Canto Cumulus®

Cross Client Supplementary Guide

An addendum to the Client User Guide

Canto®

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The Cumulus Cross Client is a standalone version of the Cumulus Native Client. This Client version is perfect for traveling professionals who need assets and metadata with them always, and also want to work with catalogs of their own. Heading out on a business trip? Grab "to-go" versions of your organization's catalogs, and you won't need to hunt for wi-fi connections.

This Supplementary Guide is an addendum to the Cumulus Client User Guide and describes the special Cross Client functions only.
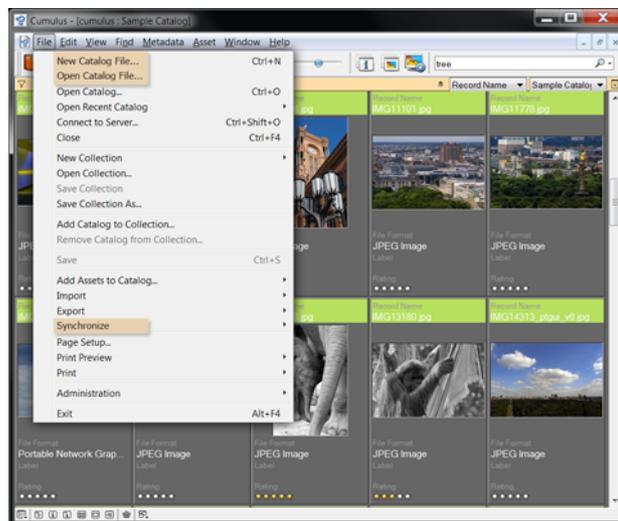
Cross Client

Introduction

Cumulus Cross Client is a standalone version of the native Cumulus Client that allows you not only to open usual or 'remote' Cumulus catalogs, but additionally to create and maintain local catalogs and to synchronize remote and local catalogs.

As opposed to remote Cumulus catalogs, local catalogs are not managed by a Cumulus Server. They reside entirely on your computer or, for that matter, somewhere in your local network. Remote Cumulus catalogs can be accessed only by Cumulus users with the appropriate permissions, whereas local Cumulus catalogs can be opened and modified by everybody who has access to the according catalog file.

The Cumulus Cross Client provides dedicated templates for local catalogs as well as appropriate view sets, asset handling sets and preferences. These local templates, sets and preferences are different from the ones a Cumulus user has at his disposal with server-managed catalogs. Furthermore, local catalogs are not capable of trigger management, they are not automatically backed up, and no version control system (e.g. Cumulus Vault) is available for local catalogs.

Remote and local catalogs may be opened simultaneously within a Cross Client, although, technically spoken, not by the same user. Therefore all settings that belong to a certain user, such as preferences, view sets and templates, are different depending on whether the currently active catalog is a local catalog or a server-managed catalog.

TIP: The collection window's title bar or the title bar of the Cumulus Cross Client, respectively, reveal the nature of the currently active catalog: Remote catalogs are identified with the Cumulus user name and the catalog name, separated by a colon; local catalogs are identified with the catalog name only.
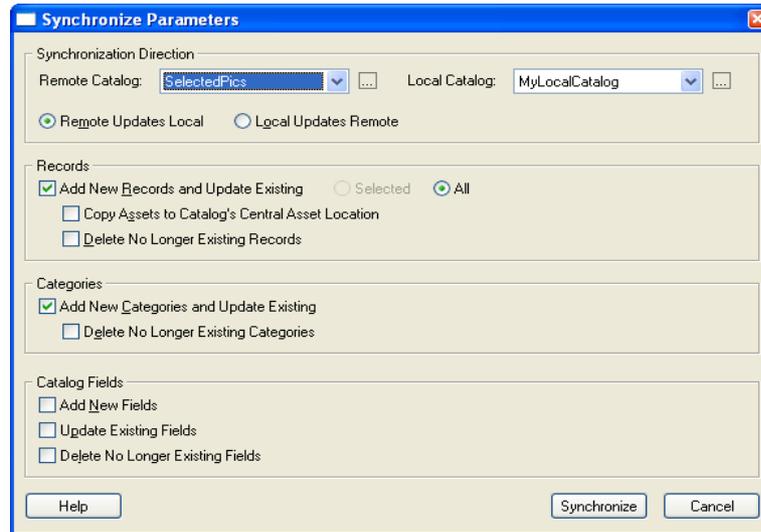

Catalog file *menu options enable users to also create and work with local catalogs.* ***Synchronize Catalogs*** *takes care of the cross-catalog updates.*

The Cumulus Cross Client adds three menu options to the **File** menu of the Cumulus Client:

- **New Catalog File** – opens a dialog to create a new local catalog (file).
- **Open Catalog File** – opens a file browser to navigate to the desired catalog file.
- **Synchronize Catalogs** – opens a dialog to set parameters and start the synchronization of a local catalog and a remote catalog.

Synchronizing Catalogs

With Cumulus Cross Client, it is possible to synchronize remote catalogs and local catalogs, that is, to update metadata and assets between the two. Cumulus offers both directions for synchronization, remote to local as well as local to remote. Which direction is applicable for you depends on your needs, e.g. the nature of your business, and the permissions you are granted by the Cumulus Administrator.

Synchronize Parameters window

The **Synchronize Parameters** dialog provides the following sections:

- **Synchronization Direction** – This section provides drop-down lists to select the **Remote Catalog** and the **Local Catalog**, as well as the possibility to select the synchronization direction: **Remote Updates Local**, or **Local Updates Remote.** The synchronization direction is indicated by an arrow between the selected catalogs.

  The catalog drop-down lists show all catalogs that are currently opened in the Cumulus Cross Client, and all catalogs that have been synchronized previously. More server managed or local catalogs can be added to the lists via the [...] icons, if necessary. Both open and closed catalogs can be synchronized likewise. If you select a currently closed catalog for synchronization, it will only be opened in the background, i.e. invisible.

- **Records** – This section defines how records and assets are treated during synchronization. By default, new records are added to and modified records are updated in the target catalog. Additionally, you may set that records that don't exist no longer in the source catalog, are deleted in the target catalog, too.

  If the dialog was evoked from a catalog with selected records, **Selected** is activated in order to only synchronize the selected records. You may change this to **All**.

  Furthermore, you may set that assets are copied along with the respective records. Assets can only be copied, if a Central Asset Location is defined in the Catalog Settings of the target catalog.

  NOTE >>> Assets that are not copied to a central asset location of the target catalog can not be accessed from that catalog. In consequence, no functions may be performed on these assets, and no preview is available! <<<

  Deactivate the **Add New Records and Update Existing** option if you want to synchronize categories only.

- **Categories** – This section defines how categories are treated during synchronization. By default, new categories are added to and modified categories are updated in the target catalog. Additionally, you may set that categories that don't exist no longer in the source catalog, are deleted in the target catalog, too.
- **Catalog Fields** – This section defines how catalog fields are treated during synchronization: New fields may be added to, modified fields may be updated in and no longer existing fields may be deleted from the target catalog. Any combination of these options is possible.
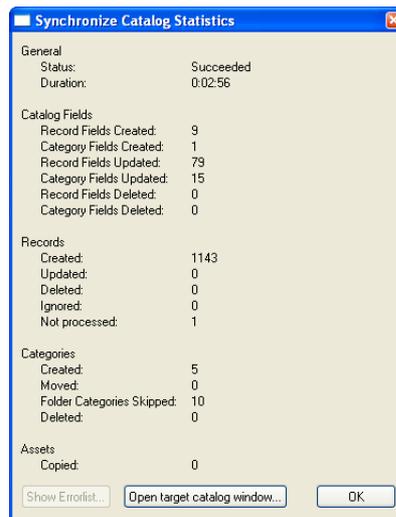
Synchronizing Selected Records

You can either synchronize selected records between catalogs, or you can synchronize entire catalogs.

To synchronize selected records:

1. In an open catalog, select the records you want to synchronize to another catalog, then select **File > Synchronize Catalogs > Synchronize**.

    The **Synchronize Parameters** dialog is displayed. The source catalog and the synchronization direction are already pre-selected.

2. Select the target catalog.

3. Set the parameter as needed. Remember that assets must be copied to the target catalog's Central Asset Location in order to be accessible from that catalog.

4. Click **Synchronize**.

5. When the synchronize process is terminated the **Synchronize Catalog Statistics** window is displayed, providing some information about the process in summary.

Synchronize Catalog Statistics *window*

6. If errors occurred during the synchronization process, click **Show Errorlist** to obtain more information on these errors.

7. To confirm the dialog and continue working, either click **OK** to close the window, or click **Open Target Catalog Window** to have the target catalog opened as new collection window.

To synchronize entire catalogs:

1. Select **File > Synchronize Catalogs > Synchronize**.

   The **Synchronize Parameters** dialog is displayed.

2. Select both a remote and a local catalog.

3. Select the synchronization direction.

4. Set the parameter as needed. Remember that assets must be copied to the target catalog's Central Asset Location in order to be accessible from that catalog.

   NOTE >>> When synchronizing a local catalog to a remote catalog, the **Delete No Longer Existing Categories** option is not available. <<<

5. Click **Synchronize**.

6. When the synchronize process is terminated the **Synchronize Catalog Statistics** window is displayed, providing some information about the process in summary.

7. If errors occurred during the synchronization process, click **Show Errorlist** to obtain more information on these errors.

8. To confirm the dialog and continue working, either click **Open Target Catalog Window** to close the window and to display the target catalog, or click **OK** to just close the window.

Hint on Version Control

Local catalogs do not support version control systems (e.g., Cumulus Vault).

If you synchronize a (remote) catalog whose assets are controlled by a version control system to a local catalog, the respective assets are outside of version control.

If you synchronize a local catalog to a remote catalog with version control, the respective asset are checked out and checked in as new versions in the version control system.