

# Cumulus User Guide



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| <b>Versions</b> |   |
| May 2022        | Original release when Cumulus first went live.  |
| Feb 2023        | ‘Expired by’ text field is now an ‘Archive’ tickbox<br><br>‘Special type’ field and the HCUK-DAM-Specials catalog introduced<br><br>Removed text referring to what differs from Telescope   |

# Cumulus – Key concepts

Cumulus is a **Digital Asset Management** system (DAM) which holds the finished files used to create and promote our products – PDFs, InDesign, Photoshop or Illustrator files, even video and sound clips. These files are called **assets**.

Cumulus stores the assets, data about the assets themselves, and data about the products those assets relate to:

- stored files – **assets**
- usage rights, file creation date etc – **asset metadata**
- title, author, pub date etc – **product metadata**

You can search Cumulus by product or asset metadata.

When assets are added to Cumulus – **ingested** – you have to supply a **product ID**, a **Part** and a **Type**.

## Product ID

An **ISBN** links assets to the product metadata. You can also use a **Plan G Serial number**. When an ISBN has been reissued you have to choose the 'release' that the assets relate to (which specifies a Plan G serial number).

| Part       | Type      |
|------------|-----------|
| Cover      | Master    |
| Content    | Layout    |
| Collateral | Component |
|            | Source    |

## Part

Part defines *where in the product your asset is used*.

This can be set to **Cover**, **Content** or **Collateral**.

Collateral is everything that isn't used in the cover or contents, including product-specific marketing material.

## Type

Type defines *how the asset is used in our workflow*.

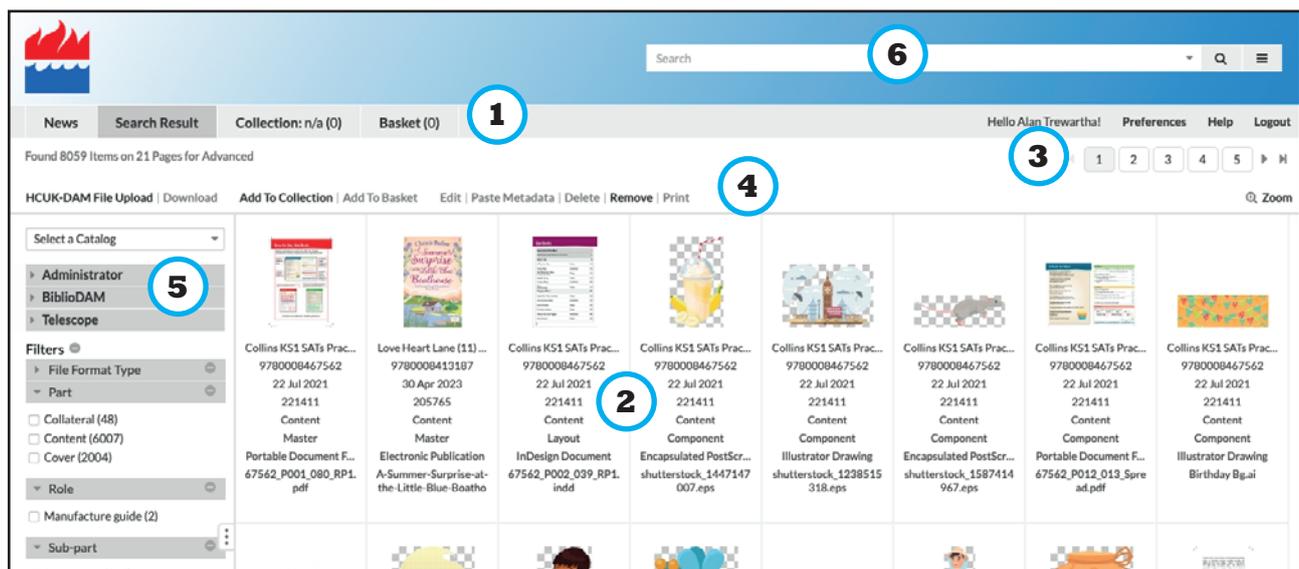
**Master** files are used to make a physical product (e.g. print ready PDF), or the finished digital file ready for distribution (e.g. EPUB or WAV audio).

**Layout** files are usually InDesign files. They define the appearance of book pages and generate the Master files with the aid of **Component** files.

**Components** These are usually the linked or 'placed art' files used in Layout documents. But it's also convenient to add some re-usable components found packaged inside the Master file of digital products, e.g. mp3 files used in an .epub file

**Source** files are any other useful assets used to create the others, e.g. layered Photoshop files and manuscripts.

# The Cumulus window



## 1 Page header

The tabs on the left...

- **News** – Any updates to the system or ongoing issues will be reported here.
- **Search Result** – When you first login, the asset list shows a standard search of 'all assets added in the past 7 days'.
- **Collection** – You can make (and share) ad-hoc asset collections. The current collection and item count shows here.
- **Basket** – Where to collect files before downloading then. The number of assets in brackets.

Under the tabs is a summary of the total items and pages of items (see X) in the main asset list...

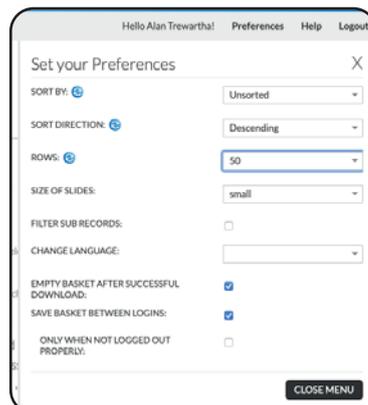
## 2 Asset list

The large central area of the screen lists the assets relevant to which tab you are on in the page header

## 3 Paging results and preferences etc

Use the page numbers and arrows to navigate through the pages of assets.

- **Preferences** – You can set things like the number of rows of assets in a page and the sort order.
- **Help** – There are links to some simple help pages, video tutorials and to this guide!
- **Logout** – get out of Cumulus.



## 4 Action toolbar

Actions that can be applied to your assets (or a selection of them)...

- **Download** – downloads them
- **Add to Collection / Basket** – Adds them to your current collection / basket
- **Remove** – Removes them from your search results/collection/basket
- **Print** – Makes a 'contact sheet' PDF

These actions grey-out when you have too many assets selected.

In addition if you have upload rights, you'll have the **HCUK-DAM File Upload** action – which launches the upload form.

## 5 Left Sidebar

In Search results this shows:

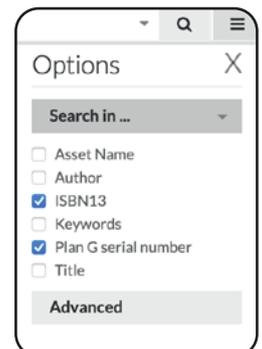
- Catalog switcher menu (only visible if you can upload, see p12 for details)
- Category browser.
- Search **filters** and values

For Collections it lists your collections.

## 6 Search

Simple. Enter a search term and hit return or click the magnifying glass.

You can change the fields you are searching against via the 'hamburger' menu (3-horizontal-lines) to the right. It also links to an 'Advanced' search dialog.



# 2 Basic use of Cumulus

1 **Log in.** Click on the Cumulus 'chiclet' in your OKTA dashboard at <https://newscorp.okta.com>.



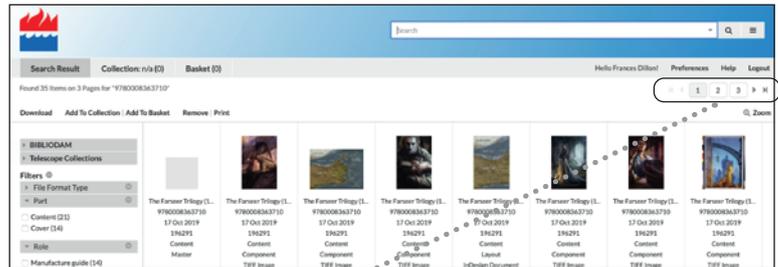
This section of the guide covers all you need to find and download files from the **Cumulus Digital Asset Management** system (DAM) using the basic features of the web interface.

(See §3 for details of how to upload files.)

2 **Search.** Now you're ready to find some assets. Type into the simple search box at the top of the page and click the Magnifying Glass or hit RETURN.

By default Cumulus searches against: ISBN13, Plan G serial number and Title. You can choose to add or remove fields from this basic search by ticking/unticking them in the panel opened by clicking the 3-horizontal-lines button to the right.

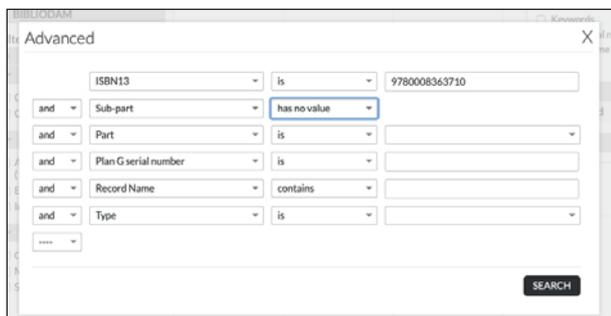
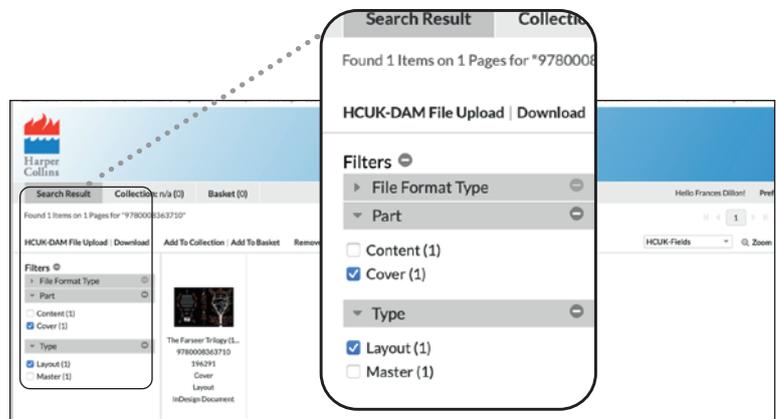
In the example here I've searched using the ISBN 9780008363710 (from Horizon) which has returned 35 assets.



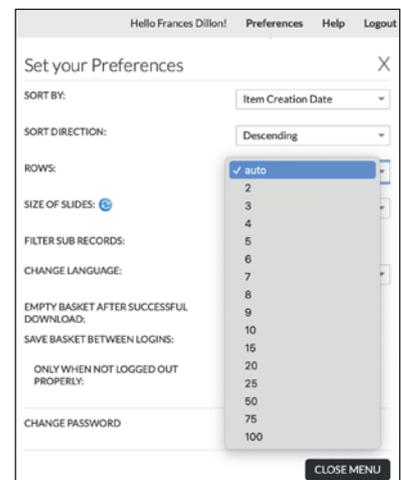
To see all your results, you may need to scroll down. To see the *next* page of results, use the **page control** at the top right of the asset list.

3 The **Filters** panel in the sidebar lists the values of some important fields showing the count of matching assets in your search results.

Tick the filtered values you are interested in, eg 'Type=Layout' and 'Part=Cover' to narrow down your search results. And here is the one cover layout we were looking for...



4 If basic search is *too* basic, click **Advanced** (from the hamburger menu to the right of the search bar). This pops open a dialog with more sophisticated ways to match assets. Leave the value fields (on the right) blank to ignore that line/field. Choose other fields and how they match from the pop up menus.



You can change the results per page and sort order under 'Preferences'



When you hover over one asset in the list of results, the action icons appear. If you hover over the icons, tool-tips tell you what they do...

**Add To Collection / Add To Basket**

**Preview Pops** opens the preview panel and 'Details' tab

**Edit Pops** opens the preview panel and 'Edit' tab  
(Only available if your login has edit rights)

**Download**

**Link Record** Create a copyable link to this asset

**Print** Downloads a *contact sheet* style PDF of the asset

(Some of these actions are available in the action toolbar which will apply to multiple assets.)

Click the **X** 'close' icon (top right) to see your search results in detail.

Now we have found some assets, take a closer look...

**5 Viewing asset info.** Clicking the  icon pops open the Preview panel. This can have up to three tabs: Details, Edit and Relations

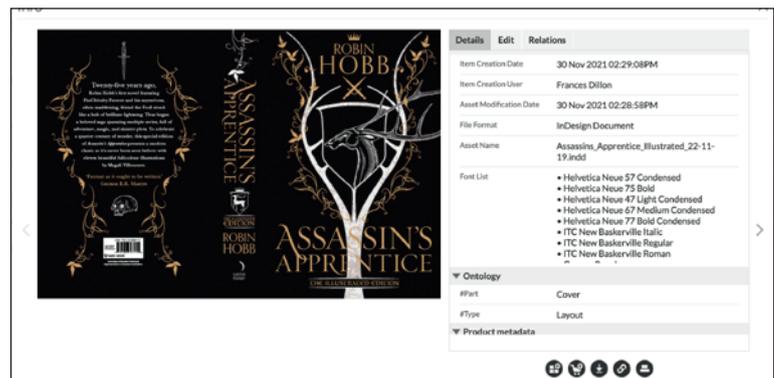
**Details** Shows further information about the asset, including who uploaded it, when and 'usage history'. Scrolling down you will also find a list of fonts used (for layout files and PDFs), how the file is classified (Part, Sub-part, Type etc), some product metadata and any embedded (XMP) data from the file itself along with notes added at the time of upload.

**Edit** If you have appropriate access rights this expands the data in the Details tab into a form that allows you to update and save changes.

**Relations** Show links between assets, depending on the type of asset:

- Layouts show the associated 'Child' assets – the component files you would expect to find in **InDesign's** Links panel.
- Components conversely show the associated Layout file as a 'Parent' asset.

There are subtly different *square* action icons in the relations panel and an extra 'eye' action that will update the large preview on the left to show that asset.



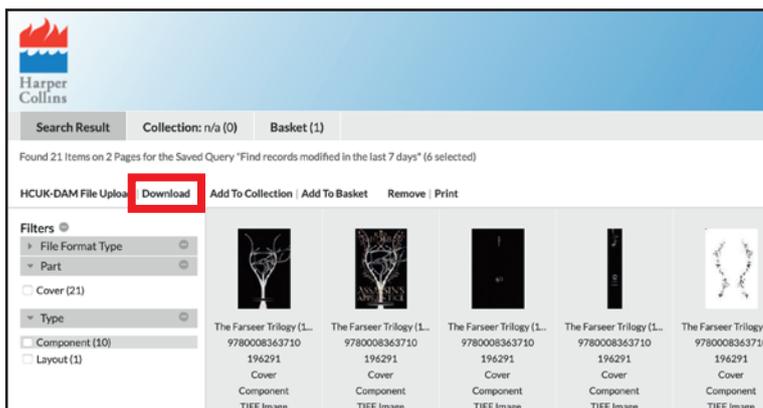
Get a large preview of a related asset using this 'eye' action icon. 



## 6 Downloading. There are three main ways to download assets:

- 1 The download pop-up **action icon**  will download individual assets whenever it appears.
- 2 The **Download** link in the group action toolbar (see picture, right) downloads **everything** in the asset list. If the list is too large the link will be greyed out and unusable. You can make a sub-selection of the assets to make it available again.
- 3 Add things to the **Basket** with the pop-up **action icon**  and download from the Basket tab

You can also use **drag-and-drop** to add assets to the **Basket** tab. The same trick works with multiple selected assets, and with the **Collections** tab too.



**Selecting multiple assets** This works with all asset lists... Hold the CTRL key (CMD on Mac) and click items to add/remove from the current selection. Selected items have a grey background. Or, to select a *range* of assets: select the first asset, then hold down SHIFT and click the last asset.

**7 Retrieving layouts and linked components.** Add the layout file to your Basket then navigate to the Relations tab in that layout files' Info view, tick the 'Select All' box at the bottom of the list and click the Add to Basket button.

**8 The Basket tab** This works as you might expect and much like the main search result tab. Use the action toolbar 'Download' link to download all assets, or a sub-selection.

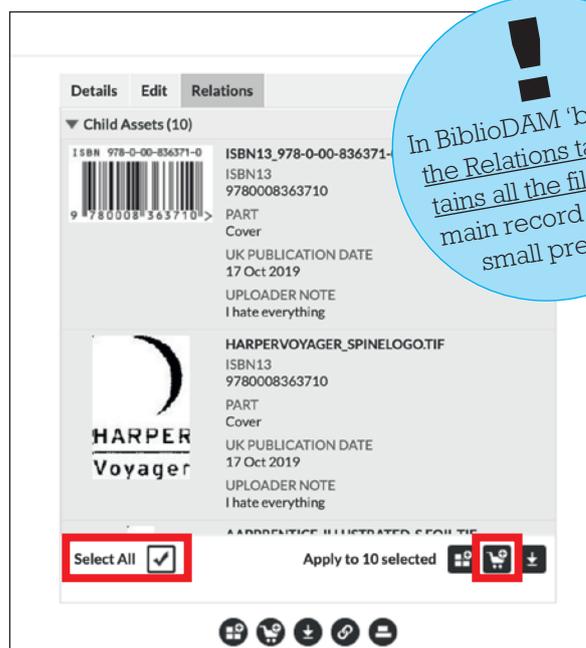
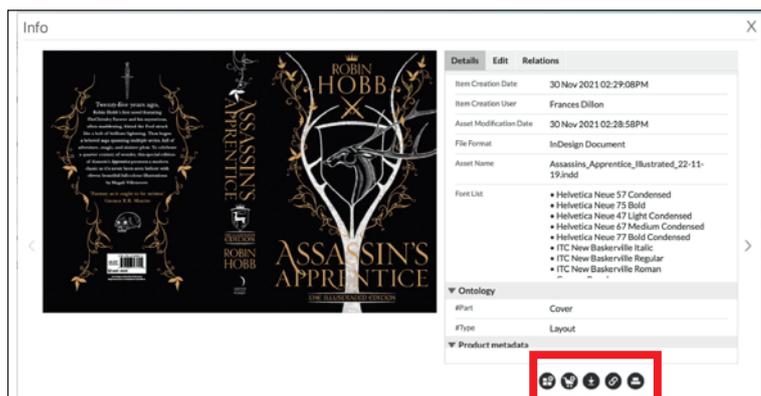
Assets are automatically removed from your basket when downloaded.

Instead of a direct download you can opt to use:

**Download Link** – This creates a link that you can send to non-Cumulus users that will allow them to download the files.

**Send Files** – This works much like Download link but directly emails the link using a small form

Both methods create special 'sent' collections that appear in your **Collections** tab. You can set the date that they 'expire', instead of the default 14 days if you need. In all cases the asset's usage history shows your account has downloaded the file.



# 3 Adding assets to Cumulus

If your login is able to upload files to the DAM, you should see the upload link in the action toolbar. Click it and the 'Upload Files' form will pop-up.

There are 3 steps, left to right, on the screen: selecting files, choosing what to do with them and setting 'metadata'...

**1 Select Files.** Click this to choose a file or multiple files as normal.

The file list appears beneath the button. If you have chosen any ZIP files it will initially list along with contents of the ZIP too.

**2 What to do with your files.** If you haven't included any ZIPs, *Upload* will be the only active option so choose it.

- **Upload** - Adds files to DAM as they are. ZIPs will upload as a single item. The file listing will make this clear by removing the individually listed contents of the ZIP

- **Extract ZIP** - The contents of any ZIP files are added to DAM as individual items. You will only be able to choose this if at least one ZIP file is listed.

- **Process ZIP** - A special case of 'Extract ZIP'. You must choose this if you are adding a ZIP of a packaged InDesign job (and won't be able to choose it if it's not one). See next page for more detail.

**3 Set metadata.** There are only three mandatory fields, a link to the product (ISBN), Part and Type. When using the 'Process ZIP' only two appear because it deals with Type for you.

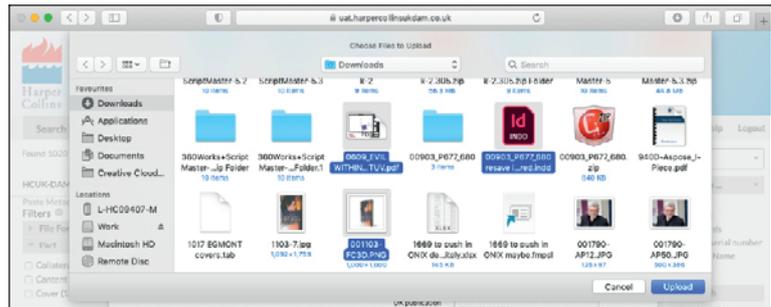
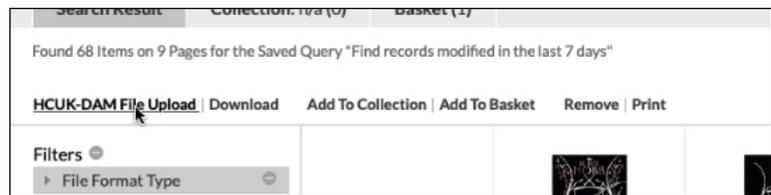
The data you provide applies to all the files you are uploading.

Mandatory fields that have not been completed appear with a red outline.

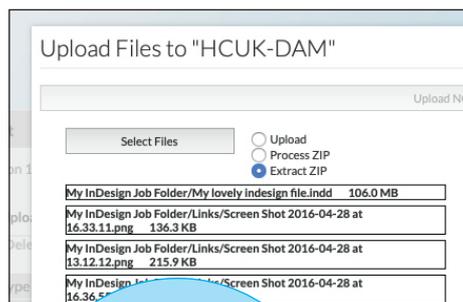
**4** If the form is complete, the item at the top changes from a legend saying 'Upload NOT ready' to become an active 'Upload' button. Click it.

The upload button then indicates progress as your files upload. *Do not close the browser window* (you can safely minimise it or leave it running in the background).

This section covers uploading files to **Cumulus DAM**.



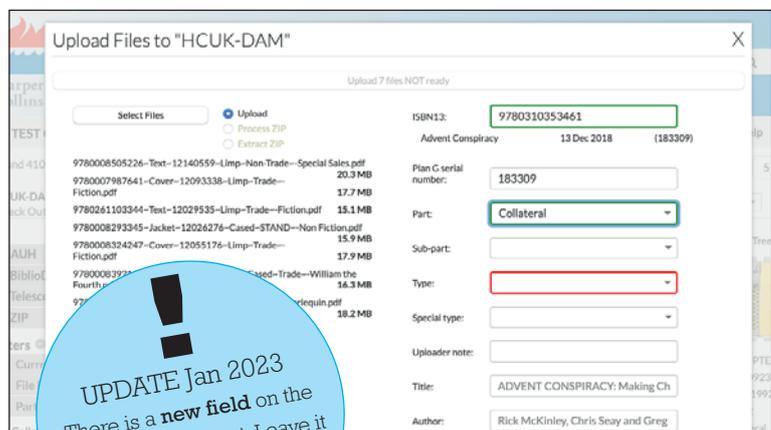
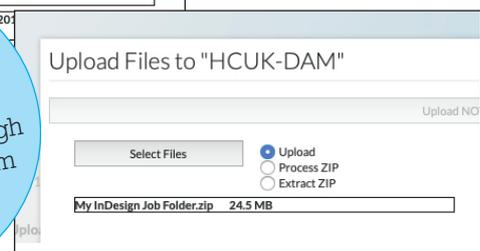
Clicking 'Select Files' opens the browser's usual dialog box



'Expand ZIP' and 'Process ZIP' will show just the contents.

'Upload' will show just the ZIP

**!** You must work through the upload form from **LEFT TO RIGHT**



**!** **UPDATE Jan 2023**  
There is a **new field** on the form: **'Special type'**. Leave it blank! But see p 12 §4 'Advanced Topics' for details.

**5 CHECK: filenames.** Specifically try to **steer clear of slash, asterisk and question mark.** But also try to avoid curly quotes, en-dashes, etc, if you can.

|   |              |   |              |   |               |
|---|--------------|---|--------------|---|---------------|
| < | less than    | " | double quote |   | vertical bar  |
| > | greater than | / | slash        | ? | question mark |
| : | colon        | \ | backslash    | * | asterisk      |

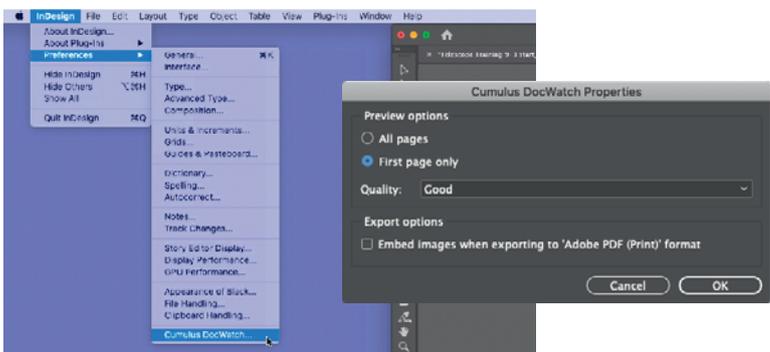
Characters to avoid in filenames

**6 Using Process ZIP.** You must choose this option if you are uploading an InDesign job. The ZIP must be of an InDesign packaged job with a single .INDD file and a folder called Links in it.

What it does for you:

- Uploads the INDD as 'Layout'
- Uploads all 'Links' as 'Component'
- Adds the components to the layout's list of 'Child assets' (in the 'Relations' tab)

**The last step, linking Layout to Components, only works if the InDesign DocWatch plugin is active when you package the job.**

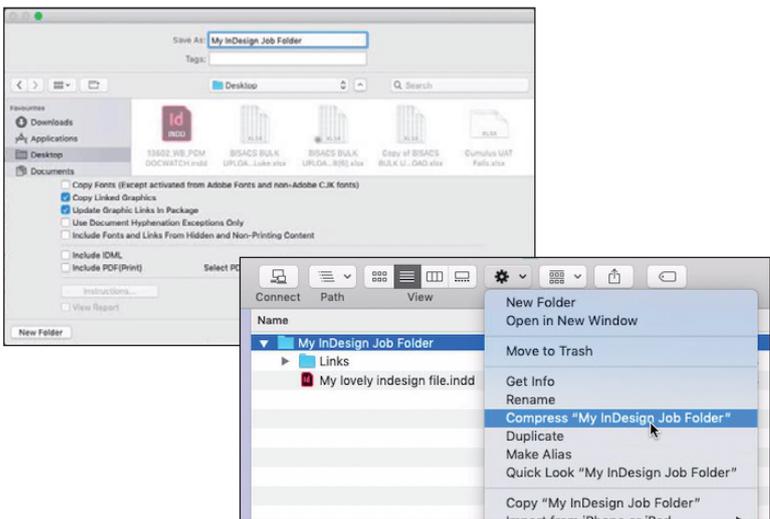


DocWatch is working if you see it listed on the Preferences menu.

How to make a ZIPped InDesign package:

- Open the INDD file
- Check that the links to placed art are all up-to-date
- Activate all fonts
- Package the job but do not include a PDF, IDML or fonts
- ZIP it with macOS 'Compress' file action

**7 Metadata product link.** If you enter the ISBN and there are multiple releases with different publication dates, you are prompted to choose the release the assets relate to (see image bottom right).



Although the ISBN field is marked as mandatory, you can instead fill in the Plan G serial number field. That pulls in the ISBN for you (and specifies the exact release).

**8 Metadata check.** Check that the details (title, author, pub date) that appear in the form match what you are expecting – just in case someone gave you the wrong ISBN by accident or a typo.

|                         |  |             |         |
|-------------------------|--|-------------|---------|
| ISBN13:                 | <input type="text" value="9780006754022"/> |             |         |
| <b>Choose a release</b> |  |             |         |
| <input type="radio"/>   | The Hobbit,                                | 02 Apr 2009 | (46569) |
| <input type="radio"/>   | The Hobbit,                                | 06 Nov 2006 | (36791) |
| <input type="radio"/>   | The Hobbit,                                | 02 Nov 1998 | (10428) |
| Plan G serial number:   | <input type="text"/>                       |             |         |
| Part:                   | <input type="text"/>                       |             |         |

**!**  
The Plan G serial number **check digit** is not used in Cumulus. Details of the product appear as a better check.

**9 Non-mandatory data**  
**Sub-part** is not a mandatory field, but both it and **Role** (which pops up when you set the Type) are very useful for products with more structure than simply cover and content. For example if there are separate assets for a cover jacket, a belly band, "on body" art and a spine "brass". See §4 for more detail.

Uploader note – Use this to indicate any special status. Just so whoever next deals with the files knows the situation.

## 10 Zip Error

If you are uploading a zip file, and the file is corrupt or incomplete in any way, Cumulus will not allow you to upload it.

## 11 Upload success or failure

Once your upload is complete, Cumulus will pop-up a confirmation message stating the total number of uploaded files in the green bar. You can also check the number of files and errors in the report line under the progress bar.

If there are upload errors, please contact the administrators before trying again. There is a mail link in the Help drop-down menu.

## 12 Post-upload checks

Search for your assets and check that the number and type of files you find matches expectations.

For Layout files check that the 'Relations' tab shows all the linked art.

You can update individual assets with descriptions or keywords using the 'Edit' tab of the detailed info view.

## 13 Archiving old asset versions

If you've uploaded files that replace other files in Cumulus, you should *archive* the older ones. In the Edit tab tick 'Archive' (right at the top) and hit SAVE.

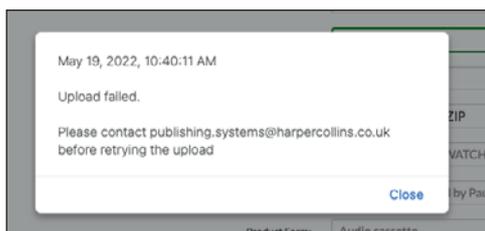
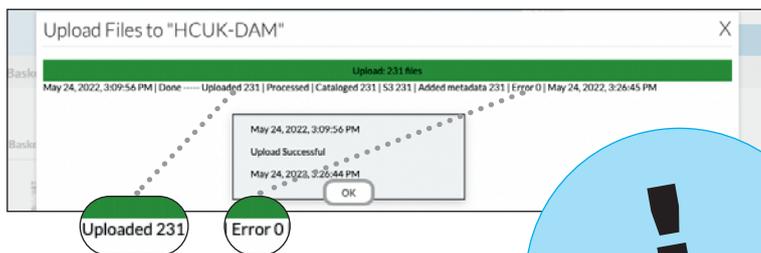
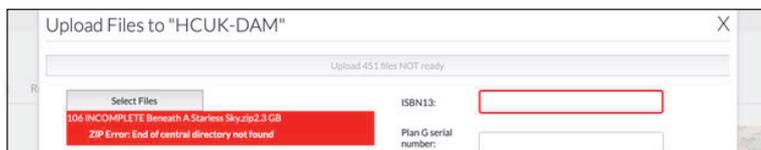
**You may find it easier to do this before uploading the replacement.**

Archived assets aren't deleted – but they move to a part of the DAM that only DAM librarians and privileged users can see. (See §4 'Extra catalogs' for more info.)

You can archive up to 100 assets in one go using **Edit** in the group action toolbar.

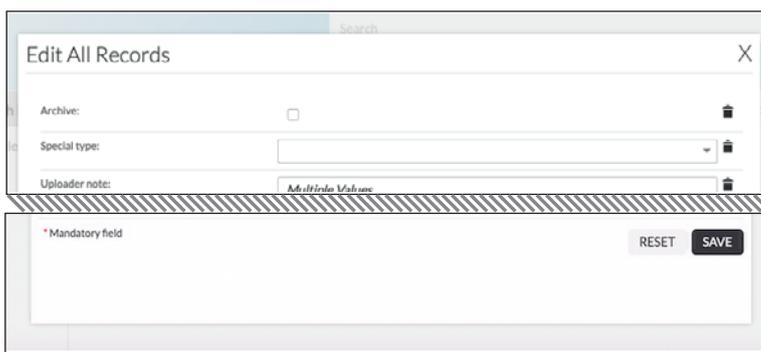
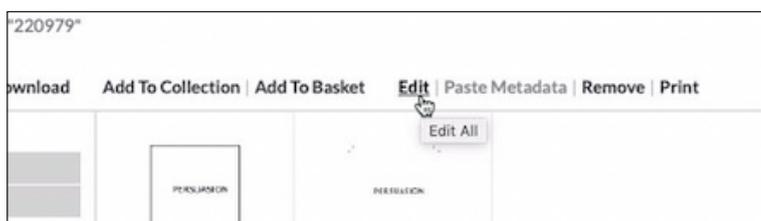
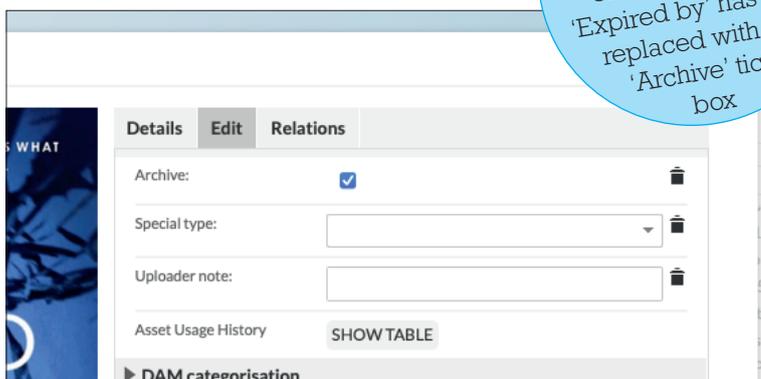
In the 'Edit All Records' dialog, update just the field you want to change (Archive) and hit the SAVE button at the bottom.

If there are more than 100 assets selected then the action button will be grey/inactive. If you really need many 100s of assets archiving, contact the administrators!



Do not close the upload form or window until Cumulus says the upload is done

UPDATE Jan 2023 'Expired by' has been replaced with the 'Archive' tick-box



# 4 Advanced topics

## Metadata for more complex products

Sometimes it's not enough to just say that the asset is used to make the Content part of a product. Or that it's simply a Source file. And though you can add descriptions and keywords to assets, that's not structured enough to be really helpful. These finer details can be added in some **non-mandatory** fields...

## Sub-part

The Sub-part is useful when the product has a **complex composition** – a book and CD, a book and poster. It's a refinement of **where** in the product it's used. You can, for example, use it to distinguish between art that goes on the body of the book and on a separate cover jacket.

### Cover sub-parts

**Body cover** – the cover on the body of the book, distinct from the separate 'dust jacket'. *Assumed default if blank.*

**Inside cover** – artwork for the back of the same physical material that has the body cover artwork on

**Jacket** – the separate 'dust jacket' that wraps around a hardback book (and sometimes a trade paperback)

**Spine art** – for non-wrap around covers, usually hardbacks, the spine art (or 'brass'), to be supplied separately

**Slip case** – the separate casing a book or series of books is kept in

**Belly band** – a tiny jacket or belt for the book, includes **half-jackets**

**Sticker** – anything separately manufactured and affixed to the cover (or jacket), usually for decorative effect

**Disk** – if there is a disk included in the product, this indicates the artwork printed on the body of the disk.

### Content sub-parts

**Interior body** – the body of the text, distinct from prelims/back matter/additional material, usually with folios in Arabic numerals. *Assumed default if blank.*

**Prelims** – the front-matter of a book before the main Interior material (often with roman numeral folios in the footer)

**Back ad** – promotional material advertising other products

**Additional material / PS section** – extra material added after the main (interior) files often in a deluxe edition of a book, with extra material about the book or author

**Signature insert / Plate section** – material designed to print on a special 'signature' dropped into the book. Usually the paper stock is different, or the section is in some sense a 'pull out'

**End paper** – decorative papers that separate the cover and content, often manufactured separately on special stock

**Disk** – the contents of any included disk. Usually WAV files or an ISO 'image' of the software to be pressed

**Electronic delivery supplement** – content supplied digitally (not embodied on a physical device, eg disk) that's distinct from the main content (which would normally be physical)

**Physical supplement** – artwork printed to make any secondary physical material distinct from the main content. Examples: a poster insert, a pack of cards in a pack with a book. DVDs and CDs should be under 'Disk'

## Role

Role is about the asset's function – what the file **does** – during manufacture or normal use.

Any with **rights implications** reveal an extra field...

## Rights holder

Standard values are...

- **HCUK** – If the asset is owned outright by HCUK
- **See editorial records asset** – you can add a Source asset of role 'Text, editorial records' to cover multiple assets
- **See XMP data** – data is in 'XMP Rights Holder'
- **Unknown** – This means the person uploading the asset does not know the rights holder. This should be updated when positive information is available.

**Contact sheet** – aggregated info on image sources used in the product, usually in 'contact sheet' form.

**Manufacture guide** – the asset is just a guide in the manufacture process. e.g. margin or fold guide.

**Emboss/foil plate** – the asset specifies a special ink or foil separately from the four-colour main artwork

**SCORM package** – a digital asset used in Virtual Learning Environments - usually comprising a ZIPped folder of assets

**XML package** – a generic digital asset, usually a ZIPped folder of HTML/XML files and elements such as images

**eBook package** – NOT an eBook, but comprising the ordinary ZIPped contents (whole or part) of an eBook, e.g. the source material used to make a proprietary eBook

**Interactive** – an interactive element

**Text, general** – any textual element, often used to pick out parts of an interactive product

**Text, manuscript** – text source material for the book

**Text, editorial records** – admin records associated with the source material, e.g. picture rights and research notes

### Roles with rights implications

**Video, Audio** – self explanatory

**Photo, general** – any photographic asset

**Photo, author** – a photo of the author e.g. as used on jacket

**Illustration** – non-photographic artwork

# Collections

## 1 Making collections

In the Search results tab, clicking 'add to collection' on the group action toolbar or the 'add to collection' icon on an individual asset will either add items to the 'current' collection or prompt you to choose an existing one or make a new one.

## 2 Working with collections

In the Collections tab you can switch to a new current collection by clicking on its name. They are listed under the 3 types: *private*, *shared*, and *sent*.

Notice the special toolbar actions...

- **New** – Opens the 'Create new collection' dialog box. It makes a *private* collection by default, ie only visible to you. But if you tick 'shared' you can make a *shared* one (see below for more).
- **Save as** – Duplicates the current collection. The copy can be *private* or *shared*.
- **Collection Link / Send** – Create a *sent* collection from the current collection. Sent collections have a unique web link that is either copied to the clipboard (Link) or sent in an email (Send).
- **Close** – Closes the current collection.

## 3 Shared Collections

When you choose to share a collection you get a blank 'users' list. Click the ADD button under it to pop up a 'Find Users' dialog box and add some names to your *shared* collection.

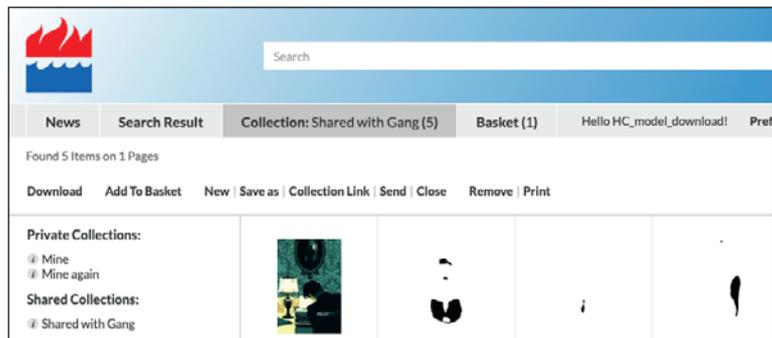
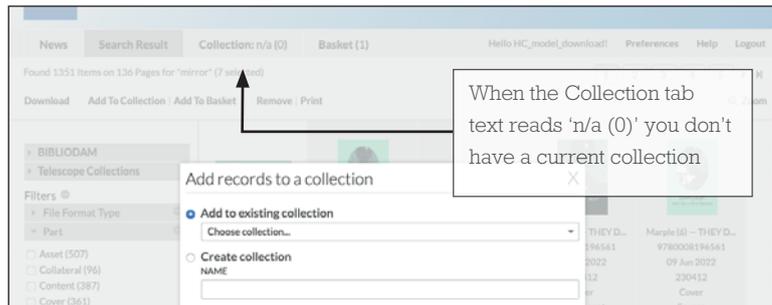
Note that if you make a shared collection, you have no special extra powers. Everyone using it has the same power: to remove people, remove and add items to the collection, and to delete the collection.

## 4 Sent Collections

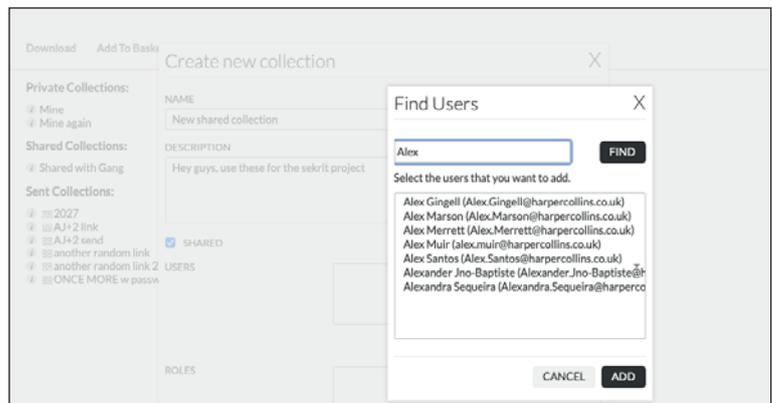
When sending a collection you can set a time limit on it (so it auto deletes). Under 'permissions' (see right) you can add a password and limit what the recipient can do with the assets.

Recipients of the link get a 'basket' style view of the assets with the name of the collection. They don't need a DAM account, but will need the password if you set one.

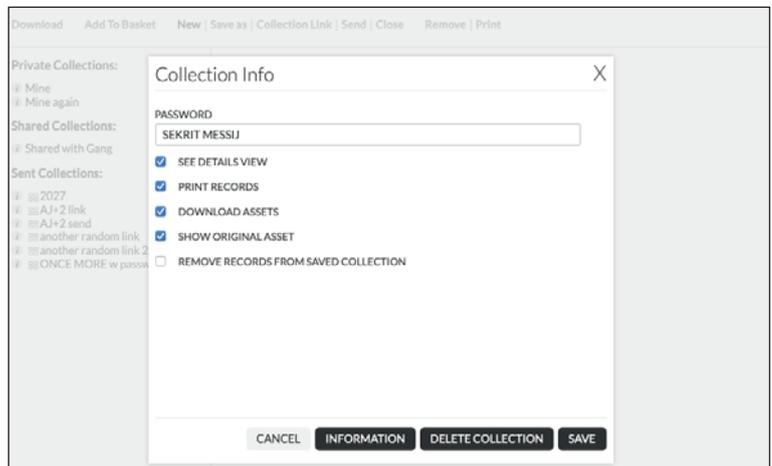
You can create collections of assets in the DAM, either for personal use, shared work with other DAM users, or for sending to external 3rd parties without a login.



The 'i' icon by each collection's name opens 'Collection' info, where you can change the name, description and update any sharing/sent details



You won't be able to find and add people who have never logged into Cumulus



## Extra catalogs

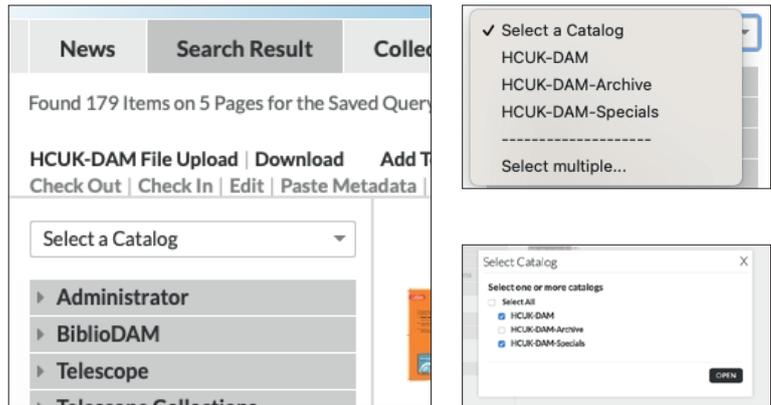
Most files in Cumulus are for making the 'trade' product – the thing that is made and distributed to any book seller putting in an order. These are held in the main catalog called 'HCUK-DAM'. But there are two other catalogs...

### “Select a Catalog”

Users who can upload (and other system admins) should see this menu at the top of the left sidebar.

Use the menu to switch from browsing the default HCUK-DAM catalog. You can browse results from multiple catalogs at the same time if you are feeling brave.

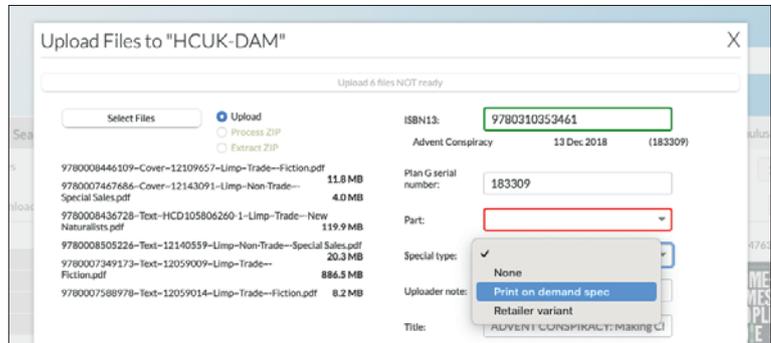
There are two extra catalogs of assets beyond 'HCUK-DAM', one for archived assets and one for 'specials'...



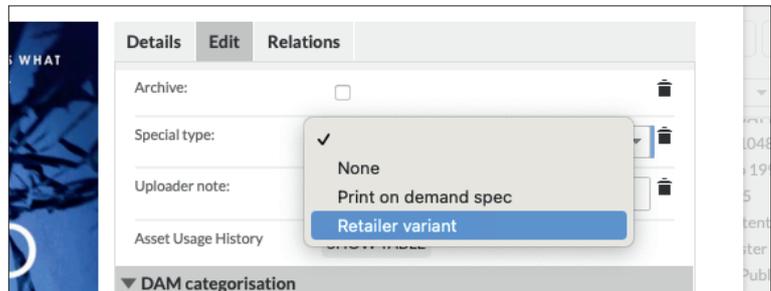
### HCUK-DAM-Specials catalog

The -Specials catalog is for files used to make variants of the main product. That is they are for different and specific supply purposes.

The 'Special type' can be assigned on upload or changed for an existing asset via the 'Edit' tab.



When an asset has a value in the 'Special type' field (other than 'none') it is moved out of the main catalog into the 'HCUK-DAM-Specials' catalog.



### HCUK-DAM-Archive catalog

There is a third catalog that 'senior users' and system administrators can see. This is where assets that have 'Archive' ticked move to. (Also assets that had a value set in the old 'Expired by' field).

Files in the extra catalogs can be distinguished by the colour of the filename... blue text for special assets, red for archived assets

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| <p><b>THE ADVENTURES...</b><br/>9780008381349<br/>02 Mar 2023<br/>199576<br/>Cover<br/>Master<br/>Portable Document F...<br/><b>199576-3 Adventures of Amina al-Sirafi_FAIR</b></p> | <p><b>SONG OF SILVER, FL...</b><br/>9780008521370<br/>02 Feb 2023<br/>230795<br/>Cover<br/>Master<br/>Portable Document F...<br/>230795-4_SongofSilverFlamelikeNight_TPB_</p> | <p><b>Collins Cambridge Lo...</b><br/>9780008215422<br/>14 Dec 2017<br/>162659<br/>Content<br/>Master<br/>Portable Document F...<br/><b>15422_P143_152.pdf</b></p> |
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