



Cumulus[®]
Media Management System™

Corel[®] Canto[®] Cumulus[®] 5 LE

Single User Edition

A user's guide to the Canto Cumulus Media Management System for Mac[®] OS, Windows[®] 95/98 and Windows NT[®].

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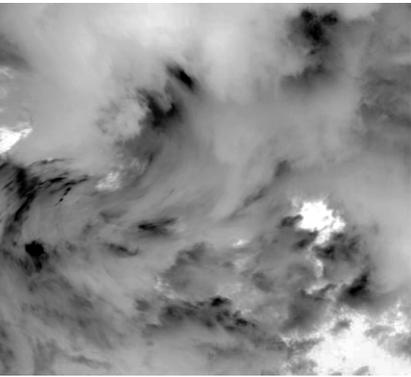
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Table of Contents

Intro	5	Learn	13
Cumulus 5	6	Tutorial: Building a Catalog	14
This User Guide	6	Getting Started	14
Cross-Platform Issues	6	Making a Catalog	14
User Interface Item Conventions	6	Adding Assets (Cataloging Assets)	14
Cumulus Step by Step	6	Automatic Directory Categories	15
Your Experience	7	Deleting Categories	15
Understanding Cumulus	7	Deleting Records	16
Assets	7	Adding Many Assets at Once	16
Catalogs	7	Creating Categories	17
Collections	7	Assigning a Record to a Category	19
Categories	7	Assigning Multiple Records to Categories	19
Records	8	Viewing and Editing Record Data	19
Finding Help	8	Finding Records by Using Categories	21
Online Help for Windows Users	8	Displaying All Records	21
Canto Online	8	Using Collections	22
Technical Support	8	Customizing a Collection View	22
Usage Ideas	8	Saving Collections	24
Magazine Production	8	Building Custom Searches	24
Image Portfolios for the Digital Age	8	Creating HTML Pages	25
		Tutorial Review	26
Install	9		
System Requirements	10	Explore	27
Windows Requirements	10	Catalogs	28
Installation	10	Collections	28
Product Registration	10	Working with Collections	29
Web Registration	10	Collection Display Options	29
Registration by Mail, Fax or E-Mail	11	• THE CUMULUS WINDOWS INTERFACE - - - - -	30
		Assets/Records	31
		Asset Information Window	31
		Field Types	31
		Record Size	32
		Renaming Records	32
		Editing a Record's Category Assignments	32

Categories	33
Root Categories and Subcategories	33
Category Types	33
Copying Categories and Associated Assets	34
Category Fields	34
Category Information Window	34
Editing Category Information.....	35
Searching	35
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.....	35
Searching with the Find Window.....	35
Simple Searches.....	35
Compound Searches.....	36
Narrowing the Search.....	37
Broadening the Search.....	38
Saving and Loading Search Setups	38
• THE FIND WINDOW AND SAMPLE SEARCH OPTIONS- -	40



The Cumulus® Media 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, PDF files, and even 3D models. 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

Intro

Cumulus 5

The new Cumulus 5 is packed with powerful features, many of which can be characterized by the word “customizable.” Cumulus 5 makes it possible for you to fully custom-tailor the record fields. Even the categories have been endowed with customizable fields. It goes without saying that the views of your catalog can be customized, too. Cumulus 5 features a new dimension: Collections, which are like snapshots from your open catalog. And with Cumulus’ new capability to export the displayed records to WYSIWYG HTML pages, you can share your images with the world more easily than ever.

With version 5 Canto offers three different editions of Cumulus:

- Cumulus 5 Single User Edition
- Cumulus 5 Workgroup Edition
- Cumulus 5 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.

NOTE: Your version of Cumulus is a limited edition of the Single User Edition. This limited edition allows a maximum of 2000 records and is not able to have more than two catalogs opened at the same time.

Optional components of the Cumulus 5 Single User Edition include:

- Cumulus 5 Web Publisher
- Cumulus 5 Browser
- Asset Storage Modules

This User Guide

This guide covers the installation and basic set up of Cumulus, and includes a brief tutorial on setting up and using a catalog.

Cross-Platform Issues

NOTE: Your version of Cumulus is for Windows only, although Canto provides Cumulus versions that run on Windows® 95, Windows NT™, and Mac™ OS (Macintosh®) systems.

Because there are so few differences between the Windows and Mac OS versions of Cumulus 5, the illustrations in this guide apply to both platforms except where indicated.

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 5 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 28.



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 28.

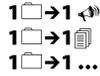
Categories

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 33.



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 5 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. There is no online help system for the Mac OS.

Canto Online

The Canto Web site (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

If all else fails, contact Corel's technical support.

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 5 Web Publisher are obvious for those selling photo libraries and other digital media assets online.



Canto provides installer utilities to help make the process of installing Cumulus trouble-free. This section provides instructions for installing and 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 parentheses.

Windows Requirements

- Pentium® 90 MHz (Pentium III 450 MHz) or compatible
- Windows 95/98 or Windows NT 4.0 SP3 (SP5)
- 20 MB (30 MB) RAM
- 20 MB (30 MB) hard disk space,
- 640x480 video display with 256 colors (1024x768 video display with True Color)
- CD-ROM drive for installation

Installation

To install Cumulus on a Windows 95, Windows 98 or Windows NT computer:



1. Insert the CD containing Cumulus into your CD-ROM drive.
2. Double-click the setup.exe file located on the CD under English\Cumulus.
3. When the Welcome screen appears, click **Next** to continue. The Software License Agreement screen appears.
4. Click **Yes** to accept the terms of the displayed license agreement. The Registration window appears.
5. Enter your name and company in the fields provided and click **Next**.

The Choose Destination Location window appears.

6. Click **Next**. If you do not want to accept the default location, click **Browse** to choose a different one.

The Select Program Folder window appears.

7. Click **Next**. 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.

8. When the Setup Complete window appears, click **Finish**.

Product Registration

Registering Cumulus should be considered part of the Cumulus installation process.

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:



1. Select **Help⇒License**.
The License dialog box appears.

If you're also registering an optional add-on, click **Add** and type its serial number in the dialog that appears.
2. Click **WWW Registration**.

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

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 installed on your computer. If you don't have the Acrobat Reader, you can find it in the Documentation folder on your Cumulus CD.

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



1. Select **Help**⇒**License**.
The License dialog box appears.

If you're also registering an optional add-on, click **Add** and type its serial number in the dialog that appears.
 2. Click **Print Registration**. A dialog box appears 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. Save the form.
 6. Print the form, then fax or mail it to the address listed for your region or send it as an attachment to an e-mail message to: registration@canto.de
-



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, 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 5. We'll also create some categories, do some searching, make a custom field, and then output the results of our efforts to HTML.

The new architecture of Cumulus 5 prevents catalogs made in Cumulus 5 from being opened in earlier versions of the program. All references within this tutorial to Cumulus refer to version 5.

Getting Started

To begin, you need to have Cumulus installed on your computer (See "Installation," p. 10, if you need some help.) You'll also need to have the CD with Cumulus 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. 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 5 CD navigate to 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 34).

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. Refer to page 34 to learn how to disable this option.

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 **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), 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.



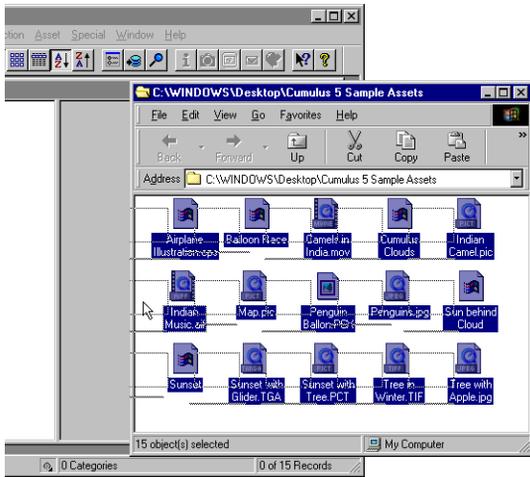
3. Click **Delete Record Only**. (Being located on a CD-ROM, the file cannot be deleted anyway.) The record is deleted and the catalog is once again empty. Don't worry, we're going to catalog some more assets right now.

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 15, 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*.

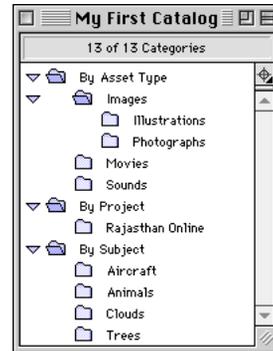
Let's go on and build a useful category hierarchy that we can use with our cataloged assets.



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** 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 **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. 32, for details.

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 can store a great deal of information on your assets. Your Cumulus Administrator decides on the amount of information which is stored for each catalog. The Cumulus Administrator also decides which field data for the records in a catalog you may edit. We're going to take a look at the Asset Information window and edit a record by adding some information to the Notes field.

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 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.

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.

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.



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 **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.

Displaying All Records

Selecting **Collection** ⇒ **Find All** 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.

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

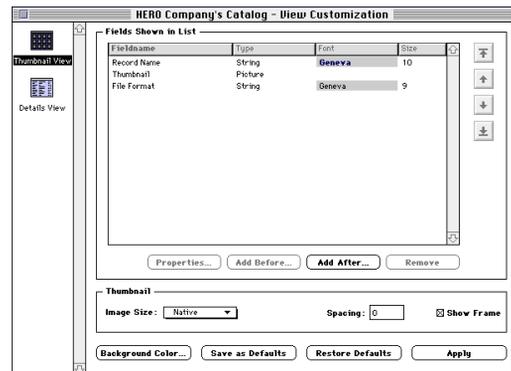
We won't cover all of the many options available with collections here, we'll cover just the basics. See "Collections," p. 28, for a complete discussion of the flexibility of Cumulus collections.

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..



In the tabs along the top of the window, you see a couple of options named **Thumbnail View** and **Details View**. These options load the settings for the thumbnail and details views, respectively. Under the **Thumbnail View** option you set up how thumbnail

- views (all sizes) will display. And under **Detail View**, you set up your text listing options.
2. If it is not activated, click the **Thumbnail View** tab. This sets up the window so that we can customize the thumbnail display.
 3. 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.
 4. 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.
 5. Click **OK** to save the change and return to the View Customization window.
 6. 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:



1. In the open View Customization window, click the **File Format** field to select it.
2. 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.

3. 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:



1. In the open View Customization window, click the top field to select it.
2. 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!)
3. Find and click on the field called Categories. This field holds a list of all of all the categories assigned to that record.
4. Click **OK** to add that field to the list.
5. 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 to disk. 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. 28.) Let's try a simple example:

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.

6. Select **Record Name** from the left field. This tells Cumulus that we want to search through each Record Name field.
7. Select **contains** from the middle field. This tells Cumulus that matched Record Name fields must contain the contents we're about to type into right field.
8. Type "sun" into the value field (right field). This tells Cumulus the text we're searching for.
9. 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.
10. 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.
11. 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. 35.)

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.

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.

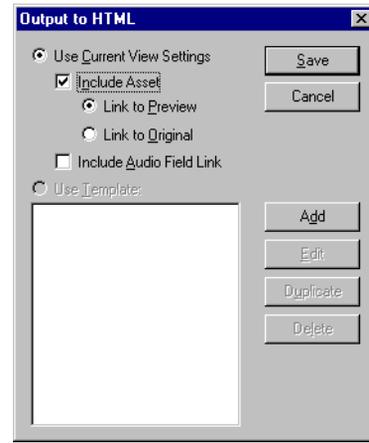
You want to make sure that what you’re seeing in the collection view is what you want to see from the Web page. If it’s not, make the changes you want using the methods you’ve learned.

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.

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

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 5 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.

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 **Control** and DEL, the record will be removed from both collection and catalog.

Working with Collections

Collections can be customized and then saved, so that your particular preferences for a special set of records can be recalled.

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 will be a copy of the active collection. In other words, the colors, fonts, fields, even the records 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 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.

Further, Cumulus makes it possible for you to select records from your collection and generate HTML pages and QuickTime videos from them.

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.

Photographer	File Format	Last Used	Copyrights	Asset Name	Asset Creation
01atgathe	JPEG Image	not used	all rights	Fichten i. Rauh...	10/9/96 13:16:42
01atgathe	JPEG Image	not used	all rights	Gänse 1-47-6.jpg	10/9/96 13:16:06
01atgathe	JPEG Image	not used	all rights	Hagebutten 10-2...	10/9/96 13:16:47
01atgathe	JPEG Image	not used	all rights	Rauhreif 1-19-12...	10/9/96 13:16:36
01atgathe	JPEG Image	not used	all rights	Rauhreif 8-21-6...	10/9/96 13:16:43
01atgathe	JPEG Image	not used	all rights	Rauhreif 8-28-12...	10/9/96 13:16:45
01atgathe	JPEG Image	not used	all rights	Rauhreifmorgen ...	10/9/96 13:15:24
01atgathe	JPEG Image	not used	all rights	Schnecke, Egen...	10/9/96 13:15:34
01atgathe	JPEG Image	not used	all rights	Wintercome 10...	10/9/96 13:17:17
01atgathe	JPEG Image	not used	all rights	Winterwald 9-29...	3/19/96 12:36:39
01atgathe	JPEG Image	not used	all rights	Winterzauber 10...	10/9/96 13:17:00
01atgathe	JPEG Image	not used	all rights	Zaun i. Rauhreif ...	10/9/96 13:16:40

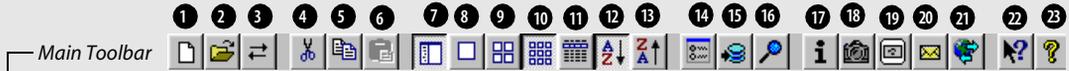
Sample collection – Details View



Sample collection – Thumbnail View

The Cumulus Windows Interface

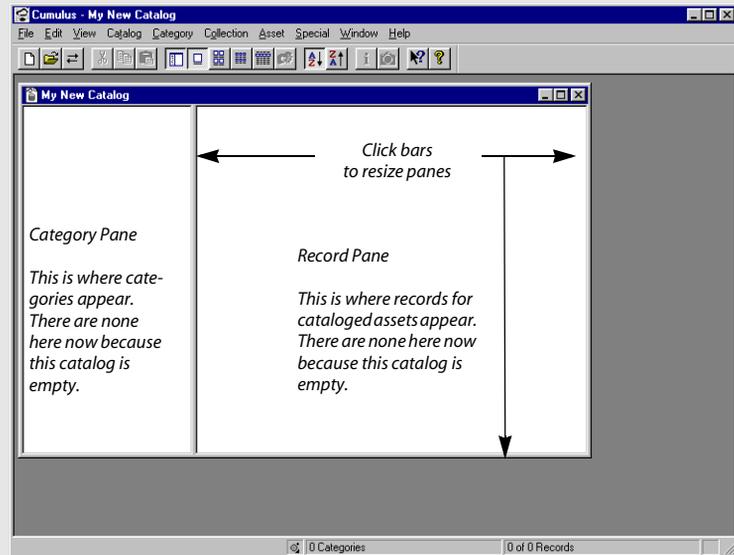
The Windows interface uses toolbars and one common window for all of its components:



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.
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: The Windows versions of Cumulus make extensive use of the secondary (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. 33, 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.

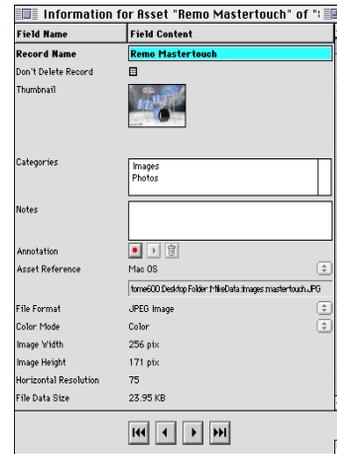
All records contain at least some searchable information in their record fields on the asset file they represent. Generally, the range of information each record includes depends on the kind of asset represented.

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.

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.

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 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 catalog provider
- 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.

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.

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.

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. 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.

Categories

Cumulus categories are used to organize records, much like folders are used to organize files in a traditional filing cabinet. 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

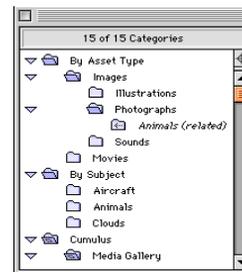
Categories can be nested within one another to create root categories and subcategories. A root category is at the highest hierarchical level in your catalog. It has no categories above it. A subcategory is any category with a category above it.

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. 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. They are identified by an arrow in their icons: 



A category structure featuring a related category and directory categories.

- **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.

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.

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.

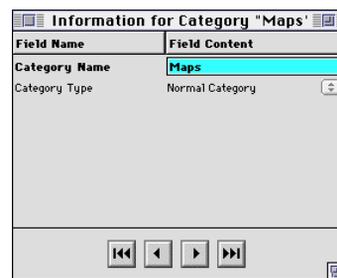
Category Fields

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.

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.

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.)

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.

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.

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 in the Status Bar.

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.

A description of the Find window and a comprehensive listing of searchable fields is listed on page 40.

All of the example searches on the following pages search for records only and are based on the catalog from the tutorial in the previous chapter.

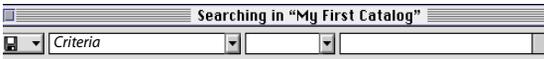
A description of the Find window and a comprehensive listing of searchable fields is listed on page 40. All of the example searches on the following pages are based on the catalog from the tutorial in the previous chapter.

Simple Searches

To set up a simple search (as opposed to a compound search, described on page 36):



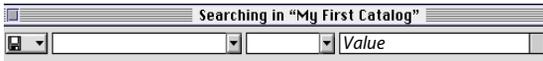
1. If the Find window is not open, click **Collection** ⇒ **Find** to open it.
2. Select a search criterion from the **Criteria** pop-up menu.



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 14 in the tutorial.

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. 37.)

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 opera-

tor **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** 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**.

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** to open it.
2. Set up the first part of the search as:



3. Leave the default search method **Search in Entire Catalog**.
4. Click **New Collection** so that the records found will be displayed in a new collection of their own.
5. Click **Find**. Cumulus finds all records in the Photographs category.
6. Now change those same fields to:



7. Click **Narrow Current Collection** as the search method.
8. Click **Current Collection** so that the records found will supersede the current collection.

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:



1. If the Find window is not open, click **Collection** ⇒ **Find** to open it.

2. Set up the first part of the search as:



3. Leave the default search method **Search in Entire Catalog** for this first step.
4. Click **New Collection** so that the records found will be displayed in a new collection of their own.
5. Now change the same fields in the Find window to:



6. Click **Broaden Current Collection** as the search method.
7. Click **Current Collection** so that the records found will supersede the current collection.

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**.
-

The Find Window and Sample Search Options

To open the Find window: Select **Collection** ⇨ **Find**



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
Category	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. 50)
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	6	Records with a group of characters in the Notes field that matches criteria.	Any line of text. For example, "ball" finds ball, balloon and base-ball. "ll rights res" finds "All rights reserved."
Record Name	String	7	The name of the record.	Balloon, Clouds, Gun Shot

Field Type	Category	Thumbnail	Date, Real, Integer	String List	String (only Sorting & Searching)	String (only Contain Searching)	String (Sorting & Searching + Contain Searching)						
Operator Menu Options	is is not contains doesn't cont. has value has no value	1 similar to not similar to	2	under up to is is not from over has value has no value	3	contains doesn't cont. has value has no value	4	starts with is is not has value has no value	5	contains doesn't cont. has value has no value	6	starts with is is not contains doesn't cont. has value has no value	7