



Cumulus®

# Canto® Cumulus® 5.5

## Single User Edition

A user's guide to the Canto Cumulus  
Digital Asset Management System.

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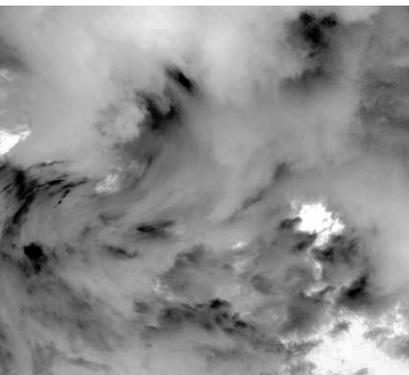
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The Cumulus® Digital Asset Management System provides powerful tools for creative professionals. At the heart of the extensive Cumulus feature set is the ability to store any type of digital media assets, including all types of documents, images, audio, video, layouts from publishing programs, presentations, and PDF files. And because you can't run a business on art alone, Cumulus also offers support for less "inspirational" file types, like word-processing documents and spreadsheets. Once assets are stored, Cumulus becomes a central media repository from which you and your co-workers can view, locate, search, organize, copy, move, categorize, and otherwise manipulate the cataloged assets. Once you've settled on a process for storing and retrieving your media assets that works for you, the process can be automated, further enhancing the efficiency of your creative workflow.

# 1

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# Intro

## Cumulus

Canto offers three different editions of Cumulus:

- Cumulus Single User Edition
- Cumulus Workgroup Edition
- Cumulus Enterprise Edition

The different editions of Cumulus are designed to meet the needs of anyone who wants to keep track of their digital media, from the budding photographer or hobby homepage designer to international multiple server, cross-platform environments in huge corporate settings. To meet individual workflow needs, Canto has developed a range of additional add-on products.

Optional components of the Cumulus Single User Edition include e.g.:

- Cumulus Viewer
- Cumulus PowerPoint SupportKit
- Asset Storage Modules

## This User Guide

This guide covers the functionality of the Cumulus Single User Edition.

### Organization

This guide offers the following basic ways to learn about Cumulus:

- Table of Contents – Find information based on section and heading.
- Index – Find information based on alphabetical listing by topic.
- Tutorial – Learn step-by-step how to build and use a simple Cumulus catalog. (See “Learn” chapter, starting on page 23.)
- Concept – Learn Cumulus basics. (See “Explore” chapter, starting on page 41.)
- Tasks – Learn Cumulus based on the need to do a certain task. (See “Use” chapter, starting on page 61 and “Present & Share” chapter, starting

on page 93. See “Catalog Maintenance” section, starting on page 75, for actions related to using and managing Cumulus catalogs.)

- Reference – Learn what the program can do based on what each menu option does. (See “Reference,” p. 111, and “Additional Functions,” p. 127.)

Information is not necessarily presented in the order in which you should read it. The way you’ll use Cumulus determines what information is of most use and importance to you.

Here are some guidelines based on user experience:

- “I know nothing about Cumulus or my computer.”

If this is you, then you need to read the manual that came with your operating system before you try to learn to use Cumulus. Cumulus is very easy to use, but it relies on many user interface conventions found on the supported platforms (drag and drop, opening and closing files, etc.). If you’re not familiar with using your computer, you’ll get lost pretty quickly.

- “I’ve got my computer down, but I’ve never used Cumulus or anything like it. All I need to do is access some Cumulus catalogs that are already made.”

The tutorial that starts in Chapter 3, “Learn,” p. 23, should be your first step. It’s a pretty quick read that will have you up and running in no time. After reading the tutorial chapter, you’ll find Chapter 8, “Reference,” p. 111, very useful. It offers a menu-by-menu rundown of the entire program. At some point you should glance over Chapter 5, “Use,” p. 61, for a better understanding of Cumulus and what’s possible.

- “I’ve got my computer down, but I’ve never used Cumulus or anything like it. And I need to build my own file collections.”

It’s best to start with the tutorial, Chapter 3, “Learn,” p. 23. To get you up to speed on Cumulus basics, read Chapter 4, “Explore,” p. 41. But before you start doing any real work, make sure that you’ve read Chapter 5, “Use,” p. 61. This section explains some

very important stuff that you should know before building your own catalogs. While using the program, you'll find Chapter 8, "Reference," p. 111, a great resource.

- "I'm already familiar with programs like Cumulus. This is nothing new to me."

You may want to start out in Chapter 8, "Reference," p. 111, to get an idea of the options available in Cumulus. But it's also a good idea to skim through Chapter 5, "Use," p. 61, and Chapter 6, "Present & Share," p. 93, to make sure there's nothing that you've missed.

- "I'm a complete Pro. There's nothing that this manual could tell me that I don't already know. I've seen it all, done it all, know it all!"

Canto accepts job applications online and is always looking for a few more geniuses like you. ([www.canto.com](http://www.canto.com))

### Cross-Platform Issues

Cumulus is a cross-platform application, meaning that it runs on Windows® and Mac® OS (Macintosh®) systems. Though most of the program's features are identical in each version, portions of the user interface differ due to operating system conventions. These differences are explained when necessary and assumed otherwise (e.g., the difference between "maximizing" a window in Windows, and "zooming" a window in the Mac OS is not explained).

Because there are so few differences between the Windows and Mac OS versions of Cumulus, the illustrations in this guide apply to both platforms except where indicated.

🍏 Sections that pertain only to the Mac OS are denoted by the icon to the left of this paragraph.

🖥️ Sections that pertain only to Windows are denoted by the icon to the left of this paragraph.

### User Interface Item Conventions

To differentiate user interface items—buttons, menus, text fields, etc.—from surrounding text, those items are displayed in **bold**. For example:

"Click the **Open** button."

To differentiate menu hierarchies, the ⇨ character is used. For example:

"Select **File⇨Open** to open a file."

This example means to select the **Open** item from the **File** menu.

### Cumulus Step by Step

Instructional steps are identified by the following structure:



1. This would be the first instruction. The mouse icon makes it easy to identify.
2. The final instruction has a border beneath it, indicating that there are no further steps.

## Your Experience

You're a busy professional. You probably don't have time to read this entire manual before you get started with the program. To ensure that the amount of material found within this document is kept to a minimum, assumptions about your experience have been made.

This manual assumes that you have a basic understanding of the use of your computer's operating system and the terminology used therein. For example, if you were to be asked to open a file, would you know how? How about saving a file in a new location? Or changing window sizes? If these actions are child's play for you, then you're set. If not, review the user instructions that came with your computer.

Cumulus is a well-designed, easy-to-use program that takes advantage of operating system standards. As such, many of its features will be obvious to you. Any parts of the program that are unique to using Cumulus are explained in detail.

## Understanding Cumulus

It's helpful to understand how Cumulus organizes files.

### Assets



An asset in Cumulus is simply any one cataloged file or data stream. A video clip, an audio clip, an image, or a page layout document are examples of files that are commonly cataloged in Cumulus. But the word *file* suggests an asset that is stored on a digital medium like a hard-disk or CD-ROM. What if the asset is a record in a database? This is not a file per se, but as far as Cumulus is concerned, it is a data stream that can be cataloged, kept track of and accessed.

### Catalogs

Like a filing cabinet, Cumulus catalogs serve as storage locations for asset collections. You can have as many catalogs as you like. Catalogs are cross-platform compatible, so it doesn't matter what type of computer is used to create a catalog. Catalogs are explained in detail starting on page 42.



### Collections



Collections are like snapshots from your open catalog. When you work with your assets in Cumulus, you're viewing a constantly changing group of records. Without collections, each view of this group would be lost as soon as it changed. Collections, however, enable you to capture any particular set of records and save it as you see it - all without disrupting your workflow. For example, you can modify the viewing

attributes of your records in innumerable ways, add or delete records, select the information that appears with each record, and on and on. Once you see something you like or could use again, save it as a collection and recall it whenever you need it. You can even send your collection as an attachment to an e-mail message in one easy step.

A collection also acts as your temporary workspace in Cumulus, meaning that changes made to your collections do not affect the content of your catalogs. Even deleting a record from a collection does not remove it from the catalog (unless you really want it to, which you can do, too). Collections are explained in detail starting on page 43.

### Categories

Like folders in a filing cabinet, Cumulus categories serve to organize assets (files). But here the similarities end.



Assets can appear in any number of Cumulus categories at one time. Categories are explained in detail starting on page 51.

### Records

Records represent assets. Each record represents one asset. Records hold information on the asset, such as file size, type, location and creation date, and much more. Cumulus allows the creation of customizable record fields, which can contain almost any sort of information you desire. Since these user-defined record fields are also fully searchable, you can tailor Cumulus to fit your requirements.



It's very important to draw the distinction between records and assets. Records are part of Cumulus catalogs; assets are not. Records represent assets.

## Finding Help

If you have a question that is not answered in this guide, there are a number of additional resources to check:

### Online Help for Windows Users

The Windows versions of Cumulus include an extensive online help system. Access it via the Windows **Help** menu. Similar to other Windows help systems, subjects are organized by contents and index, and are searchable (see “The Help Menu,” p. 125). There is no online help system for the Mac OS.

### Canto Online

The Canto Web site ([www.canto.com](http://www.canto.com)) contains many resources of value to you as a Cumulus user. Among them are a list of frequently asked questions (FAQ), several “How to” guides, and information on Canto’s valuable Cumulus training classes.

### Technical Support

To provide you with easily accessible, first-class assistance, Canto has partnerships with numerous distributors and resellers around the world. Technical support from your distributor via e-mail is free of charge for registered Cumulus users. For information on how to contact the distributor or reseller in your area, inquire where you purchased Cumulus or see Canto’s Website ([www.canto.com](http://www.canto.com)). Before submitting your question, please review the support form in the documentation folder on your Cumulus CD-ROM to make sure that you provide technical support with the appropriate information.

If you are a registered Cumulus user and your distributor does not provide support for Cumulus, you may address questions to:

The Americas -> [support@canto.com](mailto:support@canto.com)

Rest of World -> [support@canto.de](mailto:support@canto.de)

Additionally, you have the option of purchasing a Canto Service Agreement, which not only includes priority technical support by telephone, but also supplemental benefits, such as access to new filters and a monthly bulletin full of helpful tips, technical news and further information on Canto products. Please visit Canto’s Website to find out how to register for a Service Agreement and receive extra support.

## Expanding the Possibilities

Canto offers some optional components for the Cumulus editions to expand the functionality.

### Viewer



The Cumulus Viewer lets you distribute Cumulus catalogs and assets to others who don’t own Cumulus. Viewer catalogs can be distributed with original assets or just low resolution “comps.”

Complete searching and sorting functions are included, but Cumulus Viewer users can’t make catalogs of their own or add assets to the catalogs that you provide.

Cumulus Viewer is provided royalty-free, which means that you are never restricted by distribution license fees. You can distribute one catalog or one million. You can make catalogs available for download on the Web, on CD-ROM or any other distribution method you choose.

Cumulus Viewer is a must-have if you make your assets available for purchase or license, such as clip art or stock photography companies. But other businesses can take advantage too: museums, educational institutions and tourist bureaus could benefit from making image collections available to the public.

## The Asset Storage Modules

Back when Canto shipped the first version of Cumulus, few could have imagined that someday users might catalog or edit assets located in different time zones. The advent of the Internet, however, has not only made that concept possible, but necessary for multilocation workgroups.

To address this need, Canto has modularized the communication between the Cumulus application and database, and the media on which assets reside. The Asset Storage *manager* uses Asset Storage *modules* to facilitate this communication.

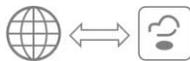
Cumulus edition comes with Asset Storage modules that provide access to assets stored on the supported operating systems' file systems—including support for the Desktop Color Separation (DCS) file format and OPI.

The Cumulus Asset Storage manager also provides a means for third parties to develop custom interfaces between the Cumulus application and external media. One company, for example, might connect to a CD-jukebox. Another might benefit from accessing assets stored in a compressed file format. Here, an Asset Storage module could be developed to automatically compress and decompress assets on the fly. An Asset Storage module could also be developed to enable direct access to assets archived by popular back-up programs.

In several years, we may look back on the idea of cataloging assets over physical wires and wonder how technology could have ever been so primitive. The Cumulus Asset Storage architecture will be ready.

## URL Asset Access

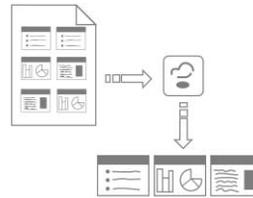
The URL AssetStore Module enables Cumulus users to catalog and access files stored on remote FTP or HTTP servers. The process couldn't be easier: type a valid FTP or HTTP URL that points to an asset, and Cumulus does the rest. For an FTP server you may also type an URL that points to a directory of assets.



Once inside a Cumulus catalog, records of URL-cataloged assets appear and behave just like any record which has been cataloged through the supported file systems. The URL AssetStore Module also enables Cumulus users to upload cataloged assets to FTP servers.

The URL AssetStore Module is installed with the Cumulus application but it will run in limited mode. This means that asset references of URL cataloged assets can be resolved but the user can not catalog from FTP or HTTP servers. For cataloging the URL AssetStore needs to be licensed.

## PowerPoint SupportKit



The Cumulus PowerPoint SupportKit allows users to efficiently manage slides created with Microsoft PowerPoint. It automatically catalogs all slides of a PowerPoint

presentation in addition to creating a record for the entire presentation document. Such cataloged slides can be added to existing PowerPoint presentations – within Cumulus as well as within Microsoft PowerPoint. Within Cumulus you may even create new PowerPoint presentations out of cataloged slides. When you are working with Microsoft PowerPoint, the Cumulus PowerPoint SupportKit allows you to insert cataloged graphics and slides into presentations.

## Usage Ideas

You probably already have a good idea of at least one way you can use Cumulus. But reading how others are using the program might inspire some creative ways to get even more from this useful tool.

### Magazine Production

Many in the field of magazine production have hailed Cumulus for its ability to maintain order in a

hectic, deadline-driven workflow. When time is scarce, files are numerous, and you've got a dozen or so people working around the clock, you have the makings for a communications breakdown that could lead to disaster. Cumulus solves those "where's the file" and "is it edited yet?" questions with its asset location and record status features. Being able to quickly see that a record is "ready for layout" helps ensure that what gets placed was ready to go.

On the business side of things, Cumulus enhances ad placement efficiency by ensuring that the most recent version of the client's ad is available to the layout artist when it's needed.

### **Image Portfolios for the Digital Age**

A freelance designer without a Web site is like...well...any designer without Cumulus! In a word: "lost." Using Cumulus, some artists have published complete, searchable portfolios online. The advantages of the Cumulus Web Publisher are obvious for those selling photo libraries and other digital media assets online.

### **Gathering Assets for Output**

Many design and layout programs lack the ability to gather all the files used in a project into one location to be transferred to the service bureau. And you know what a nightmare it is trying to gather them all manually.

Cumulus can do the gathering for you. It's as simple as dragging a Cumulus category folder onto your computer's desktop or selecting an option from a menu. All of the asset files associated with the selected category are copied into the new folder.





Canto provides installer utilities to help make the process of installing Cumulus trouble-free. This section provides instructions for installing and removing the program on all supported platforms, and also offers product registration information.

# 2

# Install

---

## System Requirements

Canto provides two levels of system requirements: *minimum* and *recommended*. Using the program on a system that falls beneath the minimum requirements may be possible, but it will most likely yield unfavorable results and is not recommended. Recommended requirements are listed below in brackets.

### Macintosh Requirements

- PowerPC® System 8.6 or later (Power Macintosh G4, Mac OS 9.1)
- 16 MB (32 MB) RAM allocated to the application
- 30 MB (40 MB) free hard disk space for installation
- 640x480 video display with 256 colors (1024x768 video display with Millions of Colors)
- CD-ROM drive for installation

### Windows Requirements

- Pentium® 90 MHz (Pentium III 850 MHz) or compatible
- Windows 95/98/Me/XP or Windows NT 4.0 SP3 (SP5) or Windows 2000 (SP1)
- 32 MB (128 MB) RAM
- 35 MB (45 MB) free hard disk space for installation
- 640x480 video display with 256 colors (1024x768 video display with True Color)
- CD-ROM drive for installation

## Installation

To install Cumulus, you need two things: the Cumulus CD and your serial number, which is found in your Cumulus Single User package.

NOTE: QuickTime (5.0 or later) should be installed *before* you install Cumulus.

If you are installing Cumulus for the first time, you can skip down to the installing section for your operating system. If you already have a previous version

of Cumulus installed on your computer, please read the following sections carefully.

### Previous Versions under Windows

Windows users must always uninstall the previous version before installing a newer version, regardless of whether it is an upgrade from Cumulus 4 or an update of an existing Cumulus installation. (See “Removing Cumulus,” p. 21.)

NOTE: When you register you will be asked for your old serial number. Make sure you have this serial number *before* deleting the old version of Cumulus. You can make a note of the serial number from the About dialog (Cumulus 4)/License dialog box (Cumulus 5).

### Previous Versions under Mac OS

Mac OS users updating an existing Cumulus installation only have to run the installer application included with the newer version of the program installation files. The installer application will keep all settings and only replace program files necessary for updating the program’s functionality. Only the old application file **Cumulus S5.0** will not be updated and has to be deleted after installation. (The name of the new application file for Cumulus 5.5 is **Cumulus Single User**.)

Mac OS users upgrading from a version prior to Cumulus 5 *must* uninstall the previous version before installing a newer version. (See “Removing Cumulus,” p. 21.)

NOTE: When you register, you will be asked for your old serial number. Make sure you have this serial number *before* deleting the old version of Cumulus. You can make a note of the serial number from the About dialog of your Cumulus 4 installation.

### Catalogs from Previous Versions

Catalog files created with versions of Cumulus prior to version 5 must be converted using the *Cumulus Catalog Converter* before they can be opened with Cumulus Single User. Once a catalog has been converted, it cannot be opened by a previous version.

For more information on converting catalogs, see “Updating Catalogs from Earlier Versions,” p. 79.

The installation instructions that follow are divided into Mac OS and Windows sections.

### Installing under Mac OS

Cumulus provides an installer application which guides you through the installation process. If installing Cumulus for the first time, experienced Mac OS users may also perform an installation via drag and drop.

NOTE: An update installation should never be done via drag and drop. Otherwise you will lose your program settings and have to reactivate any options you may have installed with your previous Cumulus version.

To install Cumulus under Mac OS using the installer application:



1. Insert the Cumulus CD into your CD-ROM drive.
2. Double-click the CD icon to view its contents, if it's not already open.
3. Double-click the English folder.
4. Double-click on the installer application **Install Cumulus Single User**.

The **Install Cumulus Single User Edition** window opens in which you can select a folder to install Cumulus into.

5. Do one of the following:  
If installing Cumulus for the first time, click **Install In New Folder** to create a new folder for your Cumulus installation.

OR

If updating a previous Cumulus installation, select its current folder on your hard disk and then click **Select Existing Folder** to update a previous Cumulus installation. And remember: After the installation is completed you have to delete the old application file named **Cumulus S5.0**. (The name of the new application file for Cumulus 5.5 is **Cumulus Single User**.)

The software license agreement is displayed.

6. Click **Continue** after you have fully read the license agreement and agreed to the terms therein.

The **Install Cumulus Single User** window opens displaying the install location. Check the install location to see if it is correct. If necessary, choose a new location under **Install Location**.

7. Click **Install** to copy the necessary program files onto your hard disk. A progress bar is displayed indicating the status of the installation.

### Cumulus Application Integration Modules

Application integration modules (sometimes called plug-ins, extensions or extras) enable direct access to Cumulus catalogs from within many popular applications.

These modules are placed in the Cumulus folder in a subfolder named Adapters. If you want to use them, copy them to the appropriate folders of the supported applications. Future upgrades of these other applications may result in the loss of these modules, which can be deleted with the older versions of those programs. If this happens, simply recopy the deleted module from your installation CD.

Application integration modules are available with the Mac OS version of Cumulus only.

When the progress bar closes, a window opens, confirming that the software was installed successfully.

8. Click **Quit** to close the window and finish the installation.

If Cumulus has been installed for the first time, it will prompt you to enter your registration information the next time it is started. (You can find your serial number in your Cumulus Single User package.)

A new installation of Cumulus can also be performed via drag and drop as described below.

To install Cumulus on a Mac OS computer via drag and drop:



1. Insert the Cumulus CD into your CD-ROM drive.
2. Double-click the CD icon to view its contents, if it's not already open.
3. Open the folder on your hard disk to which you want to install Cumulus.
4. Drag the Cumulus Single User Edition folder (found in the English folder) from the CD to the desired location.

Once all of the files have been copied, the installation is complete.

Cumulus will prompt you to enter your registration information the next time it is started. (You can find your serial number in your Cumulus Single User package.)

## Installing under Windows

To install Cumulus under Windows:



1. Insert the Cumulus CD into your CD-ROM drive.
2. Double-click **Setup.exe** located on the Cumulus CD under English\Cumulus.
3. When the Welcome screen is displayed, click **Next** to continue. The software license agreement is displayed.
4. Click **Yes** to accept the terms of the displayed license agreement. The Registration dialog is opened.
5. Enter your name, company, and serial number in the fields provided and click **Next**. (You can find your serial number in your Cumulus Single User package). The Choose Destination Location window appears.
6. Do one of the following:  
If you want to accept the default installation location, click **Next** to continue.  
OR  
If you do not want to accept the default location, click **Browse** to choose a different location. The Choose Folder dialog opens. Now you have two choices:
  - If you want to select an existing folder, under **Drives** select the drive from the drop-down menu and under **Directories** double-click the folder of your choice. Click **OK** to return to the previous dialog. Then click **Next** to continue.
  - If you want to create a new folder for your Cumulus installation, type the new folder's complete path and name directly into the field under **Path**. Click **OK** to return to the previous dialog. Then click **Next** to continue.

The Select Program Folder dialog opens.

- Click **Next** to accept the default program folder. If you do not want to accept the default program folder, choose a different one by typing the new folder name or selecting an existing folder.

Setup begins copying files.

- When the Setup Complete window is displayed, click **Finish** to end the installation and close the window.

## Removing Cumulus

Before removing Cumulus, copy any catalogs or scripts located in the Cumulus folder that you do not wish to lose to a safe place on your hard disk.

The instructions that follow are divided into Mac OS and Windows sections.

### Mac OS

To remove Cumulus from a Mac OS computer:



- Drag the Cumulus folder from its current location to the trash.
- Drag the Cumulus Preferences file to the trash. You can find this file in the Preferences folder in the computer's System folder.
- In the Mac OS Finder, select **Special** ⇒ **Empty Trash**.

Remember that the application integration modules that were installed when you installed Cumulus will still be on your hard-disk. Delete them manually if you want them removed.

### Windows

To remove Cumulus from a Windows computer:



- Click the **Start** button, point to **Settings**, and then click **Control Panel**.
- Double-click **Add/Remove Programs**. A window opens with a list of the programs installed on your computer.
- Select **Cumulus** from the list and click the **Add/Remove** button. The removal process begins. You are asked to confirm the deletion of any files that may be shared with other applications.

## Product Registration

Registering Cumulus should be considered part of the Cumulus installation process. Registration entitles you to technical support from your distributor free of charge via e-mail (see "Technical Support," p. 13), and is also required for you to be able to activate any future updates or add-ons. If you are installing any optional add-ons right now, please see "Activation Key" below.

The fastest and easiest way to register your copy of Cumulus is on the World Wide Web. If you do not have a Web connection, you can also e-mail the registration form to Canto or print it out and send it in.

### Web Registration

To register Cumulus on the Web:



- Select **Apple** / **Help** ⇒ **License**. The License dialog box opens.

If you're also registering an optional add-on, click **Add** and type its serial number in the dialog that is displayed.

2. Click **WWW Registration**.

 Select your Web browser from the displayed dialog box. Click **Register**, and your Web browser launches and initiates a connection to the Canto registration site.

3. Fill out the on-line registration form and submit it. All required serial numbers and ID's are filled in automatically.

If you registered any optional add-ons, you will receive an Activation Key from Canto. See "Activation Key," below, for details.

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If you don't have Internet access, you can fill in a registration form and register via e-mail, fax or regular mail.

### Registration by Mail, Fax or E-Mail

If you don't have Internet access, you can fill out a registration form and register via e-mail, fax or conventional mail. This option requires that you have the Adobe Acrobat Reader software installed on your computer. If the Adobe Acrobat Reader software is not on your computer, you can download it for free from Adobe's Web site ([www.adobe.com](http://www.adobe.com)).

To register Cumulus by mail, fax or e-mail:



1. Select  **Apple** /  **Help** ⇒ **License**.  
The License dialog box opens.

If you're also registering an optional add-on, click **Add** and type its serial number in the dialog that is displayed.

2. Click **Print Registration**. A message is displayed for you to save a copy of the registration form.

3. Accept the name and path suggested by Cumulus or choose your own and click **Save**. Cumulus launches the Acrobat Reader, which opens the registration form.

4. Fill out the form on your computer. All required serial numbers and ID's are filled in automatically.

5. Print the form, then fax or mail it to the address listed for your region.

OR

If possible, save the form and send it as an attachment to an e-mail message to: [registration@canto.de](mailto:registration@canto.de)

If you registered any optional add-ons, you will receive an Activation Key from Canto. See "Activation Key," below, for details.

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### Activation Key

If you purchased any optional add-ons, you will need an Activation Key from Canto in order to integrate them into your Cumulus system. To get an Activation Key, enter the serial number of the add-on in the License dialog box before clicking **WWW Registration** or **Print Registration**.

Once you have received your Activation Key from Canto, enter it into the **Activation Key** field in the License dialog box. Click **Apply**, and your add-ons will be activated and ready to go.



This section consists of a tutorial to guide you through building and using a simple catalog. You'll catalog some assets, create and delete categories, make associations between records and categories, do some searching, customize your collection, generate your own custom field, and output a collection to the Internet-ready HTML format.

**3**

**Learn**

---

## Tutorial: Building a Catalog

In this section we'll build a simple catalog that takes advantage of some of the new features of Cumulus. We'll also create some categories, do some searching, make a custom field, and then output the results of our efforts to HTML. An overview of the Cumulus Mac OS and Windows interfaces can be found on pages 45 and 46.

### Getting Started

To begin, you need to have Cumulus installed on your computer (See "Installation," p. 18, if you need some help.) You'll also need to have the Cumulus CD in your CD-ROM drive. We'll use some of the CD's sample media files for the tutorial.

### Making a Catalog

The best "first step" when building a Cumulus catalog is planning. (Suggestions for planning a Cumulus catalog can be found on page 74.) For the purposes of this tutorial, however, we're just going to jump right in. It's tough to plan the best way to build a catalog until you have some basic understanding of how the program works and what options are available to you.

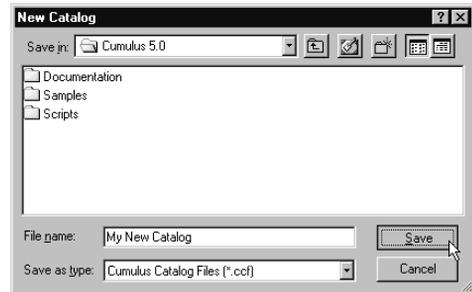
The process of making a Cumulus catalog is simple:



1. Launch the Cumulus application. If this is the first time that you've launched Cumulus, a dialog appears from which you can open an existing catalog. Click **Cancel** because we're going to build our own.

Cumulus automatically remembers the last catalog that was opened and reopens it the next time the program is launched. If you've previously used Cumulus, close the catalog that the program automatically opens before proceeding with this tutorial.

2. When the program has loaded, select **File**⇒**New Catalog**. A dialog box appears with which you can name your new catalog.



3. Type a file name for your catalog into the **File name** field and click **Save**. You can save the catalog in a different location if you'd like. (Windows users needn't worry about adding a file name extension, Cumulus adds it automatically. The Mac OS requires no file name extension.)

At this point your catalog is empty, so you should be looking at an empty window.

### Adding Assets (Cataloging Assets)

"Cataloging assets" is Cumulus-speak for adding media files to your catalog. There are two ways to catalog assets: via menu option and with drag and drop. We'll cover both, but we'll start with the menu option method:

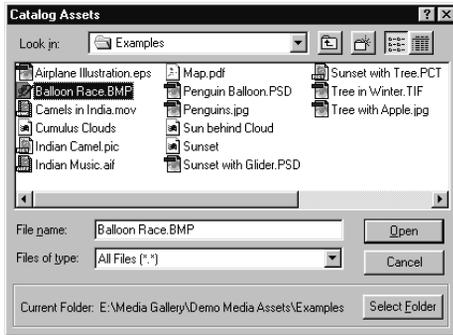


1. Select **Catalog**⇒**Catalog Assets**.

A window appears from which you can select assets to be cataloged.

2. On the Cumulus CD navigate to
  - 🍏 Media Gallery:Demo Media Assets:Examples
  - 📁 Media Gallery\Demo Media Assets\Examples

3. Select Balloon Race from the file list and click Open.



*When cataloging more than one asset, the **Select Folder** button is a quick way of adding the entire contents of a folder. Mac OS users can simply select a folder from the list and click the **Select** button.*

A window appears for a brief moment that shows the status of the cataloging process. It's not too useful when cataloging just one asset, but once you start cataloging large numbers of assets, you'll appreciate the visual feedback it offers.

After a moment, a thumbnail for the Balloon Race image appears, indicating that the cataloging process was successful and a record has been created for the asset.



Remember, each asset is represented by one record in a Cumulus catalog.

## Automatic Directory Categories

You'll notice that a list of folder icons has appeared in the left portion of the window. These are called directory categories.

So where did these new categories come from?

Among the many settings in the Catalog Properties in Cumulus is the option to use an asset's folder hierarchy as a model for directory category creation and assignment. This option is activated with Cumulus' default settings but it can be deactivated (see page 51).

While this doesn't seem too useful in our Balloon Race example, consider how valuable it becomes if your assets are stored in a folder hierarchy that properly identifies them. (See "Develop an Effective Folder Naming Convention," p. 74.)

It's important to remember that these categories *resemble* the hard-disk folder hierarchy, but the two are *not physically connected*. For example, you can move or delete one of the folders on your hard-disk and it would have no effect on the associated directory category in Cumulus. Likewise, you can delete Cumulus directory categories and have no effect on the actual hard-disk folders, or even the cataloged assets. (Not to confuse you so early on, but Cumulus does provide options for using categories to move and delete assets, but these options are explained later.)

Directory category icons have a small folder picture inside the icon. (📁) Categories that you create yourself do not have this folder picture.

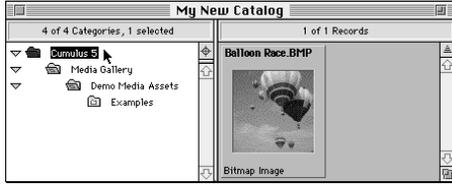
## Deleting Categories

Now let's get rid of the directory categories that Cumulus has created for us.



1. Select the root-level category from the category hierarchy. It's named for the volume on which the asset resides.

In this case its name depends on the name of your Cumulus CD.



Root category selected.

2. Select **Edit**⇒**Delete**. You are asked to confirm the deletion, which is *not* undoable, so be careful when using this option on your own.
3. Click **Delete** / **OK**. The root category and all its subcategories are deleted. You can see why the dialog box asks you to confirm your intentions. When your catalogs have many nested categories, deleting the wrong category could be disastrous.

It's important to note that neither the Balloon Race record nor the folders on the CD from which the categories were modeled were deleted. Remembering that directory categories and hard-disk folder hierarchies are different is very important.

Next we'll delete the Balloon Race record.

## Deleting Records

When you delete a Cumulus record from a catalog, you are asked if you'd also like to delete the associated asset file. While the record can be easily recreated by recataloging the asset (or by recovering the record, see "Recovering Deleted Records," p. 78), deleting the asset is the same as dragging it into the trash can *and* emptying the trash: there's no turning back. Be absolutely certain that you no longer need the asset file or that you have another copy safely stored elsewhere before you have Cumulus delete it.



1. Click on the Balloon Race thumbnail image.
2. Select **Edit**⇒**Delete**. The deletion confirmation dialog box appears.



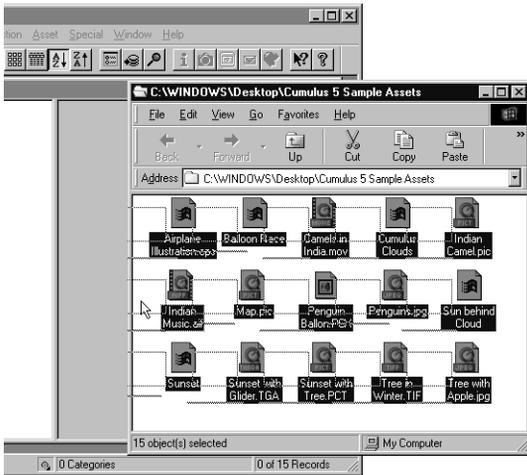
3. Click **Delete Record Only**. (Being located on a CD-ROM, the file cannot be deleted anyway.) The record is deleted and the catalog is once again empty. Don't worry, we're going to catalog some more assets right now.

## Adding Many Assets at Once

Now that you've seen one way to catalog assets, we'll learn a new way that makes cataloging many assets at once much more convenient. This is the drag and drop method mentioned earlier.



1. Open the Examples folder on your Cumulus CD from your computer's desktop. (Windows users can use Windows Explorer, if they prefer.)
2. Arrange the Examples folder and the Cumulus catalog window so that you can see both. The Examples folder's window can overlap the Cumulus window if need be.
3. Select all the icons in the Examples folder and drag them into the Cumulus window.



*Dragging many assets at once into a Cumulus window catalogs all the assets in the selection.*

Records are created for each of the assets. Here you can see the benefit of the progress information window when cataloging larger numbers of assets.



*The cataloging process indicator provides visual feedback on the cataloging status.*

Adjust the Cumulus window to see all the newly cataloged records. If you don't have a monitor large enough to fit them all, adjust the thumbnail viewing size by selecting **View**⇒**Small Thumbnails**.

You probably noticed that during the cataloging process the directory categories reappeared.

Go ahead and delete these categories, as described back on page 25, so that we can create a category structure of our own.

## Creating Categories

If you've been snooping around the Cumulus menu bar, you can probably guess how to create a new category. You can create root categories and subcategories. A root category is at the highest hierarchical level in a catalog. A subcategory is any category with a category above it.

To create a root category:



1. Select **Category**⇒**New Root Category**. This creates a new category called *Category*. The new category's name is highlighted, ready to be renamed.
2. Type *By Asset Type* and press the **Return** key to rename the category. (This name will make sense in a minute.)

Now we're going to create a few subcategories for our new category. Subcategories are like folders within folders on your hard-disk. They help organize and identify the items contained within them. To create a subcategory:



1. Click the **By Asset Type** category.
2. Select **Category**⇒**New Subcategory**. This creates a subcategory.
3. Rename the new subcategory to *Images*.

You can easily change the category hierarchies by clicking a category and dragging it on top of another category. This places the category inside the other

category. You can also drag subcategories outside their parent categories to move them up in the catalog hierarchy.

At this point your catalog should look like this:



*Images* is now a subcategory of *By Asset Type* and *By Asset Type* is a parent category to *Images*.

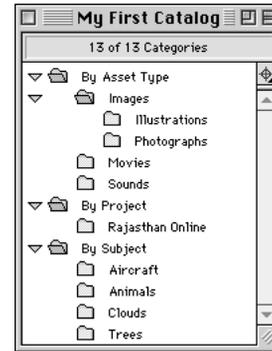
Let's go on and build a useful category hierarchy that we can use with our cataloged assets.



1. Using the techniques you've learned, create the category structure shown in the following image. You can use the drag and drop method for moving categories as needed.

Don't worry if you accidentally add a new subcategory in the wrong place. Simply drag the new subcategory on top of the category under which you meant to place it.

If you make a mistake when typing a category's name, simply double-click on the category's name (not its icon) and its name will become selected for editing. If you accidentally place a new category in the wrong place in the hierarchy, just click the misplaced category and drag it where you want it. To move a category to the root level, drag it out into the white space on the category list.



*A sample category structure. All categories are visible.*

After you've finished building the categories, take a moment to study the category hierarchy. We have three root categories:

- By Asset Type
- By Project
- By Subject

The logic here is simple: the purpose of categories is to help you find assets. These root categories describe three ways in which you might want to search for assets.

Under the *By Asset Type* category we list the three asset types that we have in our catalog:

- Images
- Movies
- Sounds

Moving even further down the hierarchy we've divided *Images* into *Illustrations*, for artwork generated on the computer, and *Photographs*, for images taken with a camera.

The remaining category hierarchies reflect other ways of organizing and finding assets.

With our modest catalog, this category structure may seem a bit over-enthusiastic. But you never know how large your catalogs will grow. It's best to anticipate growth and be ready for it. (Even though

Cumulus lets you add categories later, planning ahead saves you quite a bit of time that would otherwise be spent reassigning categories.)

In a few pages, we'll use these categories to quickly find assets that are specific to our needs. Then you'll really appreciate the power of well-planned category hierarchies.

### Assigning a Record to a Category

Categories are easily assigned to records (or vice-versa) by dragging and dropping. It doesn't matter which way you do it: dragging the record onto the category, or dragging the category onto the record. The effect is the same.



1. Click on the "Airplane Illustration" record and drag it onto the *Aircraft* category.

The "Airplane Illustration" record is now assigned to the *Aircraft* category.

If you double-clicked the *Aircraft* category to see if the Airplane record really ended up there, select **Collection** → **Find All Records** to display all records in the catalog again.

### Assigning Multiple Records to Categories

With only 15 records, we could easily add each to categories one at a time, but for larger groups of records there's a quicker way:



1. Click once on the "Cumulus Clouds" thumbnail. Now, while holding down the **Command** / **Control** key on your keyboard, click once on "Sun Behind Cloud." Using this modifier key enables you to select multiple records that are not next to one another in the catalog. (The **Shift** key selects a range of contiguous records.)

2. Once both records are selected, click on one of them and drag the group on top of the *Clouds* category. This makes the assignment for each of the selected records.

Now we're left to make the remaining category assignments. Using the techniques we've covered, make the additional category assignments shown in the grey box on the next page.

Here's a hint that will help you when you're assigning the same set of categories to several records: Category selection works like record selection. You can select several categories and then drag them onto a record. Then, you can drag that same selection of categories onto another record.

If you make a mistake, it's easy enough to remove a category assignment. See "Editing a Record's Category Assignments," p. 49, for details.

## Asset Category Assignments

<u>Record</u>	<u>Assign to</u>	<u>Categories</u>
Airplane Illustration	⇒	Illustrations, Aircraft
Balloon Race	⇒	Photographs, Aircraft
Camels in India	⇒	Movies, Rajasthan Online, Animals
Cumulus Clouds	⇒	Photographs, Clouds
Indian Camel	⇒	Photographs, Rajasthan Online, Animals
Indian Music	⇒	Sounds, Rajasthan Online
Map	⇒	Illustrations
Penguin Balloon	⇒	Photographs, Aircraft, Animals
Penguins	⇒	Photographs, Animals
Sun behind Cloud	⇒	Photographs, Clouds
Sunset	⇒	Photographs
Sunset with Glider	⇒	Photographs, Aircraft
Sunset with Tree	⇒	Photographs, Rajasthan Online, Trees
Tree in Winter	⇒	Photographs, Trees
Tree with Apple	⇒	Illustrations, Trees

*Practice: Using the techniques you've learned, make the record and category assignments indicated.*

### Viewing and Editing Record Data

There is an easy way to check whether you made all of the category assignments listed above correctly: in the Asset Information window. The Asset Information window is where you can view information on your assets, or edit information stored with your assets. (Technically, the Asset Information window is a separate program, but it's integrated with the Cumulus application so well that it's hard to tell the difference.) The categories that were explicitly associated with each record can be seen in the Categories field of the respective record.

Cumulus stores a great deal of information on your assets. Cumulus also lets you edit field data for the records in a catalog. We're going to glance at the Asset Information window and edit a record by adding some information to the Notes field.

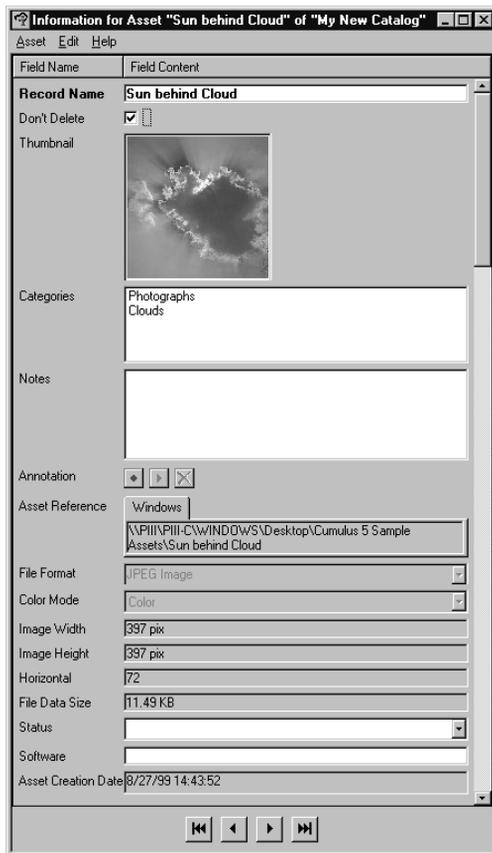
To view or edit a record:



1. Click once on a record to select it. (We've chosen the "Sun Behind Cloud" record, but you can pick any one that you like.)
2. Select **Asset⇒Information**. This opens the Asset Information window.

Fields with white backgrounds can be edited. If a text field has a grey background, then it cannot be edited. For more information on field attributes, see page 91.

You see a scrollable list of fields, which are displayed by default. Like the collection



view, this window can be customized to suit your needs. For further information, see “Customizing the Information Window,” p. 63.

3. Click in the Notes field and enter some data, e.g., “Colorado expedition May 1999.”
4. Select **Asset**⇒**Close**. You are prompted to save any changes that you have made.

This isn’t the last time you’ll see the Asset Information window during this tutorial. We’ll use it again once we’ve set up some custom catalog fields.

## Finding Records by Using Categories

All of our assets are now cataloged and their corresponding records are assigned to categories. Next we want to be able to quickly find any record based on its category assignments. Using categories to find records is as simple as double-clicking on a category icon. All of the records assigned to that category are found and displayed. Let’s try it:



1. Double-click the *Images* category. Thirteen records are displayed. What Cumulus has done is searched through all of the records to find only those assigned to the *Images* category.
2. Now double-click the *Photographs* category. Three records disappear because they are not part of the *Photographs* subcategory.

If you guessed that you might be able to select several categories to see the contents of each, you’d be right. Here’s how:



1. Click the first category once to select it.
  2.  Hold down the **Shift** key and click the second, third, etc. categories to select them. Release the **Shift** key and double-click any of the category icons. The records of all selected categories are found and displayed.
-  Hold down the **Control** key and click the second, third, etc. categories to select them. Release the **Control** key and double-click any of the selected categories. The records of all the selected categories are found and displayed.

NOTE: There are program preferences that affect the way Cumulus performs category searches. If your searches yield unexpected results, verify that your preferences are set correctly. See page 92 for details.

## Displaying All Records

Selecting **Collection**⇒**Find All Records** displays all the records in a catalog.

Cumulus offers two basic display modes: thumbnails and details. Several menu options are available to quickly change the size of the thumbnails displayed. Those options, all found in the **View** menu, are:

- **View**⇒**Large Thumbnails** – Displays the records using large thumbnails.
- **View**⇒**Medium Thumbnails** – Displays the records using medium-sized thumbnails.
- **View**⇒**Small Thumbnails** – Displays the records using small thumbnails.

The actual size of the thumbnails displayed by each menu option is determined by an application preferences setting. (See “The Application Preferences Window,” p. 92.)

The **View**⇒**Details** menu option displays the records in a horizontal, text-only listing that resembles rows in a spreadsheet.

The configuration of each display mode will be explained in a moment.

## Using Collections

Now would be a good time to back up a step and talk about collections. While this whole time you thought you were working with just catalogs, categories and records, you were working with collections at the same time. Your current collection is what you’re looking at on your screen right now. If you’ve been following this tutorial up to this point, your current collection contains all records in the catalog. They are displayed in either Thumbnail or Details view, depending on your previous selections. Now double-click any category icon in the category pane. The records of that category appear in the record pane, and these records form your collection. If you were to perform a search for particular records, the results of that search would form yet another collection.

But a collection is far more than just a name for your temporary workspace: The collection enables you to find, display, save, print and e-mail specific sets of records outside of the normal category definitions. If the group of records you’re looking at right now is something you could use – as a subset of a larger project, for example, or to e-mail to a co-worker – you can save it as a collection and recall it from your hard disk whenever you need it.

Another important feature of the collection is that it stores not only a set of records, but also the viewing preferences you defined for those records. A collection can thus be saved and displayed with fonts, colors, fields, etc. that would not otherwise apply to any single category.

## Customizing a Collection View

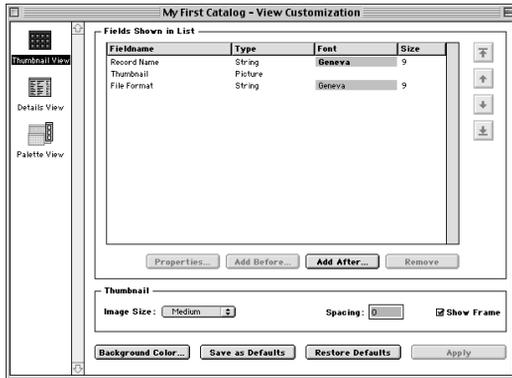
We won’t cover all of the many options available with collections here, we’ll cover just the basics. See “Collections,” p. 43, for a complete discussion of the flexibility of Cumulus collections.

Let’s start by changing the look of some of the text in the Collection window, which is the window you’ve been working with all along:



1. Select **View**⇒**Customize**. This is the menu option that you’ll use to access the formatting options for collections. This opens the View Customization window.

The fields listed in this window are the same ones displayed in your Collection window.



- Along the left side of the window /  In tabs along the top of the window, you see a couple of options named **Thumbnail View**, **Details View** and **Palette Mode**. These options load the settings for the respective view. Under the **Thumbnail View**, you set up how thumbnail views (all sizes) will be displayed. Under **Details View** you set up your text listing options. And under **Palette Mode**, you set up how thumbnail views (all sizes) will be displayed when the Palette Mode is active.
- If it is not activated, click the **Thumbnail View**  icon/ tab. This sets up the window so that we can customize the thumbnail display.
- Click the **Record Name** field and click the **Properties** button below the list of fields. This brings up a window that you can use to adjust the font style of the Record Name field.
- Change the font size to 10. This tells Cumulus that you want this field in the Collection window displayed in font size 10. You could also adjust the font color or change the font itself from this window.
- Click **OK** to save the change and return to the View Customization window.

- Click **Apply** in the lower right corner of the window. This applies the font size change.

If you can see your Collection window in the background, you will see that the record name field is now displayed using the font size you entered (or displayed based on the changes you selected.)

Fields can also be removed or added to collections. Here's how to remove a field:



- In the open View Customization window, click the **File Format** field to select it.
- Click the **Remove** button. This tells Cumulus that you don't want the File Format field visible in the Collection window. It doesn't delete the field from the catalog, it just removes it from the current collection view. Remember, you can have as many collections as you like, so you might choose to include it in another.
- Once you click the **Apply** button, the field is removed from the Collection window.

Adding a field is almost as easy as removing one. There are two different buttons that you can use to add fields. One inserts a field before the currently selected field in the list, and one adds it after:



- In the open View Customization window, click the top field to select it.
- Click **Add After**. This opens a list of all of the fields in the current catalog. If you scroll down through the list you'll get a good idea of just how much information catalogs can store for each record. (And you can add your own custom fields to this list, too!)

- Find and click on the field called Categories. This field holds a list of all the categories assigned to that record.
- Click **OK** to add that field to the list.
- If you click the **Apply** button or close the View Customization window, you can see the categories that you assigned earlier shown in the records portion of the window.

Other formatting options are described elsewhere in this manual. Take some time and play around with the various collection view options. Remember, you're only dealing with the viewing attributes of the current collection, nothing you can do from the View Customization window can delete data from the catalog.



After adding the categories field to the current collection, the categories (shown below the record names) are visible in the collection.

## Saving Collections

Once you've got a Collection window set up to your liking, select **Collection** ⇒ **Save As** to save it. Keep in mind that saved collection files not only store the visual appearance of the collection, they also store

which records were in the collection when the file was saved. You can use the Cumulus search options to find custom sets of records and to create new collections.

## Building Custom Searches

For those times when finding records by category isn't specific enough for your needs, Cumulus offers extensive search options. For example, you may have tens of thousands of asset records in your *Illustrations* category hierarchy. Suddenly, our *Illustrations* category alone doesn't seem so descriptive.

Cumulus lets you build, store and retrieve custom searches that can look deeper into a record than just its category assignments. A record holds its associated asset's file size, modification and creation date, resolution (if applicable), the name of the volume on which it's stored, and many other attributes, as well. All of this searchable information is stored within each record. (See "Collections," p. 43.) Let's try a simple example:



- Select **Collection** ⇒ **Find Records**. This opens the Find window.



The Mac OS Find window.



The Windows Find window.

The text entry fields are also pop-up menus. You can select options from the menus or type the first few letters of the option you'd like and have Cumulus fill in the rest when you click out of the field.

2. Select **Record Name** from the left field. This tells Cumulus that we want to search through each Record Name field.
3. Select **contains** from the middle field. This tells Cumulus that matched Record Name fields must contain the contents we're about to type into the right field.
4. Type "sun" into the value field (right field). This tells Cumulus the text we're searching for.
5. Choose the **Search in Entire Catalog** button. This tells Cumulus to search through all records of the catalog, regardless of which are displayed in the current collection.
6. Choose the **Current Collection** button. This tells Cumulus to replace our current collection with the set of records found rather than creating a new collection for them.
7. Click the **Find** button to conduct the search. Cumulus searches the catalog and displays any records that match the search criteria.

In this case, there are four records that match our criteria:

- Sun behind Cloud
- Sunset
- Sunset with Glider
- Sunset with Tree

Each of these records contain the text "sun" in their names.

More advanced search options, including the ability to store and retrieve searches, are explained later. (See "Searching," p. 53.)

Once you have found a set of records, you can save your collection if you like. Then your new set of records will be restored each time the collection is opened.

## Adding Custom Fields

Cumulus uses two different field types to store data: record fields and category fields.

Record fields (the more common type) are used to store information about each asset, such as its name, file type, dimensions, etc.

Category fields are used for information that relates to all assets' records assigned to the category, or they can be used to store additional information on the category itself. For example, the category Rajasthan Online might have a category field containing information on the project's deadlines, the contact person's telephone number, or the mastering studio's address. Category fields are not searchable. Remember this when deciding which field type best suits your needs.

Custom record fields behave the same as standard record fields: they can be used for searching, included in collections, and formatted any way that you like.

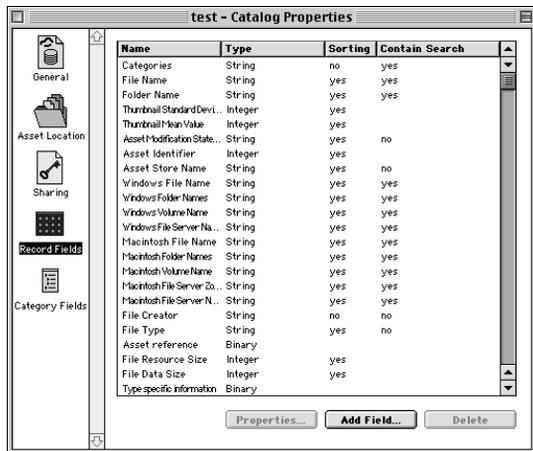
Let's say we have a photographer who would like to keep track of the film she uses when taking photographs. She could use a custom record field to do this efficiently.

Let's create a custom Fields record field and add it to our catalog:



1. Make sure our tutorial catalog is opened and is the frontmost window in Cumulus.
2. Select **Catalog** ⇨ **Properties**. This brings up the catalog properties window where you can, among other things, add and delete custom fields. In the window you'll see several 🍏 icons / 📄 tabs. Two of them read Record Fields and Category Fields.
3. Click on **Record Fields**. This loads the window with a list of the current record fields included in the catalog. The list is quite extensive! Depending on the metadata in your

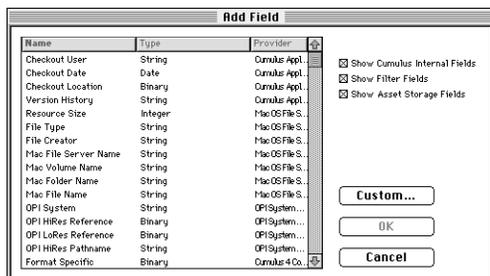
assets, and the Asset Storage module that was used to catalog them, these fields may or may not be loaded with data. Most of the time at least some fields will remain empty.



You won't see data here because this is the catalog's "shell." The actual data is stored in the records.

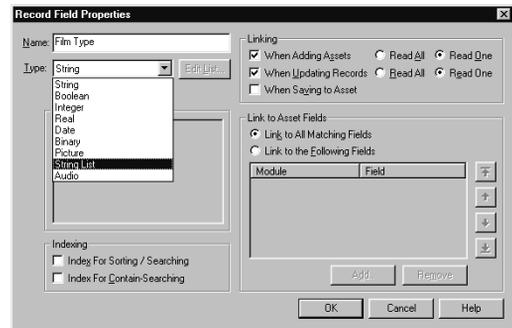
Along the bottom of the list of fields are three buttons that you will use to make your changes. Right now we're going to add a field for film type.

- Click on the **Add Field** button. This brings up a dialog box from which you can add a new field. This is a list of additional fields that Cumulus supports, but that are not currently in the catalog.

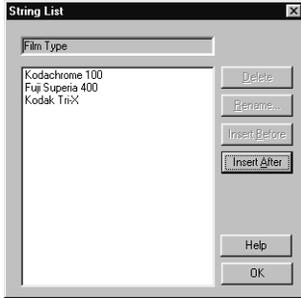


By this time you're probably thinking that Cumulus supports more fields than you have assets! You can use any of the fields shown here in your catalogs, but for our purposes at the moment, none of these are perfect. That's why we're going to go on creating a custom record field. (For an overview of all of the field types, see "Field Types," p. 48.)

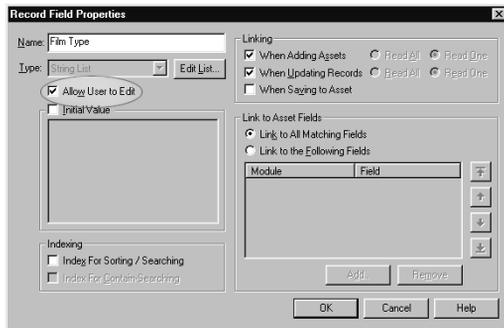
- Click the **Custom** button. This brings up the Record Field Properties window. There are many properties of a field that can be changed, but we're only going to set a few here.



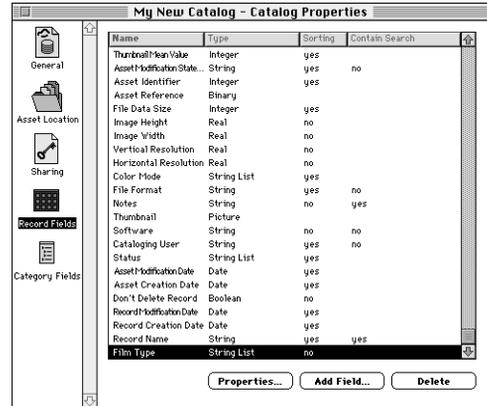
- In the Name field, enter *Film Type*. Then select **String List** from the **Type** list. A string list field is one for which you can choose from a limited range of possible data values. This way you can use a pop-up or drop-down menu to make data entry fast and accurate. For example, maybe you'd like to have a field that is pre-loaded with the names of your clients.
- Click the **Edit List** button next to the **Type** field. This opens the dialog box where you define the values. The buttons along the right side of the window should be pretty self explanatory. By first selecting an item in the list, you can choose to add an item either before or after the selected item using the buttons provided.



8. Click **Insert After** and enter a film type. You can enter as many as you like. Each item you add will appear in a pop-up menu when you're entering data. Enter at least three items so that you can get a good feel for the **Insert Before** and **Insert After** buttons.
9. Click **OK** to confirm your additions.
10. Next—this is very important—check the **Allow User to Edit** check box (highlighted below). If this is not checked, the field contents could not be modified.



11. Click **OK** to close the Record Field Properties window. This brings you back to the fields list. Scroll down the list to see the new field.



12. Finally, close the Catalog Properties window.

Lengthy as it may seem here, adding fields to a catalog is actually pretty easy. Now that you've done it once, you shouldn't have any trouble adding fields on your own.

There are many more options that affect how a field is cataloged, searched and displayed. These advanced field attributes are covered on page 91.

After a custom field has been added to a catalog, it needs to be added to a collection view in order to be seen. You learned how to add a field to a view back on page 33, but here's a quick reminder:



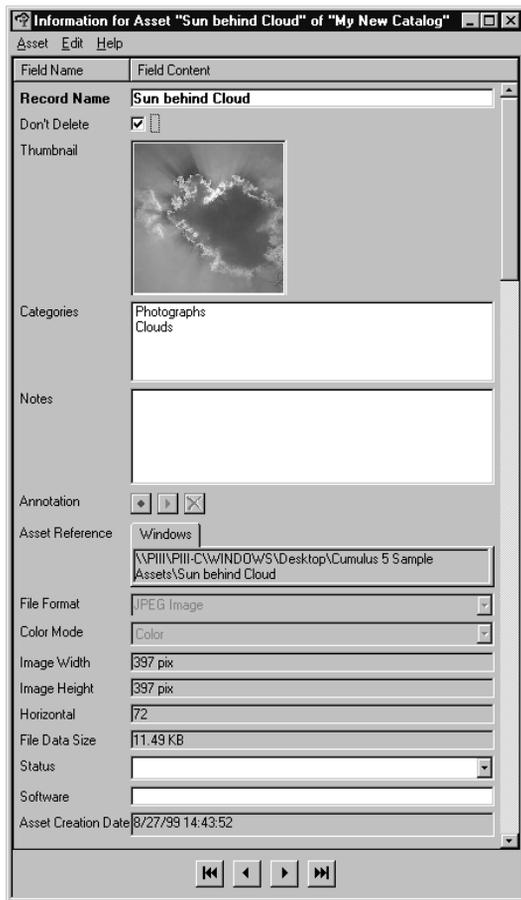
1. Select **View** → **Customize**.
2. Select a record field.
3. Click the **Add After** button.
4. Select the **Film Type** field in the field list and click **OK**.
5. Close the View Customization window.

Until data has been entered into the field, you'll just see blank space for it in the Collection window. Next,

we're going to cover how you actually get data into fields.

## Entering Data in Custom Fields

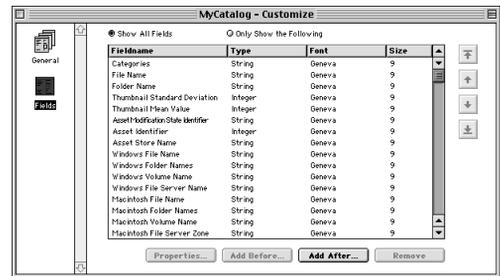
As previously mentioned, you can see and edit a record's metadata by clicking the record once to select it, and then selecting **Asset**⇒**Information**. This opens the Asset Information viewing application.



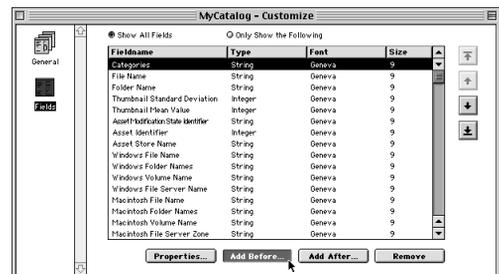
Custom fields must be added to the Asset Information window before they can be edited. Let's add our Film Type field:



1. If the Asset Information window is not open, select a record and choose **Asset**⇒**Information**.
2. Select **Edit**⇒**Customize** from the Asset information application's menubar. This opens a window with which you can customize aspects of the Asset Information application.

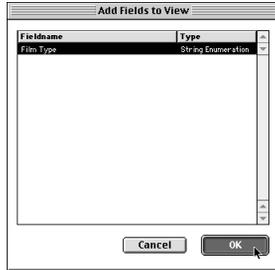


3. Click the **Fields** icon / **tab**. This presents a list of the fields currently shown in the view. We're going to add our Film Type field to the top of the list.
4. Select the field at the top of the list and click the **Add Before** button.



This presents a small window that includes all of the catalog fields that are included in the catalog but not currently displayed in the Asset Information application window. If

all of the catalog's fields are displayed, the list will be empty. But we know that since we just added a custom field, there has to be at least one.



5. Select **Film Type** from the list and click **OK** to close the window. This brings you back to the window with the list of fields.
6.  Click **Apply** to save the changes. (Mac OS changes are saved automatically.)
7. Close the window and you'll see your new field at the top of the fields in the Asset Information application window. The field is displayed as a pop-up menu. The menu's values are the values that you entered back on page 36.
8. Click the **Film Type** field to edit its value.
9. Select **Asset**⇒**Close** to close the Asset Information application and return to Cumulus. Save your changes when prompted. The changes are written back to the record.

If you have already added the field to the collection view, you will see a Film Type value shown in the Collection window. If you didn't, refer back to page 37 for instruction on how to do so.

Our next step is to output our collection to HTML for display on the Web or a corporate intranet.

## Creating HTML Pages

A great new feature of Cumulus is the ability to output collections as HTML documents, complete with preview icons and links to the original assets.

Before we do the output, let's consider what's at work here. Cumulus is about to take the records in your collection view and convert them to files suitable for display on the Web. This includes automatically making copies of the assets in the Web-ready JPEG image file format.

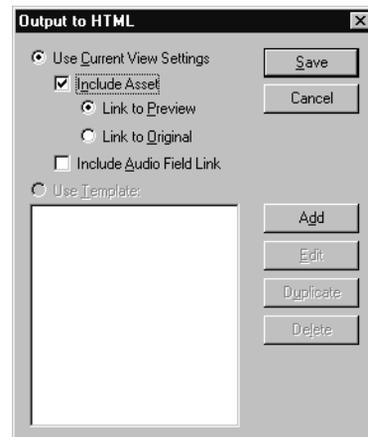
You want to make sure that what you're seeing in the collection view is what you want to see from the Web page. If it's not, make the changes you want using the methods you've learned.

You might want to keep a custom collection available specifically for HTML output. That way your HTML views can look consistent and you won't waste time adjusting the collection view each time.

Now, back to the HTML output:



1. Once your collection view is the way you want it, select **File**⇒**Output To HTML**⇒**All Records**. (You also have the option to output just the selected records.) This brings up the HTML output window.



2. Click the **Include Asset** check box and then click the **Link to Preview** button (shown above). This tells Cumulus to generate JPEG copies of the assets and provide links to them. These preview files are placed within a folder called "Previews," located beside the HTML pages themselves.
3. Click **Save** to generate the output files. You are prompted to select a location to save the files. Don't worry, the thumbnail and preview files are all neatly stored in their own folders, so you won't end up with a mess of files to contend with.
4. Select a location and a file name for the HTML pages. A progress indicator will appear and then disappear when the pages have been generated.

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That's all there is to HTML output. The HTML pages and the associated folders can be found in the location you specified, and they can be opened easily by any standard HTML browser.

## Tutorial Review

You should now know how to create a new catalog, catalog assets to create records, delete asset records, create record categories and subcategories, delete categories, assign records to categories, find records based on their category assignments, perform a simple custom search, generate custom fields, customize collection views, and (finally!) output collections to HTML.

Throughout this tutorial you came across buttons and other options not explained. Cumulus is packed with features. We stuck with the basics so we wouldn't lose anyone! The rest of the program's features are detailed elsewhere in this manual.

With this basic understanding of Cumulus you can now explore the rest of this document with the knowledge you need. The next section outlines the major components of the Cumulus application, provides a visual overview of the Cumulus user interface, and refers to details found elsewhere in this guide. Some of what is covered will be familiar to you by now.



In order to exploit the potential of Cumulus fully, it's necessary to proceed from a strong foundation. It's a good idea to know the meaning and capabilities of the features you're using in Cumulus and how they're related. This section contains an overview of the Cumulus interface and describes the basic components of Cumulus in more detail - catalogs, collections, records, categories, and searching.

# 4

# Explore

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## Catalogs

A Cumulus catalog is a group of records that, together, represents the assets you want to manage. Each asset is represented by one record. There is no limit to the number of different media file formats that can be represented in one catalog. In fact, one of the great new features of Cumulus is its ability to catalog any digital asset, in addition to the 130 file formats directly supported.

A catalog has a database file at its core. The way you work with the information in this file can be extensively customized. When you catalog assets, the catalog properties determine how and what sort of information Cumulus extracts, creates and stores on the assets as metadata in the record fields and category fields.

Each catalog can have its own distinct properties. Any changes made to the catalog properties affect the way information is stored on all of that catalog's assets. For further information, see "Catalog Properties," p. 69. To set up a catalog to store information in addition to or differently from the default settings, your Cumulus Administrator can add fields to the catalog.

To set up a catalog to store information in addition to or differently from the default settings, you can add fields to the catalog either by activating them from the list of fields that Cumulus supports or by defining your own custom fields. (See "Adding a Record Field," p. 71 and "Creating a Custom Record Field," p. 72.)

### Catalog Size and Performance

As catalogs increase in size, so do the requirements they place on computer hardware. It takes more processing power to work with 200,000 records than it does with 200. It also takes more RAM to hold the larger catalog in memory. NOTE: The unique way Cumulus searches for records prevents large catalogs from slowing down the search speed. (See "Catalog Size and Performance," p. 75, for details.)

A catalog file can be as large as four gigabytes in size, which is usually many hundreds of thousands of records. Most users will find it best to split catalogs for organizational and performance reasons long

before they ever reach the file size limit. The actual number of records that can be stored in a catalog and the catalog's actual file size is determined by the size of each record. (See "Record Size," p. 48.)

### Catalog Scope

Catalogs can include records for as many different asset types as you like. But you might find it best to have different asset formats cataloged independently. For example, it might not make sense to have your image assets in the same catalog as your audio clips, though it is possible.

On the other hand, don't limit the scope of each catalog too much. For example, when you're looking for an image to use on a Web page, do you care if it's in GIF or JPEG format? Separating similar asset types by specific file format can be inconvenient when searching. Cumulus cannot search through catalogs that aren't open. If each of your image file formats has its own catalog, they'll all have to be open if you want to search through all of them. Remember, you can use Cumulus' categories or built-in information fields to find files based on format, projects in which they were used, or status, for example.

### Things You Can Do with Catalogs

- **Backup.** (See "Backing Up Catalogs," p. 76.)
- **Change** the way assets are cataloged. (See "Cataloging Options," p. 66.)
- **Change** catalog properties. (See "Catalog Properties," p. 69.)
- **Compress.** (See "Compressing Catalogs," p. 76.)
- **Copy** a catalog. (See "Copying Catalogs," p. 77.)
- **Create** a new catalog. (See "New Catalog," p. 113.)
- **Create** a new empty copy of a catalog. (See "New Empty Copy," p. 119.)
- **Delete** a catalog. (See "Deleting Catalogs," p. 78.)
- **Distribute** catalogs to the public using Cumulus Viewer. (See the Cumulus Viewer Production Guide.)
- **Divide** a catalog into smaller catalogs. (See "Dividing Catalogs," p. 78.)

- **Merge** one catalog with another. (See “Merging Catalogs,” p. 79.)
- **Open** an existing catalog. (See “Open Catalog,” p. 113.)
- **Publish** a catalog on the Internet using Cumulus Web Publisher. (See Cumulus Web Publisher User Guide.)
- **Rename** a catalog. (See “Renaming Catalogs,” p. 78.)
- **Repair** a damaged catalog. (See “Repairing Catalogs,” p. 77.)
- **Search** through a catalog. (See “Searching,” p. 53.)
- **Set** the catalog’s properties as defaults. (See “Setting Catalog Defaults,” p. 77.)
- **Share** a catalog with other users when using the Cumulus Workgroup Edition. (See the Cumulus Workgroup or Enterprise Administrator Guide.)
- **Update** catalogs from earlier Cumulus versions. (See “Updating Catalogs from Earlier Versions,” p. 79.)

## Collections

A collection is Cumulus-speak for a set of records from any one catalog. It is a way of looking at your catalog – the way that you are looking at it at any given time. Whenever you work with assets in the record and category panes – which make up the Collection window – you’re creating or modifying collections. When you view the records in any category, you’re looking at a collection. When you view the results of a search, you’re also looking at a collection. The same is true for individual records you’ve dragged and dropped into the window – any ‘snapshot’ of your catalog can comprise a collection. A collection acts as your temporary workspace in Cumulus, and you can also save it as a file.

While a collection can contain all records in a catalog or all in a single category, it is neither one nor the other. A collection can also contain – and here is where its advantages become obvious – the results of a search (either as a new collection or replacement of the current collection), or any records you drag and drop into the Collection window. Any individual subset of a catalog comprises a collection.

Once saved, a collection file remembers far more than just the records it contains. A collection file also keeps track of viewing options, such as the Collection window’s background color, which categories were expanded, which record fields were visible, and how these fields were displayed.



*Sample collection in Thumbnail View.*

Assume, for example, that you have a catalog containing thousands of records organized neatly in categories. Your latest project, however, only requires assets from four of those categories, and from those only the image files. You could first run a search to pull all image files from those four categories. Then you could set the viewing options to display and emphasize exactly the information you need for this project. Save the collection, and from now on you can simply open the collection containing the records you really need – while the entire catalog remains available to you in the background. You could then e-mail the collection to in-house members of the project team, or publish it on the Web (output to HTML) for contributors anywhere in the world.

A collection, whether saved or unsaved, is always connected to its catalog. When a collection is open, its catalog is also open. In order to open a particular collection, you must have access to its catalog. If a record is removed from a catalog, it is removed from any of that catalog’s collections it was in. Similarly, if you delete a category, it is deleted not only from one collection, but also from the catalog.

You can, however, delete a record from the collection without deleting it from the catalog – as long as you press only the DEL key. But if you press both  **Command** /  **Control** and DEL, the record will be removed from both collection and catalog (see “Delete,” p. 116, for more information).

## Working with Collections

Collections can be customized and then saved, so that your particular preferences for a special set of records can be recalled. For further information on the extensive custom viewing potential of Cumulus, see “View Customization,” p. 94.

As collections are such flexible and malleable creatures, it might be a good idea to save your special collection once you have configured a customized view. This is because an unsaved collection with its specific view configuration is not automatically saved when you close it. And as soon as your collection changes – which can happen quite often – any unsaved changes are lost. If you have multiple unsaved collections from one catalog open at the same time, they are given numbers by Cumulus and can be identified by this number. Saving a collection is easily done via **Collection** ⇒ **Save As**. A dialog box appears for you to choose the name and location for the collection file. Once a collection is saved, it is easy to open via **Collection** ⇒ **Open**.

When you create a new collection via **Collection** ⇒ **New**, it can either be empty or contain the currently selected records. However, concerning the view the new collection will be a copy of the active collection. In other words, the colors, fonts, and fields of the new collection will be the same as the previous one. From here, you can proceed to make any changes you like while retaining the old collection in the background. You might want to save your new collection after you have assembled the desired records and carefully arranged them.

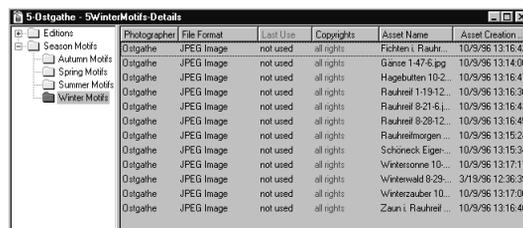
It’s also easy to send a collection by e-mail. Selecting **Collection** ⇒ **Mail To** opens your e-mail program and attaches the current collection to your e-mail mes-

sage. But remember: Since a collection is always connected to its catalog, it is necessary for the recipient to have access to the catalog ‘serving’ the collection.

Further, Cumulus makes it possible for you to select records from your collection and generate HTML pages and QuickTime videos from them. For more information on these features, please see “Present & Share,” starting on page 93.

## Collection Display Options

Each collection can display the records it contains differently. You can choose to have different records in each collection, or the same records displayed differently. Cumulus offers two basic display modes: thumbnails and details, but Cumulus also makes it possible for you to customize the appearance of your collections extensively. For further information, see “View Customization,” p. 94.



Edtions	Photographer	File Format	Last Use	Copyrights	Asset Name	Asset Creation
Season Motts	Datgathe	JPEG Image	not used	all rights	Fichten i. Rauh...	10/9/96 13:16:42
Autumn Motts	Datgathe	JPEG Image	not used	all rights	Gänse 1 47-6.jpg	10/9/96 13:14:06
Spring Motts	Datgathe	JPEG Image	not used	all rights	Hagebutten 10-2...	10/9/96 13:16:47
Summer Motts	Datgathe	JPEG Image	not used	all rights	Rauchfeli 11-13 12...	10/9/96 13:16:36
Winter Motts	Datgathe	JPEG Image	not used	all rights	Rauchfeli 8-21 61...	10/9/96 13:16:43
	Datgathe	JPEG Image	not used	all rights	Rauchfeli 8-28 12...	10/9/96 13:16:45
	Datgathe	JPEG Image	not used	all rights	Rauchfelmorgen...	10/9/96 13:15:24
	Datgathe	JPEG Image	not used	all rights	Schöneck Eigen...	10/9/96 13:15:34
	Datgathe	JPEG Image	not used	all rights	Wintersonne 10...	10/9/96 13:17:17
	Datgathe	JPEG Image	not used	all rights	Winterwald 8-29...	3/19/96 12:36:39
	Datgathe	JPEG Image	not used	all rights	Winterzauber 10...	10/9/96 13:17:00
	Datgathe	JPEG Image	not used	all rights	Zaun i. Rauchfeli...	10/9/96 13:16:40

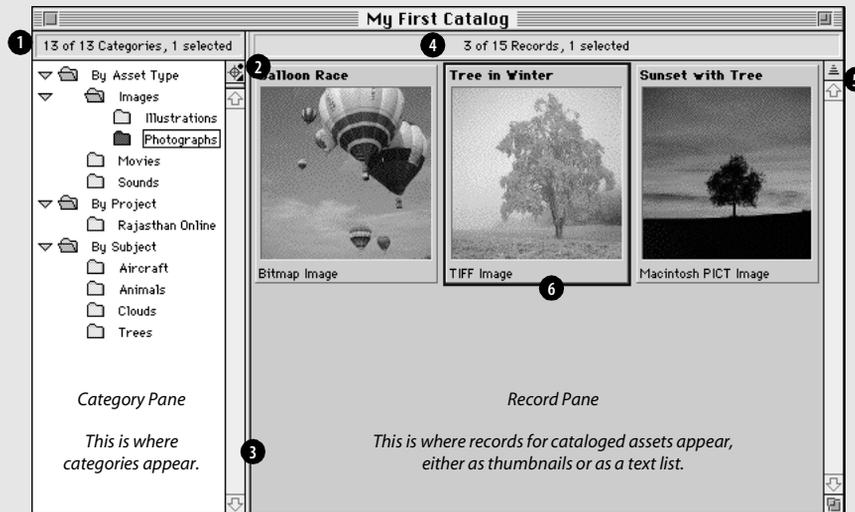
Sample collection – Details View

## Things You Can Do with Collections

- **Create** a new collection. (See “New” on page 121.)
- **Create** a slide show from your collection. (See “Creating a Slide Show,” p. 98.)
- **Customize** the appearance. (See “Asset Information,” p. 62.)
- **Open** an existing collection. (See “Open,” p. 121.)
- **Output** a collection to HTML. (See “Output to HTML,” p. 97.)
- **Save** a collection. (See “Save As,” p. 121 and “Save,” p. 121.)
- **Search** through a collection. (See “Searching,” p. 53.)
- **Send** a collection by e-mail. (See “Mail To,” p. 121.)

## The Cumulus Mac OS Interface

The Mac OS interface uses a simple window for all of its components:



### Category Pane Items

1. Shows the number of visible categories in the category pane, total number of categories in the catalog, and how many categories are selected.
2. This small icon, called the Search Compass, indicates the category search options in effect. These options are explained on page 92. Click the icon as a shortcut to access the search preference options.
3. Drag this bar horizontally to resize the category pane.

### Record Pane Items

4. Shows the total number of records in the catalog, how many are visible, and how many are selected.
5. Toggles between ascending and descending sort orders.
6. This is the selected record displayed in thumbnail view with the default view configuration settings for background and font color, frame and spacing. The size of the thumbnail displayed here is Medium (default: 128 pixel) with the three default record fields (Record Name, Thumbnail, and File Format).

*NOTE: Cumulus make extensive use of the alternate mouse button. See the appendix of this guide for details.*

## The Cumulus Windows Interface

The Windows interface uses toolbars and one common window for all of its components:

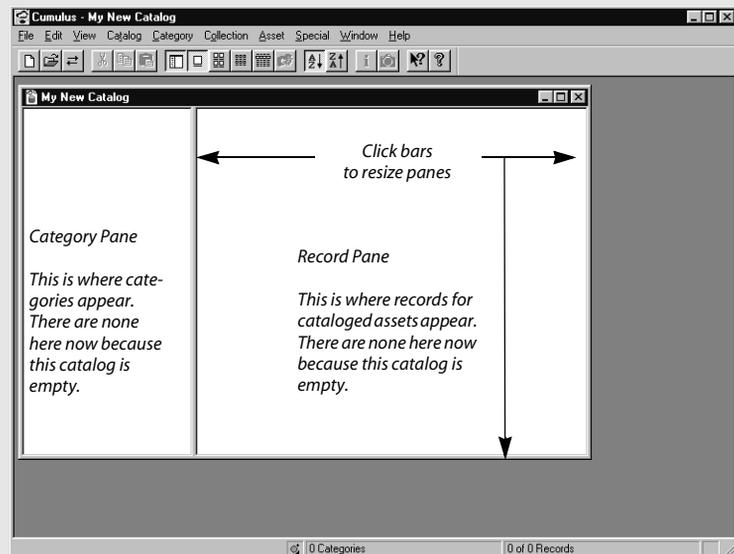


Main Toolbar

Click on and drag the frame of any toolbar to move it. Toolbars can be moved and docked to the top or bottom of the Cumulus window, or they can be dragged outside the window as independent windows. Double-click on the title bar of an independent toolbar window to move it back to its original position.

### Main Toolbar Items

1. New Catalog
2. Open
3. Connect to server
4. Cut
5. Copy
6. Paste
7. Show/hide categories
8. Show large thumbnails
9. Show medium thumbnails
10. Show small thumbnails
11. Show details (no thumbnails)
12. Sort in ascending order
13. Sort in descending order
14. Display Cataloging Options
15. Catalog assets
16. Open Find Window
17. Open Asset Information window
18. Show asset preview
19. Create slide show
20. Mail to
21. Create HTML output
22. "What's this?" help
23. Access Cumulus' online help



### Status Bar

1. This part of the status bar is used for toolbar button descriptions. Pause the mouse pointer over a toolbar button to display a brief description of that button here.
2. This small icon, called the Search Compass, indicates the category search options in effect. These options are explained on page 92. Click on the icon as a shortcut to access the search preference options.
3. The section shows the total number of categories in the catalog, how many are visible, and how many are selected.
4. Same as above, but for records.
5. A lock icon indicates that changes cannot be made to the catalog. Either you have opened it from a Cumulus Server that hasn't enabled write permissions for you, or the catalog is located on read-only media, such as a CD.

**NOTE:** Cumulus make extensive use of the alternate (right) mouse button. See the appendix of this guide for details.

## Assets/Records

In Cumulus, each asset is represented by one record. Cumulus is able to catalog every sort of digital asset such as Photoshop® image files, video clips, sound clips, or QuarkXPress® page layouts. However, a digital asset can also be a spreadsheet file or even a data stream such as an entry in a data bank that Cumulus is keeping track of for you. Records can contain a thumbnail image of the asset. Records can (and should) be categorized for easy maintenance and searching. (See “Categories,” p. 51, for more information.)

Records are not actual copies of the asset. They merely “point” to the original file. This saves disk space and avoids confusion caused by maintaining multiple copies of an asset.

Records contain information on the assets, which is called metadata. Using metadata makes it possible for Cumulus to track your assets and find their records at lightning-speed. A record is the sum of metadata stored on an asset.

Canto is setting the pace in the asset management field with its TAG files, which hold all of the information that can be viewed in the Asset Information application – and more. TAG files have been developed by Canto to be the standard file format for the storage of metadata in the field of asset management. Cumulus can create TAG files when cataloging assets from a location where the user is allowed to save files. How to activate this option, see “Catalog Assets,” p. 118.

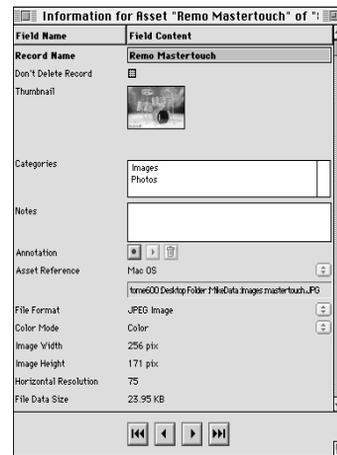
All records contain at least some searchable information in their record fields on the asset file they represent. Generally, the range of information each record includes depends on the kind of asset represented.

However, Cumulus makes it possible for you to determine precisely what sort of information should be kept on your assets. This can be defined differently for each catalog as each catalog has its own properties. It is the catalog properties that determine what information is stored on the assets in the record fields. (For further information, see “Catalog Properties,” p. 69.)

As it comes ‘out of the box,’ Cumulus has many record fields ready to be filled while cataloging, depending on the nature of the asset. Not all of the record fields that Cumulus supports are activated with Cumulus’ default settings.

### Asset Information Window

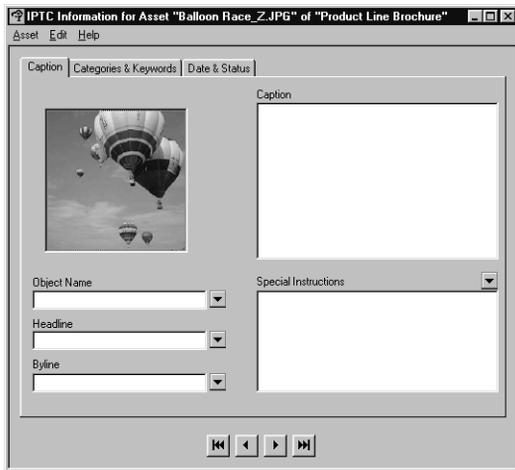
The information stored on an asset in the current catalog can be viewed using the Asset Information window.



The information on your assets can be viewed and accessed via record fields. With the default settings, not all of the information stored on an asset will be displayed in the Asset Information window. But thanks to the customizability of Cumulus, you can determine not only what record fields are displayed but also how the record fields are displayed. For further information on customizing the Asset Information window, see page 63.

## IPTC Information Window

The IPTC information stored on an asset in the current catalog can be viewed and edited using the IPTC Information window.



For further information the IPTC Information window, see page 63.

## Field Types

Cumulus can store different kinds of information. Consequently, Cumulus features many different field types for storing information. The different field types are (the examples are drawn from the default record fields):

- **String** - Can be used to store textual information (e.g., Notes).
- **Boolean** - Great for on/off, yes/no options. Displays as a check box (e.g., Don't Delete Record).
- **Integer** - Any non-fractional number up to 32 bits (e.g., non-decimal numbers as a price of \$2).
- **Real** - Any number up to 64 bits (e.g., a decimal number such as a price of \$2.99).
- **Date** - Any valid date (later than 1970) entered in the format of your computer's system settings (e.g., Record Modification Date).

- **Binary** - Not user-editable; administered by custom asset information applications, which can manipulate and store binary data for further automation (e.g., Asset Reference).
- **Picture** - Pictures can be pasted into these fields (e.g., Thumbnail).
- **String List** - This field type supports lists, such as menus, which can make data entry easier. The items in the list are defined by the user (e.g., Status, well-known to users of Cumulus 4).
- **Audio** - Can store voice annotations that can be recorded directly into the computer or come from the assets themselves.

For further information on Cumulus field types and customization, see "Catalog Properties," p. 69.

## Asset Types Supported

Cumulus will catalog any kind of digital asset you throw at it. Moreover, it directly supports 130 file formats with specially developed filters. (See "Asset Format Support," p. 80, for details on supported formats.) Visit Canto's website ([www.canto.com](http://www.canto.com)) for news, updates and downloads, including new file filters as they are developed (for registered users only).

## Record Size

In general, a record's size can depend on several factors:

- The size and quality setting of the thumbnail (if you choose to include one).
- The amount of text and notes stored in various record fields.
- The asset format the record represents. (Different assets generally require different amounts of data to describe them.)
- The amount of additional information you include in the record (such as voice annotation).

The customizability of Cumulus means that you can determine what information is stored on the assets in a particular catalog. If catalog size is a concern, there are a few catalog properties to keep in mind. These settings can affect the size of the records cat-

aloged. See “The Cataloging Options Window,” p. 88, for details on these options.

### Renaming Records

Though there is no menu option specifically for this use, renaming records is easy:



1. Select the record to be renamed.
2. Select **Asset**⇒**Information**. The Asset Information window opens, which shows information on the asset.
3. Find and change the record’s name in the **Record Name** field.
4. Select **Asset**⇒**Save** to save your changes.

If you want to edit more records in the collection, you can use the arrow buttons to load a new record. The Asset Information window is described in more detail on page 86.

### Editing a Record’s Category Assignments

Also found within the Asset Information window is a list of the categories currently assigned to the record. From this list you can remove category assignments or add new ones.

To remove a record’s category assignment:



1. Select the record whose category assignments you want to change.
2. Select **Asset**⇒**Information**. The Asset Information window opens, which shows information on the asset.
3. Select the category you wish to remove and press the **Delete** key.

4. Select **Asset**⇒**Save** to save your changes.

If you want to edit more records in the collection, you can use the arrow buttons to load a new record.

There are different ways to add a category assignment to a record, or assign a record to a category, depending on your perspective. The perhaps most intuitive way is by dragging and dropping the category to the record, or the record to the category. (See “Assigning a Record to a Category,” p. 29.) It is also possible to add a category assignment to a record via the Asset Information window, which displays a list of the categories with which the record is associated.

To add a category assignment to this list in the Asset Information window:



1. Select the record whose category assignments you want to change.
2. Select **Asset**⇒**Information**. The Asset Information window opens, which shows information on the asset. If necessary, drag this window aside so that you can also see the Category Pane of the Collection Window.
3. Click the category in question in the Category Pane.
4. Drag the category to the categories list in the Asset Information window. The category is assigned to the record.
5. Select **Asset**⇒**Save** to save your changes.

If you want to edit more records in the collection, you can use the arrow buttons to load a new record. The Asset Information window is described in more detail on page 86.

For assigning/detaching multiple categories to/from multiple records see page 129/page 130.

## Things You Can Do with Records

- **Assign** a record to a category. (See “Assigning a Record to a Category,” p. 29.)
- **Change** a record’s category assignments. (See “Editing a Record’s Category Assignments,” p. 49.)
- **Copy/Cut** and **Paste** records between catalogs and/or collections. (Record categories are copied along with records.)
- **Create** a new record (same as cataloging assets). (See “Catalog Assets,” p. 118.)
- **Customize** the fields of a record. (See “Customizing Record Field Properties,” p. 69.)
- **Delete** a record and (optionally) its asset. (See “Delete,” p. 116.)
- **Drag and drop** a record into another drag and drop-supporting application. Dragging a record copies the asset into the target document. You may prefer, instead, to place the asset manually and access it by reference.
- **Export** records. (See “Export,” p. 113.)
- **Import** records. (See “Import,” p. 113.)
- **Optimize** a records’ preview icon. (See “Optimize Thumbnail,” p. 116.)
- **Print** a record’s thumbnail or details view. (See “Print,” p. 114, and “Print Preview,” p. 115.)
- **Print** the record’s asset information. (See “Printing Asset Information,” p. 62.)
- **Rename** a record. (See “Renaming Records,” p. 49.)
- **Rotate** a record’s preview icon. (See “Rotate Thumbnail,” p. 116.)
- **Search** for specific records. (See “Searching,” p. 53.)
- **Show** or hide records (See “Show Record List,” p. 117.)
- **Update** a record to reflect an edited asset. (See “Update Record,” p. 118.)
- **Update** a record to reflect a relocated asset. (NOTE: It’s very important to keep records in sync with their associated asset files. If you move an asset after cataloging it, be sure to update its record by

using the “Update Asset Reference(s)” menu item. (See “Update Asset Reference(s),” p. 118.)

- **View** and optionally **edit** a record’s asset information. (See page 62 for details.)

## Things You Can Do with Assets

Cumulus is also able to help you manage your original assets. Cataloged assets can be copied, deleted, moved, printed – all from the Cumulus interface. And when you copy, delete or move an asset, Cumulus takes care of its TAG file at the same time, treating it accordingly. For further information, see “Catalog Assets,” p. 118.

- **Convert** the asset to another file format. (See “Convert To” on page 123.)
- **Copy** the asset into another application by dragging the record into the application.
- **Create** copies of the assets in another location. (See “Copy To,” p. 123.)
- **Customize** the display of the information on an asset. (See “Customizing the Information Window,” p. 63.)
- **Delete** an asset. (See “Delete,” p. 116.)
- **Move** assets. (See “Move To,” p. 123.)
- **Open** assets using the application they were created with or another application. (See “Open With,” p. 123.)
- **Preview** a record’s asset. (See “Preview,” p. 122.)
- **Print** assets using the application they were created with or another application. (See “Print With,” p. 123.)
- **Send** your assets by e-mail. (See “Mail To,” p. 123.)
- **Show** information on an asset. (See “Asset Information Window,” p. 62.)
- **Show** the location of the asset. (See “Show Location,” p. 123.)
- **Show** a preview image of the asset. (See “Preview,” p. 122.)
- **Writing IPTC** data back to the asset. (See “IPTC Information Window,” p. 63.)

## Categories

Cumulus categories are used to organize records, much like folders are used to organize files in a traditional filing cabinet. But the asset can appear in any number of Cumulus categories at one time. They are similar in purpose to keywords used in other programs. The number of categories in a catalog is limited only by the catalog's size. Category names can be up to 255 characters in length.

### Root Categories and Subcategories

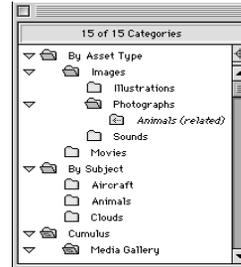
Categories can be nested within one another to create root categories and subcategories. A root category is at the highest hierarchical level in your catalog. It has no categories above it. A subcategory is any category with a category above it.

Use drag and drop to move categories where you want them. The categories that you create can be easily moved to other locations at any time.

### Category Types

Cumulus offers different types of categories: Normal Categories, Related Categories and Directory Categories. These category types have the following characteristics:

- **Normal Categories** can be created by the user as root categories or subcategories.
- **Related Categories** are aliases of existing categories which can be created by the user. They can be placed in any position in the category hierarchy. Complete alternate catalog hierarchies can be built using related categories.



*A category structure featuring a related category and directory categories.*

In the image shown, a related category was made for the category Animals and placed under the Photographs category. Selecting and double-clicking a related category works the same as with the original category. (See "New Related Category," p. 120.) They are identified by an arrow in their icons: 

- **Directory Categories** are automatically created by Cumulus during the cataloging process. These automatically created categories resemble the folder or directory hierarchy in which the assets reside. They are identified by a smaller folder in their icons:  or .

They are created by default but this option can be disabled.

To avoid automatic creation of directory categories:



1. Select **Catalog** ⇒ **Properties**. The Catalog Properties window opens.
2. Click **Record Fields**.
3. Select the field named **Categories** and click the **Properties** button.
4. Click **Link to the Following Fields**. Cumulus offers to provide you with a list of all matching fields to start with.
5. Click **Yes**.

6. Select the module which should not create categories during the cataloging process.
7. Click **Remove**.
8. Click **OK**. If you now catalog assets from this module, no directory categories will be automatically created.

To find out how to create categories, see “Creating Categories,” p. 27.

Renaming categories is easy:



1. Double-click on the category's name (not its icon). Its name will become selected for editing.
2. Edit the name. Category names can be up to 255 characters long.

### Copying Categories and Associated Assets

Categories can be dragged and dropped – along with the assets associated with each category – into other applications, such as the Windows Explorer or the Mac OS Finder. When you drop the categories, Cumulus creates a folder with the same name as the category and copies the asset files to that folder.

This option might be handy for collecting production files for output (assuming the files all have at least one common category, such as project name).

To copy categories and associated assets:



1. Select one or more categories that you want to copy along with the associated asset files.
2.  Hold down the **Control** key /  Simply drag and drop the selected categories into the target application.

You also have the option of copying only the asset files associated with selected categories (see “Save Matching Assets As,” p. 120).

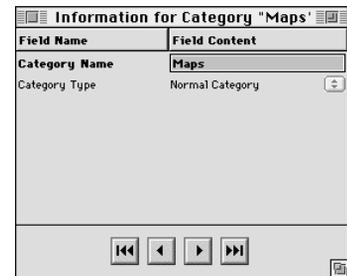
### Category Fields

Category fields are used for information that relates to all records assigned to that category, or they can be used to store additional information on the category itself. A significant difference between record fields and category fields is that category fields are not searchable.

Category fields can be activated and set up in the Catalog Properties window. For further information, see “The Cataloging Options Window,” p. 88.

### Category Information Window

Information on categories can be viewed in the Category Information window. Not all of the category fields are displayed with Cumulus' default settings.



To open the Category Information window:



1. Click once on a category to select it.
2. Select **Category**⇒**Information**. The information window for the selected category appears.

Which category fields are displayed in the Category Information window is up to you. You can determine not only what category fields are displayed but also how the category fields are displayed. (For information on editing the Information window, see also “The Information Window,” p. 86.)

Once the Category Information window is opened you can use the arrow buttons to load other categories into the window.

### Editing Category Information

In general you can edit the information stored on a category. But you can only edit information which is stored in category fields you are allowed to edit. (In the Category Field Properties, the option **Allow User to Edit** has to be activated. See “Customizing Record Field Properties,” p. 69, for details.)

To edit the information stored on a category:



1. Load category you want to edit into the Category Information window.
2. Click the field you want to edit.  
  
Fields with white backgrounds can be edited. If a text field has a grey background, then it cannot be edited.
3. Make your changes.
4. Select **Category**⇒**Save** to save your changes.

If you want to edit more categories, you can use the arrow buttons to load another category.

For further information on editing in the Information window, see “The Information Window,” p. 86.

### Things You Can Do with Categories

- **Assign** a category to a record. (See “Assigning a Record to a Category,” p. 29.)
- **Create** a new category. (See “New Root Category,” p. 120, “New Subcategory,” p. 120, and “New Related Category,” p. 120.)
- **Create** a related category. (See “New Related Category,” p. 120.)
- **Delete** a category. (See “Deleting Categories,” p. 25.)

- **Export** categories. (See “Export,” p. 113.)
- **Import** categories. (See “Import,” p. 113.)
- **Move** a category inside or outside another category. (See “Creating Categories,” p. 27.)
- **Remove** a category assignment from a record. (See “Editing a Record’s Category Assignments,” p. 49.)
- **Rename** a category. (See “Creating Categories,” p. 27.)
- **Show** or **hide** categories. (See “Show Category List,” p. 117.)

## Searching

Cumulus provides two ways to search for records: searching by category and searching with the Find window. Depending on the size of your catalogs and the complexity of your search requirements, you may find one way better suited to your needs.

### Searching for By Category

The simplest form of searching is simply double-clicking on a category in the Categories pane. This quickly finds all of the records in the active catalog that are associated with that category. You can also select more than one category to see all the records associated with the set (see “Finding Records by Using Categories,” p. 31). To quickly view the records assigned to categories, just hold down the **Alt** key / **⌘** both the **Alt** and **Apple** key and press an arrow key (up, down, left or right).

There are several Preference options that affect the way category searching works. The current search options are visually indicated by the Search Compass: . The Search Compass is found **Alt** in the Status Bar / **⌘** in the upper right portion of the category pane. (See the Search section on page 92 for more detailed information.)

## Searching with the Find Window

The Find Window reveals the true search power of Cumulus. Complex search setups can be constructed to find virtually any type of data stored on an asset. Boolean operators (and, or) increase the query possibilities even further.

The records found as a result of your search can either replace the records in the current collection or comprise a new collection of their own.

A description of the Find window and a comprehensive listing of searchable fields is listed on page 59. All of the example searches on the following pages are based on the catalog from the tutorial in the previous chapter.

## Simple Searches

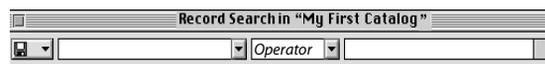
To set up a simple search (as opposed to a compound search, described on page 55):



1. If the Find window is not open, click **Collection** ⇒ **Find Records** to open it.
2. Select a search criterion from the **Criteria** pop-up menu.



3. Select an operator from the **Operator** menu.



4. Either select a value from the **Value** pop-up menu, type a value in, or drag an appropriate object onto the field. (Appropriate objects can be either thumbnails or category icons.)



5. Leave the default search method **Search in Entire Catalog**.
6. Click **New Collection** so that the records found will be displayed in a new collection of their own.
7. Click **Find**.

Below are some example search setups with brief explanations of each. We will search the catalog we created back on page 24 in the tutorial.



- This finds “Sun behind Cloud” and “Cumulus Clouds.”



- This finds “Map” and “Tree with Apple.”



- This finds all records except “Map” and “Tree with Apple.”



- This finds “Sunset,” “Sunset with Glider,” “Sunset with Tree” and “Sun Behind Cloud” because they all start with the letters “sun.”



- This finds "Tree with Apple," "Cumulus Clouds," "Sun behind Clouds," and "Penguins."

If you're following along in Cumulus, try using the drag and drop method for entering values into the **Value** field for next two examples.



- This search finds "Sun behind Clouds," "Penguin Balloon" and "Balloon Race" because Cumulus has determined that the thumbnails of these two images are similar in contrast and brightness. Remember, thumbnail searches do not search for similar image subjects. (Drag and drop: Drag the "Balloon Race" thumbnail onto the Value field.)



- This finds "Airplane Illustration," "Balloon Race," "Penguin Balloon" and "Sunset with Glider," because they're all members of the "Aircraft" category.

## Compound Searches

In larger catalogs, finding records with a single search criterion may not be efficient. To avoid sifting through tens of thousands of thumbnails, you may need to use more than one search criterion. For example, you may be looking for a photographic image in EPS format.

Cumulus lets you do this in two different ways:

- You can enter a compound search (more than one search criterion), or
- You can narrow the results of a simple or compound search. (See "Narrowing the Search," p. 56.)

Building a compound search isn't much more difficult than building a simple search. You just have to think in terms of what you are asking Cumulus to do, and then translate that request into the search fields. For example, your request, in English, might read:

"I need all records in the Photographs category that have 'tree' somewhere in their names."

Translated into Cumulus-speak, this becomes:

- *Category is Photographs and Record Name contains tree.*

Now let's break it down into separate search statements, called "conditions."

- *Category is Photographs*

In our first condition, **Category** is our search criterion, **is** our operator, and **Photographs** is the value we're searching for. This tells Cumulus that the records we want are all in the **Photographs** category. This alone would find the records we're looking for, but if our catalog contained thousands of images in the Photographs category, we'd spend quite a bit of time browsing through them all.

- *and*

This next little bit is very important. This is a Boolean operator that tells Cumulus how to consider the previous and next search conditions. By selecting **and**, we tell Cumulus that the records we want must match *both* conditions of our compound search. Another option here is **or**, which would tell Cumulus that the records we want only need to match one of the conditions.

- *Record Name contains tree*

In the second condition of the search, we help Cumulus narrow the search results by giving it part of the record name that we want. We use the operator **contains** instead of **is** because we're looking for

records that have ‘tree’ anywhere in their names. **Is** would require that the record be called exactly ‘tree,’ with no variation.

In the Find window, the field values will construct a sentence similar to the one we just broke down. When you can see each condition on a line by itself, it’s easier to visualize the results of the request.

Setting up each condition in a compound search is the same as setting up a simple search. The only additional steps are adding a new line of search fields, and specifying the Boolean connector between each condition. Here’s how:



1. If the Find window is not open, click **Collection** ⇒ **Find Records** to open it.
2. Set up the first condition of the search as:



3. Click  to reveal a second set of fields.
4. Select **and** from the Boolean pop-up menu, if it’s not already selected.
5. Set up the second condition of the search so that the window looks like this:



6. Leave the default search method **Search in Entire Catalog**.
7. Click **New Collection** so that the records found will be displayed in a new collection of their own.

8. Click **Find**. The search finds two images: “Sunset with Tree” and “Tree in Winter.”

Additional conditions may be added to further refine the search. Add and delete conditions using the following buttons:

-  Inserts a new search condition before the current condition. (The current condition is the line in which a field is highlighted or the flashing cursor I-beam is found. Click in any field to make that line the current condition.)
-  Inserts a new search condition after the current condition.
-  /  /  /  Deletes the current condition. This is *not* undoable!

## Narrowing the Search

If the results you get from either a simple or compound search are too broad, Cumulus can help. The search method **Narrow Current Collection** allows you to search through the set of records found from a previous search, instead of the entire catalog, thereby reducing the number of records found.

Using our example from the compound search section, we’ll perform the same search using the search method **Narrow Current Collection**.



1. If the Find window is not open, click **Collection** ⇒ **Find Records** to open it.
2. Set up the first part of the search as:



3. Leave the default search method **Search in Entire Catalog**.

- Click **New Collection** so that the records found will be displayed in a new collection of their own.
- Click **Find**. Cumulus finds all records in the Photographs category.
- Now change those same fields to:



- Click **Narrow Current Collection** as the search method.
- Click **Current Collection** so that the records found will supersede the current collection.
- Click **Find**. Cumulus searches through the ten records found in the first search and narrows the set of records down to just two images: "Sunset with Tree" and "Tree in Winter."

If it helps, you might want to think of Narrow Current Collection as an "and" Boolean operator. That is, after your first search, you conduct another with different search criteria, and the final results are the same as from the corresponding compound search using "and." In the example above, the same final results were achieved with the compound search previously conducted.

### Broadening the Search

If the results you get from either a simple or compound search are too narrow, Cumulus can be of assistance again. The search method **Broaden Current Collection** adds the results of a subsequent search to the records found with a previous search.

Let's conduct an example search using the **Broaden Current Collection** search method:



- If the Find window is not open, click **Collection** ⇨ **Find Records** to open it.
- Set up the first part of the search as:



- Leave the default search method **Search in Entire Catalog** for this first step.
- Click **New Collection** so that the records found will be displayed in a new collection of their own.
- Click **Find**. Cumulus finds four records: "Camels in India," "Indian Camel," "Indian Music," and "Sunset with Tree."
- Now change the same fields in the Find window to:



- Click **Broaden Current Collection** as the search method.
- Click **Current Collection** so that the records found will supersede the current collection.
- Click **Find**. The record "Map" is added to the four records found with the previous search, and your current collection is comprised of five records.

This search method can be seen as an "or" Boolean operator. That is, after your first search, you conduct

another search using different criteria, and the final results are the same as from the corresponding compound search using “or.”

### Saving and Loading Search Setups

Although Cumulus remembers your search setups if you leave them open when you quit Cumulus, you can also save search setups, called queries, to disk. This prevents you from having to rebuild them each time you need them. It also ensures that your searches are consistent from session to session, which is important for some purposes. Cumulus query files can be used on any supported platform. You can store and load queries for quick retrieval.

To save the current query:



1. Click the  button.
2. Select **Save Query**. A dialog box appears from which you can name the query.
3. Type a name for the query in the **File name** field.
4. Click **Save**.

To load a saved query:



1. Click the  button.
2. Select **Load Query**. A dialog box appears from which you can select a query.
3. Select a query file.
4. Click the button **Open**.

### Things You Can Do with Searches/Queries

- **Create** a new search condition. (See “Insert Condition Before,” p. 121 and “Insert Condition After,” p. 121.)
- **Delete** all search conditions. (See “Delete All Conditions,” p. 122.)
- **Duplicate** a search condition. (See “Duplicate Condition,” p. 121.)
- **Load** search queries. (See “Saving and Loading Search Setups,” p. 58.)
- **Save** search queries. (See “Saving and Loading Search Setups,” p. 58.)
- **Search** multiple collections and even catalogs for records. (See “Find Records In All Collections,” p. 121.)

# The Find Window and Sample Search Options

To open the Find window: Select Collection → Find Records



1. Loads or saves queries.
2. Search criteria.
3. Search operator.
4. Search value.
5. Inserts a new search condition before the current one.
6. Inserts a new search condition after the current one.
7. Deletes the current condition.
8. The whole catalog will be searched in.
9. Only the current collection will be searched in.
10. Found records are added to the current collection.
11. Found records replace the current collection.
12. Found records will comprise a new collection.
13. All records of the catalog will be shown.
14. Starts the search.

NOTE: Cumulus search options are NOT case sensitive.

Criteria	Field Type	Operator	Searches for	Sample Data/Instructions
Categories	Special	1	Records associated with specified category.	Type category name or drag category icon onto Value field. Use drag method if catalog has multiple categories of the same name. Current Search Preferences settings affect results. (See "The Application Preferences Window," p. 92)
Thumbnail	Special	2	Similar thumbnails. Compares brightness and contrast.	Type record name or drag record thumbnail onto Value field.
Horizontal Resolution	Real	3	Dot-per-inch resolution of an image asset file.	200, 300
File Data Size	Integer	3	The asset file size. (Not the record size.)	1024 KB (use KB for kilobytes) 24 MB (use MB for megabytes)
Asset Creation Date	Date	3	The date the asset was created.	11/22/97
Color Mode	String List	4	The color mode of an image.	Select from Value pop-up menu.
Cataloging User	String	5	The name of the user who cataloged the asset.	Clint, Carolyn
Notes	String	5	Records with a group of characters in the Notes field that matches criteria.	Any line of text. For example, "ball" finds ball, balloon and baseball. "Il rights res" finds "All rights reserved."
Record Name	String	5	The name of the record.	Balloon, Clouds, Gun Shot

Field Type	Categories	Thumbnail	Date, Real, Integer	String List*	String*	
<b>Operator Menu Options</b>	<div style="border: 1px solid black; padding: 2px;">                     is is not contains doesn't cont. has value has no value                 </div> 1	<div style="border: 1px solid black; padding: 2px;">                     similar to not similar to                 </div> 2	<div style="border: 1px solid black; padding: 2px;">                     under up to is is not from over has value has no value                 </div> 3	<div style="border: 1px solid black; padding: 2px;">                     contains doesn't cont. has value has no value                 </div> 4	<div style="border: 1px solid black; padding: 2px;">                     starts with is is not contains doesn't cont. has value has no value                 </div> 5	* The menu options for this field type may differ depending on the field properties.





A little up-front planning can save countless hours of work and frustration down the road. This section offers some suggestions for effective cataloging strategies. Also covered are some catalog maintenance issues and how to set application and catalog preferences to suit your needs. If you intend on doing anything more than simply browsing catalogs created by others, you should read this section.

**5**

**Use**

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## Asset Information

Catalog records contain far more than just thumbnail images. They contain useful information about the assets that help you identify them and find them when searching. Some of this information is created automatically when you catalog the asset and some can be added by you at any time.

Remember, the information on an asset is stored in a record via record fields. The record fields are defined in the catalog properties. They determine how and what sort of information Cumulus creates automatically and when you catalog the asset and what sort of information you can add.

### Asset Information Window

The information stored on a cataloged asset can be viewed and edited using the Asset Information window.

To open the Asset Information window:



1. Click once on a record to select it.
2. Select **Asset**⇒**Information**. The information window for the selected asset's record appears.

Which record fields are displayed in the Asset Information window is up to you. You can determine not only what record fields are displayed but also how the record fields are displayed. (See "Customizing the Information Window," p. 63, for further details.)

Once the Asset Information window is opened you can use the arrow buttons to load other records of the current collection into the window.

See page 86 for an overview of the options available from the Asset Information window.

### Editing Asset Information

In general you can edit the information stored on an asset. But you can only edit information which is

stored in record fields you are allowed to edit. (In the Record Field Properties field the option **Allow User to Edit** has to be activated. See "Customizing Record Field Properties," p. 69, for details.)

To edit the information stored on an asset:



1. Load the record you want to edit into the Asset Information window.
2. Click the field you want to edit.

Fields with white backgrounds can be edited. If a text field has a grey background, then it cannot be edited.

3. Make your changes.
4. Select **Asset**⇒**Save** to save your changes.

If you want to edit more records in the collection, you can use the arrow buttons to load a new record.

### Printing Asset Information

You can print the asset information of records as displayed in the Asset Information window. Exception: If the text of a string field is not displayed completely because it exceeds the length of the display, it will be printed completely.

To print asset information:



1. Load the record whose asset information you want to print into the Asset Information window.
2. Select **Asset**⇒**Print**.
3. Make the appropriate selections in the Print dialog box and click **OK**.

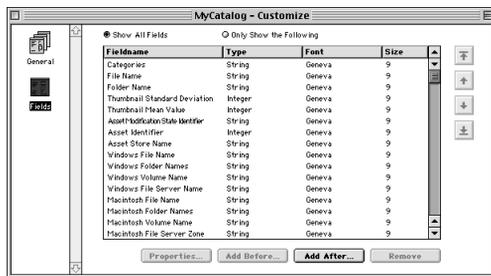
## Customizing the Information Window

You can determine general settings for the Asset or Category Information window, including which record fields are displayed and how.

To customize the Asset Information window:



1. If the Asset Information window is not open, select a record and choose **Asset or Category** ⇒ **Information**.
2. Select **Edit** ⇒ **Customize** from the Information window's menubar. This opens a window with which you can customize aspects of the Information window.



Example of a Mac OS window for customizing the Asset

Along the left side of the window / In tabs along the top of the window, you see two options named **General** and **Fields**. Under **General** you set up how the window should behave in general. And under **Fields**, you set up which record fields will be displayed and how.

See page 86 for an overview of the options available from the Customize window.

## IPTC Information Window

This Information window is specially designed for displaying and editing the IPTC data of assets.

Cumulus can read IPTC metadata information while cataloging. You can view and edit this metadata and Cumulus can write your changes back to the asset. Cumulus' management of IPTC information is conform with the IPTC standard. Being considered the industry standard its specifications are available to the public. Adobe Photoshop also uses this standard partially, meaning that text in images captioned in Photoshop's File Info will be displayed in the IPTC Information window. Photoshop only uses some of the available fields the IPTC standard comprises of. Note that even if the other fields are not displayed in Photoshop they are interchangeable between Cumulus and Photoshop.

### NOTE: Writing IPTC Data back to Assets

If you want to write back IPTC data to assets, your Cataloging Options (entry for the IPTC filter activated) and the catalog managing these assets must be prepared for this feature. IPTC record fields have to be added and their properties have to be enabled for field linking, also **Writing Metadata to Asset** must be activated in the General Catalog Properties. Cumulus provides a script to help make the process of preparation easy: **Prepare To Write IPTC** (found in the Special menu; page 134 for details). The IPTC data will be written back to the asset when any record information has been changed.

To open the IPTC Information window:



1. Click once on a record to select it.
2. Select **Asset** ⇒ **IPTC Information**. The IPTC Information window for the selected asset's record opens.

Once the IPTC Information window is opened you can use the arrow buttons to load other records of the current collection into the window.

Information can be added by entering text into the field or selecting from lists – so called 'quicklists'. Some fields provide prepared lists for immediate use. For some fields these quicklists are preset and contain values laid down by the IPTC norm. Due to IPTC standards the preset quicklists for some of that fields can't be edited. The quicklists for all other fields can be edited.

To open or edit a quicklist for a field use the arrow button next to the field. This opens a drop-down list for selecting a value. The fields for which you can edit the corresponding quicklist provide an entry ->**Edit Quicklist**. If you select this entry, a dialog for editing the quicklist opens. See "Editing Quicklists," below, for details.

See page 84 for an overview of the options available from the IPTC Information window.

### Editing Quicklists

The list displays the current values for the corresponding field. You can edit or delete these values or add new values to the list.

To add a new value:

Enter the new value in the field above the list and hit the Enter key or click the **Add** button. You then can immediately start typing the next entry.

To edit a value:

Select the value. The value will be displayed in the field above the list. Edit the value in this field and then click **Replace**. The value in the field will replace the selected value in the list.

To delete a value:

Select the value in the list and click **Delete**.

### Exporting and Importing Quicklists

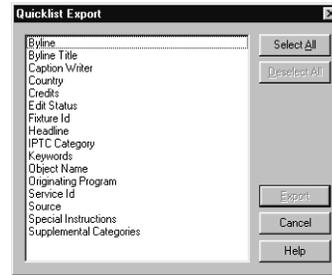
Once you have adapted the quicklist to your needs you may want to use it with other catalogs or provide it to other users. That's why Cumulus offers to export and import quicklists.

To export a quicklist:



1. Select **Edit** ⇒ **Quicklist** ⇒ **Export** in the IPTC Information window.

A dialog for selecting opens.



You can export the whole list or just parts for certain fields.

2. Select the desired parts or click **Select All**.
3. Click **Export**. A dialog box for naming and saving the quicklist opens.
4. Enter a name, select a location and click **Save**.

Another dialog box opens where you can choose the character encoding format for the list.

NOTE: Only choose Universal Encoding (UTF-8) if you want to use the export file on another operating system. (See "Character Encoding for Export," p. 101, for details).

5. Select the encoding and click **OK**.

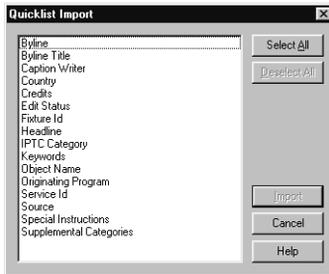
The exported list is saved as a text file. You may edit an exported text list with a text editor.

To import a quicklist or parts of it for certain fields:



1. Select **Edit** ⇒ **Quicklist** ⇒ **Import** in the IPTC Information window.
2. A dialog box to choose the list opens.
3. Select the desired list and click **Open**.

The content parts of the list will be displayed.



4. Select the desired parts or click **Select All**.
5. Click **Import**.

Your quicklist selections will then be available.

NOTE: When working with the Import function you may take the values for each field from different quicklists.

### Customizing the IPTC Information Window

You can determine general settings for the IPTC Information window.

To customize the IPTC Information window:



1. If the IPTC Information window is not open, select a record and choose **Asset** ⇒ **IPTC Information**.
2. Select **Edit** ⇒ **Customize** from the IPTC Information window's menubar. This opens a win-

dow with which you can customize general aspects for IPTC Information window.



3. Make your selection and click **OK** / **close** the Customize window.

See page 84 for an overview of the options available from the Customize window.

## Program Settings

There is no best way to use Cumulus. Many aspects of the program can be changed to adapt to your way of managing your assets. Fundamental changes can be made by modifying the settings in:

- **Preferences**
- **Cataloging Options**

Before you build any catalogs of your own, it's a good idea to become acquainted with the various setting options that Cumulus provides.

### Preferences

The settings found under **Edit** ⇒ **Preferences** affect global application behavior. They are not specific to any one catalog. Included here are options that control the way Cumulus conducts searches.

See "The Application Preferences Window," p. 92, for an overview of the options available from this window.

## Cataloging Options

The Cataloging Options settings affect how Cumulus deals with your assets during the cataloging process.

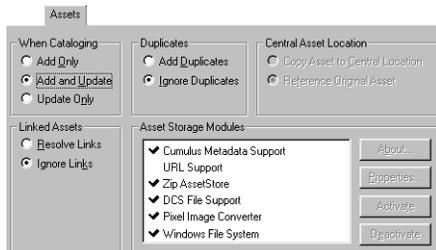
Select **Catalog** ⇒ **Cataloging Options** to open the cataloging options window. Options set from this window are not specific to any one catalog, but apply to all subsequent cataloging done.

See “The Cataloging Options Window,” p. 88, for an overview of the options available from this window. Of all the various settings available within the Cataloging Options, those concerning Asset Storage modules are described in detail in the following section. Asset Format are described in the section “Asset Format Support,” p. 80.

## Asset Storage Modules

When cataloging an asset, Cumulus uses two types of components: Asset Storage modules and filters. The Asset Storage module manages the asset’s storage (the access to its location), and the filter analyzes the asset’s contents. For example, if you catalog a file from the file system of your computer, the Asset Storage module manages the access to the file system of your computer, and the employed filter reads the file’s content.

Cumulus comes with Asset Storage modules for the Windows or Mac OS file systems as well as a module called “Cumulus Metadata Support” and special modules to handle DCS (Desktop Color Separation) files and OPI (Open Prepress Interface).



The section **Assets** of the **Cataloging Options** windows lists the **Asset Storage** modules that manages the access to an asset.

Depending on your workflow requirements, you may not need to use some of these Asset Storage modules. If, for example, you are not using services from a prepress service provider and do not have access to an OPI server, you should deactivate the OPI System Support. Deactivating Asset Storage modules which are not needed for your specific workflow enhances productivity by freeing up Cumulus’ resources and speeding up the cataloging process. To deactivate an Asset Storage module simply select it and click **Deactivate**.

If you want to learn more about Cumulus’ various Asset Storage modules, what they do and how they are configured to customize Cumulus to your specific workflow, then please continue reading the following sections.

### Mac OS File System

This Asset Storage module manages the access to files accessible from a Mac OS computer. You can define the following properties:

- **Preferred Resolving Method** – If **By Alias** is enabled, Cumulus will resolve the asset reference using the alias first. If **By Pathname** is enabled, Cumulus will resolve the asset reference using the pathname first.
- **Alias Search Method** – If **Fast Search** is enabled, Cumulus will only search at the original location. If **Extensive Search** is enabled, Cumulus will also search all mounted volumes in case the file was not found at the original location.
- **Mount Dialogs** – Dialogs prompted by the operating system when mounting volumes can either be shown or suppressed. If you choose **Suppress** failures might occur, when mounting volumes (especially removable volumes such as CD-ROMs) is required for Cumulus functions such as previewing, copying and transferring. That’s why you should only choose the **Suppress** option if you are working in a network environment and want to avoid all dialogs about mounting when accessing the server. In

case the server can't be mounted you will access the assets via Server Asset Transfer. In the case of the Single User Edition it is highly recommended to choose the Show option.

### Cumulus Metadata Support

The Asset Storage module **Cumulus Metadata Support** supports the storing of an asset's metadata in a separate TAG file for each asset. This makes it possible for stored metadata to be used externally (e.g., by other applications). Only if the Asset Storage module Cumulus Metadata Support is activated, Cumulus will be able to create a TAG file for each asset cataloged. (For further information on TAG files, see "Assets/Records," p. 47 and "Catalog Assets," p. 118.) You can define the following properties for the Cumulus Metadata Support:

- **Never** – If a TAG file exists, Cumulus Metadata Support will read it, but no TAG files will be created.
- **Only if Metadata Exists** – If metadata in a TAG file exists, it will be updated.
- **Always** – A TAG file for metadata will be created and continuously updated.

### DCS File Support

The Asset Storage module DCS File Support enables Cumulus to recognize CYMK Desktop Color Separation files so that it can effectively catalog and manage multiple-file DCS assets. This Asset Storage module supports DCS version 1.0. These DCS assets consist of one main file (which may contain a preview image) and the four standard color separation files.

When cataloging a DCS asset, this Asset Storage module creates a record for the main file only. This is important to be aware of when viewing the Asset Information window, as the information such as file size, etc. only pertain to the main file. Although only one file is cataloged, Cumulus still manages all five. For example, if you move or copy the cataloged DCS asset with Cumulus, all five DCS files will be moved or copied.

### OPI System Support

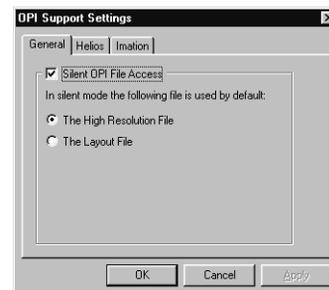
The Asset Storage module **OPI System Support** enables Cumulus to be OPI-aware. The Open Pre-press Interface (OPI) is a technology that allows placing low resolution versions of image files into page layouts and letting an OPI print spooler automatically replace them with the high resolution versions of the files for printing. Only if the Asset Storage module **OPI System Support** is activated, Cumulus will be able to recognize OPI files and carry through the correct handling of high and low resolution versions of OPI files.

The module is able to read path name information and lets Cumulus manage both high resolution and low resolution files from OPI systems like Imation Color Central™, Nine Bits PrintDesk, 4-Sight OPI™, and Helios EtherShare OPI.

Cumulus is also OPI-compatible with many other OPI systems that use EPSF or TIFF format files as their low resolution file, like Scitex® APR. With these OPI systems, low resolution files are handled as expected, but the path to the high resolution file might not be automatically recognized.

The module offers special support for Helios EtherShare OPI version 1.0 up to 2.1 and Imation Color Central 2.1 up to 2.5. For both OPI systems you can define additional properties.

If you select the **OPI Support** entry in the list of Asset Storage modules and then select the **Properties** button, the OPI Support Settings window opens.



The OPI Support Settings window has three sections:

- **General**
- **Helios**
- **Imation**

In the section **General** you can set up the module to use either the low resolution file or the high resolution file when you drag and drop an asset. If you want to use the actual cataloged file, you can disable the option **Silent OPI File Access**.

For all OPI systems (except Helios) it is recommended to catalog the low resolution file as only the low resolution file leads to the high resolution file – and not vice versa. If you have cataloged the low resolution files, do not enable **Silent OPI File Access** along with the option **High Resolution File** for these OPI systems as this combination will not work. In fact you are using a Helios OPI system you can catalog the high resolution file as only in a Helios OPI system the high resolution file leads to the low resolution file; it is even recommended to catalog the high resolution file as the information on this file will then be available with the catalog.

In the section **Helios** you can set up special properties for Helios EtherShare OPI. Only if the option **Helios EtherShare OPI Aware** is activated, will Cumulus catalog either the low resolution layout file or the high resolution file. Although the module recognizes layout files generated in the layouts folder it also supports a name extension for layout files. In the field **Layout file name extension** (default: .lay) you specify the name extension to identify OPI layout files. You should always specify the same name extension that is used by the Helios EtherShare OPI system. A file in the same folder as the high resolution file that has this name extension will be treated as the layout file for this high resolution file. The following two options are important to avoid duplication when cataloging a whole folder. They can be used to create only one record for a pair of high- and low resolutions files when cataloging. The option **Catalog High Resolution Files Only** (default) allows you to catalog only high resolution files. This is useful

to get the information (size, resolution) about those files into the Cumulus catalog. By choosing the option **Catalog Layout Files Only** you can build a catalog of only the layout files.

In the section **Imation** you can set up special properties for Imation Color Central. Only if the option **Imation Color Central Aware** is activated, will Cumulus read the IPTC information from the high resolution file while cataloging the sample file. NOTE: This option can only work properly when the high resolution file and the sample file reside in the same folder. If the option **Add Category for Sample Files** is activated, Cumulus will assign every ColorCentral sample file to a special category while cataloging. The category name can be specified in the field below this option (default: Imation Color Central). This option is useful when you catalog both the high resolution and the sample file of an image and you want to distinguish the corresponding records.

### URL Support

The URL AssetStore option comes with Asset Storage module **URL Support**. It supports FTP and HTTP URLs. It enables users to catalog and access files stored on all standard FTP and HTTP servers for Windows, Mac OS, Mac OS X, or UNIX. See “URL Support,” p. 103, for more information on this module. The URL AssetStore is installed with the Cumulus application but it will run in limited mode. This means that asset references of URL cataloged assets can be resolved but the user can not catalog from FTP or HTTP servers. For cataloging the URL AssetStore needs to be licensed. The URL AssetStore is not activated by default.

### ZIP AssetStore

The ZIP AssetStore enables you to catalog and access assets compressed within ZIP files. It automatically catalogs all files in a ZIP file. In addition to creating a record for the entire ZIP file, it creates records for each of the compressed files in the ZIP file - even of files in a ZIP file within another ZIP file. The Cumulus ZIP

AssetStore has been tested with ZIP compressed assets created with WinZip®, PKZIP® and WinRAR.

The ZIP AssetStore automatically creates categories when cataloging ZIP files. Under a root category named **Zip** for each cataloged ZIP file a category is created named after the ZIP file (e.g. **sample.zip**). If a ZIP file contains another ZIP file, a subcategory named after this additional file will also be created. If any files contained within a ZIP file were archived with subfolder references, the ZIP AssetStore creates a category tree resembling this subfolder structure.

NOTE: Password Protected ZIP Files

If the ZIP file to be cataloged contains a password protected file, Cumulus will ask you for the password. Cumulus remembers this password and if there is another password protected file within a ZIP file, it will try the password for that file. If it doesn't fit, Cumulus will also ask you for the password of that file. Then you can choose to: - type in the password and the file will be cataloged *or* - skip the password request and file will *not* be cataloged. The passwords are also requested for any preview of a password protected asset. Cumulus remembers passwords only for as long as the current session.

## Catalog Properties

Fundamental changes can be made for each catalog by modifying its properties. **Catalog** ⇨ **Properties** opens the window from which you set catalog-specific options. These options have no effect on catalogs other than the one in which they are set.

It's important to consider a catalog's properties when the catalog is new, *before* you add records to it. This window controls several important factors that come into play while cataloging assets. Examples are thumbnail size (thumbnail quality is set from the Cataloging Options window), the record and category fields. The options are divided into the following sections:

- **General** – Catalog location and name, thumbnail size, duplicates of category names.

- **Asset Location** – Displays options on a central location for the assets.
- **Sharing** – Displays options for access rights.
- **Record Fields** – Displays the fields which the records of the catalog contain. You can add or delete fields and customize selected fields.
- **Category Fields** – Displays the fields which the categories contain. You can add or delete fields and customize the selected fields.

See "The Catalog Properties Window," p. 90, for an overview of the options available from this window.

### Customizing Record Field Properties

The properties of a record field can be extensively customized. You can define

- whether the field can be edited.
- whether and how the field is indexed for sorting and searching.
- whether and how the record field is linked with the asset and its metadata fields.

To access the properties of a record field:



1. Make sure the catalog you want to customize is opened and is the active window in Cumulus.
2. Select **Catalog** ⇨ **Properties**. This brings up the Catalog Properties window.
3. Click **Record Fields**. This brings up a list of the current record fields included in the catalog.
4. Select the entry for the field whose properties you want to change.
5. Click the **Properties** button. This brings up a dialog box from which you can set the properties for the field. (See page 91 for all available options.)
6. Define the properties as you want them.

- Click **OK** to close the Record Field Properties window. This brings you back to the fields list.

### Initial Value for Fields

To add a default text to a field (e.g. the Notes field) of all newly cataloged assets in a certain catalog, you have to enable the option **Initial Value** for the field and enter the text you want to have as default. If the asset's metadata already contain a value for this field, the initial value will be ignored.

#### NOTE: Initial Value for String List Field

The initial value of a String List field must be one of the terms which you entered into the String List dialog (see "Editing a String List Field," p. 73).

#### NOTE: Initial Value for Boolean Field

The initial value of a Boolean field is "false" if the text entry field is empty or contains **0** or **false**. If the text entry field contains any other value than **0** or **false**, the initial value is set to "true". If you work in a multi-lingual environment it is highly recommended to use the value **0** (for false) or **1** (for true) as these are language independent and will work with Cumulus versions of any language.

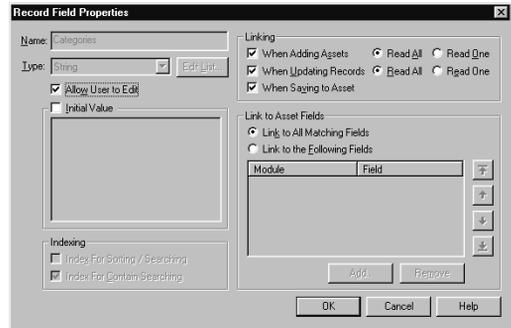
### Linking Record Fields

Some asset formats (e.g., JPEG) can store metadata. Cumulus can read, store and manage this metadata by linking it to record fields via asset fields. The asset fields are provided by the Cumulus application, the Asset Storage modules and the filters.

You can decide when the linking should happen (when adding assets and/or updating records), and whether changes to the metadata should be written back to the asset field. Changed metadata can only be written back if this function is supported by the filter or Asset Storage module used for cataloging the asset.

If the record field's type is String, you can also decide whether the linking applies to all or only the first matching asset field. If the **Read All** option is activated, the values of the linked asset fields are read consecutively.

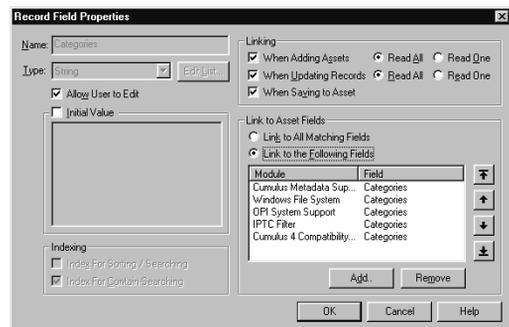
The default record field **Categories** can serve as an example for this option. Of course this record field should contain all categories. So the **Read All** option is activated.



You can link a record field to all matching asset fields of an asset or only selected ones. If you select the option **Link to All Matching Fields**, Cumulus will fill the record field with the data from all asset fields which have the same GUID (Globally Unique Identifier) or name and type.

If you select **Link to the Following Fields**, Cumulus offers to provide you with a list of all matching fields to start with.

For our example field **Categories**, the list of all matching fields looks like this:



All asset fields which "feed" the record field **Categories** are listed. You can see the different modules which provide the matching asset fields.

If **Link to the Following Fields** is activated, you can add or remove asset fields by using the appropriate button. When you click the **Add** button, a list of available asset fields is displayed.

NOTE: Field Linking Checks for Field Types

Additionally to its own type a field may be linked only to certain other field types.

Integer fields accept: String, Boolean, Real

Real fields accept: String, Boolean, Integer

Boolean fields accept: String, Integer, Real

Date fields accept: String

String List fields accept: String

String fields accept: Boolean (true, false), Integer,

Real, Date, String List (exact string matching)

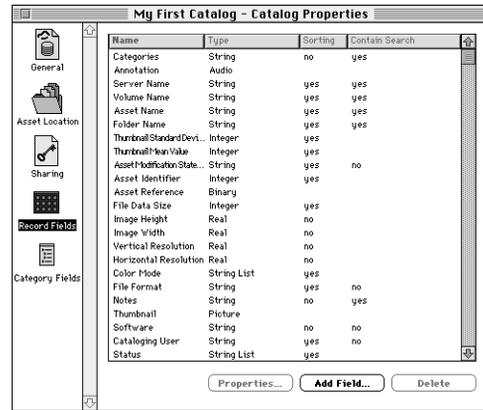
Binary fields accept: Audio, Picture

### Adding a Record Field

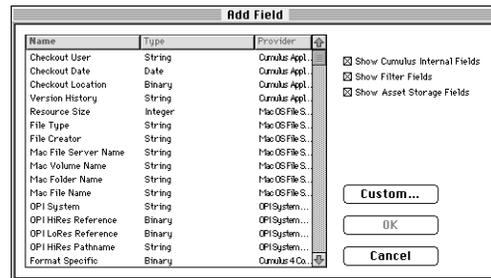
To store information in addition to or differently from the default settings, you can add fields to the catalog by activating them from the list of fields that Cumulus supports.



1. Make sure the catalog you want to customize is opened and is the active window in Cumulus.
2. Select **Catalog** → **Properties**. This brings up the Catalog Properties window.
3. Click **Record Fields**. This loads the window with a list of the current record fields included in the catalog.



4. Click the **Add Field** button. This brings up a dialog box from which you can add a new field. This is a list of additional fields that Cumulus supports, but that are not currently in the catalog.



This list can be displayed with different options for the contents:

- fields defined by filters
- fields defined by Asset Storage modules
- fields generated by Cumulus

5. Check the desired options.
6. Select the field you want to add.
7. Click **OK**. This brings you back to the fields list.

If you want this field to be shown in the Asset Information window (e.g., to edit it), you have to customize the Asset Information window and add this field. (See “Customizing the Information Window,” p. 63, for details.)

If you want this field to be displayed along with the record (thumbnail or details view), you have to customize the view and add the field to the view. (See “Adding a Field to a View,” p. 94, for details.)

### Creating a Custom Record Field

To set up a catalog to store information in addition to the fields that Cumulus supports you can define your own custom fields.



1. Make sure the catalog you want to customize is opened and is the active window in Cumulus.
2. Select **Catalog** ⇒ **Properties**. This brings up the Catalog Properties window.
3. Click on **Record Fields**. This loads the window with a list of the current record fields included in the catalog.
4. Click on the **Add Field** button. This brings up a dialog box from which you can add a new field. This is a list of additional fields that Cumulus supports, but that are not currently in the catalog.
5. Click the **Custom** button. This brings up the Record Field Properties window.

6. Enter a name for the field.
7. Select the type of the field. (See page 91 for information on field types.)
8. Define the field properties. (For details on record field properties, see “Record Fields Section,” p. 91.)

Decide whether you want to check the **Allow User to Edit** check box. If this is not checked, the field contents cannot be modified.

If you want the field to have a predefined value for every cataloged asset, check the **Initial Value** check box and enter the value.

Decide whether you want to have the field activated for indexing.

Select how the field should be linked with the asset.

Decide whether the field should be linked to asset fields and how.

9. Click **OK** to close the Record Field Properties window. This brings you back to the fields list.
10. Finally, close the Catalog Properties window.

If you want this field to be shown in the Asset Information window (e.g., to edit it), you have to customize the Asset Information window and add this field.

(See “Customizing the Information Window,” p. 63, for details.)

If you want this field to be displayed along with the record (thumbnail or details view), you have to customize the view and add the field to the view. (See “Adding a Field to a View,” p. 94, for details.)

### Editing a String List Field

To edit the entries of a String List field, the dialog box for the field must be displayed.

To open this dialog box for editing terms of a String List field:



1. Open the Field Properties window for the String List field.
2. Click the **Edit List** button. This brings up the list of terms.



You may now create a new term, edit or delete an existing term by using the corresponding buttons.

To create a new term for a String List field:



1. Select the term you want to place the new entry before or after.

2. Click **Insert Before** or **Insert After**. Which button you click depends on where in the list you want the new term placed. The **Insert After** button places the new term after the currently selected term, and **Insert Before** places the new term above it.
3. Enter a name for the new term in the dialog box that appears and click **OK**.



You can edit a term of a String List field at any time:



1. Select the term you wish to edit.
2. Click **Rename**.
3. Type a new term in the dialog box that appears and click **OK**. The term is changed in all records that use it.

You can also delete entries that you no longer need.

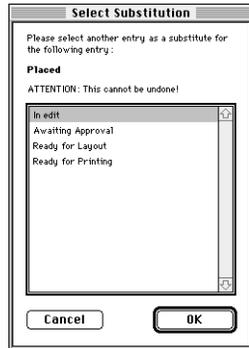
**NOTE:** Cumulus can only check whether any records are using the entry to be deleted if the String List field is activated for indexing. If Cumulus finds any records using the entry, you are prompted to assign a new entry to those records.

To delete an entry:



1. Select the entry you wish to delete.
2. Click **Delete**. The entry is simply deleted if it either has not been applied to any records or if the String List field to which the entry belongs is not activated for indexing.

If the String List field is activated for indexing, and any records using the entry to be deleted are found, then Cumulus prompts you to assign a new entry to those records.



3. Select a replacement entry from your list and click **OK**. The new entry is assigned to all records previously associated with the deleted entry. This may take a while, depending on the number of records that require reassignment.

## Working Smart

Whether you work alone or with a dozen others, following a few simple guidelines will ensure your workflow is as efficient as possible.

### Name a Catalog Manager

It's best to assign one person in your workgroup to manage assets and Cumulus catalogs. Having one manager helps keep things consistent and provides your workgroup with a recognized source for asset and catalog information.

### Develop an Effective File Naming Convention

Even though Cumulus makes it easy to keep track of assets with its thumbnail previews and wealth of search options, there is no substitute for a well planned filing system. There will be times that you must access files without the elegance of the Cumulus interface. For example, when writing scripts to enable Cumulus to automate the workflow, a consistent and predictable filing system can not only save many

hours of script debugging, but it can also enable functionality that might not otherwise be possible.

How you name your files will depend on how you use them. A news agency may decide to name incoming news stories prefixed with the current date and affixed with the file type:

```
2000-06-01-ElectionResults.txt
2000-06-01-ElectionResults.tif
```

Using the date in this order lists the files chronologically when sorted alphabetically. It also makes it easier for Cumulus scripts to select files based on a date range.

A Web design group may elect to include an image's file size in its name to make entering HTML size tags more convenient:

```
MainPageBanner200x50.gif
```

Or, to use this manual as an example, file names for screen shots of menus and dialog boxes each begin with either "M\_" or "W\_" to identify the platform from which the images come. For example, the file name for the Mac OS File menu is:

```
M_FileMenu.tif
```

It's Windows counterpart is called:

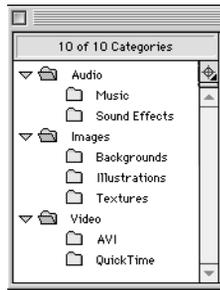
```
W_FileMenu.tif
```

Using the two file name prefixes not only helps differentiate the files at a glance, but also help to make the filing system more predictable. From this one example, you can probably guess the file names of most images in this document. Consistency and predictability are key to developing a naming convention that will serve you and your workgroup well.

### Develop an Effective Folder Naming Convention

Apply an equally clear naming convention to your folder (directory) structures. Cumulus can use your folder hierarchy to create categories when cataloging assets. This is a real time saver if your folder structure helps to identify your assets.

Some users may choose to store assets in folders based on file type rather than project name. A sound clip of audience applause, for example, may be used in many projects, but it will always be a sound clip. You can use Cumulus' categories to associate assets with one or more projects.



A folder hierarchy based on file type.

### Cross-Platform Catalog Use

Though the catalogs that Cumulus creates are completely cross-platform compatible, it is up to you to use a catalog file naming convention compatible with each platform on which you plan to use your catalogs.

Keep in mind that catalog *names* and catalog *file names* are two different things. For cross-platform purposes, you need only be concerned with catalog file names. (See "Renaming Catalogs," p. 78, for catalog naming information.)

Consult your operating system's documentation for details on the range of characters that can be used. In the meantime, here are a few tips:

- Windows uses a backslash (\) to differentiate folder hierarchies. Mac OS users should avoid using this character in their catalog names. (The Mac OS uses a colon (:) to differentiate folder hierarchies, but this character is not allowed in files name on either platform, so it is of no real concern.)
- Windows file names can be up to 255 characters in length. Mac OS file names must be 31 characters or less.

Characters that are safe for use on all Cumulus platforms include all upper - and lowercase letters, all numbers, the hyphen (-), and the underscore (\_).

## Catalog Maintenance

Taking regular care of your catalogs ensures not only the best performance, but also your data security.

### Catalog Size and Performance

The biggest factor affecting catalog size is the number of records in the catalog. There is no hard limit on the number of records that a catalog can hold, but catalog files cannot be larger than four gigabytes in size.

The actual number of records you can fit into the four gigabyte limit depends on the individual records' sizes. Factors that determine a record's size include:

- **The type of asset the record represents.** Different asset types have different information that needs to be stored to identify them, so their records use varying amounts of catalog space. For example, a video clip uses space for frame rate and total frame number fields that a simple image doesn't require.
- **The amount of text in the record's Notes field.** All those notes' characters have to be stored somewhere! If you add 1k worth of text, you add 1k to the record size. Multiply that times a thousand or so records and you have added an entire megabyte to your catalog's size.
- **The record's thumbnail size and quality.** Larger and higher quality thumbnail images take up more space. (See "Preferences," p. 65, and "Catalog Properties," p. 69, for information about thumbnail settings.)

Typically, your catalogs will never reach the maximum size. If they do, you'll need to divide them. (See "The Catalog Properties Window," p. 90, Advanced Settings.)

As a catalog grows, the time required to catalog new assets increases. Search times, however, are not affected by catalog size. There are a few tricks that you can do to increase performance when cataloging large amounts of assets at once:

- **🍏 Increase Cumulus' RAM allocation.** This is done from the "Get Info" box in the Mac OS

Finder. (Select the Cumulus application's icon and then select **Get Info** from the Finder's **File** menu.) Give Cumulus as much RAM as you can afford for the cataloging process. You can decrease the RAM partition after the assets are cataloged.

- **Choose Add Only and Ignore Duplicates in the Cataloging Options window.** These options prevent Cumulus from having to “think” too much about what it's cataloging. (See “Preferences,” p. 65, for details.)
- **Turn off any asset filters that you don't need.** (See “Asset Format Support,” p. 80.)
- **Turn off any Asset Stores Modules that you don't need.** (See “Asset Storage Modules,” p. 66.)

## Compressing Catalogs

When records are deleted from catalogs, they can optionally remain a part of the catalog in case you need to retrieve them. (See “Recovering Deleted Records,” p. 78, for information on recovering records, and “Catalog Properties,” p. 69, for information on how to make records recoverable.) However, these not-quite deleted records take up space. You can delete them permanently by compressing the catalog.



1. Select **Catalog** ⇒ **Compress**. (If the **Compress** menu option is disabled, the catalog is already compressed as much as possible.) You are warned that compressing the catalog will permanently remove the deleted records.



2. Click **OK** to compress the catalog.

## Backing Up Catalogs

The value and usefulness of a Cumulus catalog increases exponentially as the catalog grows. To prevent an unforeseen technical mishap from damaging or destroying your catalogs (and your work schedule), consider regular and frequent backups.

It's important to remember that backing up a Cumulus catalog *does not* back up the catalog records' associated asset files. Make sure that all your important files are included in your regular backups.

There are two ways of backing up a catalog:

- From your computer's desktop
- With the Cumulus Backup feature

The first way may be the quickest and most convenient, particularly if you already use a backup software program. A Cumulus catalog, being just another file on your computer, can be copied to other volumes, or included in a network or automated backup. Catalogs should be closed before they are copied to other volumes to ensure that all changes are safely saved.

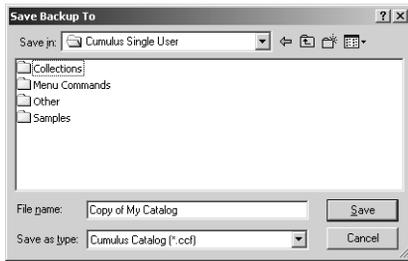
You can back up an open catalog, if you employ the Cumulus Backup feature.

To back up a catalog using the **Backup** feature:



1. Make sure the catalog you want to back up is the active window in Cumulus.
2. Select **Catalog** ⇒ **Backup**. The Backup window opens.

The name for the backup catalog file defaults to “Copy of” and the name as the original catalog file. You can change this name.



3. Click **Save**. The catalog is saved to disk.

## Restoring a Backed Up Catalog

Backed up catalogs may be opened as you would open any other catalog. Only catalogs backed up as "Minimal Backups" with former Cumulus versions require a few extra steps:



1. Select **File**⇒**Open Catalog**. Navigate to the "Minimal Backup" catalog file. (Windows users may have to select **Cumulus Backup Files (.bak)** from the drop-down list to see the file.)
2. Click **Open**. Cumulus asks you to confirm that you would like to rebuild a new catalog from the backup.
3. Click **OK** to rebuild the catalog. The New Catalog window is opened.
4. Name the new catalog file and click **Save**. Once the catalog has been rebuilt, it opens. (The name you give the catalog here is a file name, not a catalog name. The catalog name will be included in the backed-up information.)

Remember that by rebuilding a compressed catalog, you are creating a new copy of it. If the original ver-

sion of the catalog is still on your computer, keep track of which version of the file you're using.

## Copying Catalogs

The Cumulus Backup feature described above is Cumulus' mechanism for copying catalogs in their ready-to-use state. You can also use the conventional ways of copying files on your computing platform to make copies of Cumulus catalogs.

Remember, copying catalogs does not copy the associated asset files.

**Catalog** ⇒ **New Empty Copy** opens a dialog from which you can create a new empty catalog with the catalog properties of the current catalog.

## Setting Catalog Defaults

When you create a new catalog, it will have the 'out of the box' settings unless you decide to set your own defaults. **Catalog** ⇒ **Set as Default** opens a dialog from which you set the catalog properties of the current catalog to be used for creating new catalogs.

If you want the 'out of the box' settings back, select **Catalog** ⇒ **Restore Factory Defaults**. This sets the defaults for the Record and Category Fields section of the Catalog Properties to the defaults defined by Canto.

## Repairing Catalogs

If a catalog becomes damaged, Cumulus may be able to rebuild it. When you try to open a damaged catalog, Cumulus asks to repair it. You can also initiate the repair process from within the program by selecting **Catalog** ⇒ **Rebuild**.

Catalogs are most commonly damaged by power failures or shutting off the power to your computer while a catalog is open. (Selecting the standard **Shut Down** menu option to turn off your computer is safe, even when a catalog is open.)

## Recovering Deleted Records

Cumulus can recover deleted records only if the following conditions are true:

- The asset was not deleted when the record was deleted. (See “Delete” on page 116.)
- **Keep Deleted Records Recoverable** is activated for the catalog in the General section of the Catalog Properties.
- The catalog has not been compressed since the record was deleted. (See “Compressing Catalogs,” p. 76.)

Deleted records can only be recovered as a set, not one at a time.

To retrieve a catalog’s recoverable records:



1. Open the catalog from which you wish to recover records.
2. Select **Catalog** ⇒ **Recover Deleted Records**. All recoverable records are displayed in the catalog window.

Then you can start to delete any records that you don’t need. (See “Delete,” p. 116.)

## Renaming Catalogs

Cumulus catalogs actually have two names:

- One is the name of the catalog file, as you see it from your computer’s desktop. This is called the catalog *file* name.
- The other is the name of the catalog, as seen in the catalog window’s title bar. This is called, simply, the catalog name.

When a catalog is first created, the catalog name defaults to the same name as the catalog file.

To change a catalog name (what you see in the catalog window):



1. Select **Catalog** ⇒ **Properties**. The Catalog Properties window opens.
2. Click **General**. You’ll see a field labeled **Name**.
3. Enter a new name for the catalog in the **Name** field and:
  -  Close the window.
  -  Click **OK**. The change is saved and the window closes.

You change a catalog’s file name (what you see from your computer’s desktop) as you would any other file. On Windows, the catalog must be closed when it’s renamed. The Mac OS permits the catalog to remain open when renamed, but it’s still a good idea to close it first.

## Deleting Catalogs

Unlike deleting records, deleting catalogs is not undoable. (Unless you have a disk utility program that makes recovering deleted files possible.) Cumulus has no built-in mechanism for deleting catalogs. Delete catalogs as you would any other file on your computer. Remember that assets are not deleted with catalogs. Catalogs must be closed to be deleted.

## Dividing Catalogs

At some point you may wish to divide the contents of one catalog into smaller catalogs. Reasons for doing so include:

- The catalog has grown close to its maximum size (4 gigabytes).
- Your computer can no longer accommodate the number of records in the catalog effectively (processor or RAM limitations).
- The contents of the catalog have become too diverse to be usefully categorized in one catalog.

Like many operations in Cumulus, there is more than one way to divide a catalog. The first way is best suited to smaller numbers of records.

To divide a catalog using drag and drop:



1. Open the catalog you wish to divide. (See “Open Catalog,” p. 113.)
2. Create or open the catalog you wish to move records into. (See “New Catalog,” p. 113.) Arrange the catalog windows so that you can see both.
3. Search for the records you wish to move to the new catalog, using any of Cumulus’ search options. (See “Searching,” p. 53.)
4. Click on or near a thumbnail in the original catalog and select **Edit**⇒**Select All** to select the records. (At this point you could cut and paste the records between the catalogs as one way of moving them, which would save you the step of deleting the old records in the old catalog.)
5. Click on the thumbnail of any of the selected records and drag the set into the new catalog window. The records are copied. The copied records’ categories are created in the new catalog. (NOTE: Cumulus doesn’t consider copying records from one catalog to another as “cataloging assets.” Therefore, the Cataloging Options have no effect on this action.)
6. You can optionally delete the records from the old catalog by first clicking on the old catalog’s window to activate it, and then selecting **Edit**⇒**Delete** before the selection of records has changed.

To divide a catalog containing a very large number of records, it may be easier to export the records from the old catalog and import them into the new

catalog. (See the sections on exporting and importing, starting on page 101.)

After the export/import process is over, you can delete the records from the old catalog, as described above.

### Merging Catalogs

Merging catalogs requires some forethought in order to be done properly. If both catalogs contain identical category structures, the process is easy and can be done in one of two ways:

- Drag and drop records between catalogs.
- Using Cumulus’ export and import features.

“Dividing Catalogs,” above, describes each process.

But if the category structures of the two catalogs differ, there are a few extra steps to take. Read the section on exporting and importing records, starting on page 101, for details.

### Updating Catalogs from Earlier Versions

Catalogs created with Cumulus versions earlier than 5 must be updated before they can be used with Cumulus. The Cumulus Catalog Converter converts older catalogs into a format compatible with the latest Cumulus version.

The converter for Windows converts only catalogs from Cumulus 4, because that is the only previous Cumulus version for Windows.

🍏 To launch the Cumulus Catalog Converter application:



1. Navigate to the location where you installed Cumulus and double-click **Catalog Converter**. The Cumulus Catalog Converter application is started. The Cumulus Catalog to Convert dialog box opens.

🍏 To convert catalogs from earlier versions:



1. Launch the Cumulus Catalog Converter application, if it is not already open.
2. Select **File⇒Convert Cumulus Catalog**. An Open dialog box appears.
3. Select the old Cumulus catalog you want to convert and click **Open**.

The New Empty Copy dialog box appears. Don't worry, this dialog invokes the right function. The new catalog won't be empty.

4. Select a name and location for the converted Cumulus 5 catalog and click **Save**. A progress bar appears to indicate the status of the conversion.

Once the progress bar disappears, your catalog is converted to a new Cumulus 5 catalog saved under the name and location you selected.

📁 To convert a catalog from Cumulus 4:



1. Navigate to the location where you installed Cumulus and double-click **Catalog Converter.exe**. The Cumulus Catalog to Convert dialog box opens.
2. Select the Cumulus 4 catalog you want to convert and click **Open**.

The New Empty Copy dialog box appears. Don't worry, this dialog invokes the right function. The new catalog won't be empty.

3. Select a name and location for the converted Cumulus 5 catalog and click **Save**. A progress bar appears to indicate the status of the conversion.

Once the progress bar disappears, your catalog is converted to a new Cumulus 5 catalog saved under the name and location you selected.

NOTE: If any problems occur while converting a catalog, it might help to open the catalog with your former Cumulus version before converting the catalog and invoke the function **Repair** from the Administration menu.

## Asset Format Support

Probably one of the first questions you had about Cumulus was "What kinds of assets does it support?" Plain and simply, Cumulus supports *all* kinds of assets, in one way or another.

Some asset formats are fully supported, meaning that Cumulus is aware of them and knows what information to extract from them. Others are supported only to the extent that they can be added to a catalog, assigned categories, and searched, but no preview or automatic in-depth asset information is available. And in some rare cases, an asset's record will feature a thumbnail on one platform, but not on another.

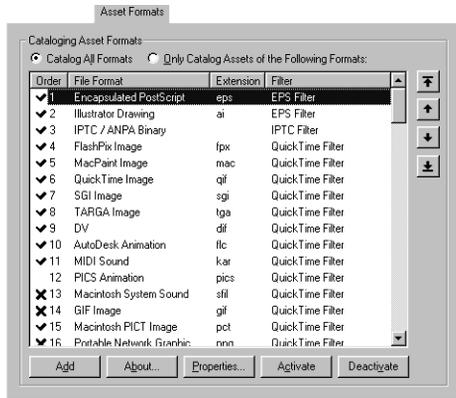
Cumulus uses what are called filters to help it catalog the contents of an asset. Cumulus tells these filters what information to look for in that asset type so that it can become part of the asset's record. Cumulus comes with a number of filters that can capture detailed information about particular assets. You can also create your own for assets not supported. Canto's Web site ([www.canto.com](http://www.canto.com)) offers new asset filters as they become available.

To see the list of filters:



1. Select **Catalog⇒Cataloging Options**. This opens the Cataloging Options window, from where the filters are accessed.

- Click **Asset Formats**. The list of installed filters is displayed.



The Windows Asset Filter list.

Active filters are indicated by a black  dot /  check mark to the left of the format. Filters that have been deactivated have a blank area to their left. Filters that are indicated by an  hyphen /  X symbol are currently not supported, but are included in the list so they will be activated at that position when the filter is available.

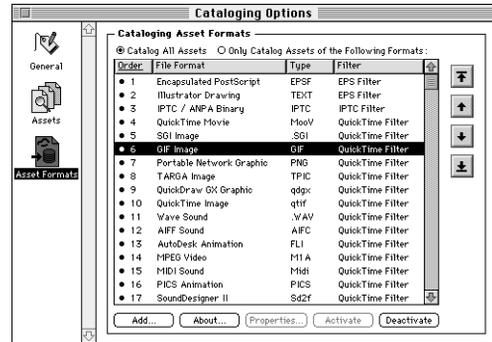
When cataloging, Cumulus starts searching for matching filters at the lowest entry number. It employs the filters in the order in which they are found. If you are not satisfied with the result of cataloging certain asset types, check the order of the filter entries. The filter that best suits your needs may come later in the order than other matching filters.

Use the arrow buttons to the right of the list to change the order of the entries.

#### NOTE: Record Field Linking

If the **Read One** option in the Record Field Properties is activated for the field link, only the metadata read by the first matching filter will be stored with the record. (For information on record field linking, see page 70.)

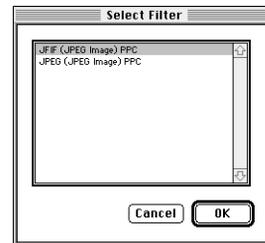
If you only use a few of the filters in the list, you can disable the others to increase program performance.



The Mac OS Asset Filter list.

## Cumulus 4 Compatibility Filter

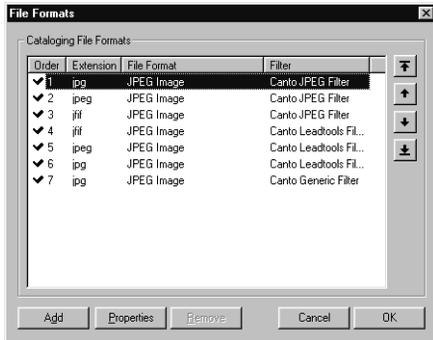
The Cumulus 4 Compatibility Filter makes sure that all filters provided for Cumulus 4 can be used with Cumulus. If you double-click (or invoke the properties of) an asset format entry with a filter labeled Cumulus 4 Compatibility Filter, a list of all Cumulus 4 filters which support the asset format might be displayed.



Cumulus 4 Compatibility Filter: Mac OS list of all Cumulus 4 filters which support the asset format.

When employing one of these filters, be aware that they only support those record fields which were included in Cumulus 4. These are: Asset Name, Asset Creation Date, Asset Modification Date, Asset Size, Asset Reference, Cataloging User, Categories, Color Mode, Don't Delete Record, File Format, Image Height, Image Width, Notes, Record Creation Date,

Record Modification Date, Record Name, Resolution (Horizontal and Vertical), Software, and Status.



*Cumulus 4 Compatibility Filter: Windows list of all Cumulus 4 filters which support the asset format.*

Cumulus 4 filters do not support the record field linking option to write metadata back to the asset.

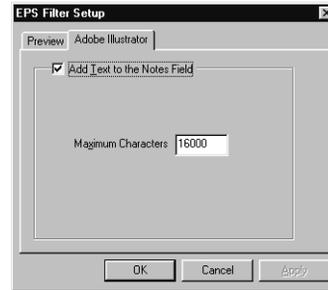
## Changing Filter Options

Some filters have options that you can change. The range of options depends on the filter. We won't cover them all because there are so many. We'll use the EPS Filter as our example.

To access a filter's options:



1. Select **Catalog** ⇒ **Cataloging Options**.
2. Click **Asset Formats** to see the list of installed filters.
3. Select the **Encapsulated Postscript** filter in the list and click **Properties**.



4. Make your selections and click **OK**.

Other filters may have options that are relevant to their corresponding formats. You can access those options in the same way you accessed the EPS options. Don't be confused when an options window for another format opens: they are each very different. (See the Support pages of the Canto Website for details on the various filter controls and their options.)

## Extending Generic Filter Options

Cumulus can catalog any digital asset. If **Catalog All Assets** (above the list of asset formats) is activated and Cumulus encounters an asset for which no specific filter is available, then it uses its generic filter. You can expand the Cumulus generic filter's capabilities to create your "own filters." For assets that don't have specific filters provided by Cumulus, you can define a thumbnail for the asset format by using the generic filter.

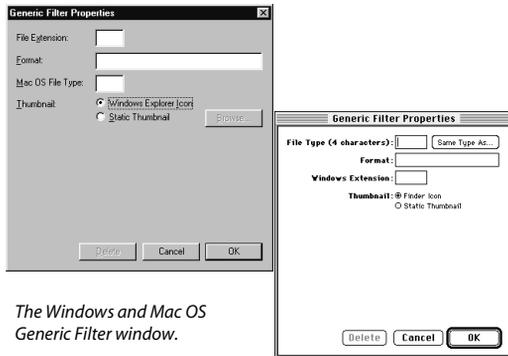
If you use filters that you've created on your own, check the Canto Website from time to time to see if a more powerful filter has been developed that you could use.

To set up a new filter:



1. Select **Catalog** ⇒ **Cataloging Options**. The Cataloging Options window opens.
2. Click **Asset Formats**.

- Click **Add**. The window to set up the properties for the new filter appears.



The Windows and Mac OS Generic Filter window.

- Enter your asset's file name extension in the **Windows Extension / File Extension** field. Do not enter the period.
- Type a name for the format in the **Format** field. If your system is aware of the asset type, its name may be entered for you.
- Enter the Mac OS file type in the **File Type / Mac OS File Type** field. The file type will always be 4 characters in length.
  - If you don't know the exact file type, click the **Same Type As** button, find the asset file and click **OK**. Using this method, Cumulus will get the proper information itself. (You can also drag and drop a file from the Finder onto the **File Type** field.)
- Choose the thumbnail you want displayed for the asset. You can use either use the asset's **Finder / Windows Explorer** icon or an image that you specify.

If you want to specify a thumbnail image to be used for your assets, click the **Browse** button. You can use any BMP file as a static thumbnail.

If you want to use a special image as thumbnail, you must first copy it to the Mac OS clipboard. Then click the **Static Thumbnail** button, which enables the picture field, and select **Edit** → **Paste**. (You can also drag and drop a record from Cumulus to use that record's thumbnail.) The image is resized, if necessary, and pasted into the thumbnail image area. Each asset cataloged with this filter will use this image as its thumbnail.

- Click **OK** to save your new filter. New filters are available immediately after you close the Cataloging Options window.

New filters are placed at the top of the filter list by default. Use the arrow buttons to the right of the list to move the filter down in the list, if necessary.

TIP: If anything goes wrong while cataloging, check the file extension!

## Moving On

The remainder of this chapter consists of visual overviews of the various Cumulus windows. You may skip ahead to the chapter "Present & Share" or to the Reference section on page 111, if you'd like. But make sure you review these pages at some point. They contain some very useful information not found elsewhere in this guide.

## The IPTC Information Window

The IPTC Information window provides access to the IPTC data stored on an asset.

To open the IPTC Information window: Select a record first and then select **Asset**⇒**IPTC Information**

1. Name of the field (as defined in the IPTC Standard).  
If the name of a field is displayed in gray, the field is not included in the catalog
2. Content of the field for the selected record.  
If the field background is dark gray it cannot be edited (editable or not depends on the field type and whether **Allow User to Edit** is checked in the record field properties).
3. Opens a quicklist for selecting a value. Clicking the desired value copies it to the field. When selecting from a quicklist, all previous text in the field will be replaced (except in the Keywords and Supplemental categories fields where new entries will be added to the existing entries).  
NOTE: You can navigate by typing the first letters of words in the list. Under Windows you can also move up and down in the quicklist with the arrow keys (and press the Enter key to select an entry).  
The fields for which you can edit the corresponding quicklist provide an entry -> **Edit Quicklist**. If you select this entry, a dialog for editing the quicklist opens. (See "Editing Quicklists," p. 64 for details.)
4. Loads the first record from the collection window's current selection.
5. Loads the previous record from the collection window's current selection.
6. Loads the next record from the collection window's current selection.
7. Loads the last record from the collection window's current selection.

The letters mark a few examples of the various field types.

- A **Text**: Most of the fields in the IPTC Information window are text fields. They allow you to enter text of one or more words. You can enter characters, numbers and special characters. The Caption and Special Instructions fields allow you to enter several lines of text.
- B **String List**: Keywords and Supplemental Categories allow you to enter a number of entries consisting of one or more words. You enter a keyword by typing the word and then pressing the Enter key or clicking the Add button. You then can immediately start typing the next entry. NOTE: To add categories to the Keywords field you can drag & drop categories from Category Pane.
- C **IPTC Category**: The IPTC Category field can only contain a 3-character abbreviation. The corresponding quicklist lets you only add 3 characters.
- D **Country Code and Country**: These fields are combined. The Country Code field can only contain a 3-character abbreviation. The Country field is a normal text field. Both fields are served from the same quicklist. If you select a value for the Country Code field, the Country field will be filled in as well (and vice versa). The corresponding quicklist lets you add and edit values for both the country and the country code.

## Menu Options

Most of the IPTC Information window menu items are also found elsewhere in the program as well.



1. Load other records of the collection window's current selection in the Information window.
2. See "The Asset Menu," p. 122, for details.
3. Enterprise Edition only: If the cursor is positioned in the field **Contained Assets** this option searches for the records of those assets which are contained in the asset. If the cursor is positioned in the field **Container Assets** this option searches for the records of those assets which contain the asset.
4. See "The Asset Menu," p. 122, for details.
5. Opens standard print setup window.
6. Prints the displayed information.
7. Saves the changes in the Information window.
8. Closes the Information window.
9. Options for editing field content. See "Text Entry Areas," p. 140, for details.
10. Options for selected record's thumbnail image. See page 116 for details.
11. Opens submenu for importing or exporting quicklists.
12. Opens a window for customizing the settings for the Information window. See below for details.



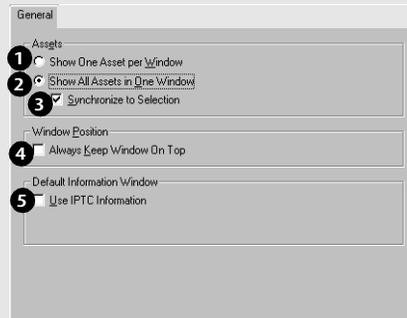
## Customizing the IPTC Information Window

To customize the IPTC Information window: Open the IPTC Information window and select **Edit** ⇌ **Customize**.

The window for customizing the settings for the Information window has one section: **General**. The selections you make in this window affect the IPTC Information window(s) of the current collection.

### General Section

1. Cumulus opens a new IPTC Information window for each asset.
2. Cumulus uses one window to show information on all selected assets. Displays and lets you edit common information for multiple records.
3. If the Information window is open, it displays the records currently selected in the Collection window.
4. Only Windows: The IPTC Information window is displayed on top of all other windows.
5. Cumulus opens the IPTC Information window and not the Asset Information window if the option **Double-Click on Record Opens Asset Information** is enabled in the Application Preferences.



## The Information Window

The Information window provides access to the information stored on a category or on an asset. The Asset Information windows provides access to the information on the asset stored in the record. The Category Information windows provides access to the information on a category. Which fields are displayed is customizable. They can be selected from the range of fields determined by the settings for the current catalog in the Catalog Properties window. The field contents are editable depending on the field type and properties.

To open the Asset Information window: Select a record first and then select **Asset**⇒**Information**

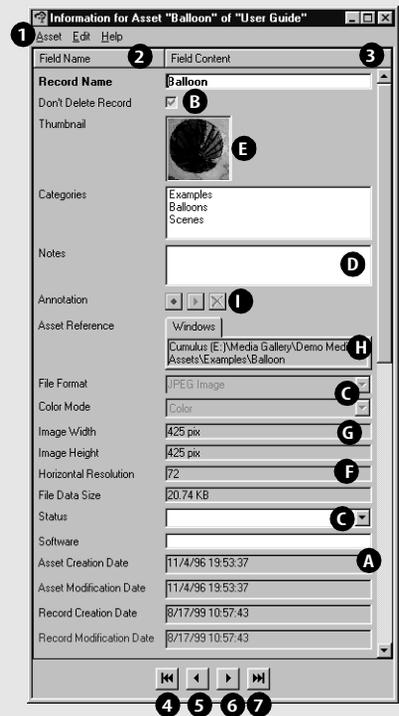
To open the Category Information window: Select a category first and then select **Category**⇒**Information**

The sample Asset Information window on the right shows all of the record fields which Cumulus sets as defaults in Windows.

1. Menubar of the Information window.
2. Name of the field (as defined in the Catalog Properties window).
3. Content of the field for the selected record/category (editable or not depending on the field type and whether **Allow User to Edit** is checked in the record field properties). If the field background is dark gray it cannot be edited.
4. Loads the first record/category from the collection window's current selection.
5. Loads the previous record/category from the collection window's current selection.
6. Loads the next record/category from the collection window's current selection.
7. Loads the last record/category from the collection window's current selection.

The letters mark a few examples of the various field types.

- A **Date:** user-editable; click in field and type new value (or in Windows use arrow up/down keys).
- B **Boolean:** Check box for selected or deselected. (If the field has no value, under Windows the check box and mark are gray and under Mac OS the check box is marked with a hyphen.)
- C **String List:** Can only be filled with values from a corresponding list. (For details on inserting a value to a String List, see "Editing a String List Field," p. 73.)
- D **String:** User-editable; characters and numbers.
- E **Picture:** Not user-editable; maintained by Cumulus or an Asset Storage Module.
- F **Real:** User-editable; numbers only (with decimal places), up to 64 bits.
- G **Integer:** User-editable; numbers only (without decimal places), up to 32 bits.
- H **Binary:** Not user-editable; maintained by Cumulus or Asset Storage Module.
- I **Audio:** User-editable; only available when QuickTime is installed on your computer (QuickTime 4.0 is recommended). You can record voice annotations for the record. (NOTE: None of the default fields is an Audio field. An Audio field always has to be set up as a custom field.)
  - ▶ Click to record a voice annotation. A dialog box appears from which you can stop or cancel the recording.
  - ▶ Click to play the voice annotation. (Button changes to ◻ for stopping while playing.)
  - ✕ Click to delete the voice annotation. (Field has no value then.)



### Editing Multiple Records Simultaneously

If you have selected multiple records before opening the Asset Information window and the Option **Show All Assets in One Window** (see **General Section # 2** below) is activated, you can change the field values for multiple records at once.

If the asset information of multiple records is shown in one window, only those field contents are displayed which have the same value. So the **Asset reference** and **Thumbnail** fields will always be empty. Check boxes (Boolean fields) with different values appear grey. The field **Categories** only displays those categories the selected records have in common. All other field types are displayed with no value if there are different values for fields.

Fields with different values do not show a value but can be edited - as well as grey (neutral) check boxes. If you add an additional category, this category is added to the set of categories for each record.

## Menu Options

Most of the Information window menu items are also found elsewhere in the program as well.



1. Load other records/categories of the collection window's current selection in the Information window.
2. See "The Asset Menu," p. 122, for details.
3. Enterprise Edition only: If the cursor is positioned in the field **Contained Assets** this option searches for the records of those assets which are contained in the asset. If the cursor is positioned in the field **Container Assets** this option searches for the records of those assets which contain the asset.
4. See "The Asset Menu," p. 122, for details.
5. Opens standard print setup window.
6. Prints the displayed information.
7. Saves the changes in the Information window.
8. Closes the Information window.
9. See "The Category Menu," p. 119, for details.
10. Options for editing field content. See "Text Entry Areas," p. 140, for details.
11. Options for selected record's thumbnail image. See page 116 for details.
12. Opens a window for customizing the settings for the Information window. See below for details.



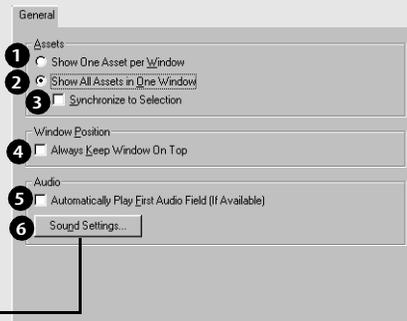
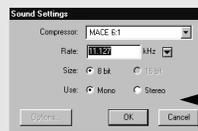
## Customizing the Information Window

To customize the Information window: Open the Information window and select **Edit** ⇒ **Customize**.

The window for customizing the settings for the Information window has two sections: **General** and **Fields**. The selections you make in this window affect the Information window(s) of the current collection.

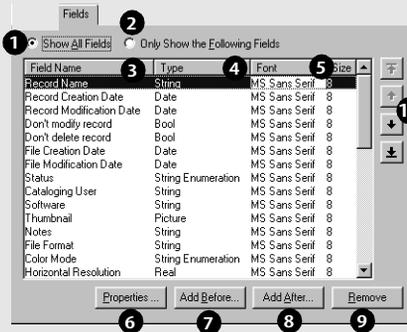
### General Section

1. Cumulus opens a new Information window for each asset/category.
2. Cumulus uses one window to show information on all selected assets/categories. Displays and lets you edit common information for multiple records/categories.
3. If the Information window is open, it displays the records/categories currently selected in the Collection window.
4. Only Windows: The Information window is displayed on top of all other windows.
5. When you open the Information window, the voice annotation in the first Audio field of the Information window will be played.
6. Opens a dialog box from which you can define the quality of your voice annotations. But don't forget: the better the quality the more data to be stored.



### Fields Section

1. All record/category fields are displayed in the Information window.
2. Only the record/category fields listed below are displayed in the Information window.
3. Name of the field (as defined in the Catalog Properties window).
4. Type of the field (as defined in the Catalog Properties window).
5. Font and font size for display of the field in the Information window.
6. Opens the properties window for the selected field.
7. Adds an additional field before the selected field. A dialog box for selecting the additional field is opened.
8. Adds an additional field after the selected field. A dialog box for selecting the additional field is opened.
9. Removes the field from the list. The field will not be displayed in the Information window.
10. These buttons change the selected entry's position in the list. The Information window displays the record/category fields in the order of this list. Starting from top: move to top of list, move before current position, move after current position, and move to end of list. (Disabled if no field is selected.)



## The Cataloging Options Window

The Cataloging Options window has three sections that provide access to each of its options. The options that are set from this window have no effect on existing records. They control the way the records of newly cataloged assets are created.

Cataloging Options, as set from this window, are global settings that affect the way records are created for all catalogs. Some settings that you might think of as cataloging settings (such as thumbnail size) can be set individually for each catalog and are therefore part of the Catalog Properties settings.

To open the Cataloging Options window: Select **Catalog** ⇨ **Cataloging Options**.

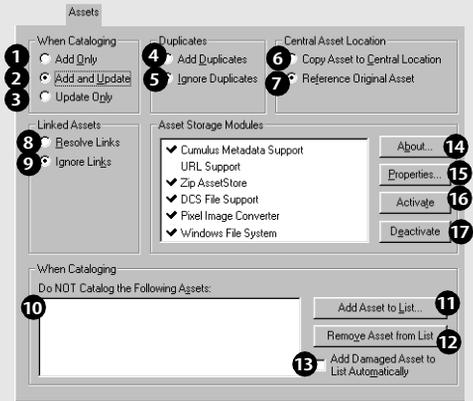
### General Section

1. Forces Cumulus to count assets before cataloging begins, so that it can display a progress bar (slows performance).
2. Opens newly cataloged asset's Information window immediately after its record has been created. Either one window for each asset (not recommended when cataloging large numbers of assets) or one window for all assets opens, depending on the settings selected in the General section of the Customize window of the Asset Information window. (See "Customizing the Information Window," p. 87)
3. Sets thumbnail quality for the different color modes: Line art (NORMAL=2 color / HIGH=4 color), Greyscale (NORMAL=8-bit greyscale, more compression / HIGH=8-bit greyscale, less compression), Color (NORMAL=24-bit color, more compression / HIGH=24-bit color, less compression.) NOTE: High-quality thumbnails make records larger.
4. Equalizes the thumbnail images for newly cataloged assets automatically. This can also be done afterwards. (See "Optimize Thumbnail," p. 116.)
5. Some programs can save images with embedded thumbnails. This option uses those thumbnails, if available, instead of creating new ones. Stored thumbnails may differ in size.
6. Uses embedded thumbnails, if available and large enough (minimum is the size defined in the Catalog Properties, General section under Thumbnail Size).
7. Creates thumbnail images of the entire asset's content. These thumbnails are consistent in size, but this option slows the cataloging process.



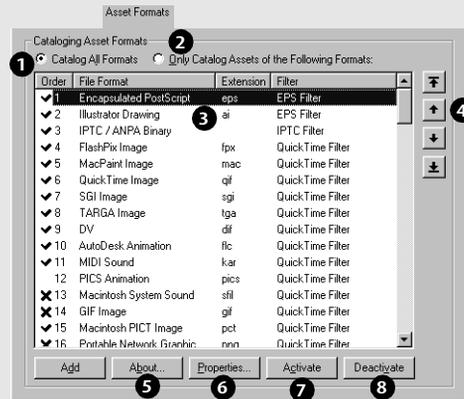
## Assets Section

1. When cataloging, Cumulus adds new records but doesn't update existing records whose assets have changed.
2. When cataloging, Cumulus adds new records and updates existing records whose assets have changed.
3. When cataloging, Cumulus updates existing records only. No new records are added.
4. When cataloging, if Cumulus finds an asset that has already been cataloged, a duplicate record is created for the asset. (NOTE: This is possible only when **Add Only** is selected, otherwise Cumulus thinks you're trying to update the existing record.)
5. When cataloging, if Cumulus finds an asset that has already been cataloged, it does not create a duplicate record.
6. Cumulus copies all newly cataloged assets to a central location specified in the Catalog Properties window and makes the newly created record reference the copied asset. Can be overridden by the Catalog Properties. (See "The Catalog Properties Window," p. 90.)
7. This is the "off" position for #6. Assets are cataloged normally and not copied to a central location.
8. Cumulus resolves any links found in the selected assets being cataloged. This enables Cumulus to catalog the assets that the shortcuts point to.
9. Links are not resolved and assets they represent are not cataloged.
10. Assets in this list are ignored when found in selection of assets being cataloged.
11. Adds assets to the "don't catalog" list.
12. Removes selected assets from "don't catalog" list (disabled if no assets are selected in the list).
13. If selected, Cumulus keeps a log of assets as they're cataloged. If a damaged asset crashes your system while cataloging, it appears in the "don't catalog" list automatically. This option slows the cataloging process; use it only if you cannot find the problem-causing asset on your own.
14. Displays information about the selected module (if available).
15. Opens the properties window for the selected module (if available).
16. Activates the selected module.
17. Deactivates the selected module.



## Asset Formats Section

1. All formats will be cataloged. For unknown formats (not listed), the Cumulus Generic filter will be used.
2. Only those formats will be cataloged which are activated in the list.
3. List of installed filters for supported asset file formats. Click on each column heading to resort the list by that field. The check mark indicates filters that are active. Enable and disable filters via the Properties window, see #4, below.
4. These buttons change the selected entry's position in the list. Filters are used in the order of their entry numbers. This is important if you have multiple filters for the same file type. Starting from top: move to top of list, move before current position, move after current position, and move to end of list. (Disabled if no filter is selected.)
5. Displays information about the selected filter (if available).
6. Opens the properties window for selected filter (if available).
7. Activates the selected filter.
8. Deactivates the selected filter.



# The Catalog Properties Window

The Catalog Properties window has five sections that provide access to each of its options. The options that are set from this window are specific to the active catalog. They have no effect on other catalogs.

Make sure a catalog's properties are set as you want them before you catalog any assets.

To open the Catalog Properties window: Select **Catalog** ⇨ **Properties**.

## General Section

1. Catalog file name, as seen from the Windows desktop/ Mac OS Finder (not editable from here).
2. Catalog name. Defaults to file name, can be changed.
3. If selected, deleted records are just hidden, not removed from the catalog. This gives you the option to recover them, if needed. (See "Recovering Deleted Records," p. 78.)
4. Selects default thumbnail size for all newly cataloged assets. Current records' thumbnails can be adjusted to the new size by updating the record. (See "Update Record," p. 118.)
5. Permits more than one category to have the same name.
6. Prevents the creation of new categories that share names with existing categories.
7. Record-field contents never written back to assets.
8. Record-field contents written back to assets if possible.
9. Record-field contents written back to assets if possible, dialogs may appear while resolving connection to assets.
10. Displays advanced catalog settings & statistics.

## Asset Location Section

1. Doesn't copy newly cataloged assets to the selected Central Location.
2. Refers to options set in Cataloging Options window to decide if assets should be copied to the selected Central Location.
3. Always copies assets to the selected Central Location, regardless of Cataloging Options window settings.
4. Opens a dialog box for selecting the Central Location.

## Category Fields Section

1. Category field name.
2. Category field type.
3. Opens dialog box for defining field properties (see #6 to #10).
4. Opens dialog box for selecting the field to be added.
5. Removes the selected field from the list.

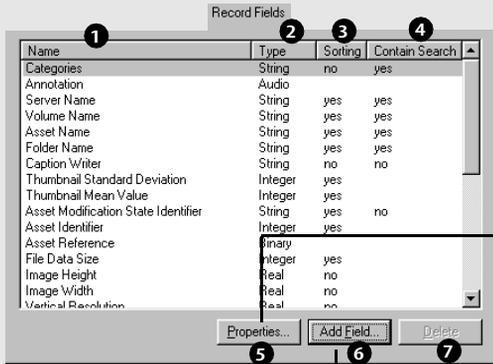
Name	Type
Parent ID	Integer
Original ID	Integer
URL Directory Path	String
Collection Type	String List
Macintosh Directory ID	Integer
Macintosh Volume ID	Integer
Windows Directory Path	String
Category Name	String

## Sharing Section

1. When Cumulus is not being used in conjunction with the Cumulus Network Server, all Sharing properties except Password are disabled. Enter a password if you wish to prevent others from being able to change the catalog.

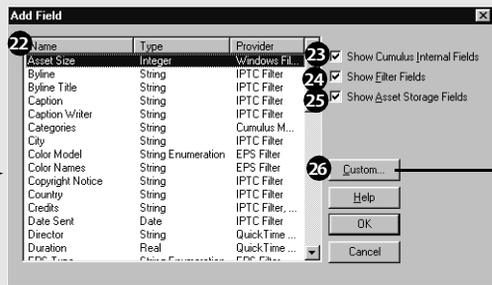
6. Name of Category field.
7. Field type (as selected from the list).
8. Not activated when field type String List is selected. Opens dialog box to edit the list of values (see **String List** on the facing page).
9. Allows user to edit the field properties.
10. If no other data is available, the field will be filled with an initial value (as defined in the list below).

## Record Fields Section



This section shows the list of all Record Fields which are active for this catalog. Use this section to select the fields which make up each record of the active catalog.

1. Name of the Record Field, as defined in the properties of the field.
2. Type of Record Field, as defined in the properties of the field.
3. Record Field can be used for sorting (yes) or not (no).
4. Only for string fields: whether the operators "contain" or "doesn't contain" are available for searching.
5. Opens dialog box for defining the field properties (see # 8 to #21)
6. Opens dialog box for selecting the field to be added (see # 22 to # 26)
7. Removes the selected field from the list.



**NOTE:** Fields can be added by:

- picking a field from the list of Filter defined fields (see # 24)
- picking a field from the list of Asset Storage defined fields (see # 25)
- picking a field from the list of Cumulus generated fields (see # 23)
- creating a new custom field (see # 26)

## Field Types

When you add a custom field, it is possible to select the field type:

**String:** Characters and numbers

**Boolean:** Creates check box for enabling or disabling function

**Integer:** Numbers without decimal places

**Real:** Numbers with decimal places

**Date:** MM/DD/YY

**Binary:** Filled by Cumulus or Asset Storage

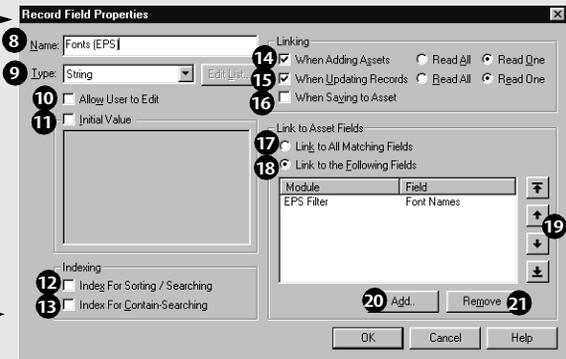
**Picture:** Filled by Cumulus or Asset Storage

**String List:** Can only be filled with values from a corresponding list. (For details on inserting a value to a String List, see explanations on the right.)

**Audio:** User-editable; only available when QuickTime is installed on your computer (recommended is QuickTime 4.0). You can record voice annotations for the record.



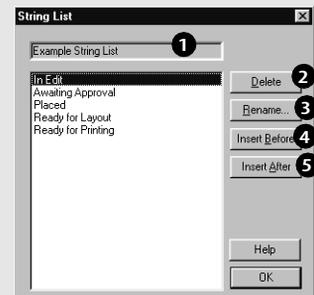
8. Record field name.
9. Record field type.
10. Allows user to edit the field properties.
11. If no other data is available, the field will be filled with an initial value (as defined in the list below).
12. Field can be used for sorting and searching.
13. Field can be used for searching by means of the operators "contain" or "doesn't contain."
14. When adding assets, the selected record field will be filled automatically. (Read One: only the first matching field will be used).
15. When updating records, the selected record field will be filled automatically. (Read One: only the first matching field will be used).
16. Any changes in field contents will be written back to the asset, if the filter for the asset format supports this function.
17. The field will be filled by data of asset fields with the same GUID (globally unique identifier) or name and type.
18. Creates links to asset fields defined below. When activated, a dialog offers to display a list of all matching asset fields.
19. These buttons change the selected entry's position in the list.
20. Displays a list of available asset fields for adding a field to the above list.
21. Removes the selected asset field from the above list.



22. Column headers for the list of record fields which can be added.
23. All Cumulus internal fields are shown in the list.
24. All filter fields are shown in the list.
25. All Asset Storage fields are shown in the list.
26. Opens dialog box for defining the field properties for the new custom field.

## String List Window

Selecting the **String List** field type activates the **Edit List** button in the **Field Properties** dialog box. Clicking this button opens the **String List** window.



1. Name of String List field.
2. Deletes the selected entry from the list.
3. Displays dialog box to rename the selected entry.
4. Places new entry above the selected entry.
5. Places new entry below the selected entry.

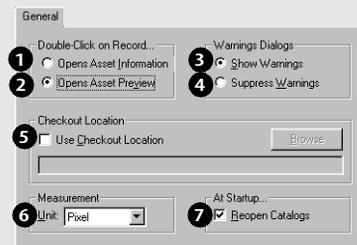
## The Application Preferences Window

The Application Preferences window has three sections that provide access to each of its options. The options that are set from this window affect program behavior globally.

To open the Application Preferences window: Select **Edit** ⇒ **Preferences**

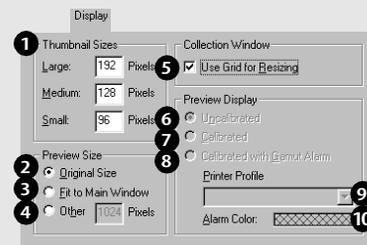
### General Section

1. Double-clicking on a record will open the Asset Information window.  
*NOTE: Cumulus will open the IPTC Information window instead if the option Use IPTC Information as Default Information Window is activated in the Customize window of the IPTC Information window.*
2. Double-clicking on a record will open the Preview window.
3. Allows certain non-critical warning dialog boxes to appear.
4. Prevents noncritical warning dialog boxes from appearing.
5. Users carrying out a version control (e.g. the Cumulus Vault Option) can define their general Checkout Location. That way they can avoid being asked for the Checkout Location for each check out they perform.
6. Selects preferred unit of measurement for heights and widths.
7. Cumulus will open all catalogs (and collections) that have been opened when the Cumulus was closed last time at startup. If this option is not enabled, Cumulus will always start without an open catalog or collection.



### Display Section

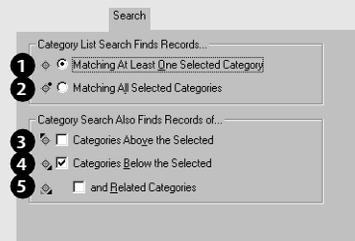
1. Defines the sizes of small, medium and large thumbnails. The sizes defined here for thumbnails are those displayed when the respective size is selected.
2. Shows asset previews at the actual size of the asset. (For images higher than screen resolution, this could result in a very large preview window.)
3. Enlarges or reduces preview to fit in the Cumulus program window.
4. Selects a predetermined horizontal measurement for all previews.
5. Snaps window to multiples of the current thumbnail size when resizing.
6. Shows preview with no ColorSync color correction.
7. Shows preview with ColorSync profile used by asset.
8. Shows preview with ColorSync profile used by asset and highlights any part of the image that is beyond the printable color spectrum of the printer selected in #9, below.
9. Selects a ColorSync printer profile. (Disabled if # 8 is not selected.)
10. Click to select a warning color for unprintable shades in asset.

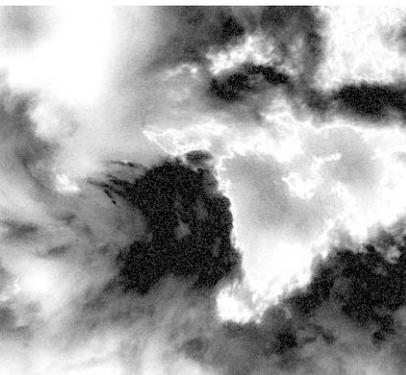


### Search Section

The options found here affect the way Cumulus finds records using category searching (double-clicking on a category). Note the small icon to the left of each option. This icon serves as a visual indicator as to what search options are selected. It is displayed in the Status Bar of each catalog.

1. Found records must match at least one selected category.
2. Found records must match all selected categories.
3. Found set includes records assigned to parent categories of the selected category. (Categories that have subcategories are called parent categories.)
4. Found set includes records assigned to subcategories of the selected category.
5. Found set includes records belonging to the original category of a related subcategory.





Even the best ideas go unappreciated if they're not effectively presented and shared. With Cumulus, you can customize the appearance of your collections as you'd like, and share your ideas by various means: HTML, slide shows, e-mailing collections or assets, or by exporting and importing categories and records to and from other Cumulus users. These promising possibilities are covered in this section.

# 6

## **Present & Share**

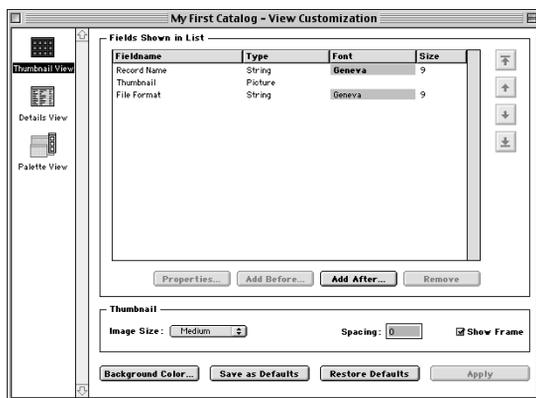
## View Customization

Cumulus offers two basic display modes: thumbnails and details. A further display mode is the palette mode. This mode is specially designed for using Cumulus with another application, e.g. a desktop publishing application. In palette mode the Cumulus application shrinks to a palette that can conveniently be used with another application. That way you can easily drag and drop cataloged assets into other applications.

You can extensively customize all views. For all views you can decide which records fields are displayed, their order and how they are displayed: font type, style, size, and color. You can also choose a background color for the each of the views. For thumbnail view and palette mode, you can select the size of the displayed thumbnail, the spacing around it and whether the record is displayed within a frame.

Your definitions will affect only the current collection. But you can set them as a default for any new collection.

Select **View** ⇨ **Customize** to display the **View Customization** window for customizing the Thumbnail View, the Details View or the Palette Mode. The fields listed in this window are the same ones displayed in your collection window.



Mac OS View Customization window

🍏 Along the left side of the window /  In tabs along the top of the window, you see a couple of options named **Thumbnail View**, **Details View** and **Palette Mode**. These options load the settings for the respective view. Under the **Thumbnail View**, you set up how thumbnail views (all sizes) will be displayed. Under **Details View** you set up your text listing options. And under **Palette Mode**, you set up how thumbnail views (all sizes) will be displayed when the Palette Mode is active.

See page 95 for an overview of the options available from the View Customization window.

### Adding a Field to a View

To add a field to one of the views:

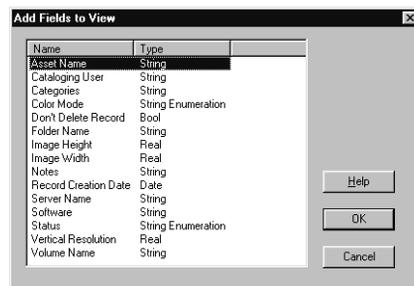


1. Select **View** ⇨ **Customize**. The View Customization window opens.
2. Click the 🍏 icon /  tab for the view to which you want to add a field.

A list of fields shown in the selected view is displayed.

3. Select the entry for the field you want to place the new field after or before.
4. Click **Add Before** or **Add After**.

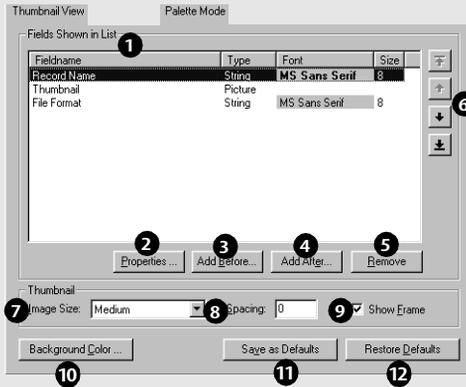
This opens a list of all of the fields in the current catalog.



## The View Customization Window

The View Customization window has three sections that provide access to each of its options. The options can be set for either the Thumbnail View, the Details View and the Palette Mode.

To open the View Customization window: Select **View**⇒**Customize**

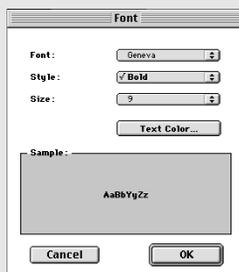
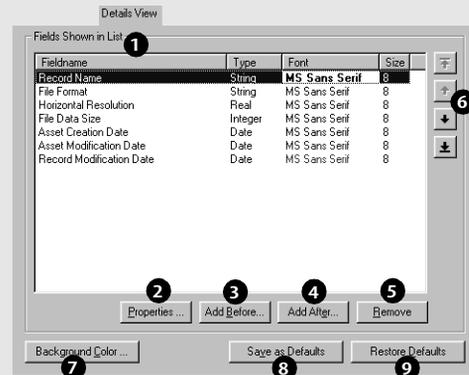


### Thumbnail View or Palette Mode Section

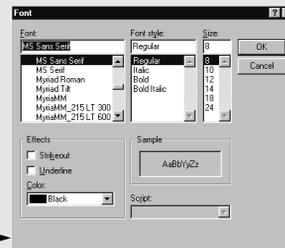
1. List of displayed fields.
2. Shows display properties of the field: font type, style, size, and color.
3. Adds a field above the selected field in the list. A dialog box for selecting the field appears.
4. Adds a field below the selected field in the list. A dialog box for selecting the field appears.
5. Removes the selected field(s) from the list.
6. These buttons change the selected entry's position in the list.
7. Defines the thumbnail size viewed. Select from the default sizes (Large, Medium, Small) or set a custom size (Other). Native is the thumbnail's size as set at the time the asset was originally cataloged. (See "The Catalog Properties Window," p. 90.)
8. Defines the spacing around the thumbnail.
9. Places a frame around the displayed record.
10. Defines the background color for the thumbnail view. A dialog box for selection appears.
11. Saves the current view settings as the default for the Thumbnail View.
12. Returns the settings to the latest stored defaults.

### Details View Section

1. List of displayed fields.
2. Shows display properties of the field: font type, style, size, and color.
3. Adds a field above the selected field in the list. A dialog box for selecting the field appears.
4. Adds a field below the selected field in the list. A dialog box for selecting the field appears.
5. Removes the selected field(s) from the list.
6. These buttons change the selected entry's position in the list.
7. Defines the background color for the Details View. A dialog box for the selection of the color appears.
8. Saves the current view settings as the default for the Details View.
9. Returns the settings to the latest stored defaults.



Dialog window for selecting the display properties (Fonts) of a field:  
Mac OS  
Windows



5. Select the field you want to add.
6. Click **OK** to add that field to the list of shown fields.
7. Click the **Apply** button. The field is added to the view.

6. Click **OK** to assign the selected properties to the field.
7. Click the **Apply** button. The field is displayed according to your settings.

## Changing the Properties of a Displayed Field

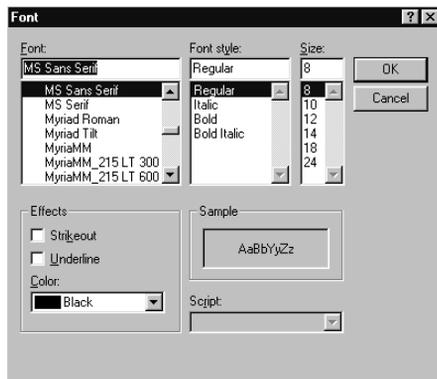
The properties of a displayed field define the font (type, style, size, and color) used to display the field contents.

To change the display properties of a field:



1. If it's not open, select **View** → **Customize** to open the View Customization window.
2. Click the  icon/ tab for the view which displays the field.
3. Select the entry for the field whose properties you want to change.
4. Click the **Properties** button.

This opens a dialog box for defining the font attributes.



5. Make your selections.

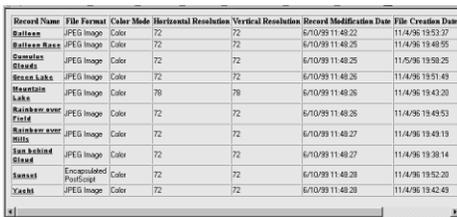


Examples for customized Thumbnail Views.

## Output to HTML

Cumulus has the ability to output collections as HTML documents, complete with preview icons and links to the original assets. Cumulus takes the records in your collection view and converts them to files suitable for display on the Web. This can include the automatic creation of copies of the assets in the Web-ready JPEG image file format.

Depending on the number of records selected and the way they are displayed, multiple HTML pages will automatically be created, and links to the other pages will be included. In keeping with the concept of What-You-See-Is-What-You-Get (WYSIWYG), the number, size, and labeling of the records on the HTML pages will reflect what you see in the record pane, whether this is the records' thumbnails or their details.



Record Name	File Format	Color Mode	Horizontal Resolution	Vertical Resolution	Record Modification Date	File Creation Date
Balloon Race	JPEG Image	Color	72	72	6/10/99 11:48:25	11/4/96 19:49:55
Summit	JPEG Image	Color	72	72	6/10/99 11:48:25	11/5/96 19:58:25
Seascape	JPEG Image	Color	72	72	6/10/99 11:48:25	11/4/96 19:51:49
Mountain Lake	JPEG Image	Color	76	76	6/10/99 11:48:25	11/4/96 19:43:20
Mountain Lake	JPEG Image	Color	72	72	6/10/99 11:48:25	11/4/96 19:49:53
Mountain Lake	JPEG Image	Color	72	72	6/10/99 11:48:27	11/4/96 19:49:19
Sea Arch	JPEG Image	Color	72	72	6/10/99 11:48:27	11/4/96 19:38:14
Seascape	Encapsulated Postscript	Color	72	72	6/10/99 11:48:28	11/4/96 19:52:20
Yacht	JPEG Image	Color	72	72	6/10/99 11:48:28	11/4/96 19:42:49

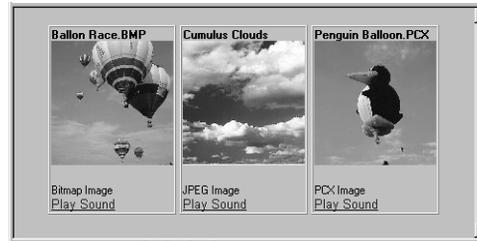
HTML page created from a Details View.

If the view you export is a thumbnail view, Cumulus creates a folder named **Thumbnails** with the corresponding thumbnails in JPEG format.

Beyond simply publishing a group of records on the Internet, Cumulus enables you to take full advantage of the Web's multimedia capabilities. You can, for example, include links to the previews or the original assets in the HTML pages created by Cumulus. If you include links to previews, Cumulus creates a **Previews** folder with the corresponding previews in JPEG format. If you include links to the originals, Cumulus creates a **File** folder with copies of the corresponding assets.

You can also add sound to your HTML presentation. If you include links to voice annotations (Audio fields),

Cumulus creates an **Audio Files** folder with the corresponding QuickTime Movie files. It then adds a link to each record with an Audio field, so that your voice annotations can be played "live" on the Internet.

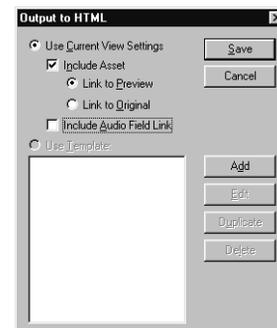


HTML page created from a Thumbnail view with default view-settings, including links to Audio fields.

How to output to HTML:

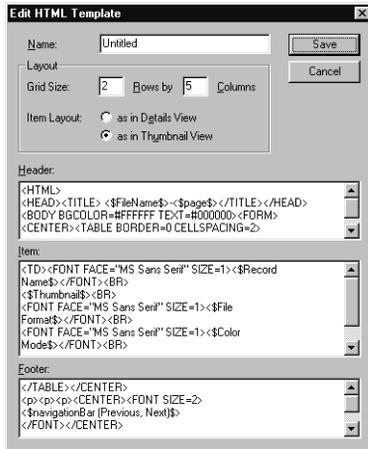


1. Make sure the view is set the way you want the final HTML page(s) to look. If you do not want to output the entire collection, select the records you want.
2. Select **File** ⇒ **Output To HTML**. This brings up a submenu. You have the option just to output the selected records or all records of the collection.
3. Select the appropriate menu item. This brings up the HTML output window.



4. Click the appropriate check boxes and buttons.

The **Add** button opens a dialog box to edit the HTML template which is used for the output. (For details, review manuals on HTML.)



5. Click **Save** to generate the output files. You are prompted to select a location to save the files. The thumbnail and preview files (neatly stored in their own folders) will also be saved in the same location selected.
6. Select a location and a file name for the HTML pages. A progress indicator will appear and then disappear when the pages have been generated.

The HTML pages and the associated folders can be found in the location you specified, and they can be easily opened by any standard HTML browser.

## Slide Show

Cumulus includes a special application for presenting the assets' previews as a slide show. This functionality is only available when QuickTime (5.0 or later) is installed on your computer. Once you have created a slide show, you can save it as a QuickTime movie and/or e-mail it.

You can have the text of a string field stored with the asset's record displayed with each slide (asset preview). You can also attach sound to your slide show – both to the entire show and to each individual “slide”. The sound for the entire show is taken from any sound file you select, and the sound for each record comes from an Audio field of that record. One way to use this feature would be to select a music file to run for the duration of the slide show, while each individual “slide” is accompanied by a voice annotation describing its contents.

### Creating a Slide Show

From (nearly) any asset that provides a preview, a slide for the show can be created. If there is no access to the asset for a preview, the thumbnail of the asset is used to create the slide.

NOTE: When the thumbnail of an asset is used for the creation of a slide, its quality is important. To achieve thumbnails of good quality you should have activated **Entire Asset** under **Create Thumbnail from** in the Cataloging Options.

To create a slide show:



1. Arrange the records in the record pane in the order you want them to appear in the slide show. The order will be from left to right, top to bottom.
2. Select the records to comprise the slide show.
3. Select **Collection** ⇒ **Slide Show**.  
A dialog appears from which you can select options for the slide show.
4. Make your selections. For further information, see “The Slide Show Windows,” p. 99.
5. Click **OK**.

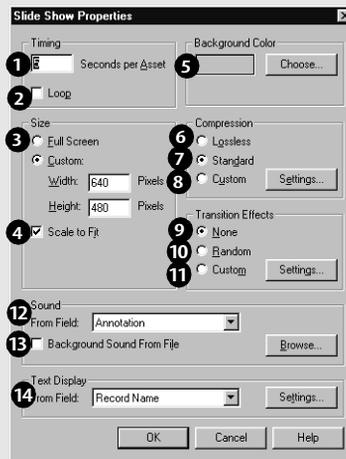
The slide show will be created. After creation, the Slide Show window appears.

## The Slide Show Windows

Cumulus includes a special application for presenting the assets' previews as a slide show. This functionality is only available when QuickTime (5.0 or later) is installed on your computer. Once you have created a slide show, you can save it as a QuickTime movie and/or e-mail it.

### Slide Show Properties

1. Determines how long each slide (asset's preview) is displayed. However, if you assign audio/sound fields to the slide show, the length of the sound field determines the duration of the display of the asset's preview.
2. Activates a looping of the slide show.
3. Defines the size of the display as either full screen or custom-defined (height and width in pixel).
4. Scales the display of smaller assets' previews up to the selected size.
5. You can define a background color for the slide show by clicking **Choose**.
6. Compresses the slide show without any image quality degradation.
7. Employs default compression values.
8. Permits selection of compression method. You can select certain compression settings by clicking **Settings**.
9. One slide will change to the next without any transition effect.
10. A transition effect will be chosen at random for each transition from one slide to the next.



11. Permits selection of the transition effect for the whole slide show. You can select specific transition settings by clicking **Settings**.

12. Attaches the sound from the audio field of the catalog. You can select the audio field by clicking the arrow button.
13. Attaches sounds from a selected AIF or WAV file. You can select a sound file by clicking **Browse**. The sound will loop according to the duration of the slide show. **NOTE:** You can attach both a sound file for the duration of the slide show and an Audio field for each record in the show. The Audio field(s) play during the preview of the associated asset. If you attach both a sound file and audio field, they will overlap during the show, allowing both to be heard.
14. You can have the text of a string field stored with the asset's record displayed with each slide (asset preview). Select the field you want to be the source for the displayed text by clicking the arrow button. You can also define settings for the text display by clicking **Settings**. A dialog for defining the properties opens.

### Slide Show Window

1. Click here to run or stop the slide show.
2. **File Menu**  
**New Slide Show** goes back to the Slide Show Properties dialog box. Changing properties of a slide show is actually creating a new slide show with the same assets, which replaces the previous slide show.  
**Save As Movie** saves the slide show as a QuickTime movie.  
**Mail As Movie** attaches the slide show as a QuickTime movie to an outgoing e-mail message. **NOTE:** Send the mail before closing the slide show – otherwise the attachment will be gone along with the slide show.  
**NOTE:** When saved or e-mailed as a movie, it can be opened and played with the usual QuickTime MoviePlayer.  
**Close** or **Exit** closes the slide show without saving.  
**NOTE:** If you close or exit the slide show without saving it as a movie beforehand, it will be gone.
3. **Edit Menu**  
**Full Screen** displays the slide show using the whole screen. To start or stop the show: Double-click anywhere. To toggle Full Screen on and off, use CTRL F/Command F.  
**Loop** runs the slide show in a loop.



## Understanding the Slide Show Window

Once you have created a slide show with Cumulus, the Slide Show window opens. It will be very familiar to QuickTime users.

To run the slide show: Click .

To stop a (looping) show: Click .

To set up the slide show to run in a loop (i.e., repeat over and over): Select **Edit**⇒**Loop**.

To have the slide show run on the entire screen:



1. Select **Edit**⇒**Full Screen**.
2. Double-click anywhere.

To toggle Full Screen on and off, use  
 **Command F** /  **Control F**.

To set up the slide show to run in a loop (i.e., repeat over and over):



1. Select **Edit**⇒**Loop**.

To close or exit the slide show:



1. Select **File**⇒**Close** or **Exit**.

NOTE: If you close or exit the slide show without saving it as a movie beforehand, it will be gone.

## Changing Slide Show Properties

You can change the properties of the slide show, which is actually creating a new slide show, using the same assets and replace the previous slide show.

To change the properties:



1. Select **File**⇒**New Slide Show**. A dialog box appears from which you can select options for the slide show.
2. Make your selections. (For further information, see “The Slide Show Windows,” p. 99.)
3. Click **OK**. The slide show will be rebuilt.

## Saving or Mailing as Movie

You can save the slide show as a QuickTime movie or e-mail it as a QuickTime movie. When saved or e-mailed as a movie, it can be opened with QuickTime.

To save the slide show as a movie:

Select **File**⇒**Save As Movie**.

To e-mail the slide show as a movie:

Select **File**⇒**Mail As Movie**.

NOTE: Send the mail before closing the slide show – otherwise the attachment will be gone along with the slide show.

## Mailing Assets

Cumulus also lets you e-mail the assets themselves, so that you can easily share them with people who don't have access to your Cumulus catalogs. You can use Cumulus' powerful search and display features to find just the right assets, and then send them off with a single command.

To e-mail assets from within Cumulus:



1. Select one or more records whose assets you want to mail.
2. Select **Asset**⇒**Mail To**.

Cumulus  asks you to select an e-mail application /  launches your default e-mail application and attaches the selected asset(s) to an outgoing message.

## Importing and Exporting

Cumulus can export and import records and categories. Exported files can be used on any supported Cumulus platform. Exporting data is not only useful for transferring data between catalogs and platforms, it's also useful for archiving category listings. These archive files can be imported into any other catalog when you need them. (You could do the same things with records, but it's probably more convenient just to keep copies of the records in catalogs.) You can only import Cumulus-exported files.

Importing and exporting data with Cumulus is easy, but there are a few things to be aware of to avoid unexpected results, as explained below.

### File Name Extensions

Windows users are all too familiar with file name extensions. The Windows operating systems depend on them to identify file types. Mac OS file types, on the other hand, are stored inside the files themselves. This makes it easy for applications to identify the files they support. In Windows, if a file doesn't have the proper extension, programs may not know how to deal with it.

Luckily, Cumulus is looking out for you on two levels here. First off, the Mac OS version of Cumulus automatically adds to the files it exports the file name extension that Windows requires. And to make sure that things still work even if you've renamed the files and lost the file name extension, the Windows versions of Cumulus can live without the extensions when importing data. But in order to see "extensionless" files in the Import dialog box, Windows users need to select the **All Files** option in the Import dialog box, shown below.



While we're on the subject of file name extensions, let's look at the two that Cumulus uses for export and import:

- **Categories** – Cumulus exports categories in a Cumulus Category Exchange File. The file name extension is **.cce**
- **Records** – Cumulus exports records in a Cumulus Record Exchange File. The file name extension is **.cre**

If at some point an exported file doesn't have the proper extension, you can add it manually.

### Character Encoding for Export

When exporting information, you can employ different character encoding formats. You should base your decision on how the exported file is to be used. Universal Encoding (UTF-8: Unicode characters coded as 8-Bit Transformation Form) makes sure that special characters are transferred correctly across platforms. Choose this format *only* if you want to use the exported file on another operating system.

### Maintaining Category Assignments

The most important thing to know when you are exporting records to be imported into another catalog, is whether the new catalog already has the categories to which the records are assigned. If it does not, the categories assigned to the imported records will be created. But categories of type "Directory" lose their type. They are created as normal categories. If you want to keep the type of these categories, you must first export and import the categories.

Remember that it may be easiest just to drag and drop records from one catalog to another, if both the source and destination catalogs are available to you. If they are not, or you are moving thousands of records at a time, then the export/import route is the way to go.

## The Export/Import Process

The exporting and importing process is pretty much the same, regardless of the data type.

Exporting goes like this:



1. Find and select the items you wish to export. (See “Searching,” p. 53, if needed, for a refresher on how to find records.)
2. Select the appropriate export option from the menus. (See “Export,” p. 113, for information on the various export menu options.)  
NOTE: When exporting categories, make sure to expand the categories if you want to export all subcategories.
3. Name the export file and save.
4. Select the character encoding format.  
NOTE: Only choose Universal Encoding (UTF-8) if you want to use the export file on another operating system.

The export file will be created.

---

Importing is just as easy (remember, you can only import Cumulus-exported files):



1. Select the appropriate import option from the menus. (See “Import,” p. 113, for information on the various import menu options.)
  2. Find the file you wish to import and open it. Its contents are appended to the active catalog.
- 

NOTE: Export/Import Process for Quicklists  
See “Exporting and Importing Quicklists,” p. 64, for a description how to export and import the quicklists for the IPTC Information window.



This chapter covers the basics of working with a fully licensed version of the Cumulus URL AssetStore Module. It describes how to catalog assets from FTP or HTTP servers and how to work with them in Cumulus. Although the records of URL-cataloged assets behave just like any record which has been cataloged through the supported file systems – working with the assets themselves from within Cumulus is slightly different.

This chapter also describes how to copy or move cataloged assets to FTP servers and how to set up the Central Asset Location for a catalog on an FTP server.

# 7

## URL Support

## Activating URL Support

If you want to catalog from FTP or HTTP servers or to work with URL-cataloged assets, the Asset Storage Module supporting URL must be activated.

To activate the URL AssetStore:



1. Launch your Cumulus application.
2. Select **Catalog** ⇒ **Cataloging Options**. The Cataloging Options window opens.
3. Click **Assets**.
4. Enable **URL Support** under Asset Storage Modules.
5. Click **OK**. / Close the Cataloging Options window.

Now the URL AssetStore is activated.

## Cataloging Assets from FTP or HTTP Servers

There are two ways to catalog assets from FTP or HTTP servers: via menu option and with drag and drop. Let's start with the menu option method. And remember: You need a fully licensed version of the URL AssetStore to catalog from FTP or HTTP servers.

NOTE: TAG Files!

Cumulus can create TAG files on an FTP server while cataloging, if the Asset Storage module **Cumulus Metadata Support** in the Cataloging Options is enabled and the user, who catalogs, is allowed to save files on this FTP server.

### Known Restrictions

Although the Cumulus URL AssetStore Module supports all standard FTP or HTTP servers and Web browsers, there are restrictions for a certain configura-

tion. If you use Microsoft Internet Explorer 5, you need a version later than 5.00 to catalog via Drag & Drop. See "Dragging ftp directory items from Microsoft Internet Explorer 5 to Cumulus," p. 109, for details.

### Cataloging Assets via Menu Command

You can catalog employing any valid URL pointing to a file and starting with **ftp://** or **http://**. But you may not use *localhost* as IP address. You may even catalog a folder but only if it is on an FTP server.

NOTE: User Authentication

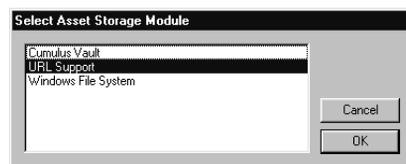
Some FTP or HTTP servers require user authentication. In this case, the host address must be prefixed with a user name and password like "user:password@host". The complete URL then looks like "ftp://smith:secret@server.com/path/file", for example.

To catalog assets from FTP or HTTP servers via menu command:



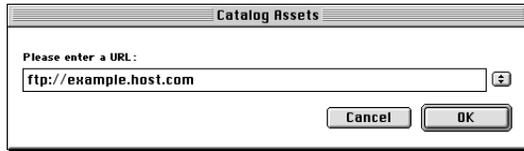
1. Open the catalog to which you want to add the assets.
2. Select **Catalog** ⇒ **Catalog Assets**.

The Select Asset Storage Module dialog box appears. This is a list of available Asset Storage Modules. One is the **URL Support**, and others include the file system you are currently using (such as the Windows or Mac OS File System, among others).



3. Select the **URL Support** and click **OK**.

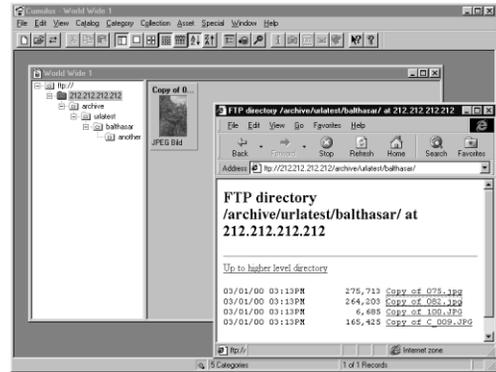
A window appears which asks for an URL.



4. Enter the URL for the asset file (or folder – on FTP only) you want to catalog.

A window appears that shows the status of the cataloging process.

After a moment, a thumbnail for the asset appears, indicating that the cataloging process was successful and a record has been created for the asset.



The progress information window appears and records are created for each of the assets.

NOTE: If you catalog many or huge files you can save time by deactivating the display of the cataloging progress. Before you start cataloging disable the Cataloging Option **Show Progress Bar** (General section, under While Cataloging).

### Cataloging Assets via Drag and Drop

To catalog assets from FTP or HTTP servers via drag and drop:



1. Open the catalog to which you want to add the assets.
2. Launch your Web browser application.
3. Navigate to the asset, FTP folder or Web page which you want to catalog.
4. Select the link for the asset or FTP folder and drag it into the Cumulus Collection window.

### URL AssetStore License Messages

Cataloging assets from URLs is only possible with an activated URL AssetStore Option. If you receive an error message that the URL AssetStore is not licensed, you must activate this option in the license dialog box.

## Working with URL-cataloged Assets

Certain functions in Cumulus work slightly different for assets stored on FTP or HTTP servers. The following sections describe only these slightly different functions. All of these functions are options of the Asset menu. If you open, print or mail an URL-cataloged asset, Cumulus first makes a copy of the asset.

NOTE: If assets were cataloged from FTP or HTTP servers requiring a user authentication, the Cumulus application knows about this protection. When you access such an asset Cumulus will ask you to enter user name and password. During the same session Cumulus remembers the entered name and password and will not ask you again if you access an asset from this FTP or HTTP server.

## Opening Assets

You can open an asset stored on an FTP or HTTP server with either the application that created the asset, or another application of your choice. Applications you choose are added to the menu. You can add up to four. The fifth addition replaces the first, and so on. You cannot manually delete any of the added applications.

To open a URL-cataloged asset from another application:



1. Select the record whose asset you would like to open.
2. Select **Asset**⇒**Open With** and select the desired application from the submenu.  
A dialog appears from which you can select a location for the copy of the asset.
3. Choose the desired location and click  **Select** /  **OK**.

Cumulus copies the asset to the specified location and opens it with the chosen application.

## Printing Assets

You can print an asset stored on an FTP or HTTP server with either the application that created the asset, or another application of your choice. Applications you choose are added to the menu. You can add up to four. The fifth addition replaces the first, and so on. You cannot manually delete any of the added applications.

To print a URL-cataloged asset from another application:



1. Select the record whose asset you would like to print.

2. Select **Asset**⇒**Print With** and select the desired application from the submenu.

A dialog appears from which you can select a location for the copy of the asset.

3. Choose the desired location and click  **Select** /  **OK**.

Cumulus copies the asset to the location you specified.

## Mailing Assets

As with other assets you can also attach an asset stored on an FTP or HTTP server to an outgoing e-mail message.

To mail a URL-cataloged asset:



1. Select the record whose asset you would like to send as an e-mail attachment.
2. Select **Asset**⇒**Mail To**.  
A dialog appears from which you can select a location for the copy of the asset.
3. Choose the desired location and click  **Select** /  **OK**.

Cumulus  asks you to select an e-mail application /  launches your default e-mail application and attaches the selected asset(s) to an outgoing message.

## Storing Assets on FTP Servers

The URL AssetStore also enables you to upload cataloged assets to FTP servers by using the Cumulus menu commands. It also allows you to employ FTP servers as the Central Asset Locations for catalogs.

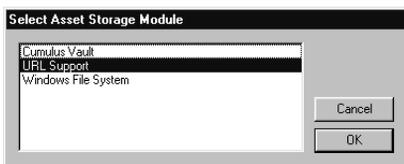
## Moving an Asset to an FTP Location

To move an asset to an FTP location:

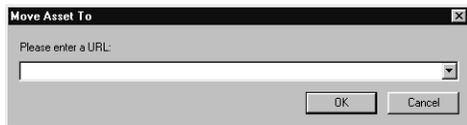


1. Select the record whose asset you would like to move.
2. Select **Asset**⇒**Move To**.

The Select Asset Storage Module dialog box opens which lists all available Asset Storage Modules.



3. Select the **URL Support** and click **OK**. A window for entering an URL opens.



4. Enter a valid FTP-URL and click **OK**.

Cumulus moves the asset to the selected location and updates the reference of the selected record.

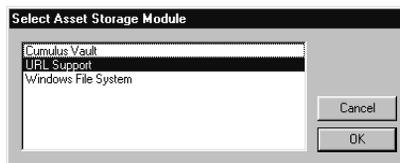
## Copying an Asset to an FTP Location

To copy an asset to an FTP location:

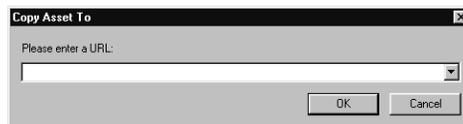


1. Select the record whose asset you would like to copy.
2. Select **Asset**⇒**Copy To**.

The Select Asset Storage Module dialog box opens which lists all available Asset Storage Modules.



3. Select the **URL Support** and click **OK**. A window for entering an URL opens.



4. Enter a valid FTP-URL and click **OK**.

Cumulus copies the asset to the selected location.

## Central Asset Location on FTP Server

Each individual catalog can be configured, such that Cumulus saves a copy of every cataloged asset to a specific location (called a 'Central Asset Location'). This option allows for the quickest possible way to locate and track a catalog's assets. The URL AssetStore enables you to employ an FTP server as a Central Asset Location for a catalog.

NOTE: Workgroup or Enterprise Edition Only the Cumulus Administrator is allowed to change the properties of a catalog which define the Central Asset Location.

To set an URL as Central Asset Location:



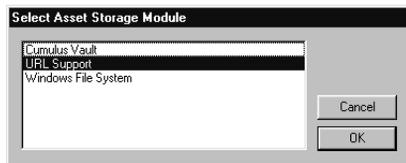
1. Make sure the catalog you want is opened and is the foremost window in Cumulus.

2. Select **Catalog**⇒**Properties**. The Catalog Properties window opens.
3. Click **Asset Location**.

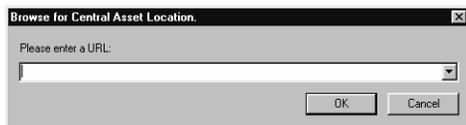
Three situations are possible. The following describes the actions necessary for each situation.

- When the Central Asset Location Option is active and only its settings need to be changed, you can continue with step 4 below.
- When a Central Asset Location is defined but not active, enable the desired option and continue with step 4 below.
- When configuring a Central Asset Location for the first time, enable the desired option. The Select Asset Storage Module dialog box opens and you can skip step 4.

4. Click the **Browse** button to choose the location. The Select Asset Storage Module dialog box opens which lists all available Asset Storage Modules.



5. Select the **URL Support** and click **OK**. A window for entering a URL opens.



6. Enter a valid URL of an existing FTP directory and click **OK**. This brings you back to the Asset Location section.

7. Click **Apply** (or **OK** / **Close** the Catalog Properties window) to save this setting of the selected catalog's properties.

## Deactivating URL Support

If you will neither work with URL-cataloged assets nor catalog from FTP or HTTP servers for a longer period, you may want to deactivate the URL AssetStore.

To deactivate the URL AssetStore:



1. Launch your Cumulus application.
2. Select **Catalog**⇒**Cataloging Options**. The Cataloging Options window opens.
3. Click **Assets**.
4. Disable **URL Support** under Asset Storage Modules.
5. Click **OK**. / Close the Cataloging Options window.

Now the URL AssetStore is deactivated.

To reactivate the URL AssetStore, follow the same procedure but enable **URL Support** in the Cataloging Options window. (See "Activating URL Support," p. 104.)

## Troubleshooting

This section contains frequently asked questions and their possible solutions.

### **Dragging from Netscape to Cumulus on Windows**

*Sometimes when I use Netscape to drag an URL into Cumulus the following message appears: "Server Busy/ This action cannot be completed."*

This message can be ignored as the functionality is ok. But the message box has to be closed before continuing to use Netscape.

### **Dragging ftp directory items from Microsoft Internet Explorer 5 to Cumulus**

*Dragging an FTP directory item from Microsoft Internet Explorer 5 into my Cumulus application just doesn't work!*

Check the version of your Microsoft Internet Explorer 5. You need a version later than 5.00 as only these versions offer the ability to disable the option **Enable folder view for FTP sites** (in **Internet Options, Advanced** tab). While this option is active only dragging the address item from the title bar works. If you disable this option dragging items into Cumulus works.

### **Correcting Mac File Type and Creator Code**

*Why doesn't Finder display the correct icon for some of my assets when I drag them from Cumulus to a Finder folder window? This happens even when I use menu commands, why?*

*Why can't I preview some assets by double clicking on their records?*

In order for the Mac OS to be able to work with a specific file, it needs to know the correct file type and creator code. Without the correct file type and creator code, files cannot be associated with applications.

The URL AssetStore Module uses information from the "File Exchange" Control Panel (Mac OS 9) or "Internet" Control Panel (previous Mac OS) to determine the file type and creator code for URL-based assets.

If the information from the Control Panel is not available, the module uses the QuickTime import modules to do this.

If both of the above are missing, a standard built-in table is used to determine a default file type and creator code.

An incorrect creator code is responsible for the inconsistent behavior described in the questions above. These problems can be solved by customiz-

ing the settings for the specific asset's file type in the appropriate Control Panel of the operating system. Please consult your operating systems documentation for more details.





This section serves as a road map to the entire Cumulus product from the perspective of the user interface. Explanations are given for each of the program's menus and toolbars.

The  and  icons identify features unique to either Mac OS or Windows, respectively.

# 8

# Reference

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## Cumulus Menus

### File

New Catalog...	Ctrl+N
Open Catalog...	Ctrl+O
Connect to Server...	Ctrl+Shift+O
Close	Ctrl+W
Import	▶
Export	▶
Page Setup...	
Print Preview	▶
Print	▶
Output to HTML	▶
Exit	Alt+F4

### Edit

Undo	Ctrl+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Ctrl+Del
Select All	Ctrl+A
Deselect All	
Rotate Thumbnail	▶
Optimize Thumbnail	
Preferences...	

### View

Palette Mode	Ctrl+Shift+P
✓ Toolbar	
✓ Status Bar	
✓ Show Category List	
✓ Show Record List	
Large Thumbnails	
✓ Medium Thumbnails	
Small Thumbnails	
Details	
Customize...	
Sort By	▶
Sort Direction	▶
Zoom In	
Zoom Out	
Fit to Window	
Reset Preview	

### Catalog

Cataloging Options...	
Catalog Assets...	Ctrl+B
Update Record	▶
Update Asset Reference	
Properties...	
Activity Monitor...	
Backup...	
Convert To...	
Set As Default...	
Restore Factory Defaults...	
New Empty Copy...	
Compress...	
Rebuild...	
Recover Deleted Records...	

### Category

Information...	
New Root Category	
New Subcategory	
New Related Category	
Show Original Category	
Show Related Categories	
Show Categories Containing...	
Find Matching Records	
Save Matching Assets As...	
Expand	
Expand All	
Collapse	
Collapse All	

### Collection

New	
Open...	
Save	
Save As...	
Mail To...	
Find Records...	Ctrl+F
Find Records In All Collections	
Find All Records	Ctrl+G
Remove Record from Collection	Del
Insert Condition Before	
Insert Condition After	
Duplicate Condition	
Delete Condition	
Delete All Conditions	
Slide Show...	

### Asset

Information...	Ctrl+I
IPTC Information...	Ctrl+Shift+I
Preview...	Ctrl+Y
Show Location	Ctrl+R
Open with	▶
Print with	▶
Copy To...	
Move To...	
Mail To...	
Convert To...	
Check Out...	
Undo Check Out	
Check In...	
Show History...	

### Additional menu items?

In several of your menus you will find menu items at the bottom which are not displayed on this page. These menu items and the items in the menu **Special** are just that: special. Because their menu assignments can easily be changed, these functions are described in alphabetical order in their own section "Additional Functions," starting on page 127.

## 🍏 The Apple Menu



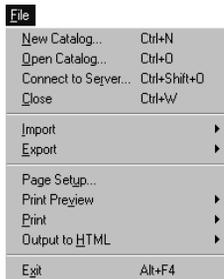
### 🍏 About Cumulus

Displays the Cumulus “About” box, which shows information on the Cumulus version and release number you are using. It also provides a button that launches your default Web browser and initiates a connection to the Canto Web site. This requires an Internet connection.

### 🍏 License

Presents a dialog box from which you can view the user’s identification information and register Cumulus. You can choose to register via Web or registration form. (For further details, see “Product Registration,” p. 21.)

## The File Menu



### New Catalog

Creates a new catalog. A dialog box is displayed for you to name the new catalog.

### Open Catalog

Opens an existing catalog via a standard open-file dialog box. Windows users should be aware that they will have to select **All Files** from the drop-down list to see catalogs without the proper file name extension (.ccf).

### Connect to Server

Cumulus Single User can be used as a client to a Cumulus Workgroup installation. This menu option opens a dialog box from which you can connect to a catalog on a remote Cumulus Server.

NOTE: Although the Single User Edition can be used as a Client application with a Workgroup or Enterprise Edition, it is highly recommended to use the appropriate Client application when working in a network environment as only this application is optimized for the Client/Server architecture of Cumulus.

### Close

Closes the active catalog. Saves any changes that are not yet saved.

### Import

This menu item opens a submenu with several menu options. Each opens a dialog box from which you can select an appropriate file type for import. The various file types are listed by the import type below:

- **Records (.cre)** – If a record in the import file already exists in the active catalog, it is imported only if the **Add Duplicates** option has been selected in the **Asset** section of the **Cataloging Options** setup.
- **Categories (.cce)** – The imported categories are appended to the active catalog. If a category in the import file has the same name as an existing category, the category is not imported.

### Export

This menu item opens a submenu with several export options. Each opens a dialog box from which you can name an appropriate file type for export. All exported files can be used on any supported Cumulus platform. The options are explained below:

- **Selected Records** – Exports the currently selected (highlighted) records to a Cumulus Record Exchange File (.cre). This menu option is disabled if no records are selected.

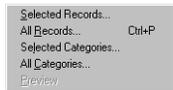
- **All Records** – Exports all records of the active collection to a Cumulus Record Exchange File (.cre).
- **Selected Categories** – Exports the currently selected (highlighted) categories in the active catalog to a Cumulus Category Exchange File (.cce). This menu option is disabled if no categories are selected.
- **All Categories** – Exports all categories as they appear in the Category pane to a Category Exchange File (.cce). Make sure to expand the category list if you want to export all subcategories.

### Print Setup

This menu item opens a standard print setup window from which you can configure your printing options. The options available to you will depend on your system configuration. See your computer's operating system manual for details.

### Print

Opens a submenu with the following menu options:



- **Selected Records** – Prints selected records using the current display style.
- **All Records** – Prints all records of the active collection using the current display style.

NOTE: If you select the print option **Print Entire Assets as Thumbnails**, the records' thumbnails will be printed in high-resolution quality so the printouts can serve as contact sheets.

- **Selected Categories** – Prints selected categories as they appear in the Category window. Make sure to expand the category list if you want to see all the subcategories in the print out.
- **All Categories** – Prints all categories as they appear in the Category pane. Make sure to expand the category list if you want to see all the subcategories in the printout.

- **Preview** – Prints the open preview. The preview will be printed in the asset's original resolution. This may take a while depending on the asset! (Disabled when no preview is open.)

If your intention is to print the actual asset, instead of its record or preview, see "Print With," p. 123, for details.

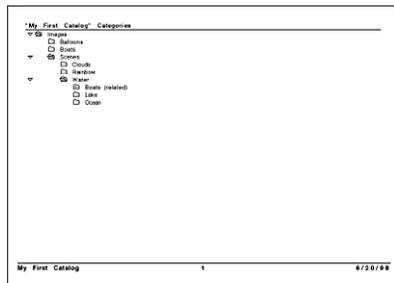
Some print examples:



Printout of all records • Small Thumbnails View

Record Name	Type	Color	Mode	Resolution	Modified
Balloon	JPEG	Color	72 dpi	8/18/98	
Balloon Race	JPEG	Color	72 dpi	8/18/98	
Cumulus Clouds	JPEG	Color	72 dpi	8/18/98	
Green Lake	JPEG	Color	72 dpi	8/12/98	
Mountain Lake	JPEG	Color	72 dpi	8/18/98	
Rainbow over Field	JPEG	Color	72 dpi	8/18/98	
Rainbow over Hills	JPEG	Color	72 dpi	8/18/98	
Sun behind Cloud	JPEG	Color	72 dpi	8/18/98	
Sunset	DIFP	Color	72 dpi	8/18/98	
Yacht	JPEG	Color	72 dpi	8/15/98	

Printout of all records • Details View



Printout of expanded list of all categories

## Print Preview

This option allows you to view the printed output before it gets sent to your printer. The output options are the same as those found in the regular **Print** menu (see previous heading).



*The Print Preview window zoomed in.*

The preview window has seven buttons that you use to navigate through the print job:

- **Print** – Sends the print job to the printer.
- **Next Page** – Opens a preview of the following printed page. (Disabled if there are no additional pages.)
- **Prev Page** – Opens a preview of the previous printed page. (Disabled if you are viewing the first page.)
- **Two (One) Page** – Displays two preview pages at a time. When two pages are viewed, the button reads **One Page**, and is used to reduce the display back to a single page. (Disabled if there is only one page in the print job, and when the display is not at the minimum zoom level.)
- **Zoom In** – Zooms in on the current page view. (Disabled when you have reached the maximum zoom level.)
- **Zoom Out** – Zooms out of the current page view. (Disabled when you have reached the minimum zoom level.)
- **Close** – Closes the Print Preview window without printing the job.

## Output to HTML

Exports the displayed view of selected or all records of the current collection in HTML format and creates HTML pages.

The appearance of the HTML pages created by Cumulus will correspond to the display of the records. (See “Output to HTML,” p. 97, for details.)

## Quit / Exit

Quits Cumulus.

## The Edit Menu



### Undo

Reverts to the former text entry if you redeceide while changing a category name.

### Cut

Removes the current item or text selection and places it on the Clipboard so that it can be pasted elsewhere.

### Copy

Copies the current item or text selection and places it on the Clipboard so that it can be pasted elsewhere.

### Paste

Places the contents of the Clipboard into the current location or text insertion point.

## Delete

Deletes the selected records or categories from the catalog after confirmation of the action. The confirmation dialog for deleting records offers two options: to delete the record only or to delete the record and its associated asset, too. This is not undoable. Make sure that you no longer need an asset or that you have a copy elsewhere before deleting one. (Disabled if no records or categories are selected.)



## Select All

Selects all objects or text. The type of selection depends on which window is active and whether you have clicked inside a text area.

## Deselect All

Cancels any previous selection.

## Rotate Thumbnail

Rotates the selected records' thumbnail images in one of three ways:

- 90° clockwise
- 90° counter-clockwise
- 180°

(Disabled if no records are selected.)

The record field **Thumbnail Rotation** saves the rotation value for a rotated thumbnail. The rotated thumbnail will be used for previewing, printing, exporting to HTML and creating slide shows.

NOTE: Catalogs Created with Versions Prior Cumulus 5.5! If the field **Thumbnail Rotation** (for storing the rotation value) should be available with catalogs that have been created with prior versions, this record field has to be added to the catalog. The field is then empty. There are two ways to fill it out:

- Open the Asset Information window and enter the according value (degree of rotation) manually.
- Select **Asset** ⇨ **Update Record**. This will set the thumbnail back to the asset's orientation. Then rotate the thumbnail again. The value of the rotation will then be stored in the Thumbnail Rotation field.

## Optimize Thumbnail

Equalizes the appearance of the selected records' thumbnails. This is useful for thumbnails that are too dark, too light, or lacking contrast. The action cannot be undone, but you can force-update the record to get back the original thumbnail. (Disabled if no records are selected.) (See "Update Record," p. 118, for information on updating a record, including its thumbnail.)

## Preferences

Opens the Preferences window, from which you can set global application behaviors. (See "The Application Preferences Window," p. 92, for details.)

## The View Menu

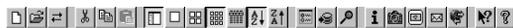


## Palette Mode

Changes the view of the Cumulus application to palette mode and back. In palette mode the thumbnails and the contents of record fields are displayed as defined in the View Customization window. (See "View Customization," p. 94, for details.)

In palette mode the Cumulus application will shrink to a palette that can conveniently be used with another application. That way you can easily drag and drop cataloged assets into other applications. All open collections will be changed to palette mode. They are displayed on top of each other. The Palette Mode window can be resized to fit your needs (and all display changes will be kept when you reopen the palette mode). All Cumulus functions remain available; to display the menus select **Menu**.

### **Toolbar**



Toggles the Toolbar on and off.

### **Status Bar**



Toggles the Status Bar on and off.

### **Show Category List**

Toggles the Category pane on and off.

### **Show Record List**

Toggles the Record pane on and off.

### **Large Thumbnails**

Displays records as large thumbnails (default 256 x 256 pixel) and the contents of record fields as defined in the View Customization window. (See "View Customization," p. 94, for details.) You can change the default size for thumbnails in the Application Preferences. (See "The Application Preferences Window," p. 92, for details.)

### **Medium Thumbnails**

Displays records as medium thumbnails (default 128 x 128 pixel) and the contents of record fields as defined in the View Customization window. (See "View Customization," p. 94, for details.) You can change the default size for thumbnails in the Appli-

cation Preferences. (See "The Application Preferences Window," p. 92, for details.)

### **Small Thumbnails**

Displays records as small thumbnails (default 64 x 64 pixel) and the contents of record fields as defined in the View Customization window. (See "View Customization," p. 94, for details.) You can change the default size for thumbnails in the Application Preferences. (See "The Application Preferences Window," p. 92, for details.)

### **Details**

Displays records in a sorted text list as defined in the View Customization window. (See "View Customization," p. 94, for details.)

### **Customize**

Displays the View Customization window for customizing the Thumbnail View or the Details View. (See "Asset Information," p. 62, for details.)

### **Sort By**

This is the menu equivalent to the sort buttons at the top of each column in the Details View. It displays a list of the available fields. Select the field you want to determine the sorting.

### **Sort Direction**

Provides two submenus used to change the direction of the sort order:

- **Sort Ascending** – Sorts the records in an A to Z (0-9) direction.
- **Sort Descending** – Sorts the records in a Z to A (9-0) direction.

### **Zoom In**

Doubles the size of a preview image. Preview images can be increased to eight times or 800% of their original size. (Disabled if no preview window is activated.)

### Zoom Out

Halves the size of a preview image. Preview images can be reduced to one eighth or 12.5% of their original size. (Disabled if no preview window is activated.)

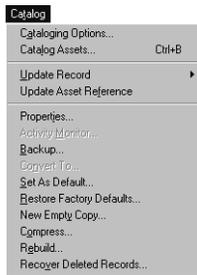
### Fit to Window

Resizes the preview image to fit inside the main Cumulus window.

### Reset Preview

Resets the preview image to its original size and orientation.

## The Catalog Menu



### Cataloging Options

Opens the Cataloging Options window, from which you determine the options that Cumulus uses when cataloging assets. Before you catalog any assets, make sure the cataloging options are set the way you want them.

(See “The Cataloging Options Window,” p. 88, for further details.)

### Catalog Assets

Opens a dialog box from which you can select assets to catalog. Keep in mind that you can also use Cumulus’ drag-and-drop support to catalog large numbers of assets at once. A progress dialog is shown while Cumulus is cataloging the assets.

If you catalog assets from a location where you are allowed to save files, Cumulus can create a TAG file for each cataloged asset. The file is named like the asset with the extension *.tag* added and is saved in the folder where the asset resides. TAG files are a standard exchange file format for metadata information on the asset. TAG files hold all of the information that can be viewed in the Asset Information – and more. For example, if a particular asset has been cataloged into different catalogs, this information is part of that asset’s TAG file.

If you want Cumulus to create these TAG files while cataloging, enable the asset storage module **Cumulus Metadata Support** in the Cataloging Options, Assets section and set its properties to **Always**.

### Update Record

Refreshes the selected records with the asset’s up-to-date information. Assets that have been modified since they were cataloged should be updated. User-entered record information is not affected by the update. Assets that are not available cannot be updated. (Disabled if no records are selected.)

There are two options for updating:

- **If Asset Has Changed** – This updates the record only if the asset has been modified since it was cataloged.
- **Always** – This forces an update of the record regardless of whether the asset has been modified. This is useful if you have changed the catalog’s thumbnail size setting and wish to refresh the existing records’ thumbnail images to reflect the new size. (See “The Catalog Properties Window,” p. 90.)

### Update Asset Reference(s)

Updates the path used to find the selected asset files. If the asset files cannot be found, Cumulus asks you to locate them. References can only be updated if the assets are available. (Disabled if no records are selected.)

Use this option if you have moved a collection of assets. Once you locate the new location of one of the missing files, Cumulus attempts to find the remaining assets in that same directory. If it cannot, it will ask you to find the remaining assets.

### Properties

Opens a window from which you can set options for the active catalog. (See “Catalog Properties,” p. 69, for details.)

### Activity Monitor

Only Workgroup Edition: Displays information on the opened catalog.

### Backup

Opens a dialog from which you can save a backup copy of the active catalog.

### Convert To

Only Workgroup Edition: Opens a dialog box from which you can convert the catalog to adapt to another database engine.

### Set As Default

Opens a dialog from which you set the catalog properties of the current catalog to be used for creating new catalogs.

### Restore Factory Defaults

Opens a dialog from which you can reset the defaults defined by Canto for creating new catalogs. These defaults are the ‘out of the box’ settings for the Catalog Properties. (Disabled unless another default has been set.)

### New Empty Copy

Opens a dialog from which you can create a new empty catalog with the catalog properties of the current catalog.

### Compress

Opens a dialog from which you can compress the active catalog. (Disabled if the catalog is already compressed as much as possible.)

### Rebuild

Opens a dialog from which you can repair (rebuild) the active catalog.

### Recover Deleted Records

Opens a dialog from which you can attempt to recover deleted records.

## The Category Menu



### Information

Opens the Category Information window for the selected category. For further information, see “Category Information Window,” p. 52. The Category Information window can show those category fields which are defined in the Catalog Properties window. Which fields are displayed depends on the customization of the window.

The Category Information window is similar to the Asset Information window. For details on how to use it and the different field types, see “The Information Window,” p. 86. You can customize the Category Information window. You can choose the fields to be displayed and their order of appearance as well as the font (size, style, color) used. Depending on the field type, you may also define the displayed length of a

field (number of lines) or the picture size. (See “Customizing the Information Window,” p. 63, for details).

### New Root Category

Creates a new root category for the active catalog. The category is named “Category” by default, but you can rename your categories as you see fit.

### New Subcategory

Creates a category under the currently selected category. (Disabled unless a single category is selected.)

### New Related Category

Makes a related category for each of the currently selected categories. (Disabled unless one or more categories are selected.) (See “Category Types,” p. 51.)

### Show Original Category

Finds and highlights the original category of a selected related category. (See “Category Types,” p. 51.)

### Show Related Categories

Finds and highlights the selected category’s related category or categories. (Disabled unless a category is selected.)

### Show Categories Containing

Opens a dialog box in which you can type a string of text that you would like to search for in all category names of the active catalog. Categories whose names contain the text string are highlighted. Related categories are included in the search.

For example: Typing “oa” would find categories called “Boats” and “Oasis.”

### Find Matching Records

Finds all records that are associated with the selected categories. This is the menu equivalent to double-clicking on category icons. (Disabled unless one or more categories are selected.)

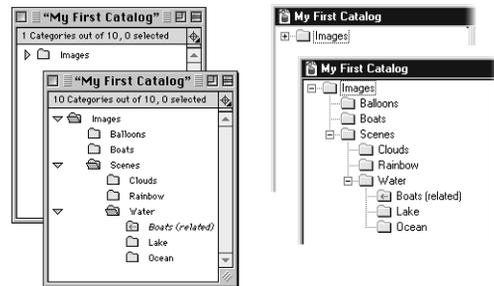
### Save Matching Assets As

Opens a dialog box from which you can choose a destination. Cumulus then copies the assets of records that are associated with the selected categories to the location you selected. The assets are saved in folders named for the categories selected.

This option is handy for collecting production files for output (assuming the files all have at least one common category, such as project name).

### Expand

Expands the selected categories to reveal subcategories. This works the same as clicking on the  right-pointing triangle icon /  plus sign icon to the left of the parent category’s folder icon. (Disabled if no parent categories are selected.)



Mac OS and Windows collapsed and expanded categories.

### Expand All

Expands all parent categories to reveal subcategories. (Disabled if all parent categories are already expanded.)

### Collapse

Collapses the selected parent categories to hide subcategories. This works the same as clicking on the  down-pointing triangle icon /  minus sign icon to the left of the parent category’s folder icon. (Disabled if no expanded parent categories are selected.)

### Collapse All

Collapses all parent categories to hide subcategories. (Disabled if all parent categories are already collapsed.)

## The Collection Menu



### New

Opens a submenu with two options for creating a new collection.

- **From Selection** – The new collection will contain the currently selected records.
- **Empty** – The new collection will be empty.

### Open

Opens an existing collection via the standard open-file dialog box.  The file extension for a collection is: **.cfe**

NOTE: You can only open a collection, if you have access to the catalog from which the collection was created.

### Save

Saves the collection as it is shown.

### Save As

Saves the collection as it is shown under a new name. A dialog box is displayed for you to name the new collection.

### Mail To

Use this option to attach the collection to an outgoing e-mail message. But remember: Since a collection is always connected to its catalog, it is necessary for the recipient to have access to the catalog 'serving' the collection.

### Find Records

Opens or activates the Find window. (See "The Find Window and Sample Search Options," p. 59, for details.)

### Find Records In All Collections

Using the query in the Find window, Cumulus searches through all open collections. (Disabled unless the Find window is open.)

NOTE: All open collections will be replaced by the search result. Using **Find Records In All Collections** overrides the option to show found records in a new collection.

### Find All Records

Resets the current selection of records to the entire contents of the catalog. This is useful after a search operation has reduced the number of visible records.

### Remove Record from Collection

Removes the record from the current collection but not from the catalog. (See "Delete," p. 116, for deleting a record from a catalog.)

### Insert Condition Before

Inserts a new search condition before the current condition. You make a condition current by clicking inside any of its fields. This is the menu equivalent to clicking the  button in the Find window.

### Insert Condition After

Inserts a new search condition after the current condition. You make a condition current by clicking inside any of its fields. This is the menu equivalent to clicking the  button in the Find window.

### Duplicate Condition

Duplicates the current condition. This is useful if you want to add a new condition that is similar to an existing condition. The new condition is added below the current condition. You make a condition current by clicking inside any of its fields.

## Delete Condition

Deletes the current condition and makes the condition before the deleted condition current. There is no undo for this action. You make a condition current by clicking inside any of its fields. This is the menu equivalent to clicking the   icon /   button in the Find window.

## Delete All Conditions

Deletes all search conditions in the Find window. There is no undo for this action.

## Slide Show

Opens a dialog from which you can create a slide show displaying the assets' previews of previously selected records. (QuickTime needs to be installed on your computer – QuickTime 4.0 is recommended). Once you have created a slide show, you can save it as a QuickTime movie and/or e-mail it.

For further information, see “Slide Show,” p. 98.

## The Asset Menu

Asset	
Information...	Ctrl+I
IPTC Information...	Ctrl+Shift+I
Preview...	Ctrl+Y
Show Location	Ctrl+R
Open with	
Print with	
Copy To...	
Move To...	
Mail To...	
Convert To...	
Check Out...	
Undo Check Out	
Check In...	
Show History...	

## Information

Opens the Asset Information window for the selected record(s). (Disabled when no record is selected.) (See “Asset Information Window,” p. 62, for details.)

## IPTC Information

Opens the IPTC Information window that provides special access to the IPTC information on the asset(s)

stored in the selected record(s). (Disabled when no record is selected.) (See “IPTC Information Window,” p. 63, for details.)

## Preview

Opens a preview window for each of the selected records. The records' assets must be available to display the Preview window. The type of window opened depends on the asset type. Image previews can be zoomed in or out. (See “Zoom In,” p. 117, and “Zoom Out,” p. 118.) You can also copy all or part of an image preview to the Clipboard. To copy the entire preview image:



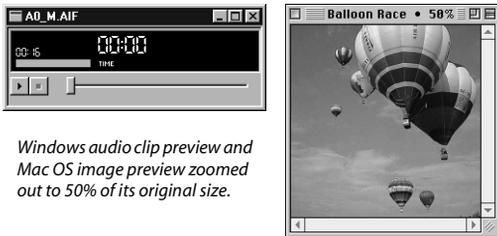
1. Activate the window with the preview image you want to copy.
2. Select **Edit**⇒**Select All**.
3. Select **Edit**⇒**Copy**.

The preview image is on the Clipboard and may be pasted into other applications. Remember, this is a copy of the preview image, not the actual asset. To select a portion of the preview image:



1. Click and hold the mouse down in the upper left corner of the region you want to copy.
2. Drag the mouse to the lower right of the region. A box is drawn around the selected area.
3. Select **Edit**⇒**Copy**.

The selected portion of the preview image is on the Clipboard and may be pasted into other applications.



*Windows audio clip preview and Mac OS image preview zoomed out to 50% of its original size.*

### Show Location

Locates the selected records' assets and displays them, e.g., in the Mac OS Finder or Windows Explorer. (Disabled if no records are selected.)

### Open With

Opens the selected records' assets with either the application that created the assets (if it's known and available), or another application of your choice. Applications you choose are added to the menu. You can add up to four. The fifth addition replaces the first, and so on. You cannot manually delete any of the added applications. (Disabled if no records are selected.)

### Print With

Prints the selected records' assets with either the application that created the assets (if it's known and available), or another application of your choice. Applications you choose are added to the menu. You can add up to four. The fifth addition replaces the first, and so on. You cannot manually delete any of the added applications. (Disabled if no records are selected.)

### Copy To

Copies the selected records' assets to the location specified in the dialog box that appears. The original assets are left alone. (Disabled if no records are selected.)

### Move To

Copies the selected records' assets to the location specified in the dialog box that appears and updates the records' asset references to point to the new location. The original assets are deleted. (Disabled if no records are selected.)

### Mail To

Use this option to attach an asset to an outgoing e-mail message. Your default e-mail application is launched.

### Convert To

Opens a dialog for converting the asset associated with the selected record to another file format. The target formats depend on the availability of Cumulus Converter modules.

NOTE: If you have selected multiple assets' records, the chosen settings will be applied to convert all selected assets.

The following Converter modules are available with a Cumulus standard installation:

- Pixel Image Converter
- ZIP AssetProcessor

The **Pixel Image Converter** allows you to convert any cataloged pixel image into the following formats on the fly: JPEG, TIFF, BMP and PDF

To convert one or more cataloged asset(s):



1. Select the record(s) representing the asset to be converted.
2. Select **Asset**⇒**Convert To** menu command.
3. If you have activated multiple AssetStores, select the respective AssetStore to manage the converted destination asset.

NOTE: If you select the Vault or the URL Asset-Store as the managing AssetStore the Pixel Image Converter won't produce a real file but

a virtual one. Cumulus will manage this virtual file as a regular asset.

4. Choose a destination for the converted asset(s).
5. If you have activated multiple Asset Converters, select **Pixel Image Converter** as Asset Converter.

The Convert Pixel Image dialog opens.

6. Select the parameters for the conversion:
  - To maintain the current proportions of pixel width to pixel height, select **Constrain Proportions**.
  - Under **Pixel Dimensions**, enter values for width and height. To enter values as percentages of the current dimensions, choose **Percent** as the unit of measurement.
  - Under **Document Size**, enter values for width, height, or resolution. You can choose different measurement units. To enter values as percentages of the current dimensions, choose **Percent** as the unit of measurement.
  - Under **Format**, first select the file format for the conversion. Depending on the selected file format the available further parameter change.
  - To store IPTC metadata with TIFF and JPEG images, select **Store IPTC Information**.
7. Click **OK**.

The selected asset(s) will be converted and stored under the name of the original asset in the selected destination. The Pixel Image Converter will automatically add the correct  File Type and Creator /  file extension to the file name.

The **ZIP AssetProcessor** compresses assets into Zip archives.

To compress cataloged assets into Zip archives:



1. Select the record(s) representing the asset to be compressed.
2. Select **Asset** → **Convert To** menu command.
3. If you have activated multiple AssetStores, select the respective AssetStore to manage the destination ZIP asset.

NOTE: If you select the Vault or the URL AssetStore as the managing AssetStore the ZIP AssetProcessor won't produce a real file but a virtual one. Cumulus will manage this virtual file as a regular asset.

4. Choose a destination for the ZIP asset.
5. Select **ZIP AssetProcessor** as Asset Converter. The ZIP AssetProcessor Parameter dialog opens.
6. Select the parameters for the conversion:
  - Under **Archive Name** you have to choose a name for your ZIP asset. The ZIP AssetProcessor will automatically add the extension ".zip" to the file name. On Mac OS this means that the name can be up to 27 characters in length without the extension.  
NOTE: If you choose an existing ZIP asset as archive name, the ZIP AssetProcessor will update the already contained assets and append new assets.
  - Under **Store as MacBinary Format** you can determine the assets to be stored including the Mac OS resource fork, data fork and finder information (e.g. File Type/Creator). This option should only be activated, if the file will definitely be extracted under Mac OS, as the MacBinary format cannot be extracted properly under Windows or UNIX.
7. Click **OK**.

The selected asset(s) will be compressed and the ZIP asset stored in the selected destination.

## Check Out, Undo Check Out, Check In, Show History

These options are only available when Cumulus Vault is installed with a Cumulus Workgroup Edition.

## The Special Menu

This menu contains special functions. For further information, see “Additional Functions,” p. 127.

## The Window Menu



The contents of the **Window** menu change to reflect the names of all open windows. Use it as a quick way to bring hidden windows to the front.

🍏 On the Mac OS, each of the windows belonging to an open catalog are arranged with that catalog in the menu. This provides a great way of making sure you have selected the Find or Category window you intended.

📖 The Windows version of the menu has some additional items:

- **Cascade** – Overlaps multiple open windows.
- **Tile** – Resizes and repositions all open catalog windows so that each can be seen.
- **Arrange Icons** – Arranges the minimized window icons along the bottom of the main Cumulus window so that each can be seen.
- **Move Split** – Grabs the categories/records dividing line for the active catalog window so that it can be moved. You can also select this line manually by positioning the mouse pointer over it, then clicking and dragging.

## The Help Menu



### 🍏 About Balloon Help

Mac OS system menu introducing Balloon Help, Apple's online help system. Cumulus does not include Balloon help. This menu appears in adherence with Apple's application developer guidelines.

### 🍏 Show (Hide) Balloons

Turns the Mac OS Balloon help system on and off. Cumulus does not include Balloon help. This menu appears in adherence with Apple's application developer guidelines.

### 📖 Contents and Index

Opens the table of contents and searchable index window for Cumulus' online help system.

### 📖 Help On

Opens context-sensitive help. This type of help presents information based on the selected item in the program. For example, if a record is selected, the help system presents information on using the Record pane. You can also press **F1** on your keyboard to reach the same help. But **F1** offers the additional benefit of being able to get help on a selected menu item.

### 📖 What's This?

This options adds a question mark to the mouse pointer, indicating that you are to click on something. The object you click on will be the topic of the help presented. This also works with menus.

### **About Cumulus**

Displays a dialog box that shows the version of Cumulus you're using. It also provides a button that launches your default Web browser and initiates a connection to the Canto Web site. This requires an Internet connection. (See the Microsoft Windows documentation for information on setting your default Web browser.)

### **License**

Presents a dialog box from which you can view the user's identification information and register Cumulus. You can choose to register via Web or registration form. (For further details, see "Product Registration," p. 21.)



No program can be all things to all people. But Cumulus comes close to this ultimate goal by allowing you to automate tasks via its API (Application Programming Interface). The Standard Cumulus API enables you not only to automate tasks within Cumulus, but also to make separate applications act together through inter-application communication.

# 9

## **Additional Functions**

## Technology

The Scripting API is based on the support of AppleEvent on Mac OS and OLE Automation in Windows. In general, all of the functions and content of Cumulus (collections, records, etc.) can be accessed by means of these two technologies. The capabilities of the Scripting API offer the potential to realize solutions specific to your situation, from simple extension of basic Cumulus functions to complex integration of Cumulus with other applications.

AppleEvent and OLE Automation are supported by the following popular programming/scripting languages:

- 🍏 Apple's AppleScript ([applescript.apple.com](http://applescript.apple.com))
- 📄 Borland's Delphi ([www.borland.com](http://www.borland.com))
- 📄 Microsoft's Visual Basic ([www.microsoft.com](http://www.microsoft.com))
- 📄 Microsoft's Visual C++ ([www.microsoft.com](http://www.microsoft.com))
- 📄 Sybase's PowerSoft PowerBuilder ([www.sybase.com](http://www.sybase.com))
- 🍏 📄 Userland's Frontier ([www.userland.com](http://www.userland.com))

It's obviously beyond the scope of this guide to explain the process of application writing. Please contact the publishers of each of the languages listed for referrals to educational materials if you need them.

## Cumulus API Examples

The standard Cumulus installation comes with additional functions which represent examples using the Scripting API. You can use these examples as they are or modify them to suit your needs.

The description of different Scripting API examples that are included with Cumulus may give you some ideas about how you can apply Cumulus automation to your workflow. The source code for all examples described here is included on the Cumulus CD, so you can change it to adapt to your local processes.

### Finding and Assigning the Included Examples

The examples included with Cumulus are either assigned to certain menus by default or stored in the

Additional Functions folder (subfolder of the Menu Commands folder). You can easily assign a function to a menu by copying (or moving) the example to the folder of the menu (subfolders of Menu Commands folder). If there is no folder for the menu to which you would like to assign the function you have to create one (named as the menu, e.g. File or View). You can also assign functions to the menus of the Asset, Category or IPTC Information window. Therefore you have to create corresponding folders as subfolders of Menu Commands folder; named:

- Information
- IPTC Information

In these folders you have to create subfolders named as the menu to which you want to assign the function (e.g. Asset, Category, Edit).

You can also assign a function to a context menu (alternate mouse button actions) by copying it to corresponding folder. You have to create these folders as subfolders of Menu Commands folder:

- Category Context Menu
- Selected Category Context Menu
- Asset Context Menu
- Preview Context Menu

For a list of all included examples, see "Using the Additional Functions" below.

### Editing the Included Examples

The examples that Canto provides with Cumulus can serve as learning tools to help you get your own applications up and running. By exploring the way these examples were written, you can get a good idea of the possibilities available to you.

🍏 The examples included with the Mac OS version of Cumulus were written in AppleScript. They are not compiled, nor protected, so you can open and modify them using any AppleScript editor. If you plan to edit any of the included examples, make sure you work from a backup copy of the file.

 The Windows examples, written in Visual Basic, are compiled and therefore not readable. But Canto has provided source code files for the applications on the Cumulus CD-ROM so that you can see how they were built. Find the source code files' folder Cumulus API Examples inside the English folder on the disc.

## Using the Additional Functions

As the menu assignments can be changed easily, the additional functions and their descriptions in this section are listed in alphabetical order.

### Assign Selected Categories

Assigns a selection of records to a selection of categories, or vice versa. (This is the opposite of "Detach Selected Categories," p. 130.)



1. Select one or more records.
2. Select one or more categories to which you want to assign the selected records.
3. Select **Asset** (default) ⇒ **Assign Selected Categories**. The records are assigned to each of the categories in the selection.

### Assign Status to Records

Assigns a status term to a selection of records.



1. Select one or more records.
2. Select the assigned menu ⇒ **Assign Status to Records**. A dialog box opens from which you can see a list of the current status terms in the catalog.

3.  **Select / ** Enter a status term from the list and click **OK**. The term is applied to each record in the selection.

### Check After Location Changed

Updates records in the active catalog to reflect a new location of their assets. This is useful if you have cataloged assets from a remote drive or volume that has since been renamed or have simply moved cataloged assets to a new location. Without this application, the records would still "point" to the old asset paths. This application does not overwrite, move or otherwise affect asset files at all.



1. Select one of the records in the active catalog that still points to the old location of the assets.
2. Select **Asset** (default) ⇒ **Check After Location Changed**. A dialog box appears asking you to locate the selected asset in its new location.
3. Find the selected record's asset on the newly renamed drive or volume and click **Open**. A window remains on the screen from which you can select some additional options for the update. (See the example below.)
4. After you select the options you want, click **Check Now**. The application searches the active catalog for all of the records that point to the old location of the assets and updates them to the new location.

The easiest way to understand how the options work is to use an example. For our example we'll use three files:

- C:\Images\file1.jpg
- C:\Images\Scenes\file2.jpg
- C:\Data\Sounds\Music\file3.jpg

Before running the application, we'll select the first file. Let's say that D:\New is the new location of the files. Below are the ways the three buttons affect the files:

Include Volume    Include Path    Include Subfolders

- D:\Images\file1.jpg
- C:\Images\Scenes\file2.jpg
- C:\Data\Sounds\Music\file3.jpg

The volume/drive was changed for the first file we selected.

Include Volume    Include Path    Include Subfolders

- D:\New\file1.jpg
- C:\Images\Scenes\file2.jpg
- C:\Data\Sounds\Music\file3.jpg

The volume/drive as well as the file path were changed for the file we selected.

Include Volume    Include Path    Include Subfolders

- D:\New\file1.jpg
- D:\New\file2.jpg
- C:\Data\Sounds\Music\file3.jpg

The volume/drive and the file path were changed for the file we selected, as well as for file2, because file2 was located in a subfolder of file1. The subfolder was not retained and now file2 is in the same folder as file1.

Include Volume    Include Path    Include Subfolders

- D:\Images\file1.jpg
- D:\Images\Scenes\file2.jpg
- D:\Data\Sounds\Music\file3.jpg

The volume/drive was changed for all of the files.

The buttons in the lower half of the box are:

- **Change asset reference** – If the asset already exists in the new location, the record's asset reference (only) is updated to reflect the new location.
- **Change asset reference and update asset at new location** – If the asset already exists in the new location, the record is completely updated to reflect the new location and any changes that might have been made to the asset.
- **Leave record untouched** – If the asset is not found in the new location, the record is not affected.
- **Delete record** – If the asset is not found in the new location, the record is deleted.

### Count File Formats

Creates a text listing of the asset file types of the current collection of records in the active catalog. Each entry also lists the number of records whose assets are of that type. You can copy the selection and paste it into other applications using the standard copy and paste techniques.



1. Select one or more records.
2. Select the assigned menu ⇨ **Count File Formats**. The file types are counted and displayed in a text window.

### Detach Selected Categories

Detaches a selection of records from a selection of categories, or vice versa. (This is the opposite of "Assign Selected Categories," p. 129.)



1. Select one or more records.
2. Select one or more categories to which you want to detach from the selected records.

3. Select **Asset** (default)⇒**Detach Selected Categories**. The records are detached from each of the categories in the selection.
- 

### 🍏 Export to FileMaker

Creates a FileMaker database record for each record in the selection of records of the active catalog. (Requires FileMaker.) A properly structured database is provided.



1. Make a copy of the FileMaker database found in the folder named Other so that you'll have a clean version the next time you need it.
  2. Select one or more records in Cumulus.
  3. Select **Special** (default)⇒**Export to FileMaker**. Select the desired FileMaker database in the dialog box that appears. Database records are created.
- 

### 📖 Export Records to Access

Exports the selected records in the active catalog to a Microsoft Access database file. Thumbnail data is included in the export as a BMP binary data stream in BMP file format (not as an OLE object, to view it you have to write a program or application).



1. Select one or more records.
  2. Select **Special** (default)⇒**Export Records To Access**. A dialog box opens from which you can choose one of the following options:
    - **Append record if table exists**
    - **Replace table if it exists**
- 

3. Choose an option and click **Start Export**. A dialog box appears from which you can choose a name and location to save the file.
  4. Name the file and click **Save**. The data is exported.
- 

### Find Via Matching Categories

Finds records in the active catalog that are assigned to some or all of the same categories as the selected records.



1. Select one or more records.
  2. Select **Collection** (default)⇒**Find Via Matching Categories**. A dialog box asks if you want records that have some assignments in common, or the exact same assignments.
  3. Click on the search type of your choice. The records are found and replace the current collection.
- 

### 📖 Find Via Similar Thumbnails

This application is similar in nature to using the Find window to locate a similar thumbnail. The difference is that this application can find similar thumbnails for more than one record at a time. It searches the entire catalog.



1. Select one or more records.
  2. Select the assigned menu⇒**Find Via Similar Thumbnails**. Records that have thumbnails that are similar in brightness and contrast to those in the selection are found and replace the current collection.
-

## Hot Folder

Watches a single asset folder for additions. Catalogs any assets added to the folder into the active catalog. (📁 Works only on NTFS.)



1. Select **Special** (default) ⇒ **Hot Folder**.
2. A window appears from which you can select a folder to watch.
3. Select a folder and a time interval for the application to check the folder.
4. 📁 Click **Start**.

You can drag a folder 🍏 onto the Hot Folder application icon / 📁 to the dialog box to start it. This automatically selects the folder to be watched.

NOTE: Hot Folder & Central Location

Do not activate the Hot Folder Function along with Central Location. With Central Location activated, the same assets are always cataloged as duplicates. With both activated together, *all* assets in the selected folder would be cataloged whenever an asset is added to the folder.

## Join Duplicate Categories

Searches the active catalog for duplicate categories. If any are found, the contents are merged into one of the categories. The remaining category is renamed to indicate that it is a duplicate. You are given the option of deleting the duplicate categories.



1. Open the catalog in which you want to search for duplicate categories.
2. Select **Category** (default) ⇒ **Join Duplicate Categories**. The application searches for

duplicates. If found, the contents are merged into the first occurrence of the category, and the duplicates are renamed. You are then given the option of deleting them.

## Live Search

Continually runs the search query that was active in the catalog's Find window when the application was launched.



1. Select **Collection** (default) ⇒ **Live Search**.
2. Select a time interval for the application to repeat the search and click 📁 **Start** / 🍏 **OK**. The search is repeated at the interval specified.

## 🍏 Merge Folder Categories

This application affects only those categories created automatically by Cumulus when cataloging. If some of a catalog's assets were cataloged from a Windows computer and others were cataloged from a Mac OS computer, then you may have catalog structures that are the same, though named differently because of the directory-naming convention differences between the two operating systems. This application merges those two category structures into one and leaves a related category linked to the Mac OS folder where the Windows folder used to be. It does not affect other categories.

## Move Folder

Moves a folder of assets (and its subfolders) and updates the assets' records to reflect the folder's new location.

NOTE: The subfolders are dissolved when you move folders with this application.



1. Select **Special** (default) ⇒ **Move Folder**. A dialog opens from which you select the folder you wish to move (📁) as well as where to move it).
2. 🍏 Choose a folder to move and click the button with the selected folder's name.  
📁 Choose the folder's current location in the top field. You can use the button to the right of the field to browse to the location.
3. 🍏 Choose a location to move the folder to and click the button with the selected destination folder's name.  
📁 Choose the folder's new location in the bottom field. You can use the button to the right of the field to browse to the location. Click **Move**.
4. The folder and its contents are moved. If a newer version of an asset being moved would be overwritten by an older version in the move, you are prompted to confirm the action.

### New Category from Date

Creates a new category in the active catalog that uses the current date and time for its name.



1. Open the catalog in which you want to add the new category.
2. Select the assigned menu ⇒ **New Category from Date**. The new category is added to the categories list.

### Optimize for Safety

Presents a number of options from which you can select settings that favor data safety over performance.



1. Select the assigned menu ⇒ **Optimize for Safety**.

🍏 The first of a series of dialog boxes /  
📁 the options window appears.



Select the options you want and click **OK**.  
The catalog options are changed.

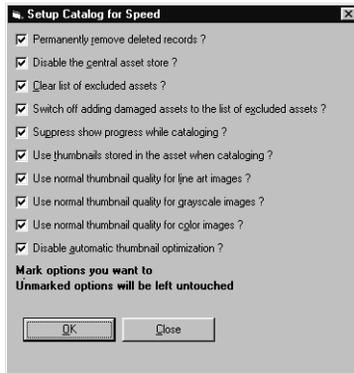
### Optimize for Speed

Presents a number of options from which you can select settings that favor performance over safety.



1. Select the assigned menu ⇒ **Optimize for Speed**.

🍏 The first of a series of dialog boxes /  
📁 the options window appears.



2. Select the options you want and click **OK**. The catalog options are changed.

### 🍏 PICT File to Thumbnail

Replaces the selected record's thumbnail image with a PICT file of your choice.



1. Select the record whose thumbnail you wish to replace.
2. Select the assigned menu ⇒ **PICT File to Thumbnail**. A dialog box appears from which you can select a PICT format image.
3. Select an image and click **OK**. The selected record's thumbnail is replaced by the PICT file at the size specified in the Catalog Properties.

### 🏠 Picture to Thumbnails

Replaces the thumbnails of the selected records with a chosen BMP, JPEG or GIF image.



1. Select one or more records for which you wish to select a new thumbnail image.
2. Select the assigned menu ⇒ **Picture to Thumbnails**.
3. Click **Assign Thumbnail**. A dialog box appears from which you can choose an image file.
4. Choose an image and click **OK**. The thumbnails are replaced by the chosen image at the thumbnail size specified in the Catalog Properties window.

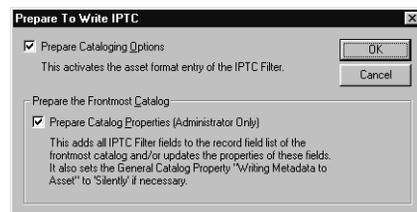
### Prepare To Write IPTC

If you want to write back IPTC data to assets, your Cataloging Options (entry for the IPTC filter activated) and the catalog managing these assets must be prepared for this feature. IPTC record fields have to be added and their properties have to be enabled for field linking, also Writing Metadata to Asset must be activated in the General Catalog Properties.

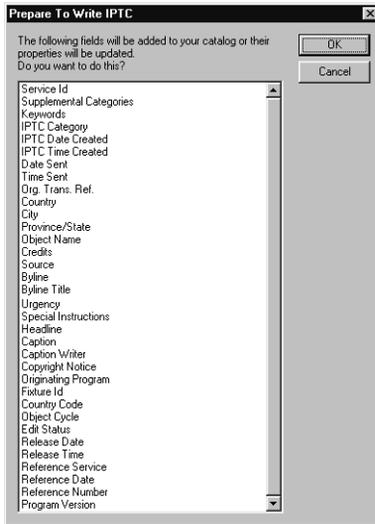
The script Prepare To Write IPTC makes the process of preparation easy. This script prepares the Cataloging Options of the user (who started the script) to be able to write IPTC data back to assets. For Single User and administrators of the Workgroup and Enterprise Edition it also prepares the current catalog.



1. Select **Special** (default) ⇒ **Prepare To Write IPTC**. A dialog box opens.



2. Select the options you want and click **OK**.  
NOTE: 'Silently!' if necessary  
This is only necessary when **Never** was previously activated; **Always** remains unchanged.
3. A dialog opens displaying the fields that will be added to the catalog.



All added fields' properties are set to **Allow User to Edit** and the linking of the fields is set to **When Saving to Asset**.

4. Click **OK**.  
A message will inform you when script was finished successfully.

### 🍏 QuarkXPress Contact Sheet

Creates a QuarkXPress contact sheet of the selected records. (Requires QuarkXPress.)



1. Select one or more records that you want to include on the contact sheet.

2. Select **Special** (default) ⇒ **QuarkXPress Contact Sheet**. QuarkXPress is launched, if it's not already running, and a new document is created. The thumbnail images are placed inside picture boxes and the record names are placed inside text boxes below the pictures. The QuarkXPress "Normal" paragraph style is applied to the record names.

NOTE: The function will only work, if you have access to the original asset.

### Redirect Asset Reference

Redirects the selected records to point to different assets.



1. Select one or more records.
2. Select **Asset** (default) ⇒ **Redirect Asset Reference**. A dialog opens for each selected record from which you select an asset.
3. Find the asset that the record should point to and click **Open**. The record is changed to point to the selected asset.

If the selected asset has a different modification date, you are asked if you would like to update the record. Be careful when using this application. It's easy to mistakenly redirect a record to the wrong asset file.

### Satellite

Displays a window that shows an at-a-glance view of the selected record, including thumbnail, categories listing and notes. You may use Satellite if you want to see some information on an asset but don't want to open the Asset Information window.



1. Select assigned menu ⇒ **Satellite**. The Satellite window appears.

Arrange the window so that you can see it and the catalog window. When you select a record in the catalog window, the record's information appears in the Satellite window.

### Show Category Folder

Works only on directory categories. A window with the corresponding directory is opened.



1. Select one or more directory categories.
2. Select **Category** (default) ⇒ **Show Category Folder**.

If more than one category is selected, a window will be opened for each category.

### Thumbnails to BMP Files

Exports the thumbnail images of the selected records in the active catalog to Windows (.bmp) files.



1. Select one or more records.
2. Select the assigned menu ⇒ **Thumbnails To BMP Files**.
3. Click **Export**. A dialog box opens from which you can choose a location.
4. Choose a location to save the file and click **OK**. The thumbnails are saved.

### Thumbnails to PICT Files

Creates a PICT format image file for each selected record's thumbnail.



1. Select one or more records whose thumbnails you wish to save.
2. Select the assigned menu ⇒ **Thumbnail to PICT Files**. A dialog box opens for each record from which you can select a file name.
3. Select a file name for the exported thumbnail image and click **Save**. The thumbnails are saved.

The first section of this appendix outlines the alternate mouse button actions and provides references to their explanations elsewhere in this guide. The second section gives a list of keyboard shortcuts to common menu commands and options.

# 10

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# Appendix

## Alternate Mouse Button Actions

Alternate mouse button actions can be used extensively throughout Cumulus. With  the right mouse button /  **Control** key + mouse button you can access shortcuts to menu items found elsewhere in the program. Which shortcuts are accessed depends on where the alternate mouse button action is executed. The alternate mouse button actions available from different areas in the program are outlined below.

NOTE: You can assign additional functions to alternate mouse button actions by copying Cumulus API examples or other executable files to the corresponding subfolders of Menu Commands folder. (See “Additional Functions,” p. 127, for further details.)

### Record Pane

If you alternately click in the background area of the Record pane, your only option is to paste a previously copied record, thereby adding it to the catalog. The copied record can be from the same or a different catalog.

If the copied record’s asset has already been cataloged in the active catalog, it is copied/duplicated only if **Add Duplicates** is enabled in the Cataloging Options window. If not, an error message tells you that the asset has already been cataloged.

If you click on a record directly, the options are:

- **Information** – Opens the Asset Information window of the selected record’s asset. (See “Information,” p. 122.)
- **IPTC Information** – Opens the IPTC Information window of the selected record’s asset. (See “IPTC Information,” p. 122.)
- **Preview** – Opens a preview window for the selected record. (See “Preview,” p. 122.)



- **Cut** – Deletes the selected record and places it on the Clipboard for pasting elsewhere.
- **Copy** – Copies the selected record to the Clipboard for pasting elsewhere.
- **Paste** – Pastes the record from the Clipboard into the catalog. (This depends upon Cataloging Options. See paragraph above.)
- **Update Record** – Displays options for updating selected record. 
- **Update Asset Reference** – Updates selected record’s asset reference. (See “Update Asset Reference(s),” p. 118.)
- **Rotate Thumbnail** – Options for rotating selected record’s thumbnail image. (See “Rotate Thumbnail,” p. 116.)
- **Optimize Thumbnail** – Optimizes selected record’s thumbnail image. (See “Optimize Thumbnail,” p. 116.)
- **Show Location** – Finds the location of the selected record’s asset. (See “Show Location,” p. 123.)
- **Open With** – Opens selected record’s asset with a specified application. (See “Open With,” p. 123.)
- **Print With** – Prints selected record’s asset with a specified application. (See “Print With,” p. 123.)
- **Copy To** – Copies selected record’s asset to specified location. (See “Copy To,” p. 123.)
- **Move To** – Copies selected record’s asset to specified location and deletes original copy. (See “Move To,” p. 123.)
- **Mail To** – Attaches selected record’s asset to an outgoing e-mail message in your default e-mail application. (See “Mail To,” p. 123.)

### Category Pane

Alternately clicking on the background of the Category pane ( when no category is selected) presents a menu with four options:



- **New Root Category** – Creates a new root-level category. (See “New Root Category,” p. 120.)
- **Show Categories Containing** – Presents a dialog box in which you can enter text for Cumulus to search for in category names. (See “Show Categories Containing,” p. 120.)
- **Expand All** – Expands all categories to reveal any subcategories within them. (See “Expand All,” p. 120.)
- **Collapse All** – Collapses all categories to hide any subcategories within them. (See “Collapse All,” p. 120.)

## Category Icons

If an alternate click in the Category pane is directly on top a category icon (🍏 when a category is selected), the menu options increase:

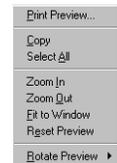


- **Information** – Opens the selected category’s Information window. (See “Information,” p. 119.)
- **New Subcategory** – Creates a new subcategory under the selected category. (See “New Subcategory,” p. 120.)
- **New Related Category** – Creates a new related category for the selected category. (See “New Related Category,” p. 120.)
- **Show Original Category** – Highlights the original category if the selected category is a related category. (See “Show Original Category,” p. 120.)
- **Show Related Categories** – Highlights the selected category’s related category if one exists. (See “Show Related Categories,” p. 120.)
- **Find Matching Records** – Finds and displays records belonging to the selected category. (See “Find Matching Records,” p. 120.)
- **Save Matching Assets As** – Finds and saves to a specified location, the assets associated with the records belonging to the selected category. (See “Save Matching Assets As,” p. 120.)

- **Expand** – Expands selected category to reveal its subcategories. (Disabled if no subcategories exist.) (See “Expand,” p. 120.)
- **Collapse** – Collapses selected category to hide its subcategories. (Disabled if no subcategories exist or the category is already collapsed.) (See “Collapse,” p. 120.)

## Asset Preview Windows

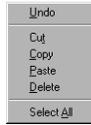
From inside an asset preview window, you can use the alternate mouse button action as a shortcut to the **Preview** menu option, with a few additional options.



- **Print Preview** – Opens the Print dialog box from which you can print the preview image (not the actual asset) to the currently selected printer.
- **Copy** – Copies the selected portion of the preview image to the Windows Clipboard for pasting elsewhere. (Click and drag in the preview image to draw a box around the area you wish to copy.)
- **Select All** – Selects the entire preview image.
- **Zoom In** – Zooms in on the preview image, thereby increasing its visible size.
- **Zoom Out** – Zooms out from the preview image, thereby reducing its visible size.
- **Fit to Window** – Resizes the preview image to fit inside the main Cumulus window.
- **Reset Preview** – Resets the preview image to its original size and orientation.
- **Rotate Preview** – Rotates the preview in one of three ways:
  - 90° clockwise
  - 90° counter-clockwise
  - 180°

## Text Entry Areas

You can alternately click inside any of the text entry areas as a shortcut to the standard text edit menu options.



Example locations where this menu can be used are:

- Find window Value field
- Name field inside the Field Properties dialog box
- Field content of string fields inside the Asset Information window (e.g., Notes)

- Field content of real and integer fields inside the Asset Information window (e.g., Horizontal Resolution and Image Height)
- A highlighted category's name (must be selected for editing)
- Field for inserting a term to a String List

## Keyboard Shortcuts

Cumulus provides the following keyboard shortcuts to common menu commands and options.

If you want to...	 Press...	 Press...
Abort a preview	Ctrl + full stop (.)	Cmd + full stop (.)
Catalog assets	Ctrl + B	Cmd + B
Connect to a Cumulus Server	Ctrl + Shift + O	Cmd + Alt + O
Copy information	Ctrl + C	Cmd + C
Close a catalog	Ctrl + F4	Cmd + W
Create new empty collection	Ctrl + Shift + N	Cmd + Alt + N
Cut information	Ctrl + X	Cmd + X
Delete selected record from collection or delete selected category from catalog	Delete	Backspace
Delete selected record and optionally its asset from catalog	Ctrl + Delete	Cmd + Backspace
Display all records in a catalog	Ctrl + G	Cmd + G
Display the asset information of a selected record	Ctrl + I or Alt + Return	Cmd + I
Execute a search using the Find window	Ctrl + F	Cmd + F
Launch context-sensitive help	F1	
Move to the next dialog box tab	Ctrl + Tab	Tab
Move to the previous dialog box tab	Ctrl + Shift + Tab	Shift + Tab
Browse categories or records	Ctrl + arrow keys	arrow keys
Paste information	Ctrl + V	Cmd + V
Preview a selected asset	Ctrl + Y	Cmd + Y
Print a selected item	Ctrl + P	Cmd + P
Select/deselect category or record	Ctrl + Spacebar	
Select/deselect multiple records or categories	Shift + arrow keys	Cmd + Shift + arrow keys
Select all records or categories	Ctrl + A	Cmd + A
Switch between the Category and Record panes in the Collection window	Shift + Tab	Cmd + Tab
View records assigned to the selected category	Alt + arrow keys	Cmd + Alt + arrow keys
Zoom in on the Preview window	Ctrl + plus sign (+)	Cmd + plus sign (+)
Zoom out of the Preview window	Ctrl + minus sign (-)	Cmd + plus sign (+)

This Glossary offers an alphabetical listing of Cumulus terms and phrases used throughout this manual and Cumulus.

**Application Preferences dialog box**

A dialog box that enables Cumulus users to define and customize global program settings.

**Application Programming Interface (API)**

A set of commands available to developers for creating applications that interact with Cumulus in order to provide new functionality.

**Asset**

A general term describing any type of digital media (including graphic, page layout, presentation, sound, and video files) that has value to its owner.

**Asset Information**

The information about an asset as stored in the record associated with the asset.

**Asset Information window**

A special window that displays the information about a cataloged asset. This information is stored in the asset's record. See also Record.

**Asset Reference**

The mechanism by which Cumulus tracks the actual location of an asset managed in a Cumulus catalog.

**Asset Storage Module**

A component of Cumulus that manages the asset's storage (the access to its location). Cumulus employs different Asset Storage Modules, e.g., Windows File System, Mac OS File System, DCS File Support (to manage Desktop Color Separation files), OPI System Support (to manage Open Prepress Interface) and Cumulus Metadata Support. The Cumulus Metadata Support module enables the storage of an asset's metadata in a separate TAG file.

**Boolean**

A system of logic based on two possible values: true or false. Cumulus uses the Boolean operators "and" and "or" to combine search conditions.

**Browser**

See Cumulus Viewer.

**Catalog**

A special file (Ⓜ with the extension .ccf) that Cumulus creates to manage cataloged assets. See also Asset and Cumulus Catalog File.

**Catalog file name**

Name of the special file for a catalog (Ⓜ with the extension .ccf). The catalog name defaults to this file name (without the extension). The catalog name can be changed without changing the catalog file name. See also Cumulus Catalog File

**Cataloging**

The process by which a user adds one or more assets to a catalog.

**Cataloging Options dialog box**

A special dialog box that controls the way in which Cumulus catalogs assets.

**Category**

Cumulus categories are used to organize records, much like folders are used to organize files in a traditional filing cabinet. But the asset can appear in any number of Cumulus categories at one time. They are similar in purpose to keywords used in other programs. See also Directory category and Related category.

**Category Information window**

A special window that displays the information about categories.

**Category Exchange File**

See Cumulus Category Exchange File.

**Category pane**

Located on the left side of the Collection window. The Category pane displays category names in a hierarchical list.

**Client**

A computer user who accesses a server application (such as the Cumulus Server) across a network.

**Client/server architecture**

A software configuration in which users (also called clients) access a server application across a network.

**Collection**

Any set of records from any one catalog, including their display properties. A collection can be saved (see Cumulus Collection File) and opened again. A collection—whether saved or unsaved—is always connected to its catalog. In order to open a particular collection you must have access to its catalog.

**Collection window**

A window featuring two panes (Category pane and Record pane) that function as the central user interface.

**Compound search**

A search query consisting of two or more search conditions.

**Cumulus**

An indispensable digital asset management system for organizing and managing digital assets. See also Asset.

There are different editions of Cumulus designed to meet the needs of anyone who wants to keep track of their digital media: Cumulus Single User Edition, Cumulus Workgroup Edition and Cumulus Enterprise Edition.

**Cumulus Administrator  
(Workgroup and Enterprise Edition only)**

A person who configures and manages Cumulus catalogs. The Administrator is responsible for keeping the catalogs running smoothly for Cumulus Client users, backing up catalogs, and other tasks.

**Cumulus application window**

The main Cumulus window containing the menu bar, the toolbar, the status bar, and as “child” window(s) the Collection window(s) and the Find window.

**Cumulus Browser**

See Cumulus Viewer.

**Cumulus Catalog File**

A special file (📁 with the extension *.ccf*) that Cumulus creates to manage cataloged assets (digital media).

**Cumulus Category Exchange File**

A file (📁 with the extension *.cce*) that Cumulus creates when exporting category information.

**Cumulus Collection File**

A special file (📁 with the extension *.cfe*) that Cumulus creates to manage saved collections.

**Cumulus Record Exchange File**

A special file (📁 with the extension *.cre*) that Cumulus creates when exporting record information.

**Cumulus Server  
(Workgroup and Enterprise Edition only)**

The computer where Cumulus Server software is installed and where Cumulus catalogs should reside.

**Cumulus Vault**

A Cumulus Add-on Product. A full-featured Version Control System that manages user access to asset files and provides up-to-the-minute information on each asset's version history.

**Cumulus Viewer**

A Cumulus Add-on Product. The royalty-free application for publishing Cumulus catalogs on CD-ROM or other removable media (e.g., Syquest, Zip, Jaz, or MO cartridges).

**Cumulus Web Publisher**

A Cumulus Add-on Product. A powerful CGI (Common Gateway Interface) application designed to publish and distribute assets over the Internet.

**Details view**

Each record appears in the Record pane as a text listing that includes fields you can define (e.g., record name, file format, resolution, etc.). See also Thumbnail view.

**Directory category**

Directory categories are automatically created by Cumulus during the cataloging process. These automatically created categories resemble the folder or directory hierarchy in which the assets reside. They are identified by a smaller folder in their icons. They are created by default but this option can be disabled.

**Drag and Drop**

A way to move user-interface objects by dragging them with the mouse and dropping them into targets.

**Filters**

Software utilities that Cumulus uses to capture information about an asset during the cataloging process. For more information on the availability of new file filters, please see the Canto Website ([www.canto.com](http://www.canto.com)).

**Find window**

Cumulus tool that enables users to search catalogs for records that match search conditions.

**FTP**

File Transfer Protocol. A standard Internet protocol, which is the simplest way to exchange files between computers on the Internet.

**Gigabyte (GB)**

A unit of storage capacity on an electronic storage device that equals 1,024 megabytes, or roughly 1.07 billion bytes. Cumulus catalog files can be up to 4 GB in size.

**HTTP**

HyperText Transfer Protocol. A standard Internet protocol, which is the most often used protocol in the World Wide Web to transfer information between servers and browsers.

**Information window**

Special windows that display the information about records or categories. See also Asset Information window, IPTC Information window and Category Information window.

**Internet Media Server**

See Cumulus Web Publisher.

**IPTC**

International Press Telecommunication Council. Standard for digital text applied to an image. Applications used for professional imaging, support IPTC; e.g. the text information in Photoshop is a subset of the IPTC information. Cumulus can read IPTC metadata information while cataloging. You can view and edit this metadata and Cumulus can write your changes back to the asset.

**IPTC Information window**

A special window that displays the IPTC information about a cataloged asset. This information is stored in the asset's record.

**Kilobyte (KB)**

A unit of storage capacity on an electronic storage device that is equivalent to 1,024 bytes.

**Media file**

Any electronic or digital media file (including graphic, page layout, presentation, sound and video files). See also Asset.

**Megabyte (MB)**

A unit of storage capacity on an electronic storage device that is equivalent to 1,024 kilobytes, or 1,048,576 bytes.

**Menubar**

Appearing at the top of the Cumulus application window, the menubar houses menus that contain every program command.

**Metadata**

Metadata is the information stored with each asset—such as file name, location, etc. Different types of assets have different metadata fields: an image file, for example, would contain information on color and resolution, while an audio file would have a field for the playback duration.

**Palette Mode**

View mode that is specially designed for using Cumulus with another application, e.g. a desktop publishing application. In palette mode the Cumulus application shrinks to a palette that can conveniently be used with another application. That way you can easily drag and drop cataloged assets into other applications.

**Path/Pathname**

A description of the location where a file is stored on a computer hard drive, server, or removable media (such as CD-ROM, Syquest, Zip, Jaz, or MO cartridges).

**Preview**

A special program mode in which you can examine cataloged assets such as video clips, sound files, and image files.

**Query**

A combination of search conditions. Queries can be saved to disk and loaded into the Find window.

**Quicklist**

A list containing default field values to fill in fields. In Cumulus available with the IPTC Information window.

**Record**

The actual catalog entry Cumulus creates when an asset is added to a catalog. Records store valuable information about an asset, such as the file name, file location, file type, resolution, etc.

**Record Exchange File**

See Cumulus Record Exchange file.

**Record pane**

Located on the right side of the Collection window, the Record pane displays records as thumbnails or plain text. See also Record, Thumbnail view and Details view.

**Related category**

An alias of an existing category that acts as a virtual cross reference to the original category. You can use related categories to place multiple instances of the same category under various parent categories, without having to copy the entire contents of the

category. Related categories are indicated by an arrow in their icons.

### Resolution

The number of pixels per inch in any graphic file format. Higher-resolution files have a higher number of pixels per inch than lower-resolution files. Working with higher-resolution files usually requires more memory and hard disk space than working with lower-resolution files.

### Script

A list of instructions executed by a computer. Scripts are used by Cumulus to perform complex tasks automatically.

### Server Asset Transfer

A Cumulus feature (especially useful in a crossplatform environment) that allows users in a network to access assets for previewing, copying and transferring via their connection to the Cumulus Server. With this feature the user is not forced to have direct access to the computer where the asset is stored. Only the computer running the Cumulus Server requires this access.

### Simple search

A search query consisting of one search condition.

### Status bar

A bar located at the bottom of the Cumulus application window, providing tool button descriptions, access to the Application Preferences dialog box, and category/record status.

### TAG file

The Cumulus Metadata Exchange file format, which Cumulus creates when cataloging assets from a location where you are allowed to save files. The file has the same name as the asset ( with the extension *.tag*). TAG files can hold all information that can be viewed in the Asset Information window—and

more. For example, if a particular asset has been cataloged into different catalogs, this information is part of that asset's TAG file.

### Thumbnail

A miniature display of a cataloged asset.

### Thumbnail view

The record appears with a miniature display of the cataloged asset in the Record pane.

### Toolbar

A standard program tool that offers buttons as shortcuts to commonly used commands.

### Tooltip

A small floating descriptive window that appears above a toolbar button when the cursor is positioned over it.

### URL

Uniform Resource Locator. The address of a file (resource) accessible on the Internet.

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