- and post-production content.
Appendix B: SKYPE AND SKYPE TX

Literally hundreds of millions of people use Microsoft Skype™, so it’s very likely that you are already acquainted with its use on mobile and desktop platforms. It’s hard to imagine a better technology to extend your productions to remote participants, whether around the corner or in far-flung corners of the world. NewTek products actually provide several approaches to working with Skype.

TriCaster 2 Elite’s app desktop and the related feature, Live Call Connect, support running a Skype client directly within live environment. Here, though, we will discuss two other approaches, the first using Microsoft’s professional level Skype TX™ platform first, and then another method of using a standard Skype client.

B.1 SKYPE TX

Until recently, however, there were ‘missing links’ in the i/o chain between Skype and the video broadcast realm. Microsoft introduced its Skype TX platform, comprising purposed-designed hardware, software, and control room tools, to link the two worlds. NewTek was honored to be selected as the sole North American manufacturer of authorized Skype TX hardware, the NewTek TalkShow™ product line.

B.1.1 TALKSHOW®

Each Skype TX-based TalkShow™ VS4000 unit provides the features needed to connect four high quality a/v streams between Skype callers and standard studio systems. NewTek live production systems make connection particularly convenient, by leveraging NewTek’s NDI® (Network Device Interface) IP protocol. Thanks to NDI, a single gigabit network connection easily handles all a/v traffic between the two units.
**Audio and Video Connections**

The basic IP connection setup between the NewTek production system and TalkShow is quite simple. Individual a/v outputs for each remote Skype caller from TalkShow can be assigned to the Switcher and Audio Mixer like any other NDI a/v input source.

Similarly, the video output from your program can be assigned as the return-to-caller source on the TalkShow system. You will likely want to prepare a unique mix minus audio feed for the audio return to each individual caller. See the sub-heading Sub-Mixes and ‘Mix Minus’ in Section 16.10.3 of this manual for more detail on configuring these.

### B.1.2 Skype TX Controller

A vital part of the Skype TX™ platform is the call-center application referred to as Skype TX Controller (available [here](#) for free). You might think of Skype TX Controller as the ‘switchboard’ for your calls. The operator can initiate outgoing calls, answer incoming calls, and more.

![Skype TX Controller Console](image)

**Figure 324**

The Skype TX Controller console provides numerous professional conveniences, including contact and call management tools, auto-answer, detailed call quality metrics, and fall-back images to be displayed automatically should network conditions for a remote caller fall below designated minimums.

### B.1.3 Skype TX Caller

NewTek’s TC2 Elite also features native Skype TX capabilities independent of a TalkShow system.
This unique support lets you directly connect Skype™ calls from anywhere in the world to either of two special Switcher inputs by leveraging the Skype TX Controller.

All you need to use this feature is a network connection between your NewTek system and the computer running the (free) Skype TX Controller application that provides call management.

**Audio and Video Connections**

Section 8.1.1 explains how to assign a Skype TX Caller to a selected video Switcher input.

In this implementation, by contrast with the use of an external TalkShow system discussed earlier, it is not necessary to manually create a special mix minus audio return feed to send to the remote caller(s). You will find details on the special 'mix minus' that is automatically supplied in Section 16.5.

In addition, you will find it worth reading Section 16.6, which explains the unique TalkBack feature provided in the Audio Mixer to let the production system operator talk 'offline' with selected callers, without fear of the conversation being overheard on program audio output.

**Hint:** The return video sent to remote Skype callers can show a tally overlay. The overlay image is named SkypeTally.png, and is located in the file folder at one of the locations below, by model:

```
C:\ProgramData\NewTek\TriCaster\Configuration\Skype\ or ...
```

This image can be deleted to disable the feature, or replaced to modify it.

**B.2 Skype for Content Creators**

Microsoft offers several variants of Skype. The Desktop version of Skype provides new possibilities for Skype users including broadcasters, streamers, and vloggers, including output using NewTek's NDI® protocol. This support for NDI provides yet another way to bring Skype calls into NDI–enabled software and systems, including TriCaster TC2 Elite.

Input setup for Skype a/v output is similar to connecting any other NDI source. The Skype client does not directly support NDI input from you to remote callers, but you can use the NDI Virtual Input application (included with the free NDI Tools pack from NewTek) to connect program video output and a mix minus audio return feed prepared as discussed in the sub-heading Sub-Mixes and 'Mix Minus’ in Section 16.10.3 of this manual.
Appendix C: PERFORMANCE CONSIDERATIONS

In this section, we’ll consider the most common questions you may have (and of course we’ll provide the answer, too). Answers are intentionally brief – perhaps just a reminder of one or two steps required to perform some operation. For this reason, we’ll also point you to explanatory information elsewhere in this manual whenever that would be useful.

C.1 TESTING, ONE TWO ...

Professionals simply do not leap into new environments blindly. They prepare, plan, plan some more, and then – most importantly – they test. This allows them to tackle the really tough jobs with confidence.

C.2 IMAG AND LATENCY

What's IMAG? It’s a compression of the expression “Image MAGnification.” Typically in modern IMAG applications, video cameras supply live imagery to projection systems, magnifying speakers and performers so that audience members further back in large venues can still see what’s going on.

IMAG is a very tricky task at the best of times, one that calls for excellent planning, and where possible, testing. Those designing an IMAG installation have, not just one, but two inter-related broadcasts to consider – in the form of the audio and video streams.

C.2.1 RELATIVITY AND THE SPEED OF LIGHT

Wouldn’t it be nice if audio and video travelled from their respective broadcast devices at the same speed? Then, wherever you were seated in the audience, the sound from hypothetically perfect speakers and the video image from huge video displays co-located at the front of the auditorium would reach your ears and your retinas at precisely the same moment!

This is not the case, however. Sound travels quite slowly – so slow, in fact, that even in relatively small venues it reaches those in the rear of the audience noticeably later than those in the front.

In loose terms, for a mid-size auditorium 600 feet long, it takes around a half-second for the audio to reach those in the back. For this reason, audio engineers often position speakers throughout the ‘house’, then introduce carefully considered delays by electronic means – to ensure ‘late sound’ from front speakers does not arrive after sound from the nearest speaker to those further back.

Light, on the other hand, travels so much faster that for all intents transmission can be considered instantaneous in the same setting. So a person in the rear will see the image on a screen at the front long before sound from a co-located speaker arrives.
If transmission of the video signal from the camera lens right through to the projection screen were instantaneous (it's not, mind you), we'd likely need to find a way to delay it. Viewed in this light, a certain amount of latency is actually “A Good Thing!”

C.2.2 LATENCY AND YOUR AUDIENCE

“Latency” – what’s that you ask? In this context, latency refers to the time it takes for the video signal to transit one part of the IMAG path, from camera lens to final display. Latency is usually expressed either in milliseconds or in video “frames” (typically either 25 or 29.97 to the second.)

As we said above, really a little video latency is not a bad thing as viewed from a surprisingly short distance back into the audience. This is just as well, since for all practical purposes a little latency is also unavoidable.

Even so, as long as audio and video are in sync at your seat, only a rather ‘significant’ degree of latency will be objectionable – unless you happen to be very near the stage. For those in the front rows, a few extra frames of latency may be rather disconcerting. (It's true that IMAG was conceived primarily for the benefit of those further back, but if the latency is too obvious for those nearest the front it can be disconcerting distraction.)

For this reason, it's desirable to keep video latency to an agreeable minimum – but put away any notion of ‘zero latency.’ Not only would this require bending the laws of physics, it would be a bad idea.

Even before considering minimizing latency in the device chain, acknowledging that there is always going to be some latency calls for some creative thinking with regard to practical staging. For example, if you design your IMAG layout in such a fashion that those in the front row are unlikely to be able to see the screen(s) without lifting their eyes from the onstage talent, they are extremely unlikely to notice a small amount of latency.

C.2.3 LATENCY AND YOUR NEWTEK SYSTEM

NewTek systems excel at IMAG, but inevitably constitute just one (albeit critical) link in a chain of devices. It is common for each device to contribute a little to the combined total latency for the system.

Your NewTek system’s portion of the total latency is well within acceptable standards for devices of this sort – roughly between 1 and 2.5 frames (the actual amount can vary slightly within this range, depending on several factors).

For example, suppose a ‘video frame’ supplied by a camera arrives at an input one millisecond after a different frame has been sent to the output. Obviously the new arrival must wait its turn; it can’t be transmitted until the correct duration for its predecessor has elapsed. Thus the newly arrived frame must ‘wait’ almost one entire frame, until its turn comes.

How can you achieve the lowest possible latency for the switcher’s section of the IMAG chain? One trick is to ‘Genlock’ your cameras to the switcher output (see Sections Section 3.6, Section 3.13 and 8.2.2). This bypasses input time-base correctors, ensuring latency is consistent during switching operations. For genlocked sources, consider disabling Frame Sync – see Section 8.1.1.
Hint: You can actually assess the latency of your pipeline fairly easily. Run timecode directly to 1) a monitor and at the same time 2) through the switcher to a second (identical) monitor. Take a photograph that encompasses both monitors, and compare the timecode shown.

C.2.4 OTHER SOURCES OF LATENCY

More often than not, significant latency is added by other devices in the IMAG chain that come after the switcher. Projectors are a common contributor, but at times the cameras themselves are a factor.

Here are some helpful points to consider when designing and connecting your system:

- If you use Multiview output from the switcher to the projector – if at all possible, match the resolution sent from the switcher to the native resolution of the projector. (On some projectors this allows the unit to avoid using its own internal scaling, which is often a significant factor in unwanted latency.)

- When possible, try supplying the projector with analog video. This can eliminate a lot of the complexity from the process (of course, this is not always possible.)

- Certain projectors provide a 'low latency mode' to disable features of the unit that carry a heavy toll in latency. Enabling this mode can make positioning the projector slightly more challenging (as you may sacrifice some ability to position and scale the image using projector menu functions) – but the latency reduction can be very worthwhile.

- Some cameras include features that add more latency than you would expect. For instance, image stabilization (by definition) adds one field of latency and sometimes more. Disable anything of that sort that you can.

- Latency may be slightly lower for progressive sessions, so for lowest latency, (genlocked) 720p cameras and session are theoretically ideal (again, for genlocked sources, consider disabling Frame Sync – see Section 8.2.3).
An oft-heard expression is "Don’t worry – we’ll fix it in post". Post-production techniques are invaluable, but they do not invalidate another often repeated axiom – “Garbage in, garbage out.” And, in the case of live production, the results are immediately obvious to your audience … for good or for bad.

For these reasons and many more, it’s important to control the visual quality of your work all the way through the production pipeline. Adequate lighting, good cameras, and high-quality connections are critical, but there are other things to consider.

Human vision is remarkably adaptable. In one study, participants equipped with inverting lenses initially saw everything upside-down. After a few days, people reported that things appeared right-side-up again.

Even when things are dramatically wrong our brains compensate to a remarkable degree. Have you ever looked at a television in a store without noticing anything untoward, and then realized that the colors on another unit nearby looked much better?

This built-in tolerance makes it difficult for us to judge whether the blacks in our video productions are really black – or just dark gray; whether reds are purple or tinged with a slight greenish caste, and so on. What we really need is a reference for comparison – just as we find it easier to pick the best-looking display from a row of television sets on a store shelf.

D.1 WHAT (AND WHERE) TO CALIBRATE?

Tip one – forget ‘point and shoot’. Lighting, set design, and countless other factors have an impact on the video attributes our cameras ‘see’.

As a first step, cameras need to be properly calibrated. Ideally, this is done right at the camera. Corrective measures taken downstream never fully compensate for problems at the first link in the chain. Most cameras, even inexpensive consumer models, provide adequate controls for this purpose. Some other video sources do not offer much if anything in the way of adjustment, however. You may need to adjust the Proc Amp settings to improve previously recorded video played from a DVD player, or a networked ‘video chat’ system.

In both cases above, the Waveform and Vectorscope monitors will help. We also need to give consideration to downstream devices, though.

Computer displays are inherently different than television sets. Thus the video you see on your computer interface can vary quite a bit from what your viewers see on their televisions. Too, you will want to be able to correctly judge colors when preparing titles and graphics. It will help you a great deal if your downstream video monitors are properly set up to allow you to make these judgments.
CALIBRATING VIDEO SOURCES

The obvious disparity between neighboring televisions on display in a store amply demonstrates that even identical (and brand-new) video devices can differ dramatically. When mixing multiple cameras we need to ensure that their output matches. Switching to a camera with obviously different color characteristics will be seen as a glaring error by your viewers.

Even when we restrict matters to a single unit, color characteristics can change as the system warms up, and as it ages. For this reason, it's important to allow a device to warm up before attempting to calibrate it.

SETTING BLACK AND WHITE

Naturally, the color range available for transmission and recording is bounded at the upper level by white and at the lower level by black. Anything else falls somewhere in-between.

Consider what happens if you gradually raise the brightness control on your television. Beyond a certain point (and unlike claims made for laundry detergent) your whites do not become whiter. They can’t – the upper limit (white) is firmly fixed. Instead, parts of the image that are nearly white are boosted, eventually also becoming white. Meanwhile, black portions of the picture are tending towards gray. Since white cannot become whiter, and black has become gray, we could say that the dynamic range of the image has been narrowed. The net result is a less vibrant image.

The same thing is true for video from your cameras. If the black and white levels from the camera are incorrect, you are effectively losing either shadow or highlight detail. For this reason, the first thing many do is calibrate their camera for correct levels.

WAVEFORM MONITOR

From days of old, for video engineering purposes the scale between black and white was defined in IRE units (IRE being an acronym for “Institute of Radio Engineers”). White was pegged at 100 IRE. For PAL (and NTSC-J) countries, black was defined as 0 IRE. For NTSC lands, black properly sat at 7.5 IRE.

Thankfully, the day of strict adherence to these analog video concepts has virtually disappeared. Today, confirming that the black and white levels your camera is sending are correct is as simple as sending first black, and then white (or the brightest part of your scene, and reading values from the scale alongside the Waveform scope.

Hint: Your system automatically compensates for the traditional 7.5 IRE black (also known as “setup” and “pedestal”) in SD format NTSC sessions.

Connect your camera to the correct input, block the lens so it receives no illumination, and check the level shown in the Waveform monitor. Generally, it should be 16 on the 8bit scale.

To check white, use either the brightest part of your scene or a white card, ensuring that it is evenly illuminated with the same lighting your main subject will receive. Move in or zoom to fill the viewfinder with this, and confirm that the Waveform monitor is showing 235 on the same scale. Otherwise, you might try using your camera’s Auto White Balance feature with the white card – your camera manual will provide instructions. Afterwards, check the black level again.
Some more professional cameras offer full manual controls for white balance and/or black level. Use these as instructed to ensure your camera is providing the correct white and black levels.

If you cannot make source adjustments, or can’t get it quite right by these means alone, you can use the Brightness and Contrast controls in the Proc Amp for that input to tweak black and white levels. (Of course it is always best to perform adjustments at the source if possible.)

D.2.2 ADJUSTING COLOR

We’re going to move into color calibration next, but first we can actually use our black and white signals for some further tests.

Vectorscope

While we’re still working with black and white levels, we can introduce the Vectorscope, and perform an initial test of the camera’s color balance.

A vectorscope (Figure 326) can be likened to the familiar ‘color wheel’ (Figure 327) which sweeps radially through the colors of the spectrum – yellow, red, magenta, and so-on, around the arc of a circle. Colors are more progressively intense (saturated) towards the outside of the circle, while color saturation is zero at its center.

As it happens, from the vectorscope point of view, neither black nor white properly have any color saturation. Thus with the lens cap on (or with a white card filling the viewfinder), the vectorscope should show only a small fuzzy trace at its center. If the fuzzy dot is off-center horizontally or vertically, this would indicate that the camera is incorrectly calibrated, actually tinting gray areas.

When the trace is off center, the direction and distance of the offset tells us what sort of tint (and how much) is represented by the deviation. You may be able to use the color controls at your camera to correct for this offset, or you can use the Proc Amp’s U Offset and V Offset controls to do so (as always, source controls are best). Adjustments to U Offset move the trace left or right, while V Offset changes adjust its vertical position.
Let's move on to a slightly more rigorous testing.

D.2.3 COLOR METRICS

At this point, we've assured ourselves that the signal from the camera is neither too bright nor too dark, that its output falls within broadcast legal luminance limits, and that the black & white part of the signal does not have an unwanted color cast.

We haven't done anything yet, though, to assure our reds are red, not slightly brown, or that our blues are not slightly green or magenta, etc. The Vectorscope can provide much more specific information about your cameras color signal. Let's see how it can assist you to ensure your colors are accurate.

USING COLOR BARS

You'll no doubt have seen the familiar color bars used as a standard reference for video signal calibration. Two examples are shown here. Figure 328 (NTSC) is an example of the color bars used in NTSC countries, while Figure 329 (PAL) is a PAL example, common throughout European nations.

![Figure 328 (NTSC)](image)

![Figure 329 (PAL)](image)

You can use color bars in conjunction with Waveform and Vectorscopes to make sure the video supplied to is consistent, accurate and broadcast legal. Most video cameras are capable of displaying color bars – check your camera manual to see how to display these (given a choice, use 75% bars). Then look at the Vectorscope to see how it traces the individual colors comprising the image.

The Vectorscope graticule has six distinct rectangular targets, one each for Yellow, Red, Magenta, Cyan, Blue, and Green. The targets are small rectangles with a cross-hair superimposed on them.

When a source is properly calibrated, the trace from the different colored segments of the color bars displayed will fall right inside their individual targets (see Figure 330).
If the trace vectors do not line up as they should even after performing a white balance at the camera, you can use Proc Amp controls to tweak the signal.

Adjust the Hue control to rotate the vectors around the center point to line them up correctly on their respective targets. Increasing Saturation will move the trace further out towards the edge of the scope. Decreasing Saturation lowers color intensity, bringing the trace back closer to the center.

Hint: Naturally, you should repeat the steps above for each connected source, to ensure a perfect match when switching from camera to camera during your live productions.

At this point, your video signal should be reasonably accurate, and broadcast legal. Naturally, there are other devices between that signal, you, and your viewers. Let’s discuss ways to calibrate downstream video monitors to ensure that you see your video at its best.

D.3 CALIBRATING YOUR MONITORS

In most cases, you will use a computer monitor of one type or another to display your system’s controls – the user interface. Even though the television monitors you likely use for final program output may look somewhat similar to your computer monitor, they do differ in a number of important respects. For this reason, we will approach their calibration separately.

D.3.1 COMPUTER MONITOR

This is a subject that could (and does) easily fill multiple volumes, but which we will sadly give short shrift. It may not be quite as important to achieve ‘spot-on’ color calibration for the monitor used for the user interface. Not surprisingly, video output color is best judged on larger downstream video monitors.

Nevertheless, you may find a trip to one of any number of websites providing test imagery and calibration hints useful. A search for “computer monitor calibration” will yield an endless list, along with some commercial utilities for those who feel the need. Here are links to several such sites:

http://epaperpress.com/monitorcal/
http://www.lagom.nl/lcd-test/
http://www.jasc.com/support/kb/articles/monitor.asp
D.3.2 PROGRAM OUTPUT MONITOR

Again, a search of the Internet for “video monitor calibration” will yield a large number of resources, both free and commercial. If you have television monitors connected to your outputs, though, you can make further use of the color bars. The approach is somewhat similar to what we did for our video sources, in that the first adjustments are to ensure that black and white levels are correct. Color calibration is performed afterward.

First, warm up your monitor for at least 10 minutes (some sources recommend a half-hour), to stabilize its output. Dim room lights and window light, to eliminate light sources that might skew your color perception. Pass the color bars from your camera through to program output (or use a color bars image in one of the Media Players for this purpose.

D.3.3 COLOR ADJUSTMENTS

Having set the black and white levels earlier, let’s continue...

NTSC

1. If your monitor has a “Blue-gun only” setting, enable it. Depending on the brand of your monitor, the alternating bars will appear either as light gray and black, or blue and black (Figure 331).

2. If the monitor lacks a “Blue-gun only” feature, you can obtain a colored filter such as a Kodak Wratten #47B gel, and hold that between your eyes and the monitor for a similar result.

3. Tweak the Color (or Saturation) knob until the small rectangular patches at very bottom of the tall upper bars on the extreme right and left of your screen merge with the tall bars above.

4. Tweak the monitor’s Hue control until the small rectangles beneath the third and fifth tall upper bars likewise blend into bar above.
5. You may need to redo the last two steps several times, balancing the adjustments of these two controls until all four of the lighter bars evenly match the smaller rectangles just beneath them. (Note that a perfect match simply may not be possible on some monitors.)

6. Check your results with some familiar imagery, and make any further tweaks you feel are required.

---

**PAL**

1. If your monitor has a “Blue-gun only” setting, enable it. Raise the Color or Saturation setting until the three right hand bars all appear to be the same shade.

2. If the monitor lacks a “Blue-gun only” feature, you can obtain a colored filter such as a Kodak Wratten #47B gel, and hold that between your eyes and the monitor for a similar result.

3. Turn off the “Blue-gun only” feature (or dispense with the filter if you used one), and examine the red bar. It should appear not be so vivid that it bleeds onto the nearby bars.

4. Check your results with some known familiar imagery, and make any further tweaks you feel are required.

---

**D.4 FURTHER READING**

You may find it helpful to review the white paper, available from NewTek’s website, entitled “NewTek TriCaster Scopes – How and Why”, by Allan Tépper. This document provides many helpful insights into waveform and vectorscope use, as well as the development and application of video standards.
## Appendix E: KEystroke Shortcuts

### E.1 Switcher...

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<tr>
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<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Row, Inputs 1 to 24</td>
<td>F1 – F12 plus [Shift + F1-12]</td>
</tr>
<tr>
<td>Preview Row, Inputs 1 to 24</td>
<td>1 – 0, -, =, and [Shift + 1-0, -, =,]</td>
</tr>
<tr>
<td>Transition Delegate – select BKGD</td>
<td>[ key (left square bracket)</td>
</tr>
<tr>
<td>Transition Delegate – multi-select BKGD</td>
<td>Shift + [</td>
</tr>
<tr>
<td>Transition Delegate – select DSK 1</td>
<td>] key (right square bracket)</td>
</tr>
<tr>
<td>Transition Delegate – multi-select DSK 1</td>
<td>Shift + ]</td>
</tr>
<tr>
<td>Transition Delegate – select DSK 2</td>
<td>\ key (backslash)</td>
</tr>
<tr>
<td>Transition Delegate – multi-select DSK 2</td>
<td>Shift + \</td>
</tr>
<tr>
<td>Transition Delegate – select DSK 3</td>
<td>Backspace</td>
</tr>
<tr>
<td>Transition Delegate – multi-select DSK 3</td>
<td>Shift + Backspace</td>
</tr>
<tr>
<td>Transition Delegate – select DSK 4</td>
<td>Insert</td>
</tr>
<tr>
<td>Transition Delegate – multi-select FTB</td>
<td>Shift + Insert</td>
</tr>
<tr>
<td>Transition Delegate – multi-select FTB</td>
<td>b</td>
</tr>
<tr>
<td>Select FTB Delegate and perform Fade</td>
<td>Ctrl + b</td>
</tr>
<tr>
<td>Auto DSK 1 On/Off</td>
<td>a</td>
</tr>
<tr>
<td>Auto DSK 2 On/Off</td>
<td>s</td>
</tr>
<tr>
<td>Auto DSK 3 On/Off</td>
<td>d</td>
</tr>
<tr>
<td>Auto DSK 4 On/Off</td>
<td>f</td>
</tr>
<tr>
<td>Take DSK 1 On/Off</td>
<td>Shift + a</td>
</tr>
<tr>
<td>Take DSK 2 On/Off</td>
<td>Shift + s</td>
</tr>
<tr>
<td>Take DSK 3 On/Off</td>
<td>Shift + d</td>
</tr>
<tr>
<td>Take DSK 4 On/Off</td>
<td>Shift + f</td>
</tr>
<tr>
<td>Select Transition (prev/next)</td>
<td>, and . (comma and period)</td>
</tr>
<tr>
<td>Select Fade Transition</td>
<td>Ctrl + f</td>
</tr>
<tr>
<td>Restore Last Transition</td>
<td>Shift + Ctrl + f</td>
</tr>
<tr>
<td>Transition – Slow ... Medium ... Fast</td>
<td>z...x... c</td>
</tr>
<tr>
<td>Transition – Increase Speed</td>
<td>Shift + c</td>
</tr>
<tr>
<td>Transition – Decrease Speed</td>
<td>Shift + z</td>
</tr>
<tr>
<td>Toggle Reverse Transition On/Off</td>
<td>e</td>
</tr>
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<td>Ping Pong Transition (off/on)</td>
<td>Alt + e</td>
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<tr>
<td>Take</td>
<td>Return Key</td>
</tr>
<tr>
<td>Take T-bar Back to Top</td>
<td>Shift + Return</td>
</tr>
<tr>
<td>Transition ... Go/Pause</td>
<td>Spacebar</td>
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<th>Key(s) Description</th>
</tr>
</thead>
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<tr>
<td>Record on/off</td>
<td>r/ Shift + r</td>
</tr>
<tr>
<td>Grab (still image)</td>
<td>p</td>
</tr>
<tr>
<td>Stream Start</td>
<td>Ctrl + /</td>
</tr>
<tr>
<td>Stream Stop</td>
<td>Ctrl + Alt + /</td>
</tr>
</tbody>
</table>

### E.4 TABS

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<tr>
<th>Action</th>
<th>Key(s) Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show (DDR, PTZ, Mixer, etc.) tab</td>
<td>Ctrl + (F1 to Fn)</td>
</tr>
<tr>
<td>Select M/E 1-8</td>
<td>Ctrl + Shift + F1-F8</td>
</tr>
<tr>
<td>Show M/E pane</td>
<td>Ctrl + m</td>
</tr>
<tr>
<td>Hide M/E pane</td>
<td>Alt + m</td>
</tr>
<tr>
<td>Toggle M/E pane</td>
<td>m</td>
</tr>
</tbody>
</table>

### E.5 WORKSPACE

<table>
<thead>
<tr>
<th>Action</th>
<th>Key(s) Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Interface A</td>
<td>Alt + Numpad 0</td>
</tr>
<tr>
<td>Show Interface B</td>
<td>Alt + Numpad 1</td>
</tr>
<tr>
<td>Show Interface C</td>
<td>Alt + Numpad 2</td>
</tr>
<tr>
<td>Show Interface D</td>
<td>Alt + Numpad 3</td>
</tr>
<tr>
<td>Show Multiview A</td>
<td>Ctrl + Numpad 0</td>
</tr>
<tr>
<td>Show Multiview B</td>
<td>Ctrl + Numpad 1</td>
</tr>
<tr>
<td>Show Multiview C</td>
<td>Ctrl + Numpad 2</td>
</tr>
<tr>
<td>Show Multiview D</td>
<td>Ctrl + Numpad 3</td>
</tr>
</tbody>
</table>

### E.6 MEDIA PLAYERS

<table>
<thead>
<tr>
<th>Action</th>
<th>Key(s) Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stop</td>
<td>k</td>
</tr>
<tr>
<td>Play</td>
<td>l (lower case L)</td>
</tr>
<tr>
<td>Go to previous playlist item</td>
<td>j</td>
</tr>
<tr>
<td>Go to next playlist item</td>
<td>; (semi colon)</td>
</tr>
<tr>
<td>Autoplay On/Off</td>
<td>u</td>
</tr>
<tr>
<td>Loop On/Off</td>
<td>' (apostrophe)</td>
</tr>
<tr>
<td>Single On/Off</td>
<td>q</td>
</tr>
<tr>
<td>Navigate through Playlist items</td>
<td>Up/Down/Left/Right Arrows</td>
</tr>
<tr>
<td>Set In Point for current Playlist Item (Clip or Audio file)</td>
<td>i</td>
</tr>
<tr>
<td>Action</td>
<td>Keyboard Shortcut</td>
</tr>
<tr>
<td>--------</td>
<td>------------------</td>
</tr>
<tr>
<td>Set Out Point for current Playlist Item (Clip or Audio file)</td>
<td>o</td>
</tr>
<tr>
<td>Split clip at current frame</td>
<td>/</td>
</tr>
<tr>
<td>Reset In and Out Point to the file’s first and last frame</td>
<td>g</td>
</tr>
</tbody>
</table>

**E.7 GENERAL**

**E.7.1 EDIT TITLE PANE**

<table>
<thead>
<tr>
<th>Action</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save the current title page</td>
<td>Ctrl + Shift+ s</td>
</tr>
<tr>
<td>Save the current title page, and duplicate it in the playlist</td>
<td>Ctrl + Shift+ s</td>
</tr>
<tr>
<td>Save the page and move to the previous playlist item</td>
<td>Page Up</td>
</tr>
<tr>
<td>Save the page and move to the next playlist item</td>
<td>Page Down</td>
</tr>
</tbody>
</table>

**E.7.2 SELECTION AND NAVIGATION**

<table>
<thead>
<tr>
<th>Action</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All</td>
<td>Ctrl + a</td>
</tr>
<tr>
<td>First/Last Item</td>
<td>Home/End</td>
</tr>
<tr>
<td>Navigate through Playlist items</td>
<td>Up/Down/Left/Right Arrows</td>
</tr>
<tr>
<td>Select All Previous/Following Items</td>
<td>Shift + Home/End</td>
</tr>
<tr>
<td>Playlist - select to Top/Bottom</td>
<td>Shift + Home/End</td>
</tr>
<tr>
<td>Playlist – add to selection (Up/Down)</td>
<td>Shift + Up/Down arrow</td>
</tr>
</tbody>
</table>

**E.7.3 Misc.**

<table>
<thead>
<tr>
<th>Action</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>Ctrl + x</td>
</tr>
<tr>
<td>Copy</td>
<td>Ctrl + c</td>
</tr>
<tr>
<td>Paste</td>
<td>Ctrl + v</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete Key</td>
</tr>
<tr>
<td>Show version</td>
<td>Alt + b</td>
</tr>
</tbody>
</table>
Appendix G: RELIABILITY TESTING

We know our products play vital roles in the productions of our customers. Durability and consistent, robust performance are much more than just adjectives for your business and ours.

For this reason, all NewTek products undergo rigorous reliability testing to ensure they meet our exacting test standards. For TC2 Elite, the following standards are applicable:

<table>
<thead>
<tr>
<th>Test Parameter</th>
<th>Evaluation Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temperature</td>
<td>Mil-Std-810F Part 2, Sections 501 &amp; 502</td>
</tr>
<tr>
<td>Ambient Operating</td>
<td>0°C and +40°C</td>
</tr>
<tr>
<td>Ambient Non-Operating</td>
<td>-10°C and +55°C</td>
</tr>
<tr>
<td>Humidity</td>
<td>Mil-STD 810, IEC 60068-2-38</td>
</tr>
<tr>
<td>Ambient Operating</td>
<td>20% to 90%</td>
</tr>
<tr>
<td>Ambient Non-Operating</td>
<td>20% to 95%</td>
</tr>
<tr>
<td>Vibration</td>
<td>ASTM D3580-95; Mil-STD 810</td>
</tr>
<tr>
<td>Sinusoidal</td>
<td>Exceeds ASTM D3580-95 Paragraph 10.4: 3 Hz to 500 Hz</td>
</tr>
<tr>
<td>Random</td>
<td>Mil-Std 810F Part 2.2.2, 60 minutes each axis, Section 514.5 C-VII</td>
</tr>
<tr>
<td>Electrostatic Discharge</td>
<td>IEC 61000-4-2</td>
</tr>
<tr>
<td>Air Discharge</td>
<td>8K Volts</td>
</tr>
<tr>
<td>Contact</td>
<td>4K Volts</td>
</tr>
</tbody>
</table>
Appendix H: CUSTOMER SUPPORT

It is frequently said that “All good things must come to an end” ... but your NewTek live production system is designed to work as well on any day as it did on the day you bought it. NewTek’s Customer Support features and options are meant to help you achieve that goal. This chapter identifies the many assets and services available to you.

H.1 PRODUCT SUPPORT

Product support is available for as long as you own your NewTek system. Find complete details on our main Support page at https://www.newtek.com/support/get-support/

- **Training:**
  - NewTek University: Our new online training will help you take advantage of the countless creative possibilities your unit offers (you can also become a Certified Operator once you pass the exam) – see http://new.tk/learn
  - Discover: Watch our online videos to learn the benefits and features of NewTek professional video production systems https://www.youtube.com/c/NewTekInc

- **Software Updates:** visit https://www.newtek.com/downloads/

- **Knowledge Base:** Our extensive online knowledge base will help you troubleshoot issues and clear up any misunderstandings – see https://support.newtek.com/hc/en-us

- **Chat:** When you need it, direct chat support is available in our Support webpages (under the heading Live Customer Support – see https://www.newtek.com/support/get-support/#request

- **Warranty:** Learn about warranty provisions and check the status of your NewTek systems at http://new.tk/warranty.

- **NewTek User Forums:** Join the conversation, get answers, learn techniques and share ideas with users like yourself at http://forums.newtek.com.

---

H.1.1 THE PROTEK℠ ADVANTAGE

The option ProTek plan goes far beyond basic service, offering you NewTek-provided priority service for however long you own your product. ProTek enhances your support experience—every step of the way.

- With ProTek coverage, you’re part of a select group of customers whose needs are our first priority.
- Every ProTek Elite customer gets the white-glove treatment by their local Elite Service Provider.
- ProTek Care customer calls and emails are answered first.
- ProTek gives you priority access to the people who can answer your questions, help you with configuration, and walk you through solutions, step by step.
- And if disaster should strike and your NewTek product needs repair, we're standing by ready to provide the best access. You get free overnight shipping.
- If you opt for a repair rather than a replacement, you get a guarantee that within three to five days of receiving your product it will be on its way back to you.
• If your product needs to be back in service immediately ProTek Care customers can usually get a replacement shipped right to your doorstep the very next day. Find full details of the ProTek program at http://new.tk/ProTek.
Appendix I: RESTORE FACTORY DEFAULTS

I.1 CREATE A ‘USER BACKUP’ DRIVE

The Backup and Restore system permits you to create a bootable clone of TriCaster’s system drive on another (same size) hard drive inserted into one of the removable drive bays or connected externally for this purpose.

The clone operation includes:

- The hidden, factory-prepared Restore partition
- It is critical that you back up before restoring and move your folders to D: drive. This procedure restores your system drive (“C:”) to its ‘as-shipped’ state. The “D:” drive, which holds content and sessions won’t be modified.

Afterward, the backup drive can be removed and stored, to be used later if necessary, to i) restore the internal drive should, or ii) in the case of a catastrophic drive failure, to be connected internally to completely replace the original drive.

Note: Since opening TriCaster’s case is a breach of warranty, please call Customer Service to obtain direction before proceeding with an internal drive replacement.

The actual creation process for the backup is discussed in the next section.

I.2 RESTORE TRICASTER SOFTWARE

We firmly expect you will never need it, but isn’t it good to know that comprehensive TriCaster Restore features are available in the event of an unforeseen problem? You can use one of two methods to access TriCaster’s Restore features, depending on your situation.

To restore your TriCaster system software after the system launches normally:

1. Click the Shut Down icon on the Home Page of the Startup Screen.
2. Click the Administrator Mode link at right to exit the TriCaster environment.
3. In the Administrator Mode screen, select the link labeled Backup or Restore System.
4. Select the Restore Factory Defaults bootup option.

If TriCaster should ever fail to boot up properly, you may need to try a different approach to restore your TriCaster system software, as follows:

1. Select the menu item labeled Restore Factory Defaults from the black boot screen that appears shortly after powering TriCaster up. (If this screen does not automatically appear, reboot and press F8 a few times in quick succession, say once per second, immediately after powering up.)
Either method described above will ultimately present you with powerful system backup and restore tools. The management screen initially presents you with 3 options as follows:

- **Restore System Partition to Factory Defaults**: overwrites the C partition (only) on the existing system drive from the disk image in its local Restore partition.

  **Note**: Following a Reset to Factory Defaults operation, the Windows® system software must be re-activated. To do this, you will need the operating system serial number, which you will find on a sticker affixed to the exterior of your TriCaster.

  **This procedure restores your system drive (“C.”) to its ‘as-shipped’ state. The “D:” drive, which holds content and sessions won’t be modified.** However any TriCaster software updates (possibly including optional TriCaster expansion packs) will be overwritten – so use this function only when necessary. When you do restore, remember to update the TriCaster software afterward.

- **Create User Backup Drive**: create a bootable clone of the entire system drive (as it exists at the time) on either an external HDD or a drive mounted in a removable hard drive bay.

  The clone operation includes:

  - The existing (factory-prepared) Restore partition
  - The complete C partition

  In cases of catastrophic drive failure requiring drive replacement, a service technician can simply connect the User Backup ‘clone’ drive in place of the original internal system drive and you’ll be back in production (prudence would call for creating a new User Backup drive as the first order of business).

- **Restore System Partition from User Backup Drive**: overwrites the C partition (only) on the existing system drive with the C partition on the external user backup drive. This allows you to insert a User Backup drive into a removable drive bay (or otherwise connect it), and regain a functional system partition as stored on the clone drive.

  **Note**: This feature it is intended to allow a restore operation of the system drive that the clone was prepared on. *It is not intended to allow restoration from a ‘foreign’ TriCaster*. Using the ‘Restore System Partition from User Backup Drive’ in the latter manner will almost certainly cause multiple problems. In a dire emergency, however (such as if a system drive fails when no User Backup from the same unit has been prepared) a User Backup created on a similar model TriCaster can be helpful, as follows:

  - Install the ‘foreign’ User Backup drive to replace the defunct system drive.
  - Power up, and – at the boot selection screen – select ‘Manage TriCaster’.
  - Choose ‘Restore System Partition to Factory Defaults’, and follow prompts.

  It will be necessary to re-activate Windows, re-enter the registration unlock code, and possibly update the TriCaster software after the restoration process in this case. Be aware that the approach above is not
encouraged, since minor hardware differences between the two TriCasters involved may well result in issues in the resulting Windows installation. As well, the new system drive will no longer have a factory restore partition. Still, it might be better than nothing in a crisis.

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