

QXP Companion

Quick User Guide



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Cumulus QXP Companion

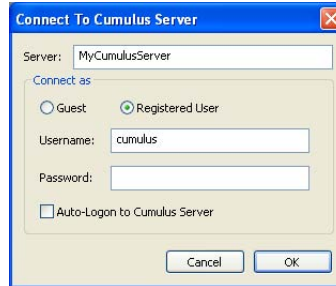
When working in QuarkXPress 7 or 8 a single menu connects you to the cataloged assets available to you based on your permissions. You can quickly find the files they need either by browsing the catalog or using Cumulus powerful search functions. Placing files into the layout is as easy as drag and drop. Any file format supported by QuarkXPress 7 or 8 can be used, including text, composition zones in addition to images. Once the layout is complete, you return to the Cumulus menu to catalog it. Any assets created for the layout are automatically cataloged, helping ensure your catalogs accurately reflect your projects, and that no file gets lost in the hectic pace of production.

This guide serves as a road map to the Cumulus XTension® menu from the perspective of the user interface. Explanations are given for each of the program's menu options.

LAUNCHING CUMULUS FROM WITHIN QXP

The first step to make use of the Cumulus advantages is to connect to Cumulus:

- 1 Select **Cumulus ▶ Connect**. The Connect dialog opens.



- 2 Specify the Cumulus Server and enter your account information. You can bypass this step in the future by activating the Auto-Logon check box, which will log you into the server automatically each time you launch QuarkXPress.
- 3 The next step is to select one or more catalogs to work with. Which catalogs are available is determined by the Cumulus Administrator (or another user who has the appropriate permissions.)
- 4 You will be connected to Cumulus and the selected catalog(s) are displayed in the Cumulus Palette window.

THE CUMULUS PALETTE WINDOW

1. Opens a list from which you can select saved search queries or perform a Find All search. (For more information on search options and saving queries, see the Cumulus Client User Guide.)
2. Entry field for Quicksearch (Default: a "contains" search in the record fields Record Name, Notes, Keywords, and Categories. A search item will be found if it is contained in one of the fields.)
3. Performs a Quicksearch.
4. Opens a list of previous Quicksearch items
5. Launches the Cumulus Client application. (Available only if you have a Cumulus Client installed on your computer and defined its location in the Cumulus XTensions Preferences. See also "Preferences," p. 11.)
6. Opens the Preview window for the selected record.
7. Opens the Information window for the selected record.
8. Click to have records of master assets displayed only. Working with QuarkXPress documents, master assets are the project files. (For more information on master assets and asset relations, see the chapter "Managing Related Assets" in the CumulusClient User Guide.)
9. Click to sort the records in ascending/descending order.
10. Displays the sort key.
11. Click to select the sort key.
12. Closes the Cumulus Palette window.
To open it again, select a catalog (Cumulus ▶ Select Catalog.)

Now you can start browsing the assets, enter text into the search field, or you can choose a predefined search query from the drop-down menu. (For more information on search options and saving queries, see the Cumulus Client User Guide.)

No matter which search option you choose, the assets found are displayed immediately, thanks to lightning fast search technology. Asset previews are avail-

able, and it's easy to see important metadata, such as file size, format, resolution and colorspace.

Getting assets into projects is drag & drop easy. Drag over images, text and even QuarkXPress Composition Zones others have worked on.

Opening a QuarkXPress project is as easy as double clicking it. If it is a catalog set up for the Vault version control, the asset will be checked out automatically.

NOTE: Placing Assets!
You should make sure that any placed asset has got its correct file name extension. And Canto recommends you to use assets from one catalog only for a QuarkXPress project. If you want to use assets from more than one catalog for the same QuarkXPress project, all used catalogs need to be opened at once in the palette window. Otherwise the QuarkXPress project might have problems to find the assets.

NOTE: Cross Platform Environment!
If you are working in a cross platform environment, Canto recommends you to house the assets in the same folder as the QuarkXPress project file or in the corresponding pictures folder of the file server. This ensures that Quark can locate the placed assets. And to help Quark to locate the placed assets, you should not use any special characters in file name of assets you want to use.

TIP: Cumulus Vault & Cross Platform Environment!
Making use of Cumulus Vault prevents you from any of the above mentioned cross platform restrictions. So employing Vault lets you use the same assets in multiple projects and that saves disc saves. Not talking about the version control advantages Vault offers.

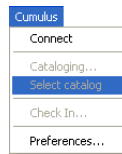
NOTE: If you employ Vault version control, always use the double-click in the Cumulus Palette window to open a QuarkXPress project.

Once complete, the project file and all assets placed within it can be cataloged using a single menu option.

A check box click automatically generates and catalogs a PDF file of the project too, regardless of whether Acrobat is installed or not. This enables approvals to be conducted by users who don't have QuarkXPress. Links between the various layouts and the assets used on them are established automatically. Asset Handling Sets offer a choice of predefined cataloging options, and can also set metadata field values automatically.

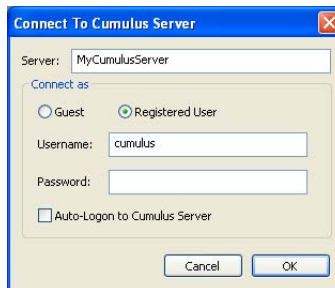
CUMULUS XTENSION MENU

QXP Companion installs a convenient Cumulus menu inside QuarkXPress that offers ready access to the few functions layout artists will ever need.



CONNECT

Opens a dialog from which you can connect to a catalog on a remote Cumulus Server and open the catalog.



When the Connect to Cumulus Server dialog box is opened:

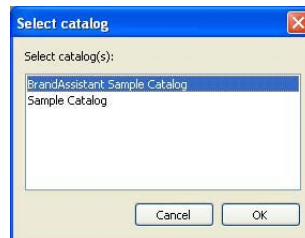
- 1 Using the drop down menu in the Server field, select the Server you wish to connect to. All currently active Cumulus Servers in the network appear in this list.

If your Cumulus Administrator specified a custom TCP/IP port number for the Client-Server connection, enter the IP address and – separated by a colon – the port number in the Server field (e.g. 123.123.123:1234).

- 2 Select either **Guest** or **Registered User**. If connecting as a registered user, type your user name and password. Your Cumulus Administrator can help you determine which way you should log on.

To bypass this step in the future, activate the **Auto-Logon** option, which will log you into the Cumulus Server automatically each time you launch QuarkXPress.

- 3 Click **OK**. The server is contacted. Once the connection is made, the Select Catalog window appears.



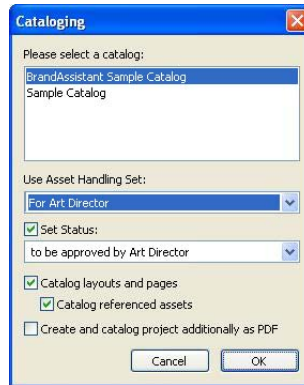
- 4 Select the catalog(s) you want to work with.
- 5 Click **OK**. The records contained in the selected catalogs are displayed in the Cumulus Palette window.

DISCONNECT

Closes the connection to the Cumulus Server and consequently also the Cumulus window.

CATALOGING

Opens a dialog which enables you to add your current QuarkXPress project to a Cumulus catalog.





Select the catalog to which you want to add the QuarkXPress project. Then select the desired Asset Handling Set. Activating the check box **Set Status** lets you select a status that the cataloged project (and its contained pages and layouts) should have.

Asset Handling Sets offer a choice of predefined cataloging options, and can also set metadata field values automatically for newly cataloged assets if they include an appropriate Metadata Template. The status selected under **Set Status** will be applied – irrespective of the asset being newly cataloged or re-cataloged.

To automatically catalog the layouts and pages of the QuarkXPress project as well and have separate records created for them, activate the **Catalog layouts and pages** option. Activating the **Catalog referenced assets** option will automatically catalog all assets that are included by references in the project and create records for them.

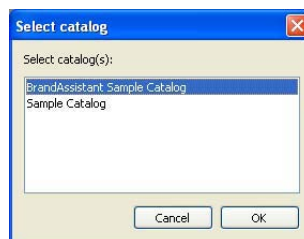
Activating the check box option at the bottom will automatically create and catalog a PDF of the project, which is helpful when reviewers don't use QuarkXPress. Note that setting the status for the created PDF requires an Asset Handling Set that includes a Metadata Template for changing the status.

NOTE: Creating PDF Files!

If you want to create PDF files, it is strongly recommended that you set the QuarkXPress preferences for previews of EPS files to **Generate**. (Select  **QuarkXPress** /  **Edit** ▶ **Preferences** and then under Application select **EPS** and set the Preview option to **Generate**.)

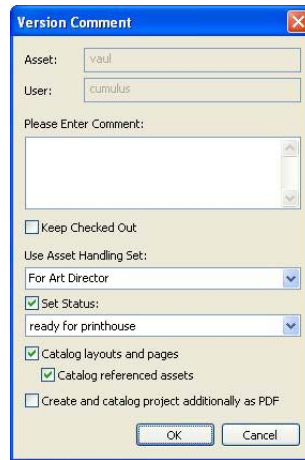
SELECT CATALOG

Opens a dialog which lets you select the catalog(s) you want to have displayed in the Cumulus Palette window.



CHECK IN

Opens a dialog that enables you to check a previously checked-out asset back into Vault as a new version. (Only available when the Cumulus Vault revision control system is activated.).



In the Version Comment dialog, the asset's name and your user name are entered automatically. You may enter your comments in the **Please Enter Comment field**.



If the **Keep Checked Out** option is activated, the changed asset (and each of the related assets for which the options are activated below) is copied to Vault as a new version but also left checked out. So you can continue working on the asset. Select the desired Asset Handling Set (one which has Vault activated as Asset-Store). Activating the check box **Set Status** lets you select a status that the cataloged project (and its contained pages and layouts) should have.

To have the records of the layouts and pages cataloged with the QuarkXPress project updated, activate the **Catalog layouts and pages** option. This will also automatically catalog new layouts and pages of the QuarkXPress project and have separate records created for them. Any layouts and pages that have not been cataloged will be cataloged.

To automatically catalog all assets that are newly placed and included by references in the project, activate the **Catalog referenced assets** option. Any referenced assets that have not been cataloged will be cataloged.

Activating the check box option at the bottom will automatically create and catalog a PDF of the current status of the project, which is helpful when reviewers don't use QuarkXPress. The PDF will also automatically be cataloged to Vault as a new asset (related to the QuarkXPress project as a variant).

NOTE: Creating PDF Files!

If you want to create PDF files, it is strongly recommended that you set the QuarkXPress preferences for previews of EPS files to **Generate**. (Select  **QuarkXPress** /  **Edit** ► **Preferences** and then under Application select **EPS** and set the Preview option to **Generate**.)

Clicking **OK** moves the new version to Vault and updates the associated records in the catalog.

Checking an asset in moves the latest version to Vault. It doesn't overwrite the previous versions, however, which are retained so that they can be viewed,

tracked or used again. (For more information on Version Management, see the *Client User Guide*, chapter “Managing Versions”.)

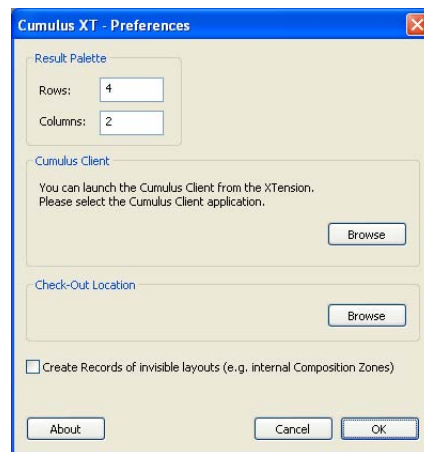
NOTE: Opening Vault Assets

If you employ Vault version control, always use the double-click in the Cumulus Palette window to open a QuarkXPress project. The asset will automatically be checked out.

Note that the pages and layouts of a QuarkXPress project are *not* placed under Vault’s control and therefore cannot be checked out or in. Accordingly no version history information can be provided for them.

PREFERENCES

Opens the Preferences dialog, from which you can set all preferences needed when you work when working with Cumulus in QuarkXPress.



Result Palette – Enter the number of rows and columns you want for the display of records.

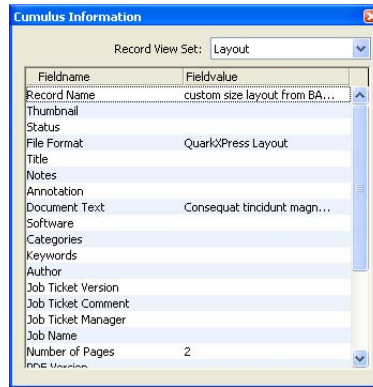
Cumulus Client – If you have installed a Cumulus Client application on your computer, you can start it from within the Palette window. Click the **Browse** button to select the location of your Cumulus Client application. Once you have defined the Cumulus Client location in the Preferences, the Cumulus button in the Palette window will be activated.

Checkout Location – If you use the Vault version control, you can define their general Checkout Location. That way you avoid being asked for the Checkout Location for each check out you perform. Note that the Checkout Location should be a folder where no other assets are stored; it should be used by the Cumulus XTensions only.

Activating the check box option at the bottom will also create records for “invisible assets” (e.g. internal composition zones) when cataloging QuarkXPress projects.

CUMULUS INFORMATION WINDOW

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



What you see depends on:

- the fields selected to be displayed in the current Record View Set.
- the fields of the catalog the asset is cataloged in and whether these fields contain any information or not.

TIP: The view set you select should match with the catalog(s) you use it with. For example, if you have a special catalog for images that includes all fields that are important for images and you use a view set that was designed for audio files, you may not see much information. If the catalog does not contain the fields that are selected for display in the view set, no information can be displayed. (For more information on Record View Sets, see the *Client User Guide*.)

If you have the appropriate permissions you can edit the stored information. Select the entry of the field which information you want to edit and edit the information in the box below. Click **Apply** to save your changes.

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