



Cumulus
Media Management System

Canto® Cumulus®

Single User 5.0

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

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This document was developed for Canto Software by:

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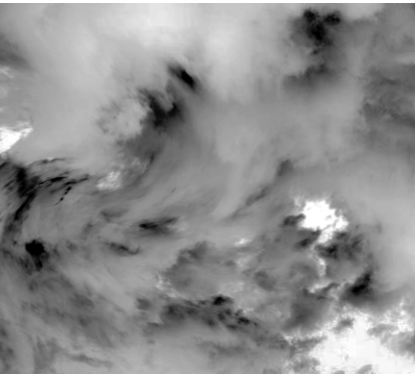
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Cumulus® Desktop and Cumulus Desktop PLUS Media Management Systems™ are powerful tools for creative professionals. At the heart of the extensive Cumulus feature set is the ability to store any type of digital media, including images, audio, video, 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 files 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 file collection. Once you've settled on a process for storing and retrieving your media that works for you, the process can be automated, further enhancing the efficiency of your creative workflow.

1

Intro

Cumulus Desktop vs. Cumulus Desktop PLUS

Cumulus comes in two flavors: Cumulus Desktop and Cumulus Desktop PLUS. The basic structure of both programs is the same, though Cumulus Desktop PLUS adds the ability to automate certain tasks and offers some special features for those publishing digital media professionally.

This User Guide

This guide covers all of the functionality of Cumulus Desktop, and most of Cumulus Desktop PLUS. Features specific to Cumulus Desktop PLUS are covered in the Cumulus Desktop PLUS Additions Guide that ships with that product.

Organization

This guide offers five 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 “Tutorial: Building a Catalog,” p. 18.)
- Concept – Learn Cumulus based on the need to do a certain task. (See second half of “Use” chapter, starting on page 27. Also see “Use,” p. 39, 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. 65.)

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 file collections that are already made.”

The tutorial that starts in Section 3, “Learn,” p. 17, should be your step one. It’s a pretty quick read that will have you up and running in no time. After reading the tutorial chapter, you’ll find Section 5, “Reference,” p. 65, very useful. It offers a menu-by-menu rundown of the entire program. At some point you should glance over Section 4, “Use,” p. 39, 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, Section 3, “Learn,” p. 17, to get you up to speed on Cumulus basics. But before you start doing any real work, make sure that you’ve read Section 4, “Use,” p. 39. This section explains some very important stuff that you should know before building your own file collections (called *catalogs*). While using the program, you’ll find Section 5, “Reference,” p. 65, a great resource.

- “I’m already familiar with programs like Cumulus. This is nothing new to me.”

You may want to start out in Section 5, “Reference,” p. 65, to get an idea of the options available in Cumulus. But it’s also a good idea to skim through Section 4, “Use,” p. 39, 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)

Cross-Platform Issues

Cumulus is a cross-platform application, meaning that it runs on Windows® 95, Windows® 98, Windows NT™, 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).

🍏 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 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 file on your computer or network server. A video clip, an

audio clip, an image, and a page layout document are examples. Remember this term; it's used throughout this guide.

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 27.



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 catalogs at one time. Categories are explained in detail starting on page 31.

Records

Records represent assets. Each record represents one asset. Records hold information about the asset, such as file size, type, location and creation date. (Records actually hold much more than this.) Records are explained in detail starting on page 29. It's very important to draw the distinction between records and assets. Records are part of Cumulus catalogs; assets are not. Assets are the files on your computer that records represent.



Help menu. Similar to other Windows help systems, subjects are organized by contents and index, and are searchable. (See "The Help Menu," p. 80) 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.

Reseller Technical Support

To provide you with easily accessible first-class assistance, Canto has partnerships with numerous distributors and resellers around the world. Because of this, the actual number you call depends upon where you purchased Cumulus. For a complete listing of these technical support numbers, please see "Where to buy" on Canto's Website. (www.canto.com) Before calling, please review the support form in the documentation folder on your Cumulus CD to ensure that you provide technical support with the appropriate information.

Canto Technical Support

Only if your reseller or distributor does *not* provide support for Cumulus, please address technical questions to:

North and South America
(415) 905-0302 (Voice)
(415) 905-0315 (Fax)
support@canto.com

Europe, Australia, Africa and Asia
+49-30 390 48 50 (Voice)
+49-30-393 10 93 (Fax)
support@canto.de

And don't forget: You must be a registered Cumulus user to receive help from Canto Technical Support.

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

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.

3D Animation Artists

Developing impressive 3D animations requires the use of many different tools: paint programs, texture programs, illustration programs, and, of course, a 3D modeler and renderer. But 3D artists agree: the cornerstone of a realistic 3D image lies within texture mapping. For this reason, animators typical have libraries of thousands of different textures.

The browseable Cumulus thumbnail images and powerful "Find Again" feature provide a fast, efficient mechanism for finding the perfect "slimy

green alien skin." For example, searching for "alien" could bring up hundreds of images. No problem with Cumulus. Narrow the search by finding "green skin" in the found set of "alien" textures. This enables you to refine a search as you go rather than having to type it all in at once.

Some animators even use Cumulus to trade their homegrown texture libraries with others. The Cumulus Desktop PLUS Royalty-Free Browser™ makes an excellent vehicle for spreading the creative wealth.

And more than just a texture mecca, Cumulus also serves as a home base for 3D models saved in Apple's QD3D file format.

Image Portfolios for the Digital Age

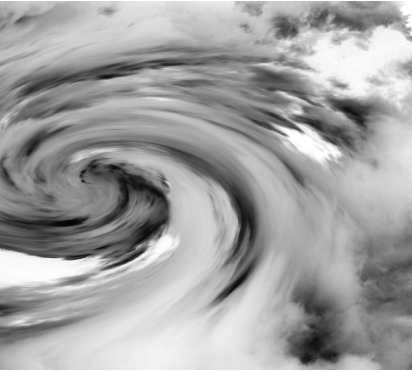
A freelance designer without a Web site is like...well...any designer without Cumulus! In a word: "lost." Using the Cumulus Desktop PLUS Internet Media Server, some artists have published complete, searchable portfolios online.

And the advantages of the Internet Media Server 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, it will most likely yield unfavorable results and is not recommended. Recommended requirements are listed below in parentheses.

Windows 95/98 Requirements

- 486 66MHz (Pentium® 133 MHz) processor
- 640x480 VGA (800x600 SVGA) 256-color video display
- 12MB (16MB) RAM
- 14MB (same) free hard-disk space
- CD-ROM drive for installation

Windows NT 4.0 Requirements

- Pentium 90MHz (Pentium 133 MHz) processor
- 640x480 VGA (800x600 SVGA) 256-color video display
- 16MB (32MB) RAM
- 14MB (same) free hard-disk space
- CD-ROM drive for installation
- Service pack 3 recommended

Mac OS Requirements

- 68030 25MHz (PowerPC®) processor
- 640x480 (800x600) 256-color video display
- 16MB (32MB) RAM
- 15MB (18) free hard-disk space
- CD-ROM drive for installation

Installation

To install Cumulus, you need two things: the Cumulus CD and your serial number, which is found on the registration card that came with your software.

If you have an older version of Cumulus installed on your hard-disk, you must remove it before installing the newer version. (See “Removing Cumulus,” p. 16.)

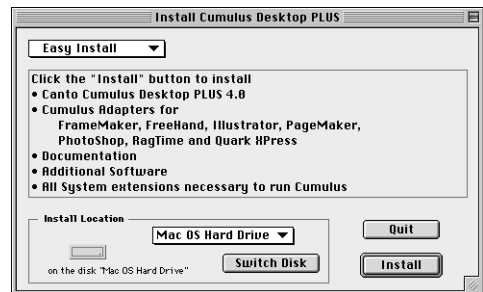
The installation instructions that follow are divided into Mac OS and Windows sections.

Mac OS

To install Cumulus on a Mac OS computer:



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 to find the program installer. The name of the installer will differ depending on which version of Cumulus you're installing. Cumulus Desktop PLUS users will find additional installers that are explained in the Cumulus Desktop PLUS Additions Guide.
4. Double-click the program installer to begin the installation. Cumulus uses a standard Mac OS installer that you will probably recognize.



5. Choose either **Easy Install** (recommended) or **Custom Install** from the pop-up menu at the top of the screen. **Easy Install** ensures that all the necessary Cumulus files are installed, including supporting documentation and a

sample media catalog. You can optionally choose **Custom Install** if you know exactly what files you need or you're supplementing an existing Cumulus install.

6. You can choose a different location for the installation by using the pop-up menu and button in the **Install Location** section of the window.
7. Click **Install**. You are asked to read and agree to the Cumulus user license agreement. If you agree, files are copied to your hard-disk. During the process, you are asked to locate folders for certain applications for which Cumulus provides integration modules. (See grey box below.) If an application is named that you do not have, or you do not wish to use the integration module for that application, click **Skip**. If you do wish to have the module installed, navigate the requested folder and click **Save**.

Windows

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



1. Insert the Cumulus CD into your CD-ROM drive.

2. Select **Run** from the Windows **Start** menu, enter one of the paths below into the dialog box that appears and click **OK**. (Replace "d:" in the paths below with the letter designation of your CD-ROM drive, if necessary.)

d:\English\DT_PLUS\setup.exe
d:\English\Desktop\setup.exe

The first path installs the Cumulus Desktop PLUS software. The second path installs the Cumulus Desktop software. You can also use the mouse to navigate to these directories on the CD and double-click the Setup icons, if you prefer.

3. Read and click **Next** (then **Yes**) to proceed through the first few screens of the installer until you get to the Setup Type window.



4. Choose either **Typical** (recommended), **Compact** or **Custom** from the buttons at the left of the screen. Typical ensures that

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.

During the Cumulus installation, these modules are placed within folders that reside in the folders of the supported applications. The process of upgrading these other applications may result in the loss of these modules if they are deleted with the older versions of those programs. Should this happen, simply relaunch the Cumulus installer, select a custom install, and choose the missing module for the installation.

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

all Cumulus files are installed, including supporting documentation and a sample media catalog. **Compact** installs only those files necessary to run Cumulus, but includes no sample media catalog or documentation. You can optionally choose **Custom** if you know exactly what files you need. If you use this option to supplement an existing Cumulus installation, be aware that the automated uninstall removes only the last components installed. (See below.)

5. You can optionally choose a different location for the installation by using the **Browse** button.
6. Click **Next** to proceed to the Registration Information screen. If you selected **Custom** as the installation type, you must first choose the options you want to install.
7. Fill out the registration information as requested. Your serial number is found on your warranty registration card. Click **Next** to read and proceed through the remaining screens to complete the installation.

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:



1. Drag the Cumulus folder into the trash.
2. Empty the 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:



1. Select **Settings**⇒**Control Panel** from the Windows **Start** menu. The Control Panel opens.
2. Double-click the **Add/Remove Programs** icon. A window appears with a list of the programs installed on your computer.
3. 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

Filling out and sending in the Cumulus registration card should be considered part of the Cumulus installation.

Canto also offers online registration from its Web site (www.canto.com). Easy access to the Web registration page is available from inside Cumulus. Mac OS users should select **WWW Registration** from the Apple menu. Windows users will find their **WWW Registration** menu option underneath the **Help** menu.

For fans of the fax machine, Canto offers a quick and easy way to print out the registration form. Under the menus listed above, you'll also find a **Print Registration** option. Print the form, fill it out and fax it in. The fax numbers are listed on the form.

Choose the way that works best for you. But remember, only registered users are eligible for product updates, special promotional offers, and Canto's free technical support.



The Cumulus interface takes advantage of the unique features found on the Mac OS and Windows platforms. For this reason, there are cosmetic differences between the two versions of the program. This section begins with a tutorial to guide you through building and using a simple catalog. There is also a visual overview of each interface to give you a general idea of how interface items are used. After completing the tutorial and reviewing the interface used on your computing platform, you'll have a good feel for the four basic components of Cumulus: catalogs, categories, records and searching. In the last part of this section, these four core components are described in detail.

3

Learn

Tutorial: Building a Catalog

In this section we'll build a simple catalog, create some categories and do some searching. An overview of the Cumulus Mac OS and Windows interfaces can be found on pages 20 and 21.

Getting Started

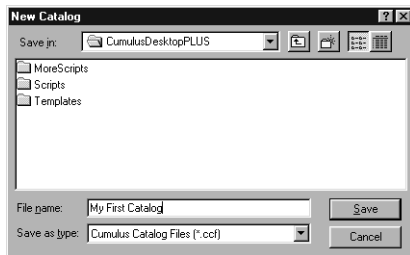
To begin, you need to have Cumulus installed on your computer (See "Installation," p. 14) You'll also need to have the Cumulus CD in your CD-ROM drive. We'll need some of the disc's sample media files for the tutorial.

Making a Catalog

The process of making a Cumulus catalog is simple:



1. Launch the Cumulus application. A dialog appears from which you can open an existing catalog. Click **Cancel** because we're going to build our own.
2. When the program has loaded, select **File** ⇨ **New**. A dialog box appears from which you can name your new catalog.



3. Type a file name for your catalog into the **File name / New Catalog** field and click **Save**. You can save the catalog in a different location if you'd like. (Windows users don't need to worry about adding a file name extension. Cumulus adds it automatically.)

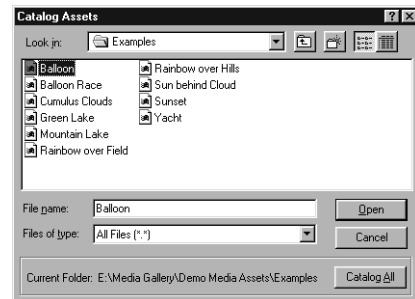
At this point you should be looking at an empty catalog window similar to those shown on pages 20 and 21.

Adding (Cataloging) Assets

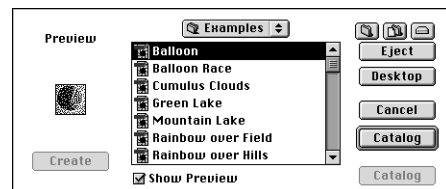
"Cataloging assets" is Cumulus-speak for adding media files to your catalog. There are two ways to catalog assets: by menu options and by drag and drop. We'll cover both.



1. Select **File** ⇨ **Catalog Assets**. A dialog box appears showing the contents of the current folder.
2. Navigate to **Media Gallery****Demo Media Assets****Examples** on the Cumulus CD.
3. Select **Balloon** from the file list and click **Open**.

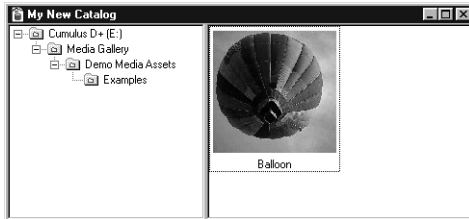


*When cataloging more than one asset, the **Catalog All** button is a quick way of adding the entire contents of a folder.*



*The **Catalog** button toward the bottom of the Mac OS dialog box will also catalog the entire contents of a folder. You must highlight the folder's name in the list area to enable the button.*


After a moment, a thumbnail for the Balloon image appears, indicating that a record has been successfully created for the asset.



Automatic Categories

Windows users will immediately notice that a hierarchy of folders has appeared in the Categories pane. The same has happened on the Mac OS side, but it's not yet apparent. Let's make it so:



1.  Select **Category** ⇒ **Show Categories**. This opens the Mac OS Categories window for the active catalog. Now you can see the same folder hierarchy visible in the screen shot above.

So where did these new categories come from? Among Cumulus' many cataloging options is the ability to use an asset's folder hierarchy as a model for category creation and assignment. While this doesn't seem too useful in our Balloon 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. 45.) Turning this option on and off is explained in detail, starting on page 67.



It's important to remember that categories like these *resemble* the hard-disk folder hierarchy, but the two are *not at all connected*. For example, you can move or delete one of the folders on your

hard-disk and it would have no effect on the categories. Likewise, you can delete categories and have no effect on the actual hard-disk folders, or even the cataloged assets.

Deleting Categories

Let's get rid of those unwanted categories that Cumulus created for us.

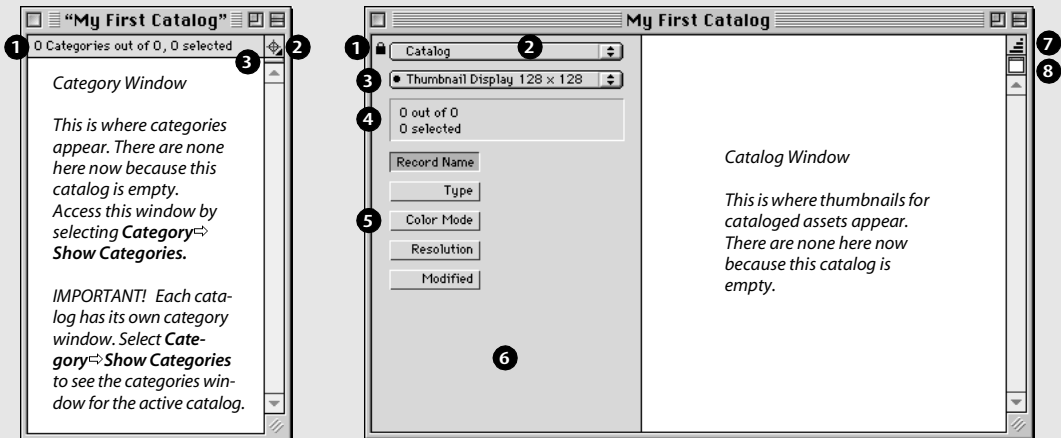


1. Select the root-level category from the unwanted category hierarchy. It's named for the volume on which the asset resides. In this case it's either called Cumulus D+ or Cumulus D, depending on the name of your Cumulus CD.
2. Select **Category** ⇒ **Delete Category**. You are asked to confirm the deletion, 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 the Balloon image was not deleted and the folders on the CD from which the categories were modeled were certainly not deleted either. Remembering that catalog categories and hard-disk folder hierarchies are different is very important. Now we'll delete the Balloon record.

The Cumulus Mac OS Interface

The Mac OS interface uses several windows for all of its components:



Category Window Items

1. Shows the number of visible categories in the category window, 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 63. Click on the icon as a short-cut to access the search preference options.
3. Drag this bar vertically to split the category window into two halves.

Catalog Window Items

1. A lock icon indicates that changes cannot be made to the catalog. Either you have opened it from a Cumulus Network Server that hasn't enabled write permissions for you, or the catalog is located on read-only media, such as a CD.
2. Selects the window's view: either Catalog or Administration.
3. Selects between text-only, or small, medium and large thumbnail displays.
4. Shows the number of visible records in the record window, total number of records in the catalog, and how many records are selected.
5. Five buttons sort the contents of the catalog window by either record name, file type, file color mode, file resolution, or last date modified.
6. The large grey area of the window is called the Side Bar.
7. Toggles between ascending and descending sort orders.
8. Toggles the Side Bar (grey area of the Catalog window) on and off. When the Side Bar is off, catalog information is displayed at the top of the window.



Find Window

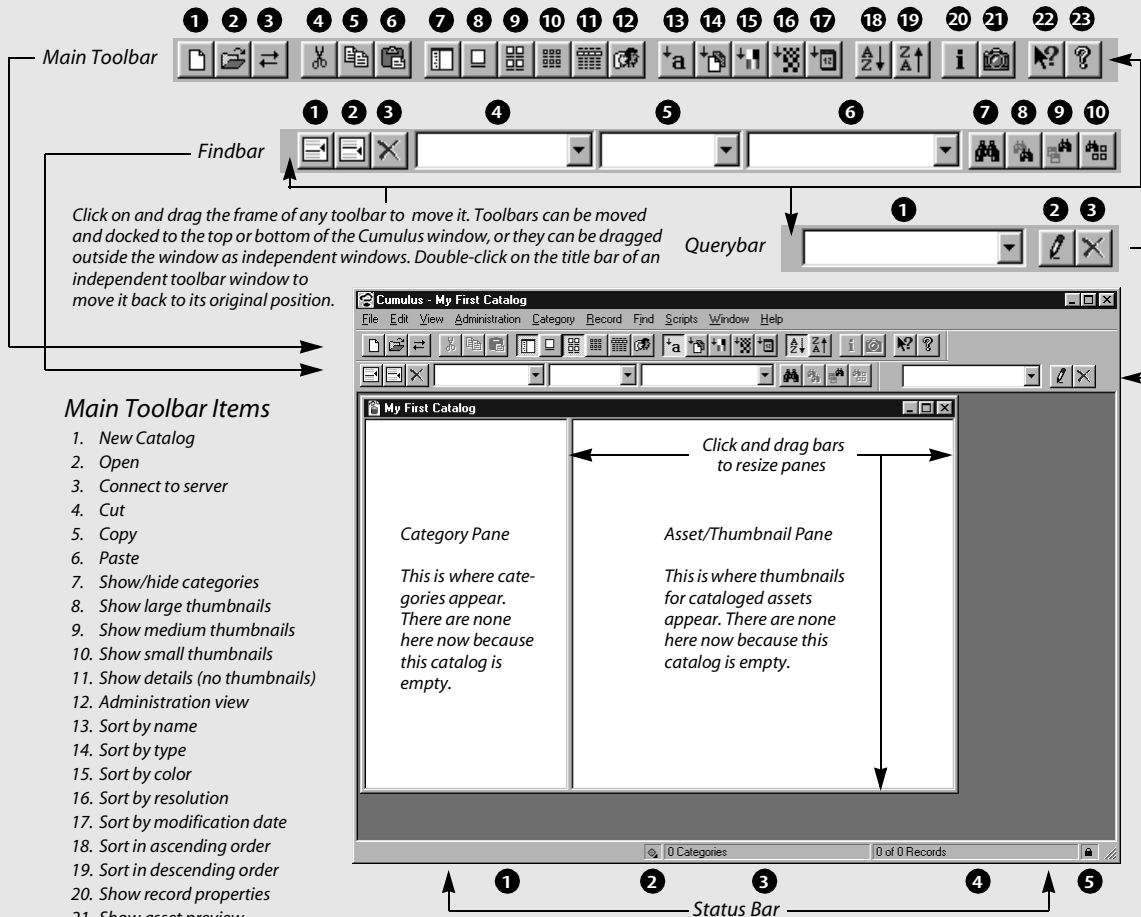
Use this window to conduct custom searches. Access it by selecting **Find**→**Find**.

Find Window Items

1. Criteria field
2. Operator field
3. Value field
4. Insert new search condition above current (visible) search condition
5. Insert new search condition below current (visible)
6. Delete current condition
7. Find (show) all records in the active catalog
8. Find in current selection
9. Find in active catalog

The Cumulus Windows Interface

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



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. Administration view
13. Sort by name
14. Sort by type
15. Sort by color
16. Sort by resolution
17. Sort by modification date
18. Sort in ascending order
19. Sort in descending order
20. Show record properties
21. Show asset preview
22. "What's this?" help
23. Access Cumulus' online help

Querybar Items

1. Query name field
2. Save current query (must be named first)
3. Delete current query

NOTE: The query bar isn't visible the first time you run Cumulus. It must be selected from the **View** menu.

NOTE: The Windows versions of Cumulus make extensive use of the secondary (right) mouse button. See the appendix of this guide for details.

Findbar Items

1. Insert new search condition above current (visible) search condition
2. Insert new search condition below current (visible)
3. Delete current condition
4. Criteria field
5. Operator field
6. Value field
7. Find in active catalog
8. Find in current selection
9. Find in all open catalogs
10. Show all records in active catalog

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 62. Click on the icon as a short-cut 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 Network Server that hasn't enabled write permissions for you, or the catalog is located on read-only media, such as a CD.

Deleting Asset 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. 48), deleting the asset is a permanent thing. Be absolutely certain that you no longer need the asset file or have another copy safely stored elsewhere before you have Cumulus delete it.



1. Click on the Balloon thumbnail.
2. Select **Record** ⇨ **Delete Record**. The deletion confirmation dialog box appears.

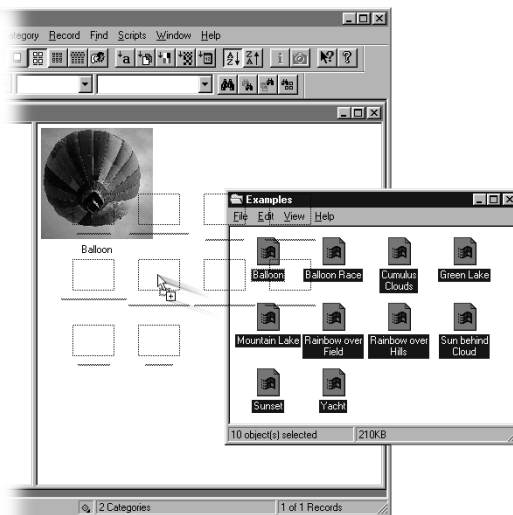


Here you can see the option to also delete the asset file. For this exercise, leave it unchecked. (Being located on a CD-ROM, the file cannot be deleted anyway.)

3. Click **Delete**. 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.



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



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. Records are created for each of the assets.

Adjust the Cumulus window to see all the records. If you don't have a monitor large enough to see them all, adjust the thumbnail viewing size by:

- selecting a new size from the **Thumbnail Display** pop-up menu to the left of the thumbnails.
- selecting **View** ⇨ **Small Thumbnails**.




You may have noticed that during the cataloging process our unwanted categories reappeared. As previously mentioned, these categories are created because of a cataloging preferences option that is enabled by default. (See “Cataloging Options,” p. 44, for details on the different cataloging options.)

Go ahead and delete these categories as described back on page 19.

Creating Categories

If you’ve been snooping around the Cumulus menu bar, you can probably guess how to create a new category.






1.  Mac OS users first need to click inside white area of the category window to activate it and the menu options that we need.
2. Select  **Category**⇒**New Category /**  **Category**⇒**New Root Category**. This creates a new category called, “category.” The new category’s name is highlighted, ready to be renamed.
3. Type “Images” and press the **Return** key to rename the category.

Creating Subcategories

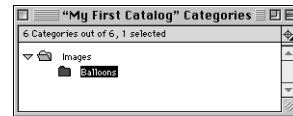
Now we’re going to create a few subcategories for our Images category. Subcategories—like folders within folders on your hard-disk—serve to further organize and identify the items within.



1. Click on the Images category.

2. Select  **Category**⇒**New Category /**  **Category**⇒**New Subcategory**. This creates a subcategory on the Windows platform, but creates another top-level category on the Mac OS.
3. Rename the new category “Balloons.”
4.  Mac OS users now need to click on the new Balloons category and drag it on top of the Images category. This places Balloons inside the Images category. This type of drag and drop placement of categories also works on Windows.

At this point your category pane/window should look something like this:



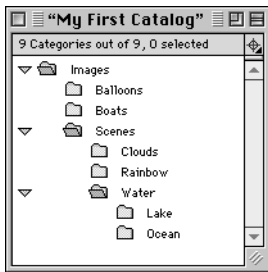
You would now say that Balloons is a subcategory of Images. Or that Images is a master category to Balloons.

Let’s continue 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 on the following page. Windows users should take advantage of the **New Subcategory** menu item. Mac OS users can use the drag and drop method for moving categories.

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.



A sample category structure. All categories are visible.

After you've finished building the categories, take a moment to study the category hierarchy. Everything you cataloged is an image, so that's the root category. Next you subdivide image type into three topics:

- Balloons
- Boats
- Scenes

Within the Scenes category, you've added even more definition by adding Clouds, Rainbow and Water. And finally, in the Water category you've broken it down into Lake and Ocean.

So to summarize:

- Everything in the catalog is an image.
- Everything under the Scene category is an image of a scene of some type.
- Everything under the Water category is an image of a scene that has water in it.

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 quite a bit of time that would otherwise be spent reassigning categories.)

Assigning a Record to a Category

Categories are most 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.




1. Click on the Balloon record and drag it onto the Balloons category.

The Balloons category is now assigned to the Balloon record.

Assigning Multiple Records to Categories

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



1.  Click on the white background near one of the thumbnails. This activates the Record window so that our next step will work as intended.
2. Choose **Edit** ⇒ **Select All**. A border is drawn around each of the records indicating that they are all selected.
3. Click on any of the thumbnails and drag it on top of the Images category. This assigns all of the records to the Image category.

The **Select All** feature selected our entire catalog. Usually, however, you will find the records you need with one of the search options. (See "Searching," p. 32.)

Our next step is to also assign the records to the subcategories that best describe them. Some records will be assigned to only one subcategory, while others will be assigned to multiple categories.



1. Click on the Yacht record and drag it on top of the Boats subcategory.
2. Click on the “Rainbow over Hills” record, and, while holding down the **Control** key / **Command** key, click on the “Rainbow over Field” record. Once both records are selected, you can release the key. You may recognize this method of selection as a common way to choose a number of items that may or may not be adjacent. To select a range of contiguous records—that is, all next to one another—you could select the first record in the range, hold down the **Shift** key, and then select the last.
3. Click on either record’s thumbnail and drag it on top of the Rainbow subcategory.

Now, using the techniques we’ve covered, make the additional category assignments below. But before you start, here’s a hint that will help when 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.

Record	Assign to	Categories
Balloon Race	⇒	Balloons, Scenes
Cumulus Clouds	⇒	Scenes, Clouds
Green Lake	⇒	Scenes, Water, Lake
Mountain Lake	⇒	Scenes, Water, Lake
Rainbow over Field	⇒	Scenes
Rainbow over Hills	⇒	Scenes
Sun behind Cloud	⇒	Scenes, Clouds
Sunset	⇒	Scenes
Yacht	⇒	Water, Ocean

If you make a mistake, it’s easy enough to remove a category assignment. See “Editing a Record’s Category Assignments,” p. 30, for details.

Finding Records by Using Categories

All of our assets are cataloged and their records assigned to categories. Now 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 on the Water category. Three records are displayed: Yacht, Mountain Lake and Green Lake. What Cumulus has done is searched through all of the records to find those assigned to the Water category.
2. Now double-click on the Lake category. The Yacht record disappears because it’s not part of the Lake subcategory.

Experiment with double-clicking on the different categories. 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 once on the first category.
2. **Hold down the Shift key** and click on the second, third, etc. categories. Release the **Shift** key and double-click on any of the category icons. The records of all selected categories are found and displayed.

Hold down the Control key and click on the second, third, etc. categories. Without

releasing the **Control** key, double-click on the last category *before* you select it. The records of all selected categories are found and displayed.

Displaying All Records



Selecting  **Find** ⇨ **Find All** /  **Find** ⇨ **Show All** displays all the catalog's records.

Building Custom Searches

There will be times when finding records by category won't be specific enough for your needs. For example, you may have tens of thousands of scenes with water in them. Suddenly, our Water category 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 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 "Records/Assets," p. 29.) Let's try a simple example:



1. Select  **Find** ⇨ **Find** /  **View** ⇨ **Findbar**. This opens the Find window. (Windows displays the Findbar by default the first time you run Cumulus. A check mark by the item in the **View** menu indicates when it's visible.)






The Windows Findbar.



The Mac OS 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 criteria field (left field). This tells Cumulus that we want to search through the records' Name fields.
3. Select **contains** from the operator field (middle field). This tells Cumulus that matched records' Name fields must contain the contents we're about to type into the **Value** field.
4. Type "sun" into the value field (right field). This tells Cumulus the text we're searching for.
5. Click the  **Find** button /   toolbar button) to conduct the search. Cumulus searches the catalog and displays any records that match the search criteria.

In this case, there are two records that match our criteria: "Sunset" and "Sun behind Cloud." Both of these records contain the text "sun" in their file names.

More advanced search options, including the ability to store and retrieve searches, are explained later in this section. (See "Searching," p. 32.)

Tutorial Review

You should now know how to create a new catalog, catalog assets to create records, delete asset records, create categories and subcategories, delete categories, assign records to categories, find records based on their category assignments, and perform a simple custom search.

With this basic understanding of Cumulus you can now explore the rest of this document with the know-how you need. The rest of this section outlines the four major components of Cumulus and refers to details found elsewhere in this guide. Some of what is covered next will be familiar to you now.

Catalogs

A Cumulus catalog is a group of records that, together, represents a collection of assets. Each record represents one asset. There is no limit to the number of different media types that can be represented in one catalog.

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 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 hindering the search speed.) (See “Catalog Size and Performance,” p. 46, for details.)

A catalog file can be as large as 2 gigabytes in size, which is usually many hundreds of thousands of records. Most users will find it best to split apart 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. 29.)

Catalog Scope

Catalogs can include records for as many different asset types as you’d like. But you might find it best to have different asset types 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 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 the entire collection. 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. (See “Status,” p. 40.)

Catalog Display Options



You can view catalogs in two basic formats: thumbnail images or a scrolling text list. There are three size options for the thumbnail displays:




- Small Thumbnails (96 pixels x 96 pixels)
- Medium Thumbnails (128 pixels x 128 pixels)
- Large Thumbnails (192 pixels x 192 pixels)

Thumbnails offer an at-a-glance view of the asset file (in some cases), but they are slower to display. You can optionally have the record’s name appear below each thumbnail image. Windows users can also have tooltip-type help appear over each thumbnail showing additional information about the record’s asset. See the Application Preferences overviews on  page 63 /  page 62 for display option details.

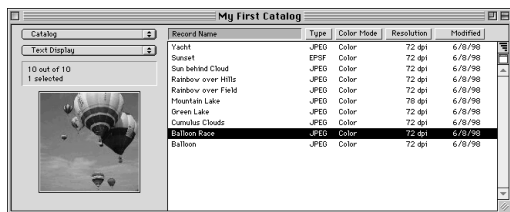
To change the size of the thumbnail display:



1. Choose  one of the thumbnail size options from the **View** menu /  **Edit** ⇨ **Catalog Display**. Mac OS users can also select a size from the pop-up menu to the left of the thumbnail display area.

Text lists (called Details on Windows) show a scrolling list of the records. Along the top of the list are five column headings: Record Name, Type, Color Mode, Resolution, and Modified. Clicking on one of these headers sorts the list by that field. The sort order is reversed by  clicking on the  icon to the right of the catalog window /  clicking again on the column heading.

Mac OS users will also see the thumbnail of any selected asset in the left bar of the catalog window.



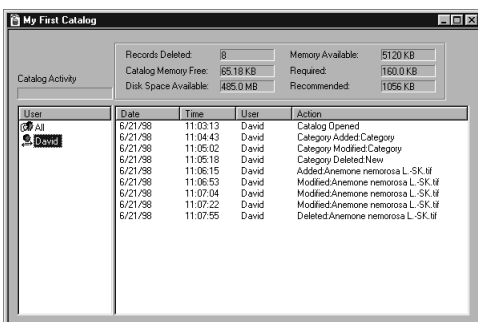
Catalog shown in Mac OS List View

There is one last catalog view option that you probably won't use too much, unless you're using Cumulus as a client to the Cumulus Network Server software. It's called the Administration View.

From this view you can see:

- A log of activity to the catalog, which includes when the catalog was opened and closed, compressed or repaired; when records were added and deleted; and when the category and status lists were modified.
- The amount of space that would be reclaimed by compressing the catalog.
- Suggested memory requirements for using the catalog.

The Administration view has other useful features that come into play only when the active catalog is served by the Cumulus Network Server. These features are explained in the Cumulus Network Administrator User Guide.



The Windows Administration View window.

Things You Can Do with Catalogs

- **Backup** a catalog. (See "Backing Up Catalogs," p. 47.)
- **Change** the way assets are cataloged. (See "Cataloging Options," p. 44.)
- **Change** catalog setup/properties. (See "Catalog Setup / Catalog Properties," p. 44.)
- **Compress** a catalog. (See "Compressing Catalogs," p. 46.)
- **Copy** a catalog. (See "Copying Catalogs," p. 48.)
- **Create** a new catalog. (See "New," p. 66.)
- **Delete** a catalog. (See "Deleting Catalogs," p. 49.)
- **Distribute** catalogs publicly using Cumulus Desktop PLUS' Royalty Free Browser. (See Cumulus Desktop PLUS Additions Guide.)
- **Divide** a catalog into smaller catalogs. (See "Dividing Catalogs," p. 49.)
- **Merge** one catalog with another. (See "Merging Catalogs," p. 50.)
- **Open** an existing catalog. (See "Open," p. 66.)
- **Publish** a catalog on the Internet using Cumulus Desktop PLUS. (See Cumulus Desktop PLUS Additions Guide.)
- **Rename** a catalog. (See "Renaming Catalogs," p. 48.)
- **Repair** a damaged catalog. (See "Repair," p. 73.)
- **Save** a catalog. (See "Save," p. 66.)
- **Search** a catalog. (See "Searching," p. 32.)
- **Share** a catalog with other users when using the Cumulus Network Server. (See the Cumulus Network Server's Administrator's User Guide.)
- **Update** catalogs from earlier Cumulus versions. (See "Updating Catalogs from Earlier Versions," p. 50.)

Records/Assets

At the heart of the Cumulus catalog is the record. Each record represents one asset file, such as a Photoshop® image file, a video clip, a sound clip, or a QuarkXPress® page layout. Some records contain a thumbnail image of the asset. Records can (and should) be categorized for easy maintenance and searching. (See “Categories,” p. 31, for details.)

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.

All records contain at least some searchable information about the asset file they represent. The range of information each record includes depends on the asset type represented. Some information common to all records includes:

- Asset file name (The asset’s name as it appears from your computer’s desktop.)
- Asset file type (The type or format of the file.)
- Asset file location on the computer or server (Where the actual asset resides.)
- Asset file size (The size of the asset file.)
- Asset file creation date (The date the asset was first created.)

Asset Types Supported

Cumulus supports virtually all computer files in one way or another. (Assuming those files are smaller than the catalog file size limit described back on page 27.) (See “File Format Support,” p. 52, for details on supported formats.)


Record Size

A record’s size depends on several factors:

- The size and quality setting of the thumbnail.
- The amount of text stored in the Notes field.

- The type of asset the record represents. (Different assets require different amounts of data to describe them.)

If catalog size is a concern, there are a few cataloging preferences to keep in mind. These settings directly affect the size of the records cataloged:

- Thumbnail quality
- Include Notes from Asset
-  Include Finder Comments

See “Cataloging Options,” p. 44, for details on these options.

Record Status

Records can be assigned a status from a list of terms that you define. Status is a good way of tracking records that are being used in production. For example, some common status terms are:

- Awaiting Approval
- In Edit
- Ready for layout
- Placed



Though similar in some respects, there are important differences between record status and record categories:

- Record status terms describe the current *state* of the asset, not the asset itself. (Categories describe the asset.)
- A record can have only one status term applied to it at any given time.

None of the four status term examples above specifically describe an individual asset. They could therefore be applied to any asset in a catalog, from a sound file (think Web site or CD-ROM development) to an image file or even a spreadsheet. What they describe is the *state* of the asset, not its visual characteristics.

If you think of an asset as “noun” (the “thing”), the record status would be the “verb” (the asset’s movement along the production path), and








record categories would be the “adjectives” (describing the “thing”).





Record status can be applied manually to existing records from within the record’s  Information /  Properties window, or it can be applied automatically to all newly cataloged assets (see “Cataloging Options,” p. 67). Cumulus Desktop PLUS users can even use Cumulus’ **Assign Status to Records** script to quickly apply a given status to a group of records.

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  **Record ⇌ Properties /  Record ⇌ Information**. A window opens showing the record’s information.
3.  Click on the Record tab.
4. Find and change the record’s name in the  **Name /  Record Name** field.
5.  Close the Information window. You are prompted to confirm the change.  Click **OK** to save the name change and close the Properties window.

The Record  Information /  Properties window is described, in detail, on pages  42 and  43.

Editing a Record’s Category Assignments





Also found within the Record  Information /  Properties 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 an assignment:



1. Select the record whose category assignments you want to change.
2. Select  **Record ⇌ Properties /  Record ⇌ Information**. A window opens showing the record’s information.
3.  Click on the Record tab. A list of categories appears.
4. Select the category you wish to remove and click  **Remove /  –** (minus sign button). The category is removed.
5.  Close the Information window. You are prompted to confirm the change.  Click **OK** to save the category change and close the Properties window.





To add a category assignment from this list:



1. Click on the category in the Categories  Pane /  Window.
2. Drag the category to the categories list in the Record  Information /  Properties window. The category is assigned to the record.

 Mac OS users can click on the + button to bring the catalog’s Categories Window to the front.

You can also assign categories by dragging category icons to thumbnails and vice versa. (See “Assigning a Record to a Category,” p. 24.)

The Record  Information /  Properties window is described, in detail, on pages  42 and  43.

Things You Can Do with Records


- **Assign** a record to a category. (See “Assigning a Record to a Category,” p. 24.)
- **Change** a record’s category assignments. (See “Editing a Record’s Category Assignments,” p. 30.)
- **Change** a record’s **status**. (See “Record Status,” p. 29.)
- **Copy** a record’s asset. (See “Copy Asset(s) To,” p. 78.)
- **Copy/Cut** and **Paste** records between catalogs. (Record categories are copied along with records, but status terms are not.)
- **Create** a new record (same as cataloging assets). (See “Catalog Assets,” p. 67.)
- **Delete** a record and (optionally) its asset. (See “Delete Record(s),” p. 76.)
- **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. 67 / 🍏 See “Export (Records, Categories, Query),” p. 68.)
- **Import** records. (⌘ See “Import,” p. 67 / 🍏 See “Import (Records, Categories, Query),” p. 67.)
- **Move** a record’s asset. (See “Move Asset(s) To,” p. 78.)
- **Open** and (optionally) edit a record’s asset. (See “Open Asset(s) With,” p. 77.)
- **Optimize** a records’ preview icon. (See “Optimize Thumbnail(s),” p. 76.)
- **Preview** a record’s asset. (See “Asset Preview,” p. 77.)
- **Print** a record’s **asset** with another application. (See “Print Asset(s) With,” p. 77.)
- **Print** a record’s thumbnail, details or **information** (properties). (⌘ See “Print (Records, Categories),” p. 69 / 🍏 See “Print,” p. 68.)
- **Rename** a record. (See “Renaming Records,” p. 30.)
- **Reveal** a record’s asset on your computer’s desktop. (See “Find Asset(s) / Explore Asset(s),” p. 78.)
- **Rotate** a record’s preview icon. (See “Rotate Thumbnail(s),” p. 76.)
- **Search** for specific records. (See “Searching,” p. 32.)
- **Update** a record to reflect an edited asset. (See “Update,” p. 75.)
- **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. 76.)
- **View** and optionally **edit** a record’s asset information. (See pages ⌘ 42 and 🍏 43, for details.)

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.

Automatic Categories

Cumulus can automatically create categories when cataloging assets. These automatic categories resemble the folder hierarchy in which the assets reside. This option can be disabled. (See

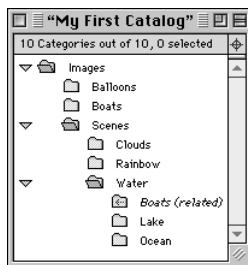
“Cataloging Options,” p. 67.) Automatic categories are identified by a folder in their icons. 

Subcategories


Categories can be nested within one another to create subcategories. Use drag and drop to move categories where you want them. Subcategories can be moved to other locations at any time.

Related Categories

You can also create aliases of an existing categories, called Related Categories. Using Related Categories, you can place categories in other locations in the category hierarchy for which they're suited. Or, you can build complete alternate category hierarchies. In the image shown, a related category was made for Boats and placed under the Water category.





Selecting and double-clicking on a related category works the same as it does with the original.



Related categories are identified by an arrow in their icons.  (See “Make Related Category (Categories) New Related Category (Categories),” p. 74.)

Things You Can Do with Categories

- **Assign** a category to a record. (See “Assigning a Record to a Category,” p. 24 and “Information / Properties,” p. 76.)
- **Create** a new category. (See “New Category,” p. 74.)
- **Create** a related category. (See “Make Related Category (Categories) New Related Category (Categories),” p. 74.)
- **Delete** a category. (See “Delete Category (Categories),” p. 74.)






- **Export** Categories.  See “Export,” p. 67 /  See “Export (Records, Categories, Query),” p. 68.)
- **Import** categories.  See “Import (Records, Categories, Query),” p. 67 /  See “Import,” p. 67.)
- **Move** a category inside another category. (See “Creating Subcategories,” p. 23.)
- **Remove** a category assignment from a record. (See “Editing a Record’s Category Assignments,” p. 30.)
- **Rename** a category. (See “Rename Category,” p. 74.)
- **Show or hide** categories.  See “Category List,” p. 72. /  See “Show Categories,” p. 74.)

Searching

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

Searching By Category

The simplest form of searching is simply double-clicking on a category in the Categories window/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. 25.)

There are several Preference options that affect the way category searching search works. The current search options are visually indicated by the Search Compass.  The Search Compass is found  in the Status Bar /  in the upper right portion of the Categories Window. (See the Search sections on  page 62 and  page 63 for details.)

Search Options at a Glance

NOTE: Cumulus search options are NOT case sensitive.



Windows Findbar and the Mac OS Find window



Criteria	Operator	Searches for	Sample Data/Instructions
Record Name	①	The name of the record.	Balloon, Clouds, Gun Shot
File type/format	④	The file format of the asset file.	Select from Value pop-up menu.
Color mode	④	The color mode of an image.	Select from Value pop-up menu.
Resolution	⑥	Dot-per-inch resolution of an image asset file.	200, 300
File size	⑥	The asset file size. (Not the record size.)	1024 KB (use KB for kilobytes) 24 MB (use MB for megabytes)
Modification date	③	The date the record was last changed. (Not the asset.)	12/19/97
Creation date	③	The date the asset was created.	11/22/97
Volume name	①	The name of the hard-disk or media on which the asset is stored.	ClipartZip5
File name	①	The file name of the asset.	Balloon.tif, Clouds.jpg, Gun Shot.aif
Folder name	①	The name of the folder in which the asset resides.	images
User name	①	The name of the user who cataloged the asset.	Clint, Carolyn
Status	④	Status term applied to a record.	Select from Value pop-up menu.
Thumbnail	②	Similar thumbnails. Compares brightness and contrast.	Type record name or drag record thumbnail onto Value field.
Category	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 "Preferences," p. 71)
Notes	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."

Operator Menu Options

① contains starts with is not doesn't cont.

② similar to not similar to

③ is prior to after is not

④ is is not

⑤ contains doesn't cont.

⑥ under up to is is not from over

Searching with the Findbar/Find Window

The Findbar/Find Window taps into the true search power of Cumulus. Complex search setups can be constructed to find virtually any type of data stored within a record. Boolean operators (and, or) increase the query possibilities even further.

A comprehensive listing of searchable record fields is listed on page 33.

Simple Searches

To set up a simple search (as opposed to a compound search, described on page 35):



1. Select a search criterion from the **Criteria** pop-up menu.



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



3. 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.)



4. When all three fields contain valid search information, click   /  **Find**.

Below are some example search setups with brief explanations of each. We search the catalog we created back on page 18 in the examples.



- This finds “Green Lake” and “Mountain Lake.”



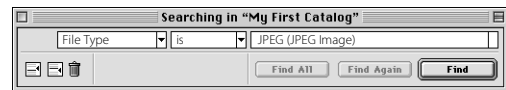
- This finds “Yacht” and “Balloon Race.”



- This finds all records except “Yacht” and “Balloon Race.”



- This finds “Sunset” and “Sun Behind Cloud” because they both start with the letters “sun.”



- This finds all records except “Sunset,” which is not a JPEG file. (It’s an EPS file.)

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 “Yacht” 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 to Value field.)



- This finds “Balloon Race” and “Balloon,” because they’re both members of the “Balloon” 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 water scene 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. 36.)

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 Scene category that have ‘cloud’ somewhere in their names.”

Translated into Cumulus-speak, this becomes:

Category is Scenes and Record Name contains cloud.

Now let’s break it down into separate search statements, called “conditions.”

- *Category is Scenes*

In our first condition, **Category** is our search criterion, **is** is our operator, and **Scenes** is the value we’re searching for. This tells Cumulus that the

records we want are all in the Scenes category. This alone would find the records we’re looking for, but if our catalog contained thousands of images in the Scenes category, we’d spend quite a bit of time browsing through them all.

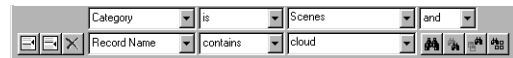
- *and*

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 cloud*

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

So let’s have a look at how the search looks in Cumulus and learn how to build it.




The field values construct a sentence similar to the one we just broke down. Now that 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. Set up the first condition of the search as:







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



5. When all six fields contain valid search information, click  /  /  **Find**. The search finds two images: “Cumulus Clouds” and “Sun behind Clouds.”

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. A feature called **Find Again** 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 **Find Again** technique.



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



2. Click  /  /  **Find**. Cumulus finds seven records in the Scene category.
3. Now change those same fields to:



4. Click  /  /  **Find Again**. Cumulus searches through the seven records found in the first search and narrows the set of records down to just two images: “Cumulus Clouds” and “Sun behind Clouds.”

Saving Search Setups

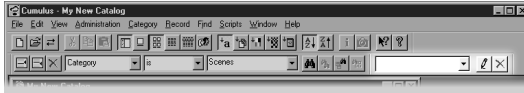
You can export complex search setups, called queries, to disk. This prevents you from having to rebuild them each time you need them. It also ensures that your searches are consistent from session to session, which is important for some purposes. Cumulus query files can be used on any supported platform. (See “Importing and Exporting,” p. 50.)



The Windows Querybar

The Windows versions of Cumulus feature a query bar pop-up menu that can be used to conveniently store queries for quick retrieval.



1. Select **View**⇒**Querybar**. The Querybar opens in the location it was in when you last quit Cumulus. The very first time it's opened, appears in the toolbar, as shown below.



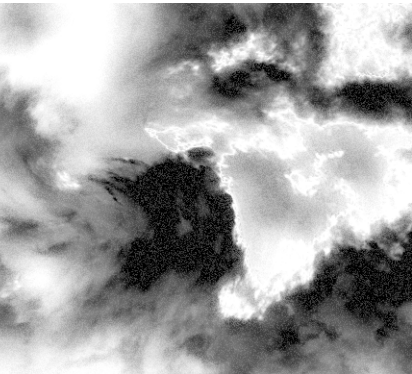
2. To save the current query, type a name in the query field and click the  button.
3. To load a saved query, select the query name from the pop-up menu.
4. To delete a query stored in the Querybar, select the query name from the pop-up menu and click the  button.

The Querybar configuration is saved when you quit Cumulus. However, storing a query in the Querybar is not the same as saving it to disk. If you

want your queries available to other users, you must export them. (See "Export," p. 67.)

Things You Can Do with Searches/Queries

- **Create** a new search condition. (See "Insert Condition Before," p. 78 and "Insert Condition After," p. 79.)
- **Delete** all search conditions. (See "Delete All Conditions," p. 79.)
- **Duplicate** a search condition. (See "Duplicate Condition," p. 79.)
- **Export** (save) search queries. (⌘ See "Export," p. 67 / ⌘ See "Export (Records, Categories, Query)," p. 68.)
- **Import** (load) search queries. (⌘ See "Import," p. 67 / ⌘ See "Import (Records, Categories, Query)," p. 67.)
- **Search** multiple catalogs for records. (⌘ See "Find In All Catalogs," p. 78. / ⌘ Mac OS Cumulus Desktop PLUS users can use the "Search in all Catalogs" script to search more than one catalog at a time. See "Search in all Catalogs," Cumulus Desktop PLUS Additions Guide.)



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.

4

Use

Record Information

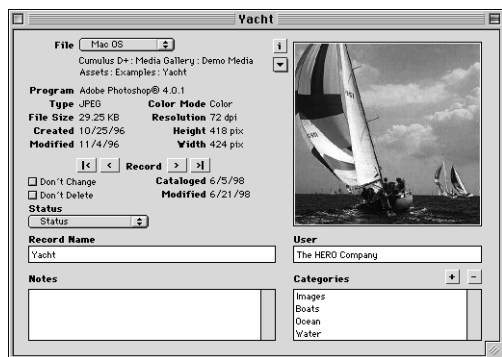
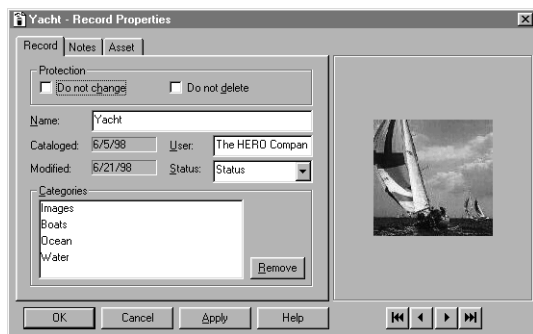
Catalog records contain far more than just thumbnail images. They contain useful information about the assets that help you identify them and find them when searching. Some of this information is created automatically when you catalog the asset and some can be added by you at any time.

Information

To see a record's information:



1. Click once on the record to select it.
2. Select **Record** ⇨ **Information** / **Record** ⇨ **Properties**. The information/properties window appears.



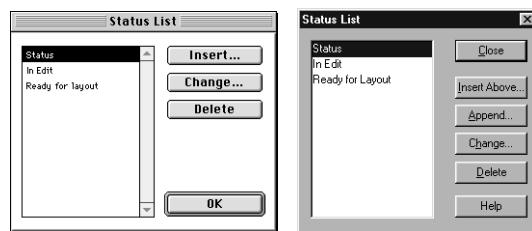
The Mac OS and Windows record information windows are similar in function, but the layouts are quite different. See page 42 / page 43 for an overview of the options available from each window.

Status

To enable easier tracking of a record throughout the production process, you can assign it a status. (You might find additional uses for this feature too.) Each catalog has its own list of status terms, which you can edit to suit your needs. Each record can have only one status applied at a time, but you can change the status (and status terms) as often as you need. (See "Record Status," p. 29, for details.)

Status terms are catalog specific and there is no way of exporting or importing them between catalogs. However, if you copy records from one catalog to another, and the destination catalog has the status terms that are applied to the records being copied, the terms remain applied to the records. Otherwise the records are set to the default status term.

Before you can assign a status, however, you have to create a list of status terms. To create or edit your catalog's status terms list, select **Record** ⇨ **Status List**, which opens the Status list window.



Mac OS and Windows Status list windows. Two new entries, "In Edit," and "Ready for Layout" have been added to the default "Status" entry.

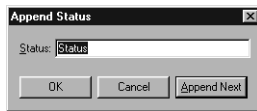
Cumulus provides a default status term called "status," which is applied to all newly cataloged assets. You can specify another term to be used in its place. (See "Cataloging Options," p. 44.)

The default term is needed because all assets must have a status. Once you create your own status terms, you can delete this default if you'd like.

To create a new status from the Status list window:



1. Click **Insert** or **Append** / **Insert Above** or **Append**. Which button you click depends on where in the list you want the new status placed. The **Append** button places the new status at the end of the list. The **Insert (Above)** button option places the new status above the currently selected status in the list. On the Mac OS, the top button changes between **Insert** and **Append**, depending on if anything is selected in the status list.
2. Enter a name for the new status in the dialog box that appears and click **OK**. Status names must be unique. If Cumulus won't accept the name you're typing, it may already be on the list.



Windows users can optionally click the **Append Next (Insert Next)** button to add additional status entries.

There are two ways of assigning a status term to a record:

- During the cataloging process. (See "Cataloging Options," p. 44.)
- From the **Status** pop-up menu in the Record Information/Properties window. (See the interface overviews on page 42 and page 43 to locate the menu.)

Cumulus Desktop PLUS users can also use scripts to assign status terms to records. (See the Cumulus Desktop PLUS Additions Guide that comes with that product.)

You can edit a status term at any time:



1. Select the status term you wish to edit.
2. Click **Change**.
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 status terms that you no longer need:

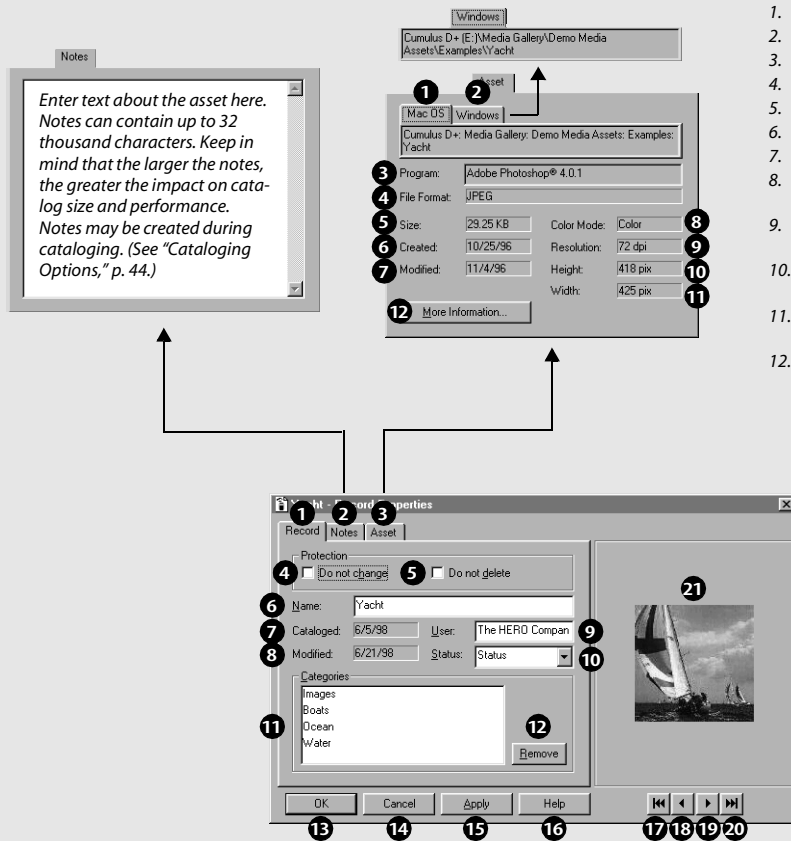


1. Select the status term you wish to delete.
2. Click **Delete**. If the status has not been applied to any records, it is simply deleted. If any records are using it, Cumulus asks you to assign a new status to those records.



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



The Windows Record Properties Window




Asset Screen Items (all)

1. File path to asset in Mac OS format
2. File path to asset in Windows format
3. Creator program for asset
4. Asset file format
5. Asset file size
6. Date asset was created
7. Date asset was last modified
8. Color mode of asset (color, greyscale, line art)
9. Resolution of image asset file (dots per inch)
10. Height of image asset file (see "Preferences," p. 44, for unit options)
11. Width of image asset file (see "Preferences," p. 44, for unit options)
12. Additional information about asset, such as the length of a video clip or the number of pages in a document (not always available)

Main Window Items

1. Record tab selects record information screen
2. Notes tab selects notes screen
3. Asset tab selects asset information screen
4. Prevents any changes to record
5. Protects record from deletion
6. Record name, up to 63 characters long (doesn't have to be the same as asset name)
7.  Date asset was cataloged and record created
8.  Date record was last modified
9. User who cataloged asset
10. Status applied to record (see "Status," p. 40)
11. Categories assigned to record (dragging category icons into this field is one way of assigning them to the record)
12. Unassigns selected categories
13. Saves any changes and closes window
14. Cancels any changes and closes window
15. Applies changes without closing window
16. Opens online help to appropriate topic
17. Loads the first record in the catalog window's current selection
18. Loads the previous record in the catalog window's current selection
19. Loads the next record in the catalog window's current selection
20. Loads the last record in the catalog window's current selection
21. Thumbnail image of asset (if applicable)

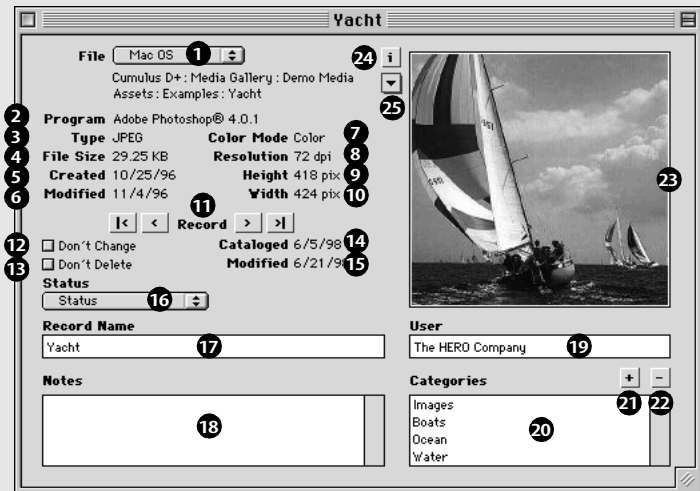
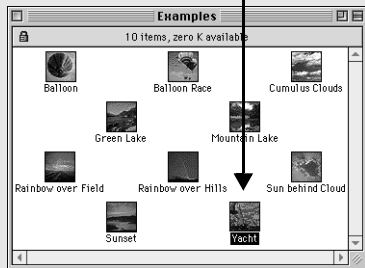
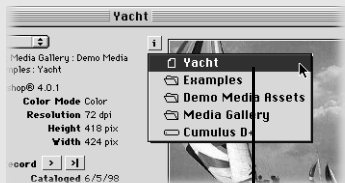
 A lock icon indicates fields that are not user-editable. The values in these fields are maintained by Cumulus.

The Mac OS Record Information Window

Information Window Items

1. Selects either Mac OS or Windows file path display format (shown in field beneath)
2. Creator program for asset
3. Asset file type
4. Asset file size
5. Date asset was created
6. Date asset was last modified
7. Color mode of asset (color, greyscale, line art)
8. Resolution of image asset file (dots per inch)
9. Height of image asset file (see "Preferences," p. 44, for unit options)
10. Width of image asset file (see "Preferences," p. 44, for unit options)
11. Navigation buttons to load the first, previous, next and last record in the catalog window's current selection into the Information window
12. Prevents any changes to record
13. Protects record from deletion
14. Date asset was cataloged and record was created
15. Date record was last modified
16. Status applied to record (see "Status," p. 40)
17. Record name, up to 63 characters long (doesn't have to be the same as asset name)
18. Space for notes. Notes can contain up to 32 thousand characters. Keep in mind that the larger the notes, the greater the impact on catalog size and performance. Notes may be created during cataloging. (See "Cataloging Options," p. 44.)
19. User who cataloged asset
20. Categories assigned to record (dragging category icons into this field is one way to assigning them to the record)
21. Brings Categories window to the front so you can drag new categories into the categories field below
22. Removes selected categories
23. Thumbnail image of asset (if applicable)
24. Additional information about asset, such as the length of a video clip or the number of pages in a document (not always available)
25. Pop-up menu that shows path to asset. Select any item in the menu to reveal that folder or file in the Finder.

A lock icon indicates fields that are not user-editable. The values in these fields are maintained by Cumulus.



- 25 Selecting an option from the pop-up menu opens that item in the Finder.

Program Settings

There are three menu options in Cumulus from which you can choose program settings. Two of the three affect catalogs only:

- **Cataloging Options**
-  **Catalog Setup** /  **Catalog Properties**

The third, **Preferences**, is used to access and set application settings that affect overall program behavior, including searching.

A visual overview of each of these preference/option windows is at the back of this section.



Cataloging Options

Before you build any catalogs of your own, it's a good idea to become acquainted with the various cataloging options that Cumulus provides. Select **File**⇒**Cataloging Options** to open the cataloging options window.



Options set from this window are not specific to any catalog, they apply to all subsequent cataloging.

See  page 56 /  page 58 for an overview of the options available from this window.



Catalog Setup / **Catalog Properties**



 **Administration**⇒**Catalog Properties** and  **Administration**⇒**Catalog Setup** open windows 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 Setup/Properties when the catalog is new, *before* you add records to it. There are several important factors that come into play while cataloging assets that are controlled from this window. Examples are thumbnail size (thumbnail quality is set from the Cataloging Options window), whether changes are saved immediately or later, and whether a log file is saved that tracks the catalog's activity.

See  page 60 /  page 61 for an overview of the options available from this window.

Preferences

The settings found under  **Edit**⇒**Preferences** /  **View**⇒**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  page 60 /  page 61 for an overview of the options available from this window.

Workflow Considerations

Whether your workgroup consists of you alone, or you and 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 files 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 Desktop PLUS 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:

98-06-01-ElectionResults.txt

98-06-01-ElectionResults.tif

Using the date in this order lists the files chronologically when sorted alphabetically. It also makes it easier for Cumulus Desktop PLUS 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

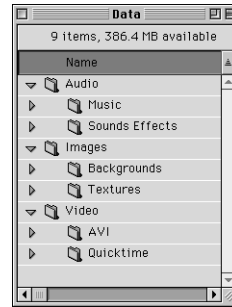
Using the two file name prefixes not only helps differentiate the files at a glance, but also help to make the filing system more predictable. From this one example, you can probably guess the file names of most images in this document. Consistency and predictability are key to developing a naming convention 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. 48, 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 name files 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

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 two gigabytes in size.

The actual number of records you can fit into the two 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 "Cataloging Options," p. 44 and "Catalog Setup / Catalog Properties," p. 44, for information about thumbnail settings.)

Typically, your catalogs will never reach the maximum size. If they do, you'll need to divide them. (See "Dividing Catalogs," p. 49.)

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.
- **Select Save Changes Later in the Catalog Properties/Setup window.** This prevents Cumulus from rebuilding its search index after each asset is cataloged. Though this does decrease cataloging time, you may regret it if the power goes out while during the process. (See "Catalog Setup / Catalog Properties," p. 44, for details.)
- **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 "Cataloging Options," p. 44, for details.)
- Turn off any file filters that you don't need. (See "Changing File Filter Options," p. 52.)

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. 48, for information on recovering records, and "Catalog Setup / Catalog Properties," p. 44, 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 **Administration** ⇨ **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 back-ups.

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 back-ups.

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 back-up 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 back-up. Catalogs should be closed before they are copied to other volumes, to ensure that all changes are safely saved. (Particularly if you have **Save Changes Later** selected in the Catalog Setup/Properties window. See "Catalog Setup / Catalog Properties," p. 44.)

The Cumulus Backup feature can save exact copies of catalogs, like those you copy yourself, or it can save catalogs in a special format that saves disk space. The first type of back up is called a "Full

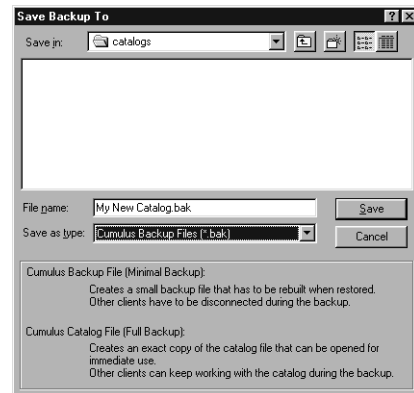
Backup" (.ccf file extension). The second is called a "Minimal Backup" (.bak file extension).

Minimal back-ups must be rebuilt by Cumulus before they can be used. The time required to rebuild a catalog depends on the catalog's size and the speed of the computer doing the job.

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



1. Open the catalog you wish to back up and select **Administration** ⇨ **Backup Copy** / **Administration** ⇨ **Backup**. The Backup window opens. The name for the back-up catalog file defaults to the same name as the original catalog file. The appropriate file name extension (.bak or .ccf) is added automatically, depending on the type of back up you choose. If you choose a Full Backup, you may need to choose a different name to avoid overwriting the original catalog.



2. Select one of the two back-up types from the drop-down list / radio buttons and click **Save**. The catalog is saved to disk in the format selected.

Restoring a Backed Up Catalog

Catalogs backed-up as “Full Backups” may be opened as you would open any other catalog. But catalogs saved as “Minimal Backups” require a few extra steps:



1. Select **File**⇒**Open**. 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 confirms that you would like to rebuild a new catalog from the back-up.
3. 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 version of the catalog is still on your computer, keep track of which version of the file you’re using.

Copying Catalogs

The “Full Backup” option described above is Cumulus’ mechanism for copying catalogs in their ready-for-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.

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 **Administration**⇒**Repair**.

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.)

Catalogs that have the **Save Changes Immediately** option set are more likely to be successfully repaired. (See “Catalog Setup / Catalog Properties,” p. 44.)

Recovering Deleted Records

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

- The catalog preference **Keep Deleted Records Recoverable** has been enabled, (see “Catalog Setup / Catalog Properties,” p. 73), and
- The asset was not deleted when the record was deleted, (see “Delete Record(s),” p. 76), and
- The catalog has not been compressed since the record was deleted. (See “Compressing Catalogs,” p. 46.)

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 **Administration**⇒**Recover Deleted Records**. All recoverable records are displayed in the catalog window.

Delete any records that you don’t need. (See “Delete Record(s),” p. 76.)

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  **Administration** ⇨ **Catalog Properties** /  **Administration** ⇨ **Catalog Setup**. The catalog properties/setup window opens.
2. Click on the **General** tab. You'll see a field labeled **Name**.
3. Enter a new name for the catalog in the **Name** field and:
 -  Close the window. You are asked to confirm the change.
 -  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 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 (2 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," p. 66.)
2. Create or open the catalog you wish to move records into. (See "New," p. 66.) 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. 32.)
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 **Record** ⇨ **Delete Record(s)** 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 67.)

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 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 67, for details.

Updating Catalogs from Earlier Versions

Catalogs created with Cumulus versions earlier than 4.0 must be updated before they can be used with this version of Cumulus. The Cumulus Catalog Converter—which gets installed with the Mac OS **Easy Install** option (See "Mac OS," p. 14.)—converts older catalogs into a format compatible with the latest Cumulus version. There is no converter for Windows, because there was no version of Cumulus for win-

dows that used the older catalog format. If you need to update an older Mac OS catalog to use on a Windows computer, you must do the conversion on a Mac OS-compatible computer.

The Cumulus Catalog Converter instructions can be found in the utility's folder.

Importing and Exporting

Cumulus can export and import records, categories and queries, but not status term lists. 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 queries and category listings. These archives 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 to just keep copies of the records in catalogs.) You can only import Cumulus-exported files.

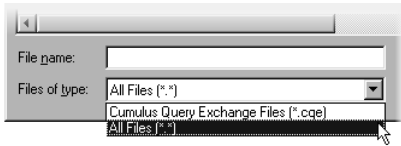
Importing and exporting data with Cumulus is easy, but there a few things to be aware of to avoid unexpected results, as explained below.

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. On 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 its exports the file name extension that Windows requires. And to ensure 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 "extension-less"

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 three that Cumulus uses:

- **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**
- **Queries** – Cumulus exports search queries in a Cumulus Query Exchange File. The file name extension is **.cqe**

If at some point an exported file doesn't have the proper extension, you can add it manually.

Maintaining Category and Status 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 imported records will lose their associations with those categories, even if you import the categories later. If you want the exported records to maintain their category assignments, you must first export and import the categories.

For example, if a record was assigned to the Images category in the old catalog, and there is no Images category in the new catalog, the record simply loses its association with that category. If there *is* an Images category in the new catalog, the record is assigned to that category automatically.

The same applies to status terms. But status terms must be entered manually. There is no way of transferring them between catalogs.

Remember that it may be easiest to just drag and drop records from one catalog to another, if both the source and destination catalogs are available to you. If not, or you are moving thousands of records at a time, 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. 32, if needed, for a refresher on how to find records.)
2. Select the appropriate export option from the menus. (See "Export," p. 67 and "Export (Records, Categories, Query)," p. 68, for information on the various export menu options.)
3. Name the export file and save.

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. 67 and "Import (Records, Categories, Query)," p. 67, for information on the various import menu options.)
2. Find the file you wish to import and open it. It's contents are appended to the active catalog as defined in the Cataloging Options window. (See "Cataloging Options," p. 44.)

File Format Support

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

Some files 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 in-depth file information is available. And in some cases, a file may display with a preview icon on one platform, but not on another.

Cumulus uses what are called File Filters to help it catalog the contents of an asset file. These filters tell Cumulus 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. And you can create your own for files not supported. Canto’s Web site (www.canto.com) offers new file filters as they become available.

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



Changing File Filter Options

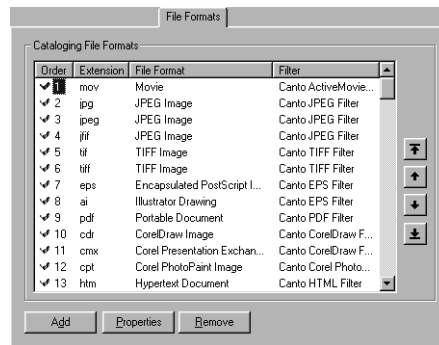
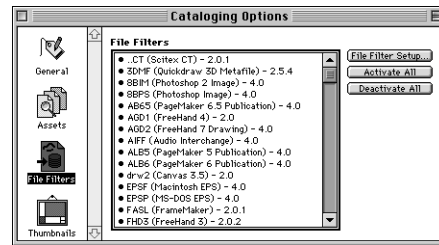
Some file filters have options that you can change. The range of options depends on the filter. We won’t cover them all because there are so many. We’ll use the JPEG file filter as our example.

To access a filter’s options:







1. Select **File** ⇒ **Cataloging Options**. This opens the Cataloging Options window where the file filters are accessed.

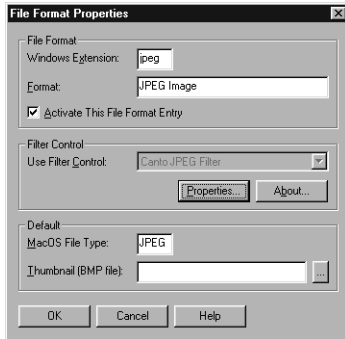
2. Select the File Formats  tab /  icon to see the list of installed filters.




The Mac OS and Windows File Filter lists.

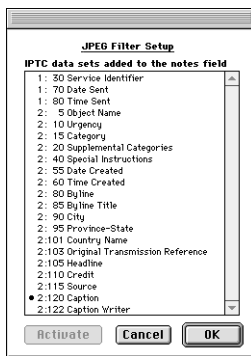
3. Scroll down the list (if necessary) to see the JPEG filter entries. You’ll see more than one.
 -  Windows has three: two for basic JPEG files and one for the JPEG interchange format, JFIF. Windows file filters are based on file name extensions, which is why there are two for JPEG (JPEG and JPG).
 -  The Mac OS uses two: one for basic JPEG files and one for the JPEG interchange format, JFIF. Mac OS filters are based on a file’s embedded file type, so file name extensions are ignored.
4. Select the second JPEG filter in the list and click  Properties /  Filter Setup. A window appears that differs considerably between the two platforms. This is because Cumulus for the Mac OS uses an external program, called the Filter Generator, to create

new filters. Windows lets users create new filters from inside the application from the window shown below. (See “Creating a New File Filter,” below, for details.)



The Windows File Format Properties Window.

5.  Windows users should click the **Properties** button to see a window similar to the Mac OS window below.



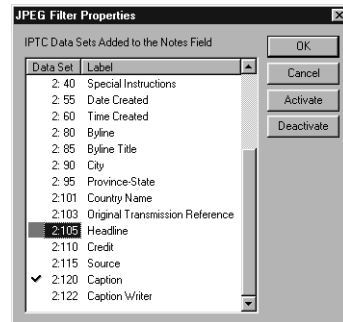
The Mac OS JPEG Filter Setup Window. “Caption” is active.

This window lists all the cataloging options available for JPEG files. Each of the items in the list pertains to one IPTC header field in a JPEG file that contains that information. IPTC file headers are used by news agencies to transport relevant information about an image inside the image itself. (Photoshop, for example, supports these headers

by way of its File Info dialog box.) You can choose to have Cumulus add any, all or none of this information to a newly cataloged record’s Notes field. To activate and deactivate fields:



1. Select the field in the list.
2. Click on the **Activate/Deactivate** button. Active fields are denoted by a mark to their left.



The Windows JPEG Filter Setup Window. “Caption” is active, “Headline” is selected.

3. Click **OK** to close the window and save your changes. Your new settings will be in effect the next time you catalog JPEG assets.

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

Creating a New File Filter

You can create your own filters for files that are not currently supported by Cumulus. These filters,

however, will not have the advanced information collection capabilities of a Canto-developed filter. To be able to access all of a file's embedded information requires knowledge about the file's internal structure. But your "home-grown" filters can still be used to catalog your special assets so you can assign them categories and search for their records.

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

The process of creating a new filter is pretty different on each platform, so we're going to split our instructions into two sections here. We'll start with the Mac OS. Windows users feel free to move ahead to "New Filters for Windows."

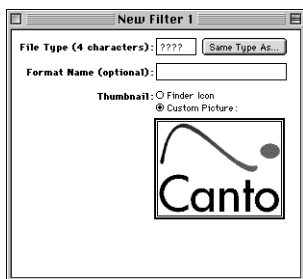
🍏 The Mac OS Filter Generator

Mac OS Cumulus users can use an external program, called the Filter Generator, to create filters. The Filter Generator is located in the Cumulus folder after an **Easy Install**. (See "Installation," p. 14, for installation details.)

To create a new filter:



1. Launch the Filter Generator as you would any other Mac OS application. A new filter window opens by default, as shown here.



2. Enter the file type for your asset file in the **File Type** field. The file type will always be 4 characters in length. If you don't know the exact file

type, don't guess. Instead, 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.)

3. You can optionally (but recommended) enter a name for your file filter in the **Format Name** field. This is important when you have more than one filter for the same file type. Cumulus uses the filters in alphabetical order, based on file type first, then format name. Since you can't change the file type, you must rely on the format name field to determine the order in which the filter is used. (You can also disable other filters if you don't need them. See "Changing File Filter Options," p. 52, for details.)
4. The last option you have is to choose the thumbnail you want displayed for the asset. You can either use the asset's Finder icon or a picture that you specify. If the asset files store thumbnail information in a format that Cumulus supports, the file's thumbnail will be used.

If you want to use a custom picture, you must first copy it to the Mac OS Clipboard. Then click the **Custom Picture** button, which enables the picture field below, 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.

5. Save the new filter by selecting **File ⇨ Save**. A default name is entered. You may change this if you wish, but Cumulus will still read the name you gave the filter in the **Format Name** field. You must save the filter into the File Filters folder in the Cumulus folder in order for the program to

be able to find it. New filters are available after you quit and relaunch Cumulus.

A few words about using the Filter Generator:

- Make sure you don't overwrite any Canto filters when naming and saving your own. If you do, you'll have to reinstall Cumulus to get them back. (See "Installation," p. 14, for details.)
- You can edit your own filters, but Cumulus must not be running when you save the edits.

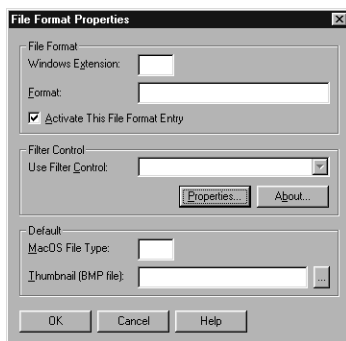
New Filters for Windows

You got a brief glimpse at the Windows File Format Properties Window a few pages back. Now we'll use it to create a new filter.

To access this window to create a new filter:



1. Select **File**⇒**Cataloging Options**. The Cataloging Options window opens.
2. Click the **File Formats** tab.
3. Click **Add**. An empty file format window appears.



The Windows File Format Properties Window.

4. Enter your asset's file name extension in the **Windows Extension** field. Do not enter the period.

5. 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.
6. The **Activate This File Format Entry** option determines whether the filter will be active.
7. Select a **Filter Control** from the drop-down list. If you don't know which filter control can handle your asset type, select **Canto Generic Filter**.
8. Click **Properties** to see if your filter control has any properties to configure. If so, configure them as needed. (See the Support section of the Canto Web site for details on the various filter controls and their options.)
9. You can optionally choose a Mac OS file type in the field provided. When the catalog is opened on a Mac OS computer, this file type is shown in the record's Information (Properties) and Catalog window.
10. If you want to specify a thumbnail image to be used for your assets, either type a path into the **Thumbnail (BMP file)** field or click the button to the right of the field to find one. Images must be in the Windows BMP file format.
11. 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.

Moving On

The remainder of this chapter consists of visual overviews of the various Cumulus preferences windows. You may skip ahead to the Reference section on page 65, 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 Windows Cataloging Options Window

The Windows Cataloging Options window has five tabs 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.

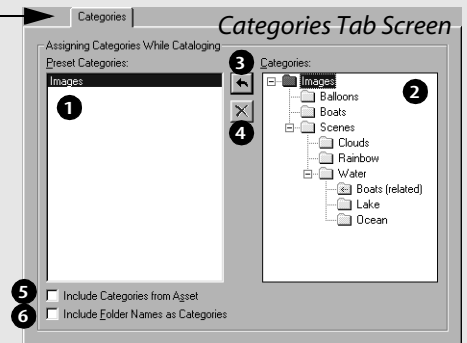
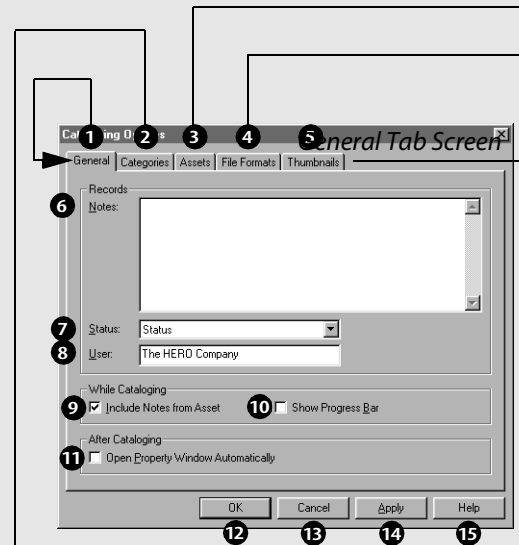
Cataloging Options, as set from this window, are global settings that affect the way records are created for all catalogs. Some settings that you might think of as cataloging settings (such as thumbnail size), can be set individually for each catalog and therefore they are part of the Catalog Properties settings. (See page 60.)

General Tab Items

1. Loads General screen
2. Loads Categories screen
3. Loads Assets screen
4. Loads File Formats screen
5. Loads Thumbnails screen
6. Text entered into this field is added to the Notes fields of all newly cataloged assets, which increases record size (See "Catalog Size and Performance," p. 46)
7. Selects Status term to be applied to all newly cataloged assets (See "Status," p. 40)
8. Assigns user name to all newly cataloged assets (defaults to computer owner's name, as entered in the operating system set up)
9. Copies any notes that are part of asset file into record, which increases record size (See "Catalog Size and Performance," p. 46)
10. Forces Cumulus to count assets before cataloging begins, so that it can display a progress bar (slows performance)
11. Opens newly created records' Properties windows immediately after each asset has been cataloged (not recommended when cataloging large numbers of assets) (See "Catalog Setup / Catalog Properties," p. 44)
12. Saves changes and closes window
13. Cancels changes and closes window
14. Applies changes without closing window
15. Opens online help to appropriate topic

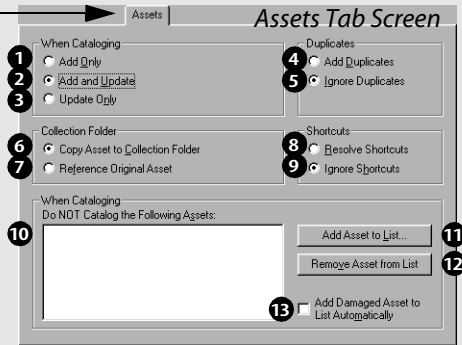
Categories Tab Items

1. Lists categories to be assigned to all newly cataloged records (selected from list on right)
2. Lists all categories in current catalog (use + and - icons to expand and collapse list)
3. Copies selected categories from Categories list on right, to Preset Categories list on left, to be assigned to all newly created records (disabled if no categories are selected)
4. Removes selected categories from Preset Categories list on left, so they are not assigned to all newly created records (disabled if no categories in Preset Categories list are selected)
5. Some asset files may have keywords built in from use in other applications. This option uses those keywords as categories. Clipart libraries often contain keywords in each file.
6. Cumulus builds a category hierarchy that resembles each asset's file path



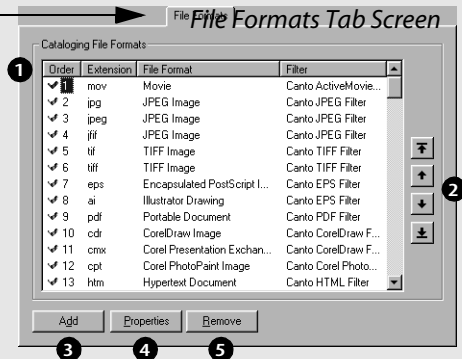
Assets Tab Items

1. Cumulus adds new records when cataloging, 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 folder specified in the Catalog Properties window and makes the newly created record reference the copied asset. Can be over written in Catalog Properties. (See "Catalog Setup / Catalog Properties," p. 44)
7. This is the "off" position for #6. Assets are cataloged normally and not copied to a Collection folder.
8. Cumulus resolves any shortcuts found in the selected of assets being cataloged. The enables Cumulus to catalog the assets the shortcuts point to.
9. Shortcuts 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.



File Formats Tab Items (See "File Format Support," p. 52.)

1. 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.
2. These buttons change the selected filter's position in the list. Filters are used in the order they appear in this list. 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.)
3. Opens a window from which a new filter can be created and added to the list of support file types.
4. Opens Properties window for selected filter.
5. Removes selected filter from list. (Disabled unless a user-specified filter is selected in the filter list. You cannot remove the standard filters, though you can disable them.)



Thumbnails Tab Screen

Thumbnails Tab Items

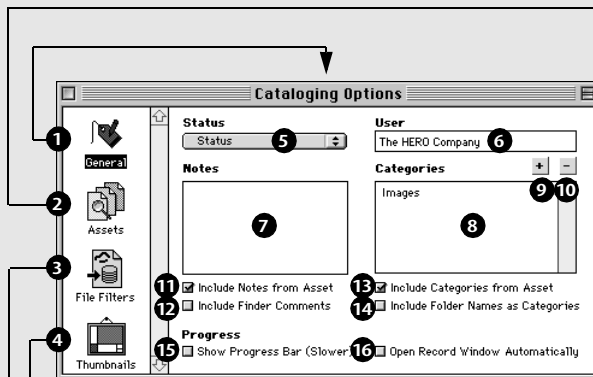
1. Sets thumbnail quality for the different color modes: Line art (NORMAL=2 color / HIGH=4 color), Greyscale (NORMAL=8-bit greyscale, more compression / HIGH=8-bit greyscale, less compression), Color (NORMAL=24-bit color, more compression / HIGH=24-bit color, less compression) NOTE: High-quality thumbnails make records larger.
2. Equalizes the thumbnail images for newly cataloged assets automatically. This can also be done afterwards. (See "Optimize Thumbnail(s)," p. 76)
3. 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.
4. Creates thumbnail images of the entire asset file. These thumbnails are consistent in size, but this option slows the cataloging process.



The Mac OS Cataloging Options Window

The Mac OS Cataloging Options window has four icons 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 therefore they are part of the Catalog Set Up settings. (See page 61.)



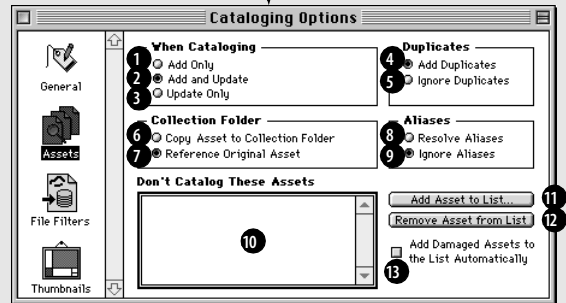
General Items

1. Loads General screen
2. Loads Assets screen
3. Loads File Filters screen
4. Loads Thumbnails screen
5. Selects Status term to be applied to all newly cataloged assets (See "Status," p. 40)
6. Assigns user name to all newly cataloged assets (defaults to computer owner's name, as entered in the operating system set up)

7. Text entered into this field is added to the Notes fields of all newly cataloged assets, which increases record size (See "Catalog Size and Performance," p. 46)
8. Lists categories to be assigned to all newly cataloged records
9. Opens active catalog's Categories window so that you can drag categories into the Categories field to be assigned to all newly created records.
10. Removes selected categories from Categories list, so they are not assigned to all newly created records (disabled if no categories in Categories list are selected)
11. Copies any notes that are part of asset file into record, which increases record size (See "Catalog Size and Performance," p. 46)
12. Copies information stored in the Finder's Get Info box into record, which increases record size (See "Catalog Size and Performance," p. 46)
13. Some asset files may have keywords built in from use in other applications. This options uses those keywords as categories. Clipart libraries often contain keywords in each file.
14. Cumulus builds a category hierarchy that resembles each asset's file path
15. Forces Cumulus to count assets before cataloging begins, so that it can display a progress bar (slows performance)
16. Opens newly created records' Information windows immediately after each asset has been cataloged (not recommended when cataloging large numbers of assets) (See "Catalog Setup / Catalog Properties," p. 44)

Asset Items

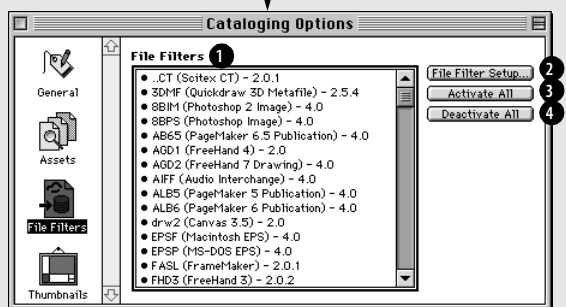
1. When cataloging, Cumulus adds new records when cataloging, but doesn't update existing records whose assets have changed
2. When cataloging, Cumulus adds new records and updates existing records whose assets have changed
3. When cataloging, Cumulus updates existing records only. No new records are 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 folder specified in the Catalog Properties window and makes the newly created record reference the copied asset. Can be over written in Catalog Setup. (See "Catalog Setup / Catalog Properties," p. 44)
7. This is the "off" position for #6. Assets are cataloged normally and not copied to a collection folder.
8. Cumulus resolves any aliases found in the selection of assets being cataloged. The enables Cumulus to catalog the assets the aliases point to.
9. Aliases are not resolved and assets they represent are not cataloged.



10. Assets in this list are ignored if they are found in the 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

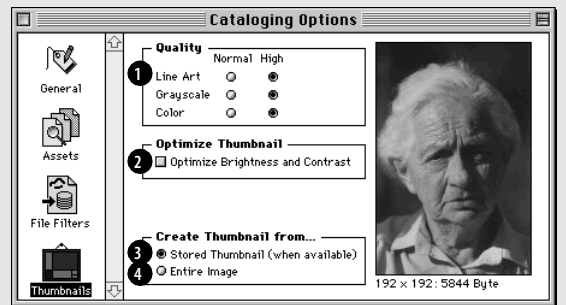
File Filter Items(See "File Format Support," p. 52.)

1. List of installed filters for supported asset file formats. Double-click on a filter in the list to enable and disabled it. (A bullet indicates that it is enabled.) Filters are used and shown in alphabetical order based on file type, then filter name (as set from within the Filter Generator program). This is important if you have multiple filters for the same file type. To change a filter's order in the list, you must rename the filter's name using the Filter Generator program. File filters are inside the File Filters folder in the Cumulus folder.
2. Some filters have options that you can access and change to suit your needs. If this button is enabled, you can click it to access the selected filter's option panel. (Disabled if selected filter has no editable options.)
3. Activates all filters
4. Deactivates all filters



Thumbnails Items

1. 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.
2. Equalizes the thumbnail images for newly cataloged assets automatically. This can also be done afterwards. (See "Optimize Thumbnail(s)," p. 76)
3. Some programs can save images with embedded thumbnails. This options uses those thumbnails, if available, instead of creating new ones. Stored thumbnails may differ in size.
4. Creates thumbnails images of the entire asset file. These thumbnails are consistent in size, but this option slows the cataloging process.



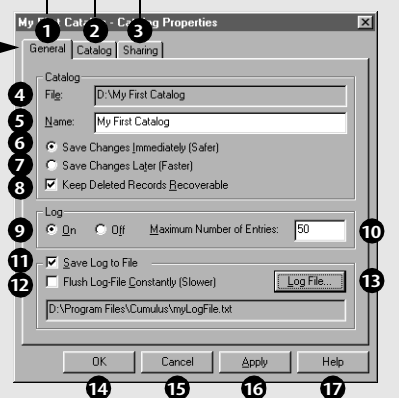
The Windows Catalog Properties Window

The Windows Catalog Properties window has three tabs 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.

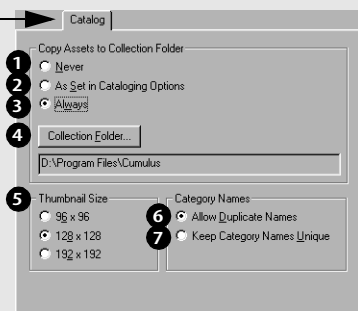
General Tab Items

1. Loads General screen.
2. Loads Catalog screen.
3. Loads Sharing screen.
4. Catalog file name, as seen from the Windows desktop (not editable from here).
5. Catalog name. Defaults to file name, but can be changed.
6. Saves catalog changes as soon as they're made. This slows overall performance, but is much safer.
7. Saves catalog changes later. This improves performance, but in the event of a system crash or power failure, you may find that your catalog has lost some changes you made, or needs to be repaired. (See "Repairing Catalogs," p. 48.)
8. 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. 48.)



Compressing or repairing a catalog removes all deleted records permanently.

9. Enables or disables logging of catalog activity. Logs can be viewed from the Administration view. (See "Administration," p. 72.) Logs are not saved to disk unless #11, below, is selected.
10. Limits the maximum number of entries in the log. Older entries are overwritten by new ones.
11. Saves log to disk file. Cumulus asks you to name the new file when selected and displays the file's path in the field below.
12. Saves entries to the disk file as soon as they occur. (Slows performance.) (Disabled unless log is being saved to disk.)
13. Creates a new log file and displays its path in the field below.
14. Saves changes and closes window.
15. Cancels changes and closes window.
16. Applies changes without closing window.
17. Opens online help to appropriate topic.

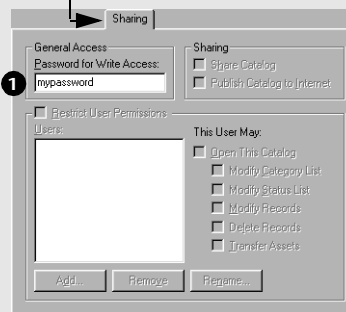


Catalog Tab Items

1. Doesn't copy newly cataloged assets to a Collection folder.
2. Defers to options set in Cataloging Options window to decide if assets should be copied to a Collection folder.
3. Always copies assets to Collection folder, regardless of Cataloging Options window settings.
4. Selects Collection folder

and displays folder's path below.

5. Selects default thumbnail size for all newly cataloged assets. Current records' thumbnails can be adjusted to the new size by doing a record update. (See "Update," p. 75.)
6. Permits more than one category to share the same name.
7. Prevents the creation of new categories that share names with existing categories.



Sharing Tab Items

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. See the Cumulus Network Server documentation for additional details.

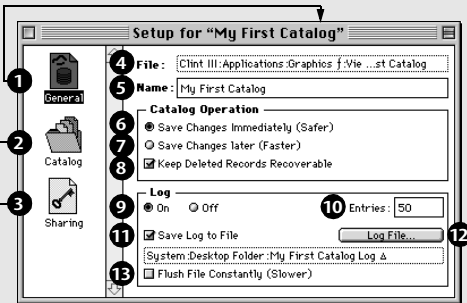
The Mac OS Catalog Setup Window

The Mac OS Catalog Setup window has three icons 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.

General Items

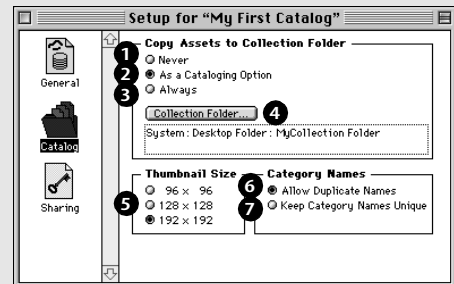
1. Loads General screen.
2. Loads Catalog screen.
3. Loads Sharing screen.



4. Catalog file name, as seen from the Finder.
5. Catalog name. Defaults to file name, but can be changed.
6. Saves catalog changes as soon as they're made. This slows overall performance, but is much safer.
7. Saves catalog changes later. This improves performance, but in the event of a system crash or power failure, you may find that your catalog has lost some changes you made, or needs to be repaired. (See "Repairing Catalogs," p. 48.)
8. 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. 48.)
9. Compressing or repairing a catalog removes all deleted records permanently.
10. Enables or disables logging of catalog activity. Logs can be viewed from the Administration view. (See "Administration," p. 72.) Logs are not saved to disk unless #11, below, is selected.
11. Limits the maximum number of entries in the log. Older entries are overwritten by new ones.
12. Saves log to disk file. Cumulus asks you to name the new file when selected and displays the file's path in the field below.
13. Creates a new log file and displays its path in the field below.

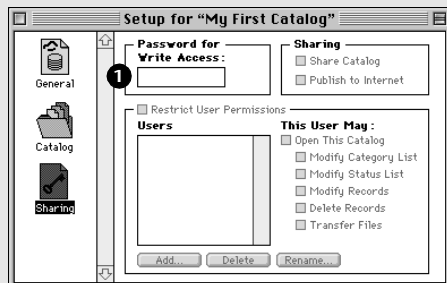
Catalog Items

1. Doesn't copy newly catalog assets to a Collection folder.
2. Defers to options set in Cataloging Options window to decide if assets should be copied to a Collection folder.
3. Always copies assets to Collection folder, regardless of Cataloging Options window settings.
4. Selects Collection folder and displays folder's path below.
5. Selects default thumbnail size for all newly cataloged assets. Current records' thumbnails can be adjusted to the new size by doing a record update. (See "Update," p. 75.)
6. Permits more than one category to share the same name.
7. Prevents the creation of new categories that share names with existing categories.



Sharing Items

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. See the Cumulus Network Server documentation for additional details.



The Windows Application Preferences Window

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

General Tab Items

1. Loads General screen.
2. Loads Display screen.
3. Loads Search screen.
4. Cumulus remembers and reopens the catalogs you had open when you last quit the program.
5. Makes a double-click on a thumbnail open the Record Properties window.
6. Makes a double-click on a thumbnail open the Preview window.
7. Reopens catalogs in the view they were when last closed.
8. Opens all catalogs in Details View mode.
9. Opens all catalogs in Thumbnail View mode.
10. Opens all catalogs in Administration View mode.
11. Allows certain non-critical warning dialog boxes to appear.
12. Prevents non-critical warning dialog boxes from appearing.
13. Saves changes and closes window.
14. Cancels changes and closes window.
15. Applies changes without closing window.

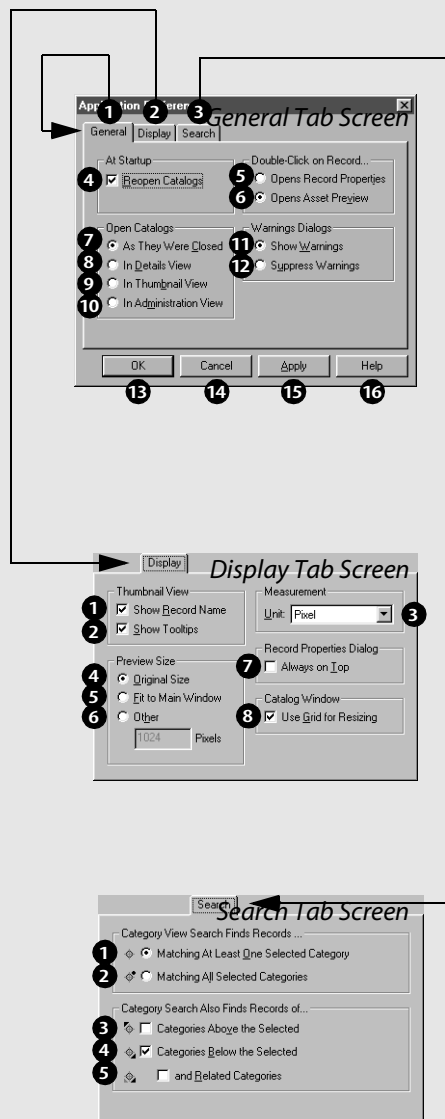
Display Tab Items

1. Displays record name beneath thumbnail.
2. Enables tooltips when mouse pointer is over thumbnails. Tooltips may show the asset's name, file type, color mode and resolution, depending in file type.
3. Selects preferred unit of measure for heights and widths.
4. 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.)
5. Enlarges or reduces preview to fit in the Cumulus program window.
6. Selects a predetermined horizontal measurement for all previews.
7. Forces Record Properties windows to always be on top of catalog and other windows.
8. Snaps catalog window to multiples of the current thumbnail size when resizing.

Search Tab Items

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 catalogs.

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



The Mac OS Application Preferences Window

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

General Items

1. Loads General screen.
2. Loads Display screen.
3. Loads Search screen
4. Cumulus remembers and reopens the catalogs you had open when you last quit the program.
5. When finding for an asset, Cumulus will search entire hard-disk referenced in the record's file path, but not other volumes.
6. When finding an asset, Cumulus will search all mounted volumes, which can dramatically increase search times. (You can abort a search by pressing Command-Period.)
7. Reopens catalogs in the view they were when last closed.
8. Opens all catalogs in Text View mode.
9. Opens all catalogs in Thumbnail View mode.
10. Opens all catalogs in Administration View mode.
11. Makes a double-click on a thumbnail open the Record Information window.
12. Makes a double-click on a thumbnail open the Preview window.
13. Allows certain non-critical warning dialog boxes to appear.
14. Prevents non-critical warning dialog boxes from appearing.
15. Cancels changes and closes window.

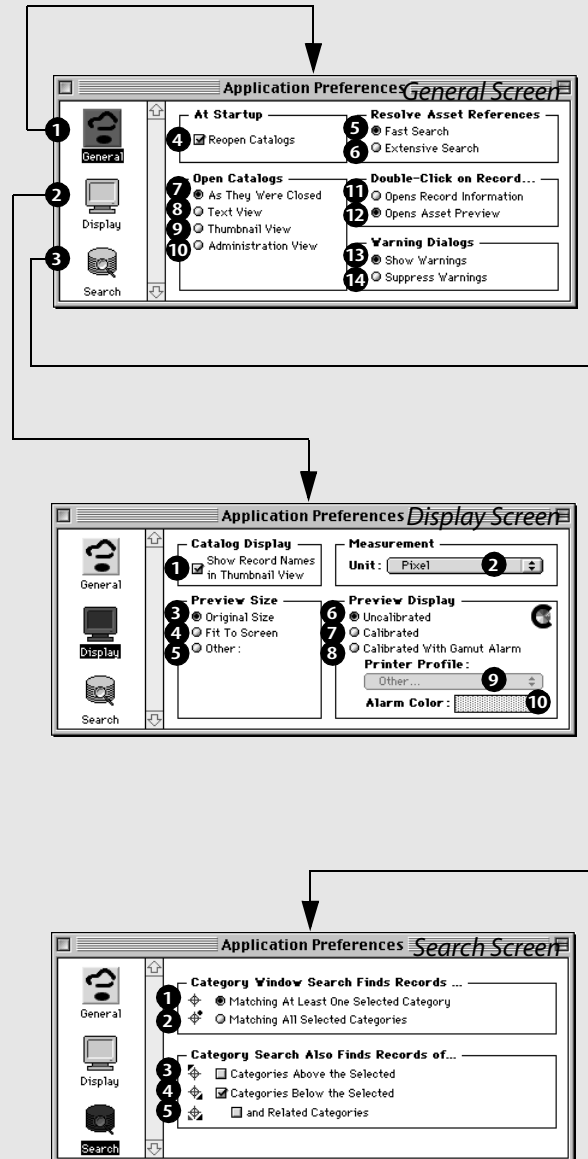
Display Items

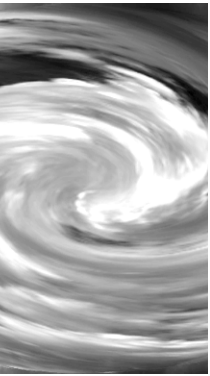
1. Displays record name beneath thumbnail.
2. Selects preferred unit of measure for heights and widths.
3. Shows asset previews at the actual size of the asset. (For images higher than screen resolution, this could result in a very large preview window.)
4. Enlarges or reduces preview to fit the screen.
5. Selects a predetermined horizontal measurement for all previews.
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 Items

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—shown in the upper right corner of the Categories windows—serves as a visual indicator as to what search options are selected.

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



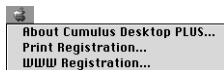


This section serves as a road map of the entire Cumulus product from the perspective of the user interface. Explanations are given for each of the program's menus and toolbars. The icons  and  identify features unique to either the Mac OS or Windows, respectively.

5

Reference

🍏 The Apple Menu



About Cumulus Desktop (Cumulus Desktop PLUS)

Displays the Cumulus “About” box, which shows the registered user’s identification information.

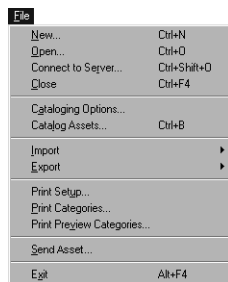
Print Registration (for faxing)

Presents the standard Print dialog box, from which you can print the product registration form. Filling out and faxing this form to Canto is one way of registering Cumulus.

WWW Registration

Presents a dialog box from which you can choose a Web browser to use to connect to the Cumulus registration site on the World Wide Web. You need to have Internet access for this to work. Like faxing (described above), this is another registration alternative to mailing in the registration card.

The File Menu

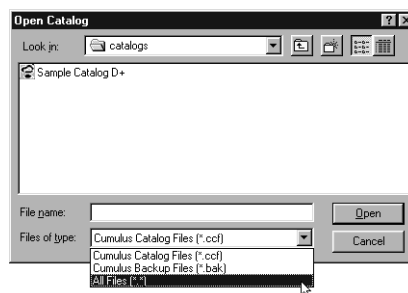


New

Creates a new catalog. A dialog box is displayed for you to name the new catalog. (See “Making a Catalog,” p. 18.)

Open

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 pop-up menu shown below to see catalogs without the proper file name extension (.ccf).



Connect to Server

Cumulus Desktop and Cumulus Desktop PLUS can be used as clients to a Cumulus Network Server. This menu option opens a dialog box from which you can connect to a catalog on a remote Cumulus Network Server. Consult the client software guide that comes with the Cumulus Network Server package for details.

📖 Users of Cumulus Desktop PLUS for Windows can also use this dialog box to log into the Cumulus Internet Media Server to set up catalogs for Internet publishing. (See the Cumulus Desktop PLUS Additions guide for details.)

Close

Closes the active catalog. Saves any changes that are not yet saved.

🍏 Save

Saves changes made to a Mac OS catalog record’s information. (Windows uses the **OK** button in the Record Properties dialog box to save changes.)

Cataloging Options

Opens the Cataloging Options dialog box from which you determine the options that Cumulus uses when cataloging assets. These options are explained in detail starting on page 44.

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. (See "Adding Many Assets at Once," p. 22.)

Before you catalog any assets, make sure the cataloging options are set the way you want them. These options are explained in detail starting on page 44.

Import

The Windows **Import** menu has three menu items. 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:

- **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.
- **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 **Cataloging Options** setup. (See "Cataloging Options," p. 44.)
- **Query** (.cq) – The imported query replaces any query currently set in the Findbar. Make sure you export any queries that you do not want to lose before importing a new one. You can also save the current query to the Querybar to avoid deleting it when doing an import. (See "The Windows Querybar," p. 36.)

See "Importing and Exporting," p. 50, for a complete explanation of importing and exporting, and

some important information that you should know before you try it.

Import (Records, Categories, Query)

On the Mac OS, the name of this menu item changes to reflect the active window. If the Find window is active, the menu reads **Import Query**; if the catalog window is active, the menu reads **Import Records**; and if the category window is active, the menu reads **Import Categories**.

Each option opens a dialog box from which you can import an appropriate file. The program behavior for each differs:

- **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.
- **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 **Cataloging Options** setup. (See "Cataloging Options," p. 44.)
- **Query** (.cq) – The imported query replaces any query currently set in the Find window. Make sure you export any queries that you do not want to lose before importing a new one.

See "Importing and Exporting," p. 50, for a complete explanation of importing and exporting, and some important information that you should know before you try it.

Export

The Windows **Export** menu open a submenu with five menu options for different file types to export. 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 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 in the active catalog to a Category Exchange File (.cce).
- **Selected Records** – Exports the currently selected (highlighted) records in the active catalog to a Cumulus Record Exchange File (.cre). This menu option is disabled if no records are selected.
- **All Records** – Exports all records in the active catalog to a Cumulus Record Exchange File (.cre).
- **Query** – Exports the query shown in the Findbar to a Cumulus Query Exchange File (.cqe). This menu option is disabled if there is no query in the Findbar.

See “Importing and Exporting,” p. 50, for a complete explanation of importing and exporting, and some important information that you should know before you try it.

Export (Records, Categories, Query)

On the Mac OS, the name of this menu item changes to reflect the active window. Each option opens a dialog box from which you can export an appropriate file.

- If the Find window is active, the menu reads **Export Query**. Use this option to export the query shown in the Find window to a Cumulus Query Exchange File (.cqe).
- If the Catalog window is active with no records selected, the menu is disabled.
- If the Catalog window is active and only one record is selected, the menu reads **Export Record**. Use this option to export the selected record to a Cumulus Record Exchange File (.cre).
- If the Catalog window is active and more than one record is selected, the menu reads **Export**

Records. Use this option to export the selected records to a Cumulus Record Exchange File (.cre). You can export all records in a catalog by selecting **Find**⇒**Find All** and then **Edit**⇒**Select All** before you do the export.

- If the Category window is active with no categories selected, the menu reads **Export All Categories**. Use this option to export all of the categories in the active catalog to a Cumulus Category Exchange File (.cre).
- If the Category window is active with one or more categories selected, the menu reads **Export Selected Categories**. Use this option to export the selected categories of the active catalog to a Cumulus Category Exchange File (.cre).

See “Importing and Exporting,” p. 50, for a complete explanation of importing and exporting, and some important information that you should know before you try it.

Page Setup / 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

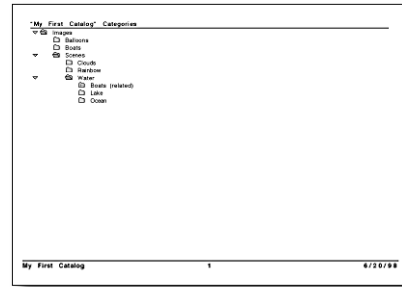
Though the name of the Mac OS **Print** menu item doesn’t change, its function is dependent upon the active window and the current selection:

- **Catalog window active, no records selected** – Prints all records using the current catalog display style. (See “Catalog Display,” p. 71.)
- **Catalog window active, one or more records selected** – Prints selected records using the current catalog display style. (See “Catalog Display,” p. 71.)
- **Category window active, no categories selected** – Prints all categories as they appear in

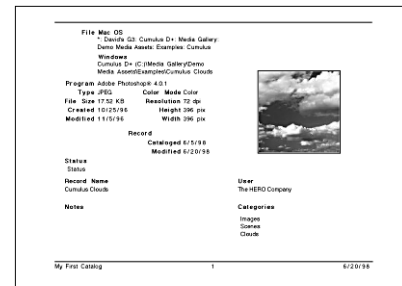
the Category window. Make sure to expand the category list if you want to see all the sub-categories in the print out.

- **Category window active, one or more categories selected** – 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.
- **Record Information window active** – Prints a detailed report of the record’s information as seen in the record’s Information window. (See “Information / Properties,” p. 76.)
- **Find window active** – There are no print options for the Find window.

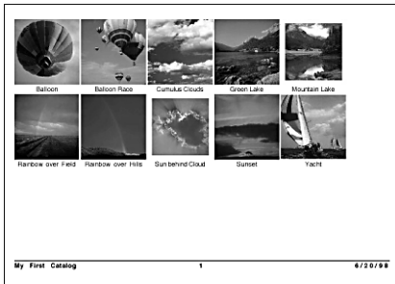
If your intention is to print the actual asset, instead of its record, see “Print Asset(s) With,” p. 77 for details. Some print examples (Windows output is similar):



Print-out of Expanded List of All Categories



Print-out of Record Information



Print-out of all Records • 96 x 96 Thumbnail Display

Record Name	Type	Color Mode	Resolution	Modified
Balloon	JPEG	Color	72 dpi	6/8/98
Balloon Ride	JPEG	Color	72 dpi	6/8/98
Cumulus Clouds	JPEG	Color	72 dpi	6/8/98
Green Lake	JPEG	Color	72 dpi	6/12/98
Mountain Lake	JPEG	Color	72 dpi	6/8/98
Rainbow over Field	JPEG	Color	72 dpi	6/8/98
Rainbow over Hills	JPEG	Color	72 dpi	6/8/98
Sun behind Cloud	JPEG	Color	72 dpi	6/8/98
Sunset	EPF	Color	72 dpi	6/8/98
Yacht	JPEG	Color	72 dpi	6/15/98

Print-out of all Records • Text Display

Print (Records, Categories)

The name of the Windows Print menu changes depending on which window pane is currently active. When the Record pane is active, the menu reads **Print Records**. When the Category pane is active, the menu reads **Print Categories**. You make a pane active by clicking anywhere within its bounds.

When the menu item reads **Print Records**, there are several options available:

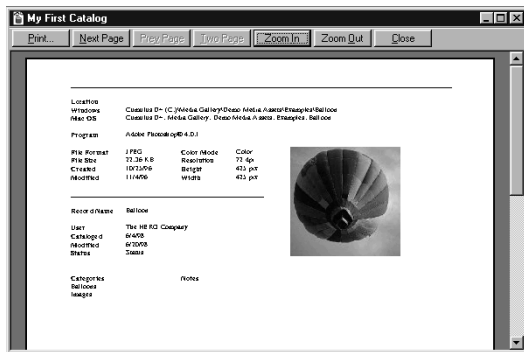
- **As Small Thumbnails** – Prints selected records as 96 pixel x 96 pixel thumbnails.
- **As Medium Thumbnails** – Prints selected records as 128 pixel x 128 pixel thumbnails.
- **As Large Thumbnails** – Prints selected records as 192 pixel x 192 pixel thumbnails.
- **Details** – Prints selected records as a text list.

- **Properties** – Prints a detailed report of the selected records' properties as seen in the record's Properties window. (See "Information / Properties," p. 76.)

Use the Windows **Print Preview** menu option (see next heading) to see examples of various output formats.

Print Preview (Records, Categories)

This menu 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), but there is no option for printing selections only; all records or categories are printed when printing from **Print Preview**.



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 but-

ton 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 on the current page view. (Disabled when you have reached the minimum zoom level.)
- **Close** – Closes the Print Preview window without printing the job.

Send Asset

Use this option to attach an asset to an outgoing email message. Your default email application is started.

Quit / Exit

Quits Cumulus.

The Edit Menu

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Zoom In	⌘+
Zoom Out	⌘-
Catalog Display	▶
Sort Catalog By	▶
Preferences...	

Edit	
Undo	⌘+Z
Cut	⌘+X
Copy	⌘+C
Paste	⌘+V
Delete	Del
Select All	⌘+A
Deselect All	

Undo

Reverts Cumulus to the state it was in before the previous command or action.

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.

Clear / Delete

Deletes the current item or text selection *without* placing it on the Clipboard.

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.

Zoom In

Doubles the size of a thumbnail preview image. Preview images can be increased to 800% their original size.

Zoom Out

Halves the size of a thumbnail preview image. Preview images can be reduced to 12.5% of their original size.

Catalog Display

Opens a submenu. It is the menu equivalent to the pop-up menu in the Side Bar. Use it to select the display mode of the catalog records:

- **Text Display** – Displays records in a sorted text list.

- **Thumbnail 96 x 96** – Displays records using small thumbnail images.
- **Thumbnail 128 x 128** – Displays records using medium-sized thumbnail images.
- **Thumbnail 192 x 192** – Displays records using large thumbnail images.
- **Administration** – (Available only from this menu.) Displays the catalog Administration View.

See “Catalog Display Options,” p. 27, for details on the different catalog views.

Sort Catalog By

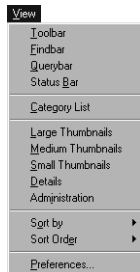
Opens a submenu. It is the menu equivalent to the five sort buttons in the Side Bar and at the top of each field in the Text Display view:

- **Record Name** – Sorts the records by their names.
- **File Type** – Sorts the records by their assets’ file types.
- **Color Mode** – Sorts the records by their assets’ color modes.
- **Resolution** – Sorts the records by their assets’ resolutions.
- **Modified** – Sorts the records by their modification dates. (Not the modifications dates of the assets.)

Preferences

Opens the Mac OS Preferences window, from which you can set global application behaviors. (See “Preferences,” p. 44, for an explanation of each preference option.)

The View Menu



Toolbar



Toggles the Toolbar on and off. (See “The Cumulus Windows Interface,” p. 21, for an explanation of each Toolbar button.)

Findbar



Toggles the Findbar on and off. (See “The Cumulus Windows Interface,” p. 21, for an explanation of each Findbar button and field.)

Querybar



Toggles the Querybar on and off. (See “The Cumulus Windows Interface,” p. 21 and “The Windows Querybar,” p. 36, for an explanation of each Querybar button and field.)

Status Bar



Toggles the Status Bar on and off. (See “The Cumulus Windows Interface,” p. 21, for an explanation of each Status Bar item.)

Category List

Toggles the Category Pane on and off.

Large Thumbnails

Displays records as 192 x 192 (pixel) thumbnails. (See “Catalog Display Options,” p. 27, for details on the different catalog views.)

Medium Thumbnails

Displays records as 128 x 128 (pixel) thumbnails. (See “Catalog Display Options,” p. 27, for details on the different catalog views.)

Small Thumbnails

Displays records as 96 x 96 (pixel) thumbnails. (See “Catalog Display Options,” p. 27, for details on the different catalog views.)

Details

Displays records in a sorted text list. (See “Catalog Display Options,” p. 27, for details on the different catalog views.)

Administration

Displays the catalog Administration View. (See “Catalog Display Options,” p. 27, for details on the different catalog views.)

Sort by

This is the menu equivalent to the five sort buttons at the top of each column in the Details list view:

- **Record Name** – Sorts the records by their names.
- **File Type** – Sorts the records by their assets’ file types.
- **Color Mode** – Sorts the records by their assets’ color modes.

- **Resolution** – Sorts the records by their assets' resolutions.
- **Modified** – Sorts the records by their modification dates. (Not the modifications dates of the assets.)

Sort Order

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 an Z to A (9-0) direction.

Preferences

Opens the Windows Application Preferences window, from which you can set global application behaviors. (See “Preferences,” p. 44, for an explanation of each preference option.)

The Administration Menu



The Administration menu offers options that are used in the maintenance of a catalog. It is not directly related to the Administration View; don't confuse the two. (See “Catalog Display Options,” p. 27, for information on the Administration View.)

Backup Copy

Opens a dialog from which you can save a backup copy of the active catalog. (See “Backing Up Catalogs,” p. 47.)

Compress

Opens a dialog from which you can compress the active catalog. (See “Compressing Catalogs,” p. 46.)

Repair

Opens a dialog from which you can repair (rebuild) the active catalog. (See “Repairing Catalogs,” p. 48.)




Recover Deleted Records

Opens a dialog from which you can attempt to recover deleted records. (See “Recovering Deleted Records,” p. 48.)

Clear Log

Clears the activity log for the active catalog. (See “Catalog Setup / Catalog Properties,” p. 44, for information on the log file.)

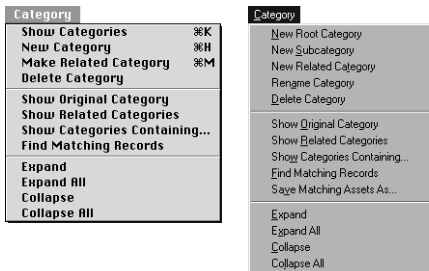
Save Log / **Save Log As**

Opens a dialog from which you can name and save the active catalog's log file to disk. The file is saved in a tab-delimited text file that resembles the way it looks on-screen, as seen from the Administration View. (Log file options are explained in the Catalog Setup/Properties overviews on  page 60 and  page 61.) ( This menu option is disabled unless you are in Administration View.)

Catalog Setup / **Catalog Properties**

Opens a dialog box from which you can set options for the active catalog. (See “Catalog Setup / Catalog Properties,” p. 73.)

The Category Menu



The currently selected window / pane determines which menu options are available.

Show Categories

Displays the Category window for the active catalog. NOTE: It's important to remember that each open catalog has its own Category window. Don't confuse the Category window of one catalog with the Category window of another. If you regularly work with multiple catalogs open at a time, it's a good idea to arrange the Category and Find windows of each so that you can easily tell them apart. Cumulus remembers the last positions of the windows each time it starts up.

Also keep in mind that even though a catalog's Category and Find windows close when that catalog is closed, they do not automatically come to the front when their catalog is activated.

New Root Category

Creates a new root category for the active catalog. The category is named "Category" by default.

New Category

Creates a new root category for the active catalog. The category is named "Category" by default. (Disabled unless a Category window is active. If you have multiple catalogs open, make sure the proper Category window is active before you create the new category. See note above.)

New Subcategory

Creates a category under the currently selected category. (Disabled unless a single category is selected.)

Make Related Category (Categories)

New Related Category (Categories)

Makes a related category for each of the currently selected categories. (Disabled unless one or more categories are selected.) (See "Related Categories," p. 32.)

Rename Category

Highlights the name of the selected category. You can type or paste a new name. (This is the same action as clicking inside the name directly.) Category names can be up to 255 characters long. (Disabled if none or more than one category is selected.)

Delete Category (Categories)

Deletes the selected category or categories. Confirms the deletion because this is an undoable action. (Disabled unless one or more categories are selected.)

Show Original Category

Finds and highlights the original category of a selected related category. Disabled unless a related category is selected. / Disabled unless a category is selected. (See "Related Categories," p. 32.)

Show Related Categories

Finds and highlights the selected category's related category. (Disabled unless a category is selected.) (See "Related Categories," p. 32.)

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.) (See “Searching By Category,” p. 32.)



Save Matching Assets As

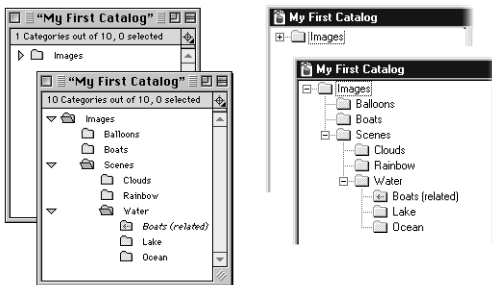
Opens a dialog box from which you can choose a destination. It then copies the assets of records that are associated with the selected categories to the location you selected. The assets are saved in folders named for the categories selected.

( Mac OS users can do the same by simply dragging and dropping category icons onto either a folder or disk icon in the Mac OS Finder. The associated assets are copied to the dropped location.)

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 master category’s folder icon. (Disabled if no master categories are selected.)



Mac OS and Windows collapsed and expanded categories.


Expand All

Expands all master categories to reveal subcategories. (Disabled if all master categories are already expanded.)

Collapse

Collapses the selected master categories to hide subcategories. This works the same as clicking on the:

 down-pointing triangle icon.

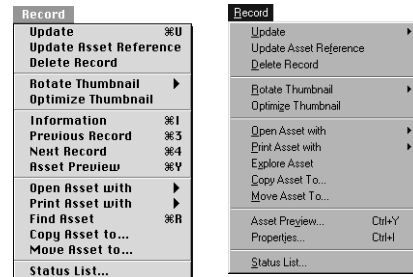
 minus sign icon to the left of the master category’s folder icon.

(Disabled if no expanded master categories are selected.)

Collapse All

Collapses all master categories to hide subcategories. (Disabled if all master categories are already collapsed.)

The Record Menu



The currently selected  window /  pane determines which menu options are available.

Update

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 the asset has changed** – This is the first of the two submenu options in Windows. This is the default behavior for the Mac OS menu option. This updates the record only if the asset has been modified since it was cataloged.
- **Always** – This is the second submenu option for Windows. Mac OS users can access this by holding down the **Option** key when selecting the menu. (Changes menu option to read **Force Update**.) This forces an update to 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 "Catalog Setup / Catalog Properties," p. 44.)

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.

Delete Record(s)

Deletes the selected records after confirmation of the action. The confirmation dialog offers a checkbox option

to delete the 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 are selected.)

Rotate Thumbnail(s)

Rotates the selected records' thumbnail images in one of three ways:

- 90° clockwise
- 90° counter-clockwise
- 180° (flips vertically)

(Disabled if no records are selected.)

Optimize Thumbnail(s)

Equalizes the appearance of the selected records' thumbnails. This is useful for thumbnails that are too dark, too light, or lacking contrast. The action is undoable, but you can force-update the record to get back the original thumbnail. (Disabled if no records are selected.) (See "Update," p. 75, for information on updating a record, including its thumbnail.)

Information / Properties

Opens the Information / Properties window for the selected records. On the Mac OS, multiple windows are opened when more than one records is selected. (Disabled when no record is selected.) (See "Importing and Exporting," p. 50, for details on how the Information/Properties windows work.)

Previous Record

Loads the previous record in the catalog into the active Information window. This is the menu equivalent to using the button in the Information window. (Disabled unless an record's Information window is active.)

Next Record

Loads the next record in the catalog into the active Information window. This is the menu equivalent to using the button in the Information window.

(Disabled unless an record's Information window is active.)

Asset 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. 71 and "Zoom Out," p. 71.) You can also copy all or part of an image preview to the Clipboard. To copy the entire preview image:



1. Select **Edit**⇒**Select All**.
2. 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:

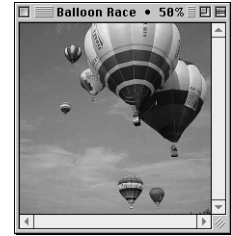


1. Click and hold the mouse down in the upper left corner of the region you want to copy.
2. Drag the mouse to the lower right of the region. A box is drawn around the selected area.
3. Select **Edit**⇒**Copy**.

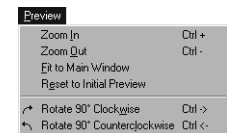
The selected portion of the preview image is on the Clipboard and may be pasted into other applications.



Windows audio clip preview and Mac OS image preview zoomed out to 50% of its original size.



When a preview is opened in Windows, a new menu called **Preview** appears in the menu bar. From this menu you can zoom in or



out on image previews, fit the preview image to the main Cumulus window, reset the preview image to its original condition, and rotate the image in either direction. A row of six buttons is appended to right side of the Toolbar offering the same functionality as the **Preview** menu. These options are enabled only for image previews.

(The **Asset Preview** menu option is disabled if no records are selected.)

Open Asset(s) 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 Asset(s) 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.)

🍏 Find Asset(s) / 📁 Explore Asset(s)

Locates the selected records' assets and displays them in 📁 Windows Explorer / 🍏 the Mac OS Finder. (Disabled if no records are selected.)

Copy Asset(s) 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.)

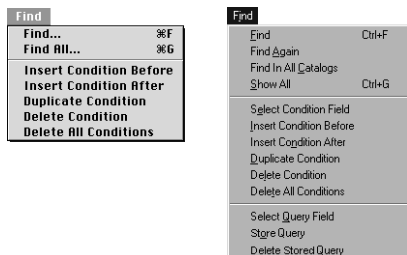
Move Asset(s) To

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.)

Status List

Opens the Status List window, which displays all of the current record status terms for the active catalog. These terms are user-defined and are explained on page 40.

The Find Menu



Find

- 🍏 Opens or activates the Find window.
- 📁 Performs the query active in the Findbar.

Select **View**⇒**Findbar** if the Findbar isn't visible. This is the menu equivalent to clicking the 🏠 button in the Findbar.)

📁 Find Again

Using the query in the Findbar, Cumulus searches through the selection of records found by the previous search operation, not the entire catalog. The previous search may have been conducted using the Findbar or by double-clicking on a selection of categories. This is the menu equivalent to clicking the 🏠 button in the Findbar.

📁 Find In All Catalogs

Using the query in the Findbar, Cumulus searches through all open catalogs.

🍏 Find All / 📁 Show All

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.

📁 Select Condition Field




Selects the Criteria field of the current search condition. For example, in the image below there are two search conditions. The set of three icons to the left of the fields indicates that the bottom condition is current. In this case, **Select Condition Field** would select the field that contains "Record Name." You make a condition current by clicking inside any of its fields.



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 📁 Findbar / 🍏 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  Findbar /  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  button in the Findbar /   icon in the Find window.


Delete All Conditions

Deletes all search conditions in the  Findbar /  Find window. There is no undo for this action.


Select Query Field

Places the cursor inside the Querybar field.

Store Query

Stores the current search query, as shown in the Findbar, in the Querybar. You cannot overwrite a query stored in the Querybar. If you have updated a stored query and wish to replace the older version, delete the older version, then store the updated query. (See “Delete Stored Query,” below, for details.) This is the menu equivalent to clicking the  button in the Querybar. (Disabled unless a name for the new query has been typed into the Querybar field.)


Delete Stored Query

Deletes the query shown in the Querybar field. This does not affect the contents of the Findbar fields. If you mistakenly delete a query, you can immediately re-save it, since it will be loaded into the Findbar. Other than this, there is no undo for deleting queries. This is the menu equivalent to clicking the  button in the Querybar. (Disabled unless a query has been loaded from the Querybar.)

The Windows Menu



The contents of the **Windows** menu changes 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.

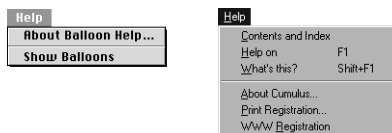
 The Windows version of the menu has some additional items:

- **New Window** – Opens a new window with the same contents as the active window.
- **Cascade** – Overlaps multiple opened 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.
- **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 mouse the mouse pointer over it, then clicking and dragging.

The Scripts Menu

Scripts are available only with Cumulus Desktop PLUS. See the Cumulus Desktop PLUS Additions guide for **Scripts** menu details.

The Help Menu



Apple About Balloon Help

Mac OS system menu introducing Balloon Help, Apple's online help system. Cumulus does not include Balloon help. The menu appears in adherence with Apple's application developer guidelines.

Window Contents and Index

Opens the table of contents and searchable index window for Cumulus' online help system.

Apple Show (Hide) Balloons

Turns on and off the Mac OS Balloon help system. Cumulus does not include Balloon help. The menu appears in adherence with Apple's application developer guidelines.

Window 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.

Window 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 on menus.

Window About Cumulus

Displays a dialog box that shows your user registration information and 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. (Requires an Internet connection.) (See the Microsoft Windows documentation for information on setting your default Web browser.)

Window Print Registration (for faxing)

Presents the standard Print dialog box, from which you can print the product registration form. Filling out and faxing this form to Canto is one way of registering Cumulus.

Window WWW Registration

Launches your default Web browser and initiates a connection to the Cumulus registration site on the World Wide Web. You need to have Internet access for this to work. Like faxing (described above), this is another registration alternative to mailing in the registration card. (See the Microsoft Windows documentation for information on setting your default Web browser.)

This appendix outlines the alternate mouse button actions for Windows and provides references to their explanations elsewhere in this guide.

6

Appendix

Windows Alternate Mouse Button Actions

The Windows alternate mouse button is used extensively throughout Cumulus. (We'll refer to clicking on the alternate mouse button as "right-clicking.") Below is text that describes the actions available with the alternate mouse button from different areas in the program. All right-mouse menu items are shortcuts to menu items found elsewhere in the program.

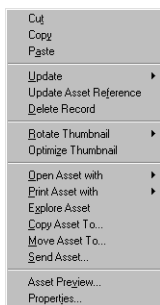
Catalog Pane

If you right-click in the background area of the Catalog 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:

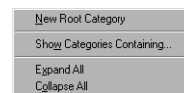
- **Cut** – Deletes the selected record and places it on the Windows Clipboard for pasting elsewhere.
- **Copy** – Copies to selected record to the Windows Clipboard for pasting elsewhere.
- **Paste** – Pastes the record from the Windows Clipboard into the catalog. (Dependent upon Cataloging options. See paragraph above.)
- **Update (record)** – Options for updating selected record. (See "Update," p. 75.)
- **Update Asset Reference** – Updates selected record's asset reference. (See "Update Asset Reference(s)," p. 76.)



- **Delete Record** – Deletes selected record. (See "Delete Record(s)," p. 76.)
- **Rotate Thumbnail** – Options for rotating selected record's thumbnail image. (See "Rotate Thumbnail(s)," p. 76.)
- **Optimize Thumbnail** – Optimizes selected record's thumbnail image. (See "Optimize Thumbnail(s)," p. 76.)
- **Open Asset With** – Opens selected record's asset with a specified application. (See "Open Asset(s) With," p. 77.)
- **Print Asset With** – Prints selected record's asset with a specified application. (See "Print Asset(s) With," p. 77.)
- **Explore Asset** – Finds selected record's asset with Windows Explorer. (See "Find Asset(s) / Explore Asset(s)," p. 78.)
- **Copy Asset To** – Copies selected record's asset to specified location. (See "Copy Asset(s) To," p. 78.)
- **Move Asset To** – Copies selected record's asset to specified location and deletes original copy. (See "Move Asset(s) To," p. 78.)
- **Send Asset** – Attaches selected record's asset to an outgoing email message in your default email application. (See "Send Asset," p. 70.)
- **Asset Preview** – Opens a preview window for the selected record. (See "Asset Preview," p. 77.)
- **Properties** – Opens selected record's Properties window. (See "Information / Properties," p. 76.)

Categories Pane

Right-clicking on the background of the Categories pane presents a menu with four options:



- **New Root Category** – Creates a new root-level category. (See "New Root Category," p. 74.)
- **Show Categories Containing** – Presents a dialog box into which you can enter text for Cumu-

lus to search for in category names. (See “Show Categories Containing,” p. 74.)

- **Expand All** – Expands all categories to reveal any subcategories within. (See “Expand All,” p. 75.)
- **Collapse All** – Collapses all categories to hide any subcategories within. (See “Collapse All,” p. 75.)

Category Icons

If a right-click in the Category pane is directly on top a category icon, the menu options increase:



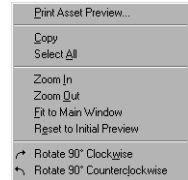
- **New Subcategory** – Creates a new subcategory under the selected category. (See “New Subcategory,” p. 74.)
- **New Related Category** – Creates a new related category for the selected category. (See “Make Related Category (Categories) New Related Category (Categories),” p. 74.)
- **Rename Category** – Highlights the selected category’s name so that you can enter a new one. (See “Rename Category,” p. 74.)
- **Delete Category** – Deletes the selected category. (See “Delete Category (Categories),” p. 74.)
- **Show Original Category** – Highlights the original category if the selected category is a related category. (See “Show Original Category,” p. 74.)
- **Show Related Categories** – Highlights the selected category’s related category if one exists. (See “Show Related Categories,” p. 74.)
- **Find Matching Records**– Finds and displays records belonging to the selected category. (See “Typing “oa” would find categories called

“Boats” and “Oasis.” Find Matching Records,” p. 75.)

- **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. 75.)
- **Expand** – Expands selected category to reveal its subcategories. (Disabled if no subcategories exist.) (See “Expand,” p. 75.)
- **Collapse** – Collapses selected category to hide its subcategories. (Disabled if no subcategories exist or the category is already collapsed.) (See “Collapse,” p. 75.)

Asset Preview Windows

From inside an asset preview window you can use the alternate mouse button as a short cut to the **Preview** menu option, with a few additional options.



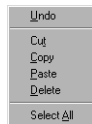
- **Print Asset Preview** – Opens the Print dialog box from which you can print the preview image (not the actual asset) to the currently selected printer.
- **Copy** – Copies the selected portion of the preview image to the Windows Clipboard for pasting elsewhere. (Click and drag in the preview image 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 Main Window**– Resizes the preview image to fit inside the main Cumulus window.
- **Reset to Initial Preview** – Resets the preview image to its original size and orientation.

- **Rotate 90° Clockwise**– Rotates the preview image 90° to the right.
- **Rotate 90° Counterclockwise** – Rotates the preview image 90° to the left.

(These menu options are also briefly described on page 77.)

Text Entry Areas

You can right-click inside any of the text entry areas as a shortcut to the standard text edit menu options.

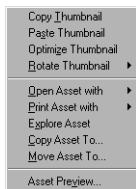


Example locations where this menu can be used are:

- Findbar Value field
- Querybar field
- Record Name field inside the Properties window
- User Name field inside the Properties window
- Notes field inside the Properties window
- File path field inside the Properties window
- Program location field inside the Properties window
- A highlighted categories name (must be selected for editing)
- Status terms name update field

Thumbnail Previews in the Properties Window

From inside the Properties window you can right-click on the thumbnail preview see the following options:



- **Copy Thumbnail** – Copies the thumbnail image to the Windows Clipboard.
- **Paste Thumbnail** – Replaces the record's thumbnail image with the one on the Windows Clipboard.
- **Optimize Thumbnail** – Optimizes selected record's thumbnail image. (See "Optimize Thumbnail(s)," p. 76.)
- **Rotate Thumbnail** – Options for rotating selected record's thumbnail image. (See "Rotate Thumbnail(s)," p. 76.)
- **Open Asset With** – Opens selected record's asset with a specified application. (See "Open Asset(s) With," p. 77.)
- **Print Asset With** – Prints selected record's asset with a specified application. (See "Print Asset(s) With," p. 77.)
- **Explore Asset** – Finds selected record's asset with Windows Explorer. (See "Find Asset(s) / Explore Asset(s)," p. 78.)
- **Copy Asset To** – Copies selected record's asset to specified location. (See "Copy Asset(s) To," p. 78.)
- **Move Asset To** – Copies selected record's asset to specified location and deletes original copy. (See "Move Asset(s) To," p. 78.)
- **Asset Preview** – Opens a preview window for the selected record. (See "Asset Preview," p. 77.)



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