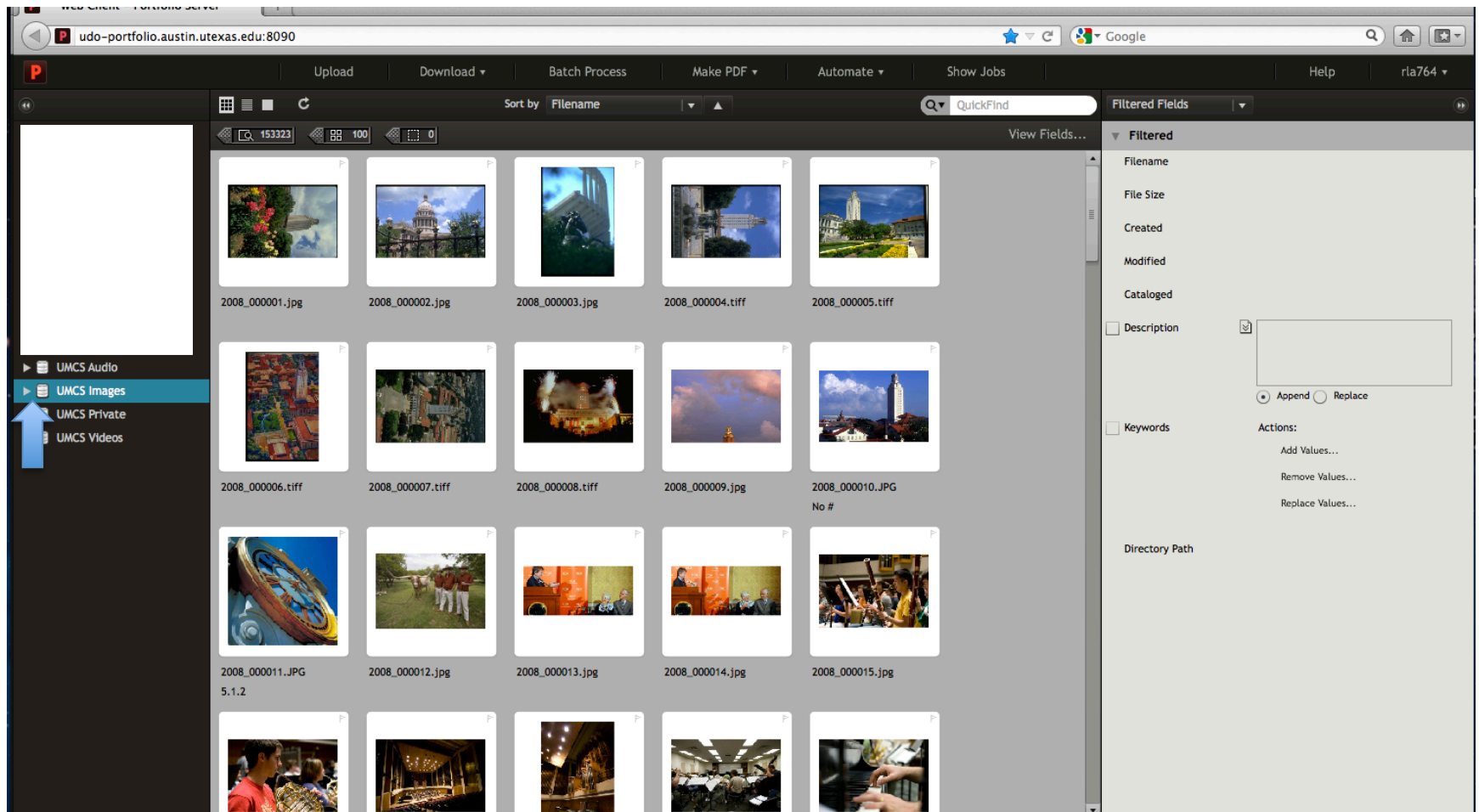


# Extensis Portfolio

A Brief How-to

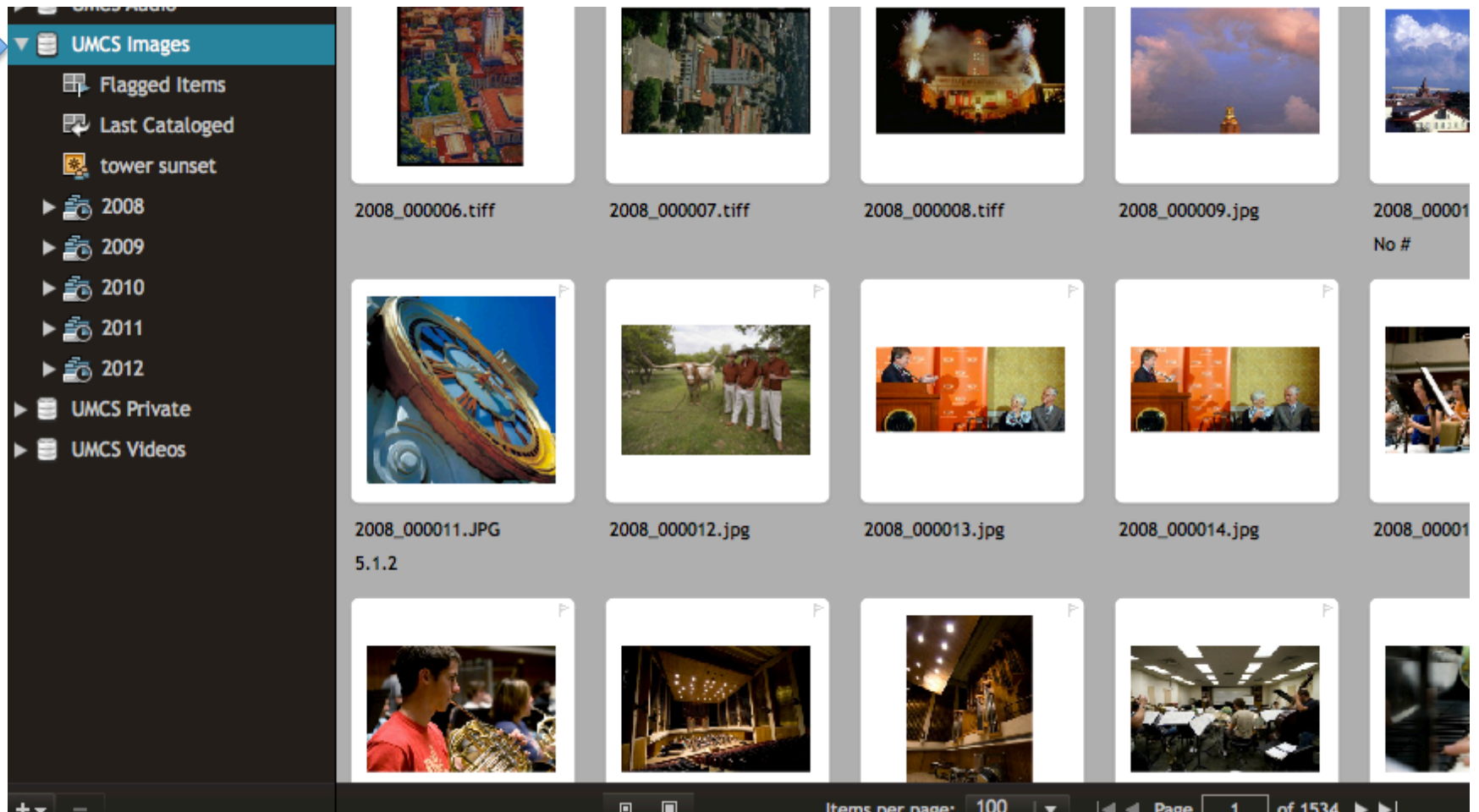
- Login to the Portfolio Server using the Web Client through:  
<http://udo-portfolio.austin.utexas.edu:8090/>
- Your username should be your EID with the same password. If this does not work, see the Digital Asset Manager.

# Catalogs



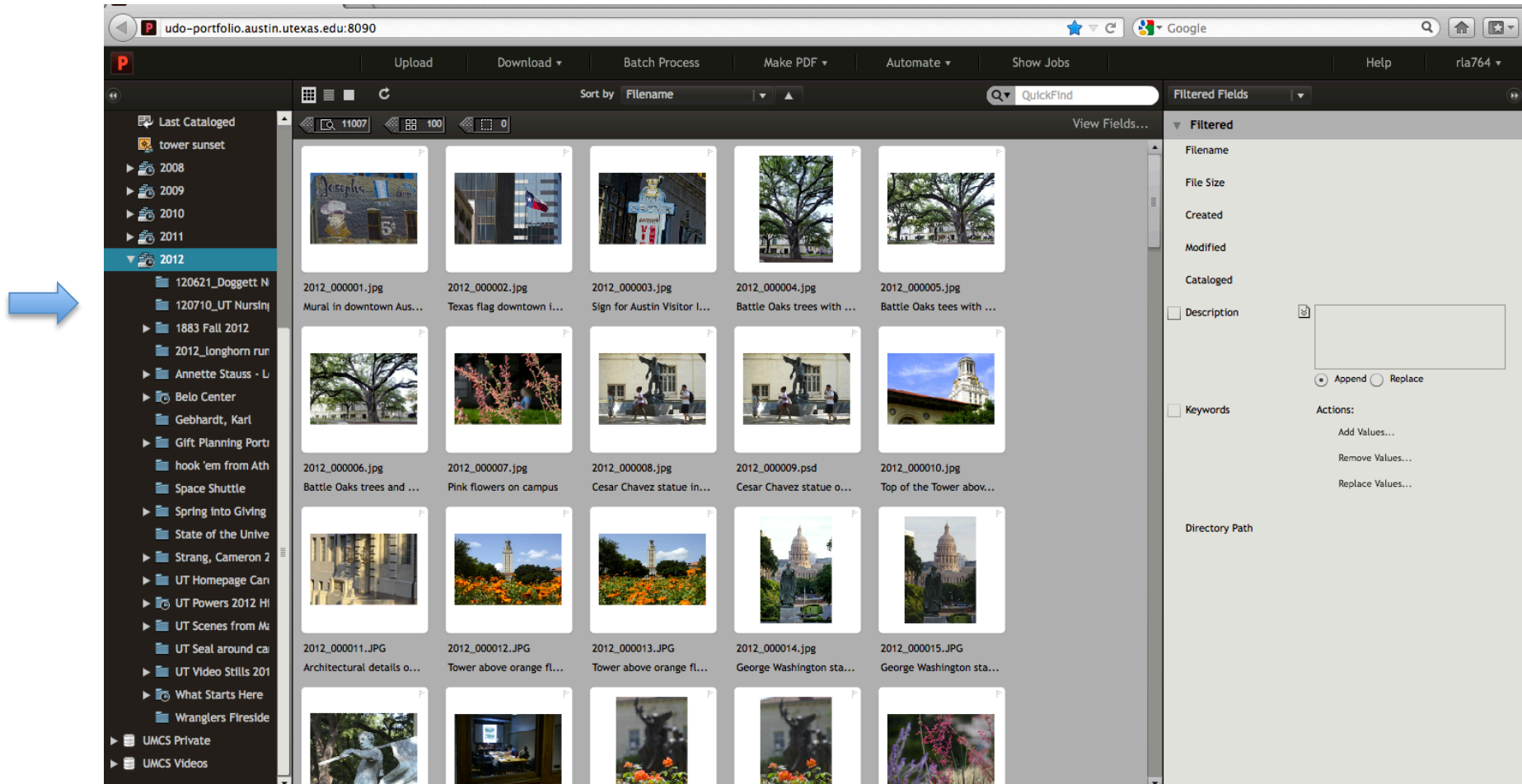
Select the catalog you want to upload to from the list on the left hand column

Click the triangle next to the catalog name to display the folders in the catalog



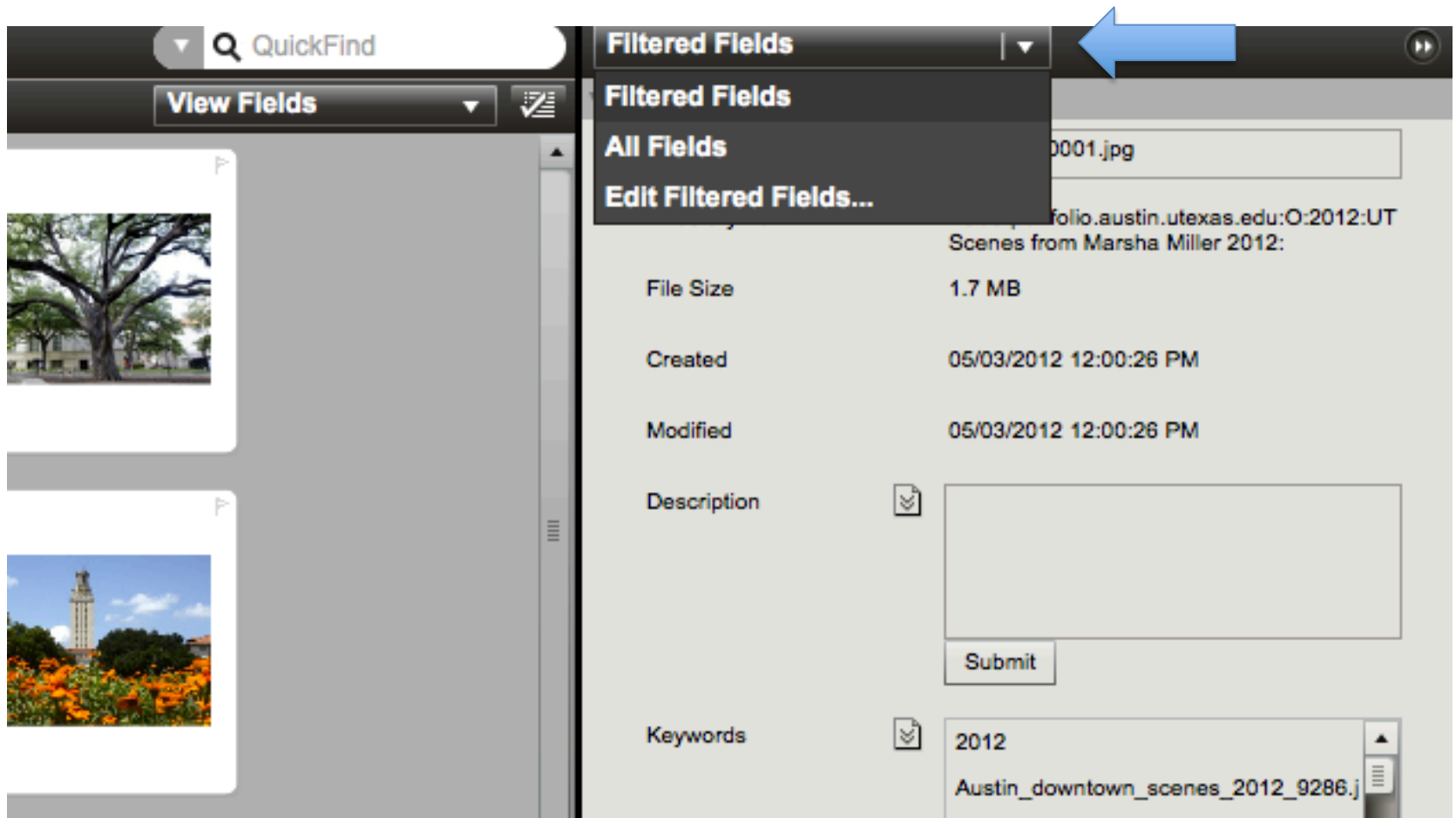
This will give you the list of years.

# Folder Selection



This will give you the list of the originating events for the files if you want to find something specific.

# Metadata



The screenshot shows a software interface for managing metadata. At the top, there is a search bar labeled 'QuickFind' and a 'View Fields' dropdown menu. A blue arrow points to the 'Filtered Fields' dropdown menu, which is open and shows three options: 'Filtered Fields', 'All Fields', and 'Edit Filtered Fields...'. The 'All Fields' option is selected. Below the dropdown, the metadata for a file named '0001.jpg' is displayed. The metadata includes:

File Size	1.7 MB
Created	05/03/2012 12:00:26 PM
Modified	05/03/2012 12:00:26 PM
Description	<input type="text"/>
Keywords	2012 Austin_downtown_scenes_2012_9286.j

The interface also features a 'Submit' button and a 'QuickFind' search bar at the top left. On the left side, there are two image thumbnails: one of a large tree and one of a building with orange flowers in the foreground.

Select “All Fields” in order to see all of the metadata schemas. Custom includes information pertinent to the department, while the other schemas are Portfolio native.

# Selecting Thumbnail

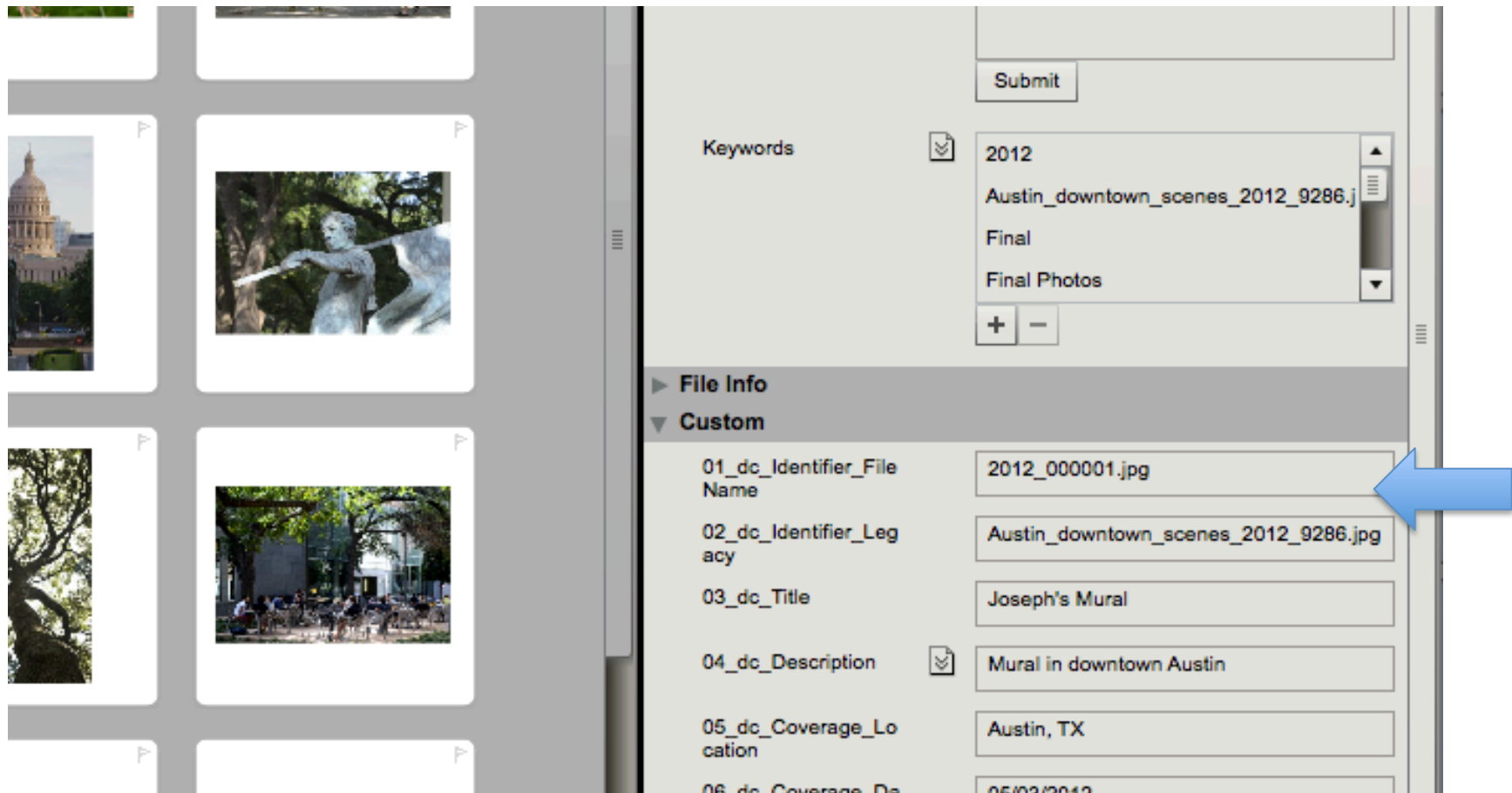
The screenshot shows a web-based photo gallery interface. The main area displays a grid of image thumbnails. A blue arrow points to the first thumbnail in the second row, which is titled "Mural in downtown Aus..." and has the filename "2012\_000001.jpg". A tooltip above this thumbnail displays "Filename: 2012\_000001.jpg".

The interface includes a sidebar on the left with a folder tree, a top navigation bar with "Upload", "Download", "Batch Process", "Make PDF", "Automate", "Show Jobs", and "Help". The right-hand panel shows metadata for the selected image:

Filtered Fields	
Filename	2012_000001.jpg
File Size	1.7 MB
Created	05/03/2012 12:00:26 PM
Modified	10/29/2012 02:49:46 PM
Cataloged	10/30/2012 11:23:24 AM
Description	<input type="text"/> <input type="button" value="Submit"/>
Keywords	2012 2012_000001.jpg from Marsha <input type="button" value="+"/> <input type="button" value="-"/>
Directory Path	::Udo-portfolio.austin.utexas.edu;0:2012:UT Scenes from Marsha Miller 2012:

In order to see information about an image, click on the thumbnail

This will open a pane on the right side of the screen that shows the manually entered metadata and/or the technical embedded data.



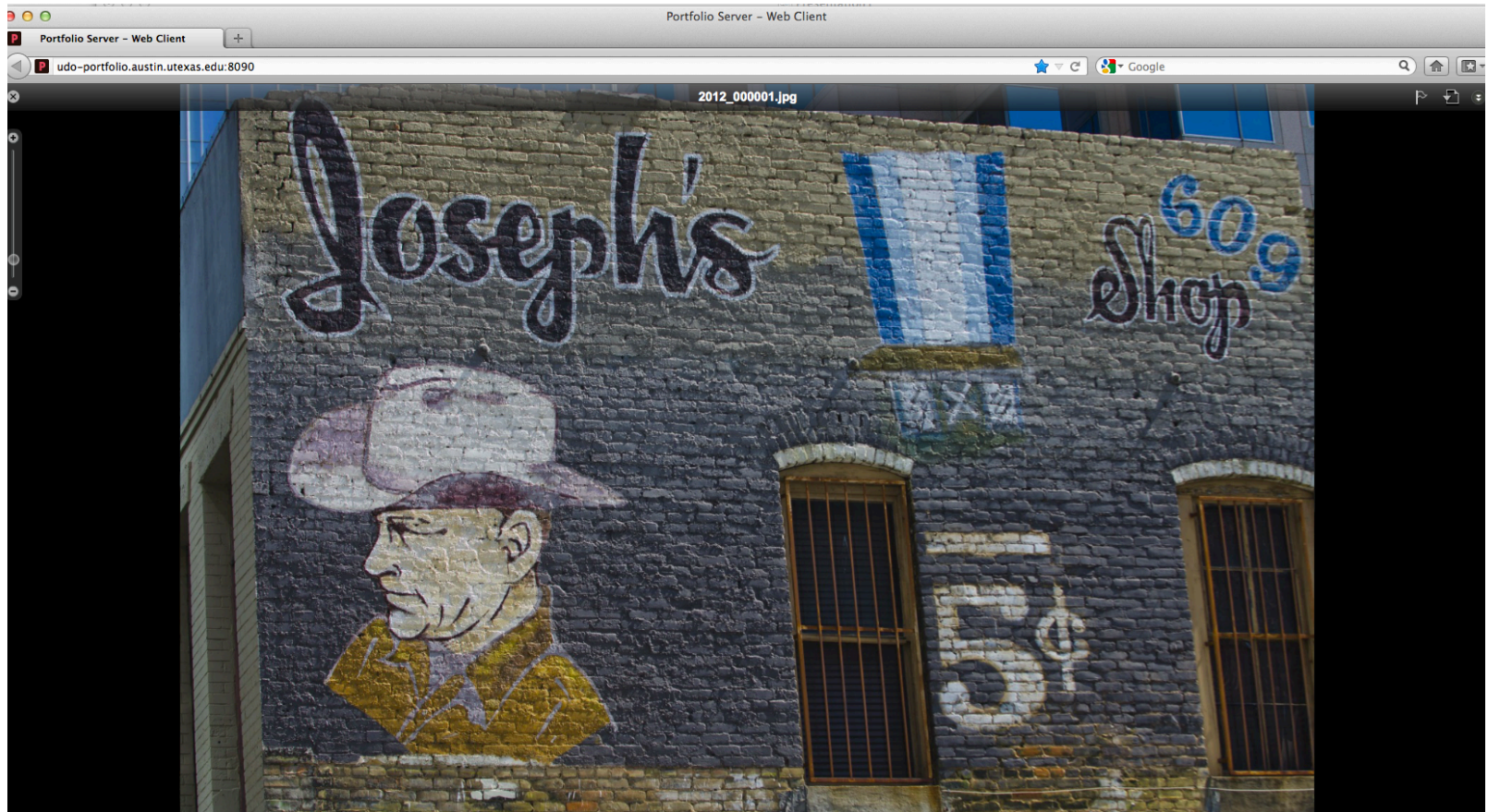
The screenshot displays a photo management interface. On the left, a grid of photo thumbnails is visible, including a building, a statue, and a park scene. On the right, a metadata pane is open, showing a 'Keywords' section with a list of terms: '2012', 'Austin\_downtown\_scenes\_2012\_9286.j', 'Final', and 'Final Photos'. Below this, the 'File Info' section is expanded to show 'Custom' metadata fields:

Field Name	Value
01_dc_Identifier_File Name	2012_000001.jpg
02_dc_Identifier_Legacy	Austin_downtown_scenes_2012_9286.jpg
03_dc_Title	Joseph's Mural
04_dc_Description	Mural in downtown Austin
05_dc_Coverage_Location	Austin, TX
06_dc_Coverage_Date	05/03/2012

A blue arrow points to the '01\_dc\_Identifier\_File Name' field.

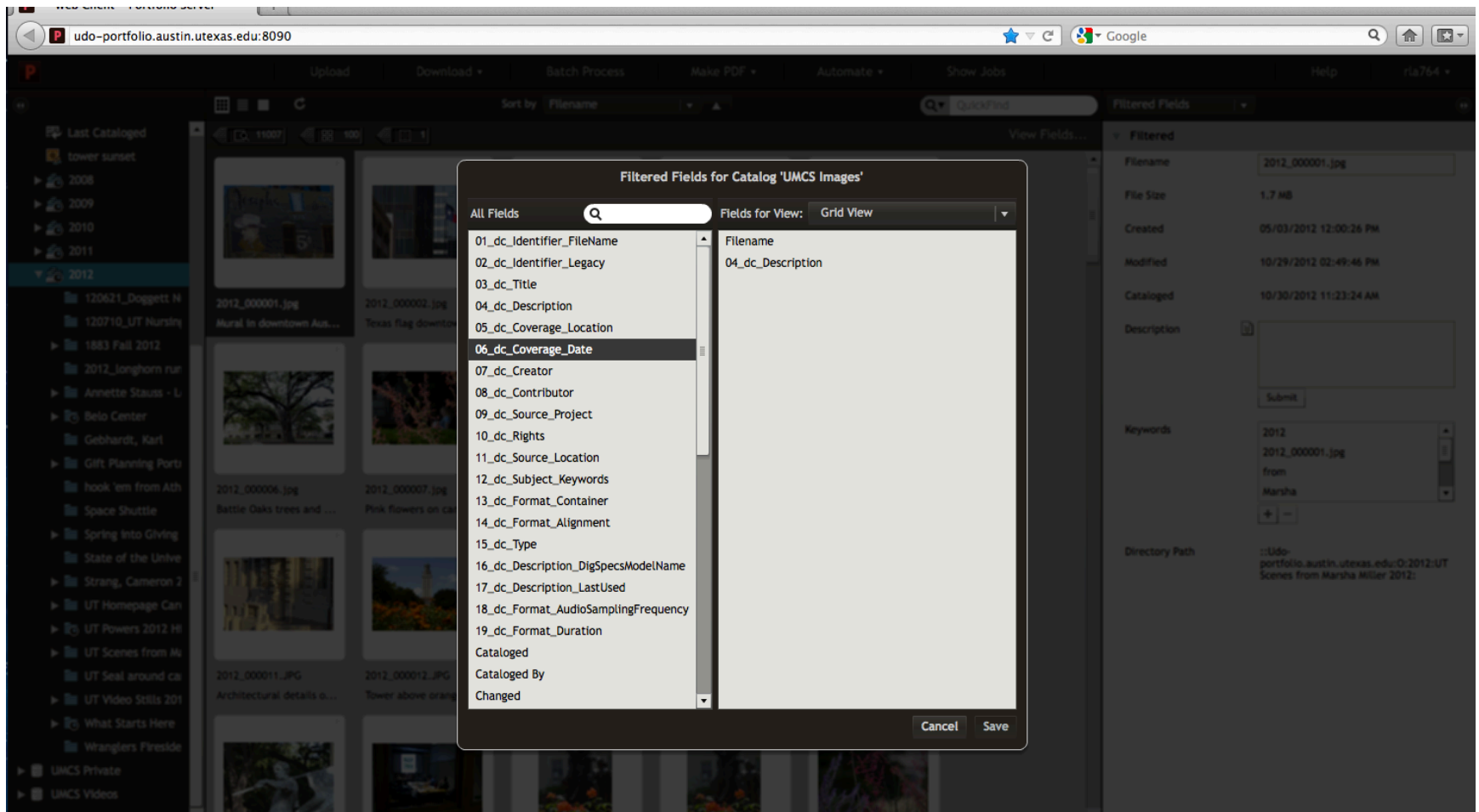


# Close-up of Image



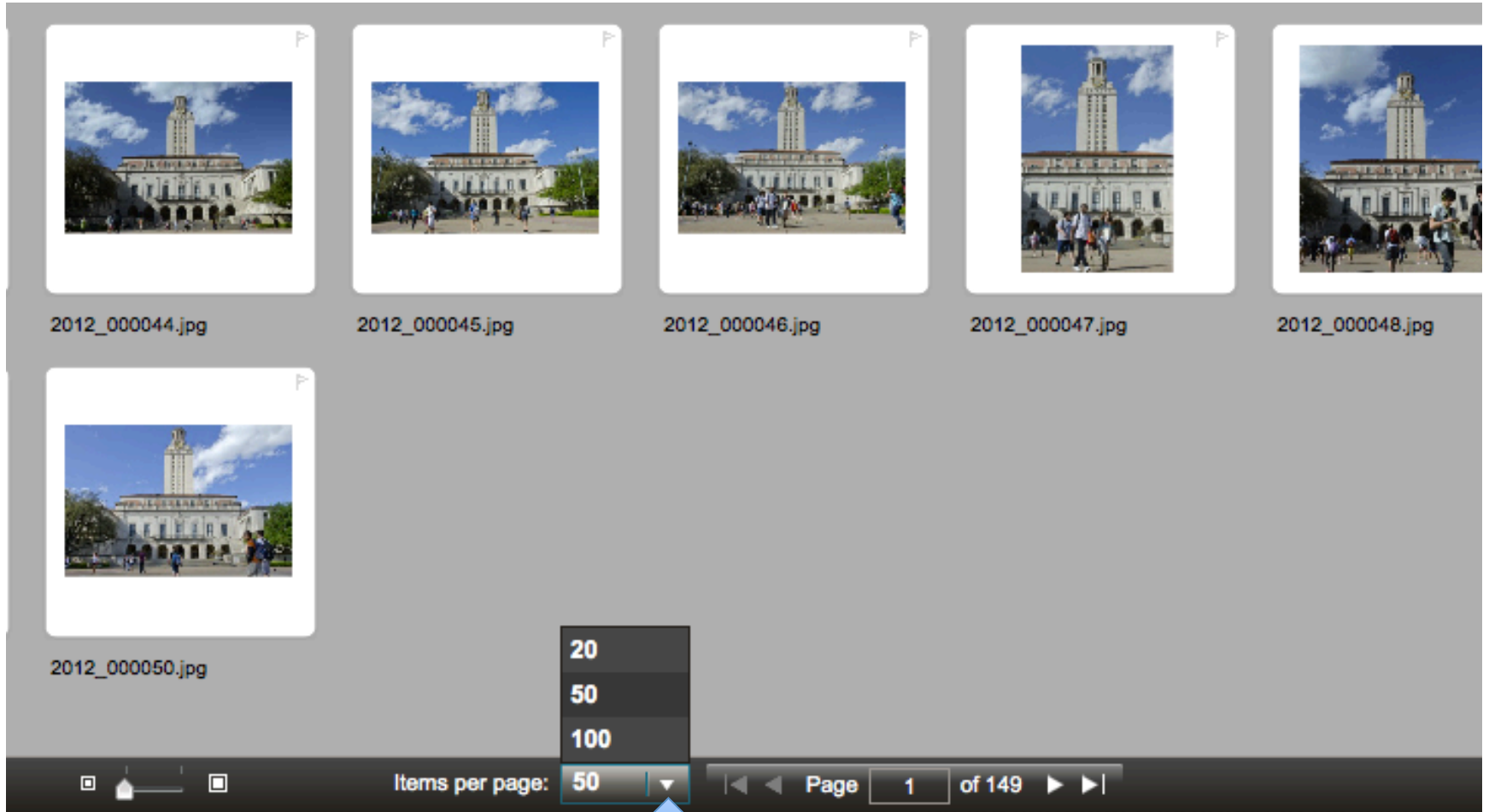
Double clicking a thumbnail will bring up a larger image. Exit by selecting the “x” in the top left hand corner.

# Viewing More Fields

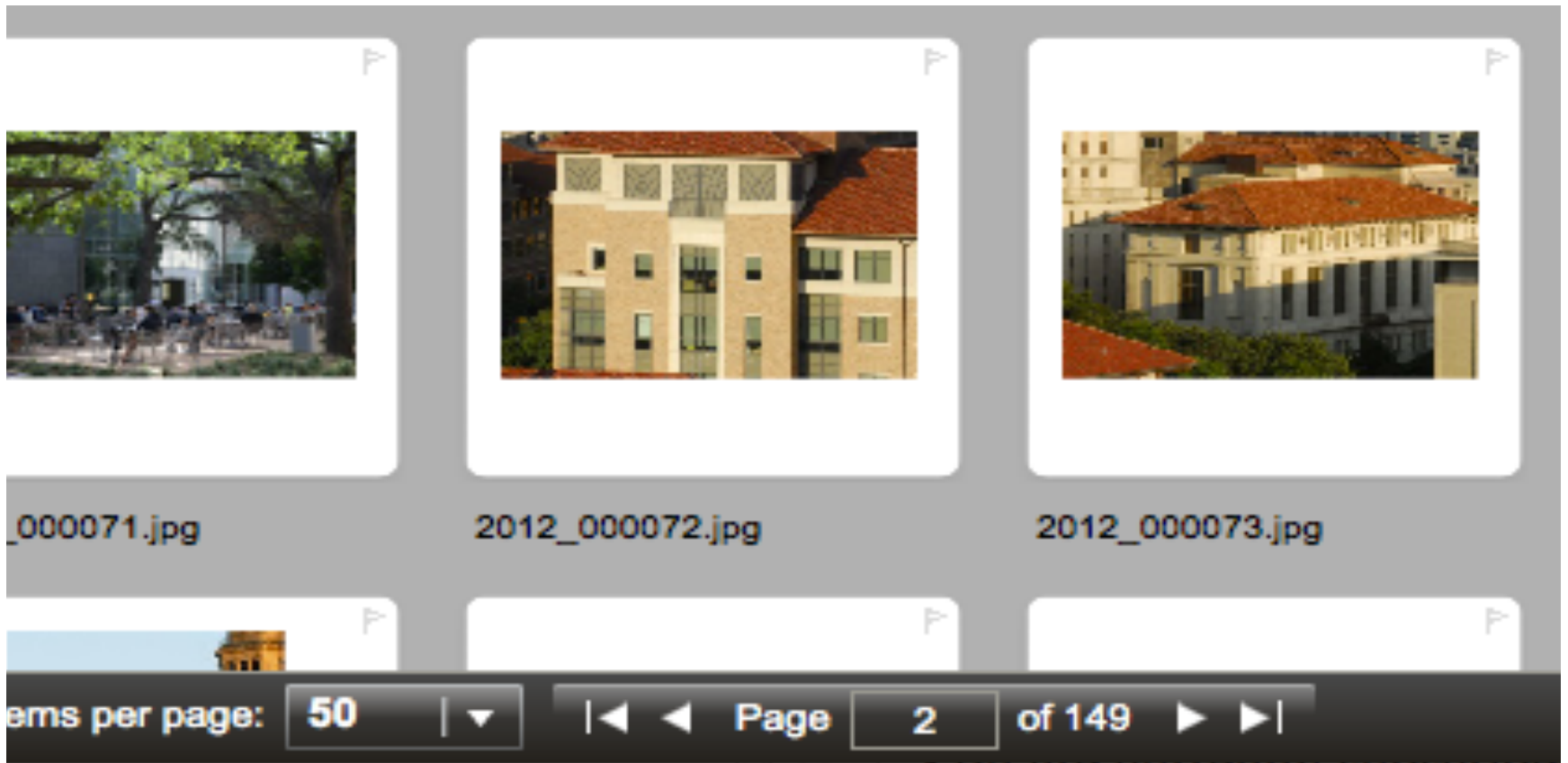


If you'd like to see more metadata fields under each thumbnail, choose "View Fields" in the top-left corner of the center pane

# Interface View



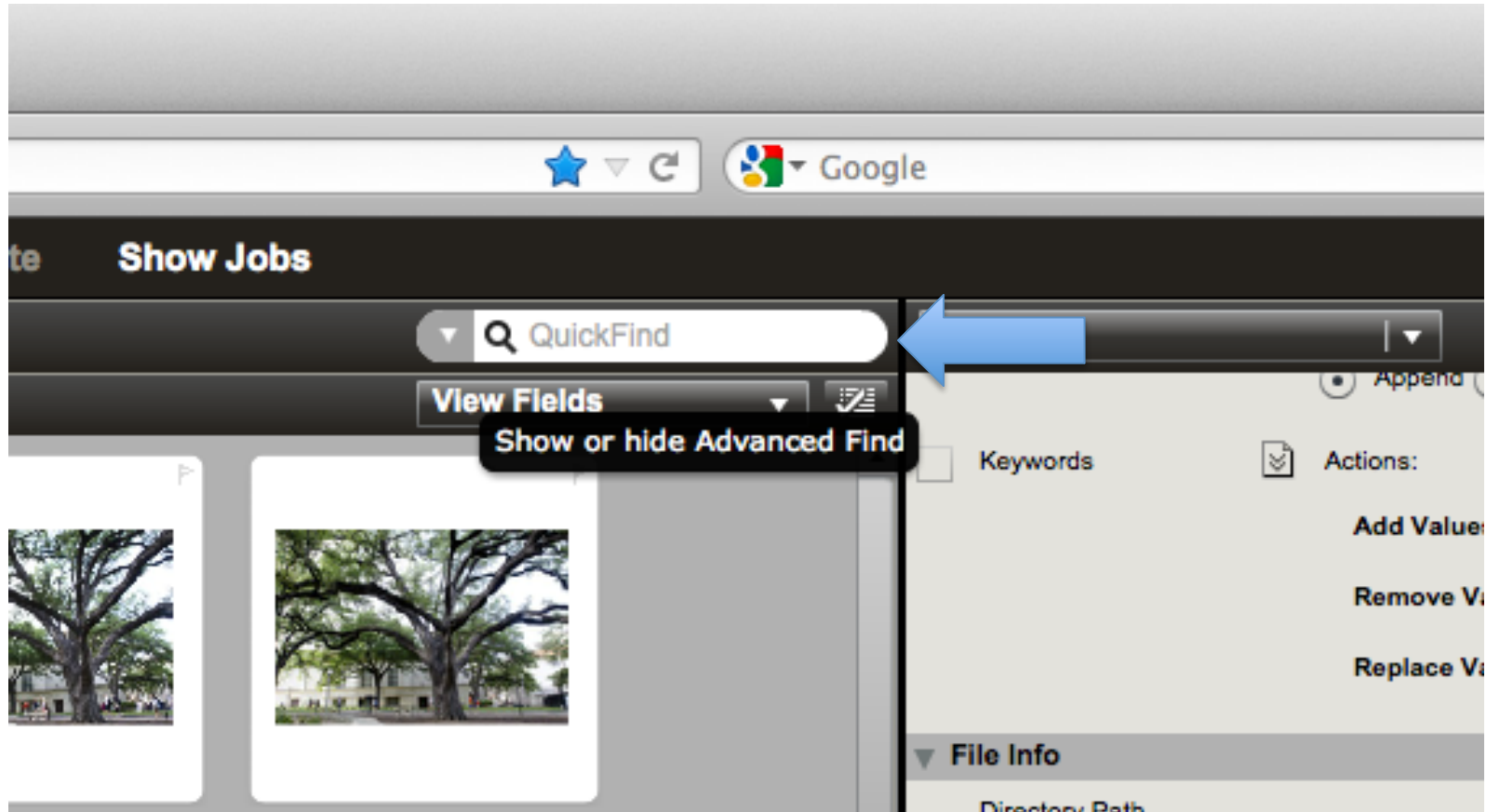
You can view more thumbnails at a time per page.



Portfolio cannot display all of the thumbnails on one page,  
so to see each page you must click through them



# Searching



Use QuickFind to do searches. All metadata fields are searchable.

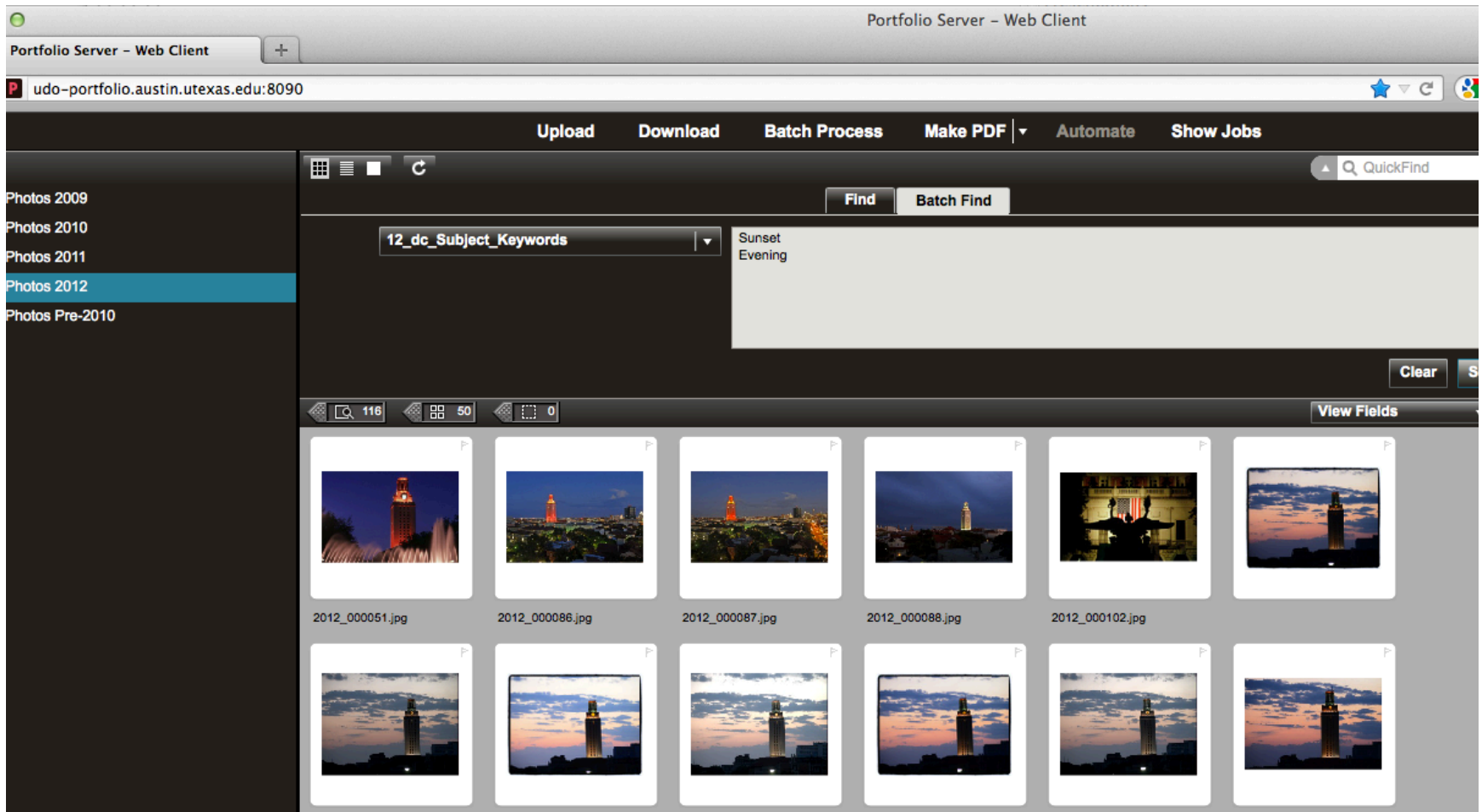
# Advanced Search

The screenshot displays a photo management application interface. At the top, there is a browser address bar showing 'udo-portfolio.austin.utexas.edu:8090' and a search bar with 'Google'. Below the browser, a navigation bar contains buttons for 'Upload', 'Download', 'Batch Process', 'Make PDF', 'Automate', 'Show Jobs', and 'Help'. The main interface is divided into several sections:

- Left Sidebar:** A tree view of folders including 'Photos 2008' through 'Photos Pre-2008', 'UMCS Audio', and 'UMCS Images'. Under 'UMCS Images', there are sub-folders like 'Flagged Items', 'Last Cataloged', and a list of years from 2008 to 2012, with 2012 expanded to show various sub-folders.
- Search Bar:** Located at the top center, it includes a 'QuickFind' search box and a 'View Fields...' link. Below it, search criteria are defined: '12\_dc\_Subject\_Keywords contains tower' and '12\_dc\_Subject\_Keywords contains sunset', connected by an 'and' operator. Buttons for 'Find', 'Batch Find', 'Save as Smart Gallery', and 'Search' are present.
- Image Grid:** A grid of 15 photo thumbnails, each with a filename below it, such as '2012\_001870.ORF Tower behind Burleson...'. The photos show a tower at sunset.
- Right Panel:** A 'Filtered Fields' panel with a 'Filtered' dropdown. It lists fields like 'Filename', 'File Size', 'Created', 'Modified', 'Cataloged', 'Description', and 'Keywords'. There are checkboxes for 'Description' and 'Keywords', and a text input field for 'Description'. Below this, there are 'Actions' like 'Add Values...', 'Remove Values...', and 'Replace Values...'.

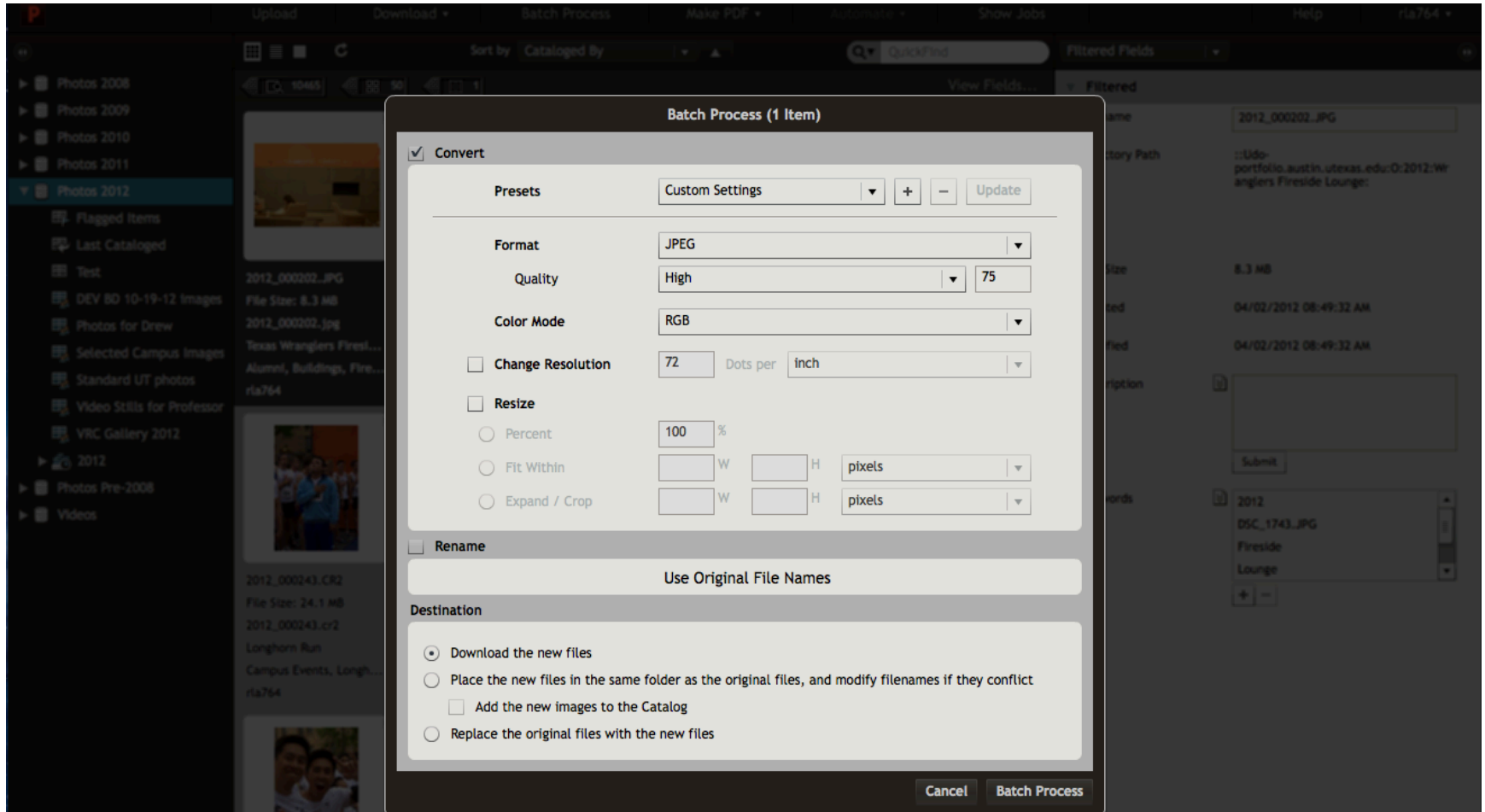
For more specific searches, select the arrow next to QuickFind for the advanced search options.

# Batch Find



Or, use Batch Find to search many options at once.

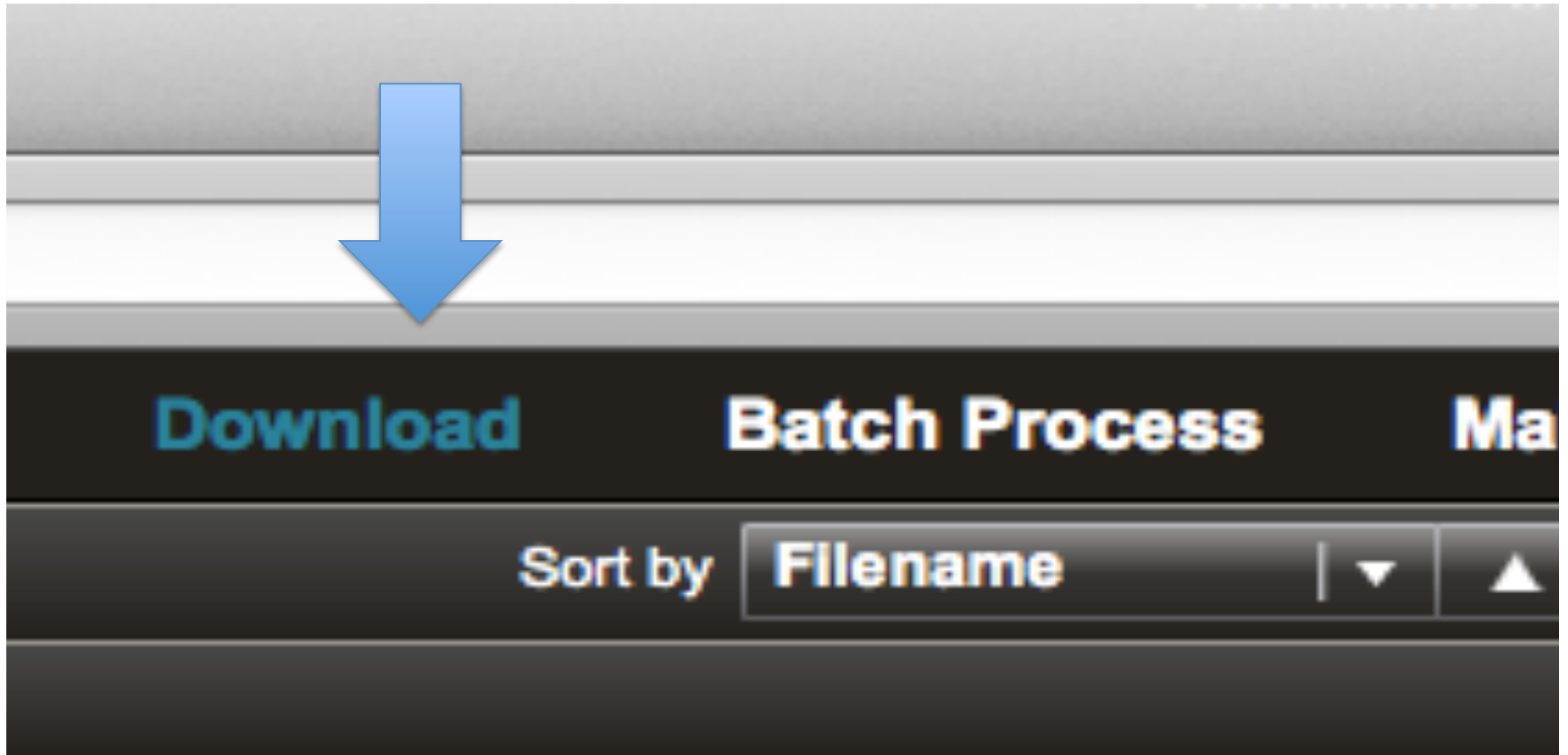
# Batch Convert



Images can download as 72 DPI and web ready



# Download



To download a particular image, select the image and then select “Download” on the top toolbar

# Show Jobs

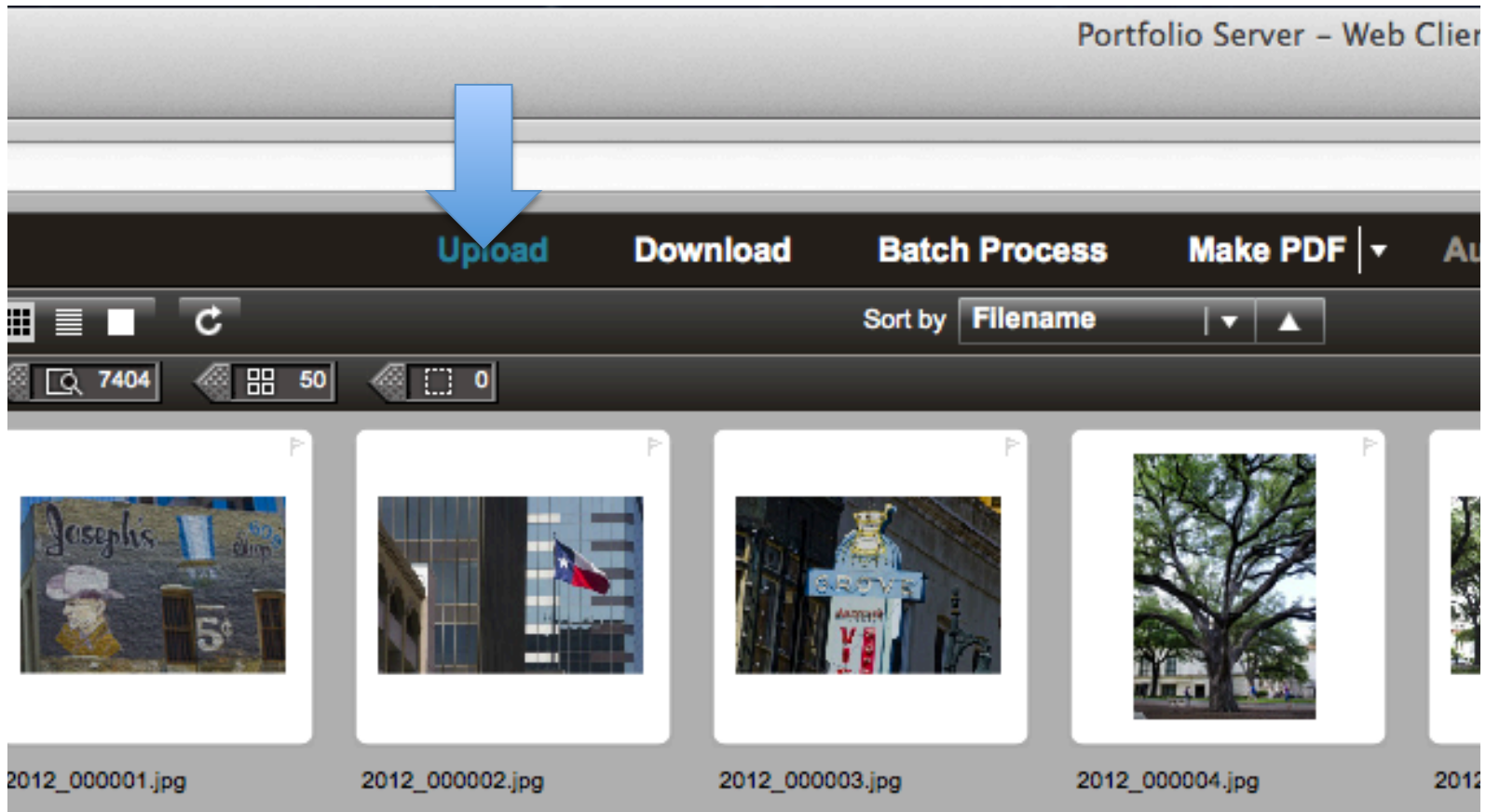
The screenshot displays a web client interface for a portfolio server. The browser address bar shows 'udo-portfolio.austin.utexas.edu:8090'. The interface includes a top toolbar with options like 'Upload', 'Download', 'Batch Process', 'Make PDF', 'Automate', and 'Show Jobs'. A 'Jobs' dialog box is open in the center, titled 'Jobs', with a 'Status: Complete' indicator. The dialog contains a 'Download Files' section with the following details:

Field	Value
Catalog	UMCS Images
Started	11/26/2012 11:20:45 AM
Finished	11/26/2012 11:20:47 AM

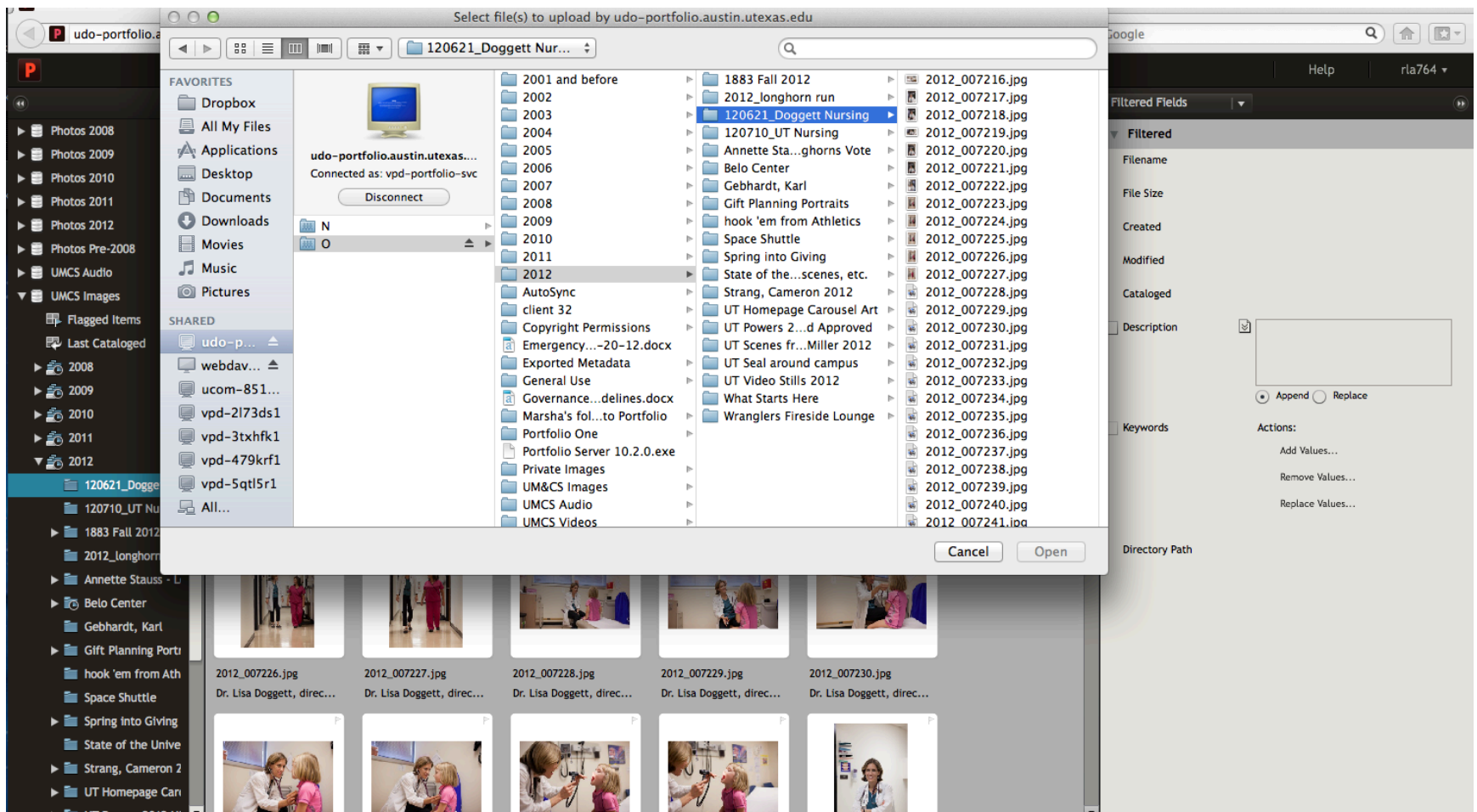
Below the table is a 'Download' button. At the bottom of the dialog are 'Clear Completed Jobs' and 'Close' buttons. The background shows a grid of image thumbnails and a sidebar with a file tree structure.

You can select many items through “Batch Process” to download later, and they will queue up in the “Show Jobs” tab on the top toolbar.

# Upload



To upload a new file, select “Upload” on the top toolbar. You must select a folder file first. If there is no applicable file, create one via Finder to talk to the Digital Asset Manager.



A Finder window will pop up and you can select your file.

# Cataloging

The screenshot displays a web client interface for cataloging photos. The main area shows a grid of 25 photo thumbnails, each with a filename and a partial description. The right panel shows a metadata form with fields for Name, Identifier, Title, Description, Location, Date, Creator, Contributor, Source Project, Rights, Source Location, Subject Keywords, Format, Alignment, Type, and Description. A blue arrow points to the Subject Keywords field.

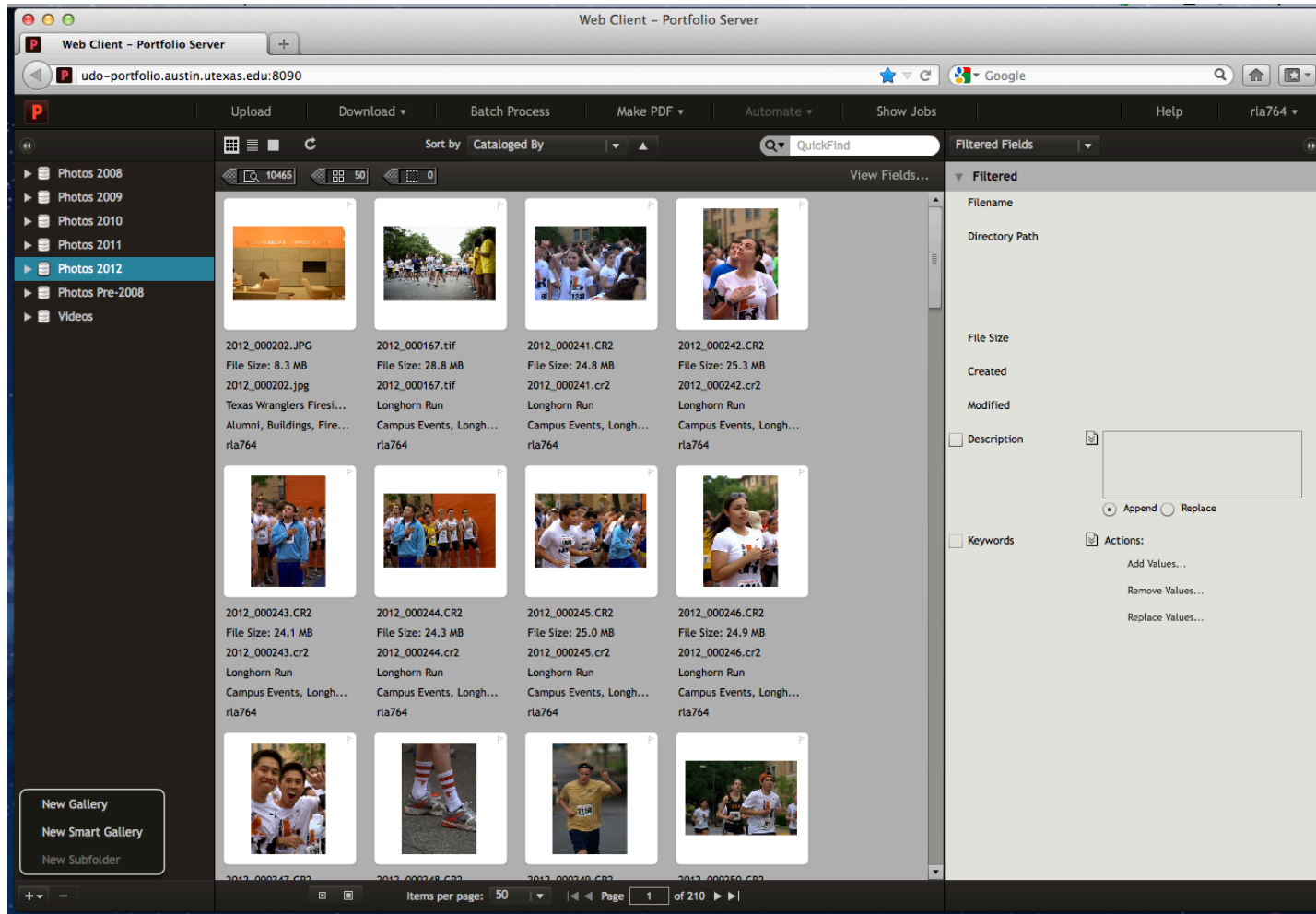
Filename	Description
2012_007216.jpg	Dr. Lisa Doggett, direc...
2012_007217.jpg	Dr. Lisa Doggett, direc...
2012_007218.jpg	Dr. Lisa Doggett, direc...
2012_007219.jpg	Dr. Lisa Doggett, direc...
2012_007220.jpg	Dr. Lisa Doggett, direc...
2012_007221.jpg	Dr. Lisa Doggett, direc...
2012_007222.jpg	Dr. Lisa Doggett, direc...
2012_007223.jpg	Dr. Lisa Doggett, direc...
2012_007224.jpg	Dr. Lisa Doggett, direc...
2012_007225.jpg	Dr. Lisa Doggett, direc...
2012_007226.jpg	Dr. Lisa Doggett, direc...
2012_007227.jpg	Dr. Lisa Doggett, direc...
2012_007228.jpg	Dr. Lisa Doggett, direc...
2012_007229.jpg	Dr. Lisa Doggett, direc...
2012_007230.jpg	Dr. Lisa Doggett, direc...

**All Fields**

Name	Dr. Lisa Doggett
02_dc_Identifier_Legacy	Dr. Lisa Doggett
03_dc_Title	Dr. Lisa Doggett
04_dc_Description	Dr. Lisa Doggett, director of the School
05_dc_Coverage_Location	The University of Texas at Austin
06_dc_Coverage_Date	07/12/2012
07_dc_Creator	Birzer, Brian (photographer)
08_dc_Contributor	
09_dc_Source_Project	Nursing School Photos
10_dc_Rights	The University of Texas at Austin
11_dc_Source_Location	Portfolio server, 2012
12_dc_Subject_Keywords	"Family Wellness Center: "UT School of Nursing" Dr. Lisa Doggett" Nursing
13_dc_Format_Container	JPEG
14_dc_Format_Alignment	
15_dc_Type	Image
16_dc_Description_DiagramSpecsModelName	Canon EOS 5D Mark II
17_dc_Description_LastUsed	

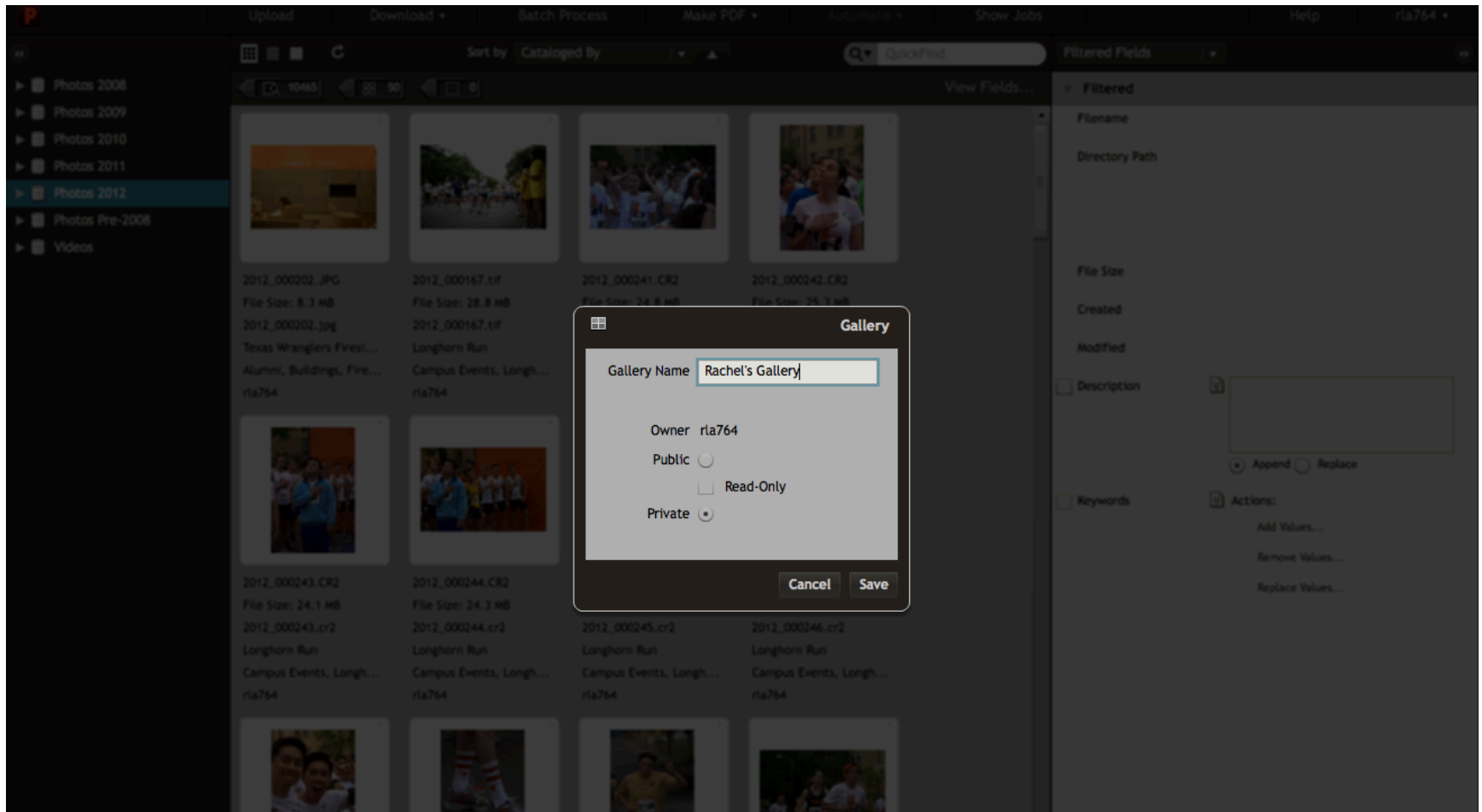
You can enter metadata for the new file under Custom Fields on the right panel. If your user permissions allow it, feel free to edit or add metadata to any file.

# Creating a Gallery

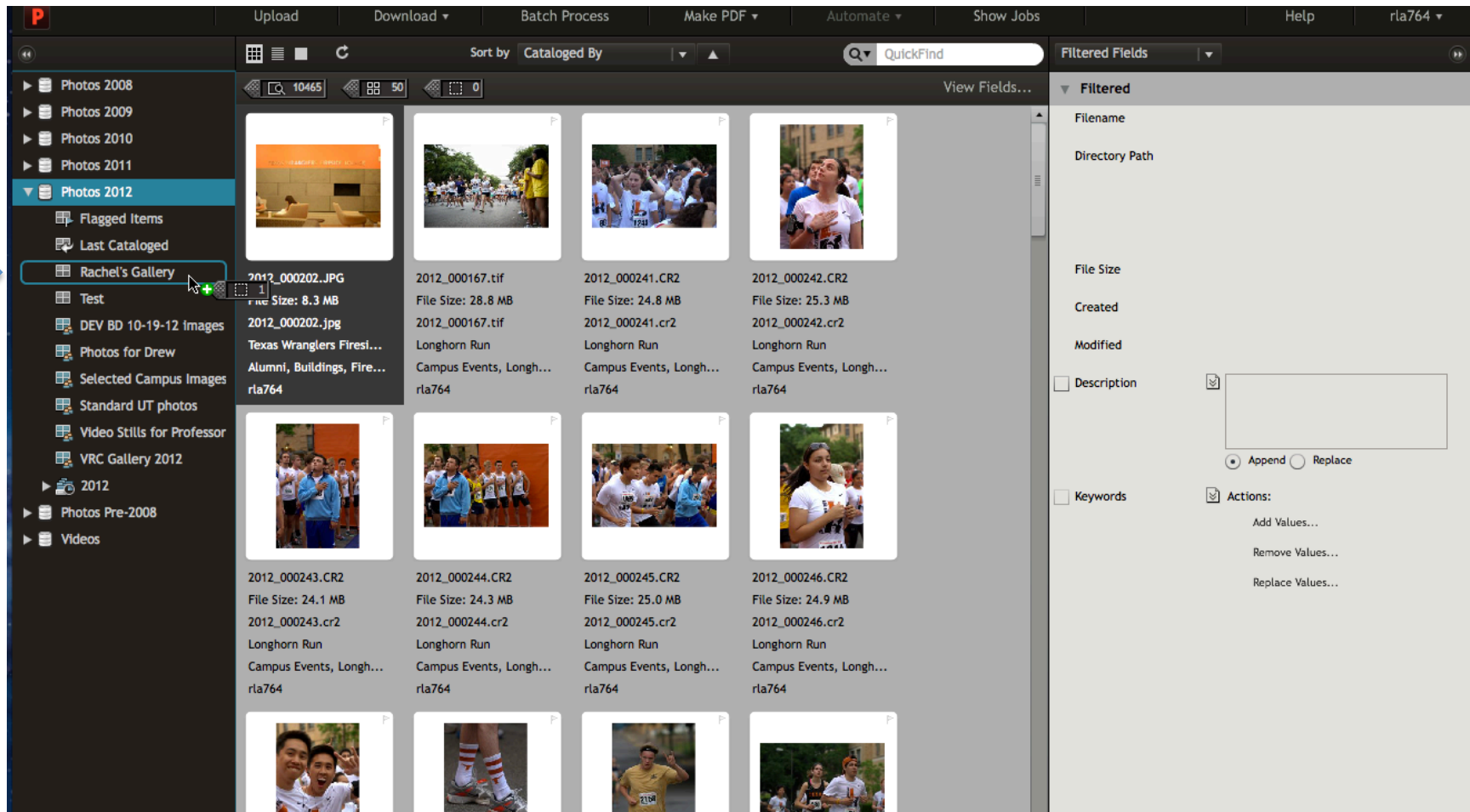


Select + sign at the bottom right corner and select “New Gallery”

# Name and Privacy Settings



# Drag selections in



The screenshot displays a photo management application interface. On the left, a sidebar contains a tree view of folders and galleries. A blue arrow points to the 'Rachel's Gallery' folder, which is highlighted. The main area shows a grid of photo thumbnails. Below each thumbnail, the filename, file size, and metadata are visible. The right sidebar shows a 'Filtered Fields' panel with various metadata fields and actions.

**Left Sidebar (Folders and Galleries):**

- Photos 2008
- Photos 2009
- Photos 2010
- Photos 2011
- Photos 2012**
- Flagged Items
- Last Cataloged
- Rachel's Gallery** (highlighted)
- Test
- DEV BD 10-19-12 Images
- Photos for Drew
- Selected Campus Images
- Standard UT photos
- Video Stills for Professor
- VRC Gallery 2012
- 2012
- Photos Pre-2008
- Videos

**Main Grid (Top Row):**

Thumbnail	Filename	File Size	Metadata
	2012_000202.JPG	8.3 MB	Longhorn Run
	2012_000167.tif	28.8 MB	Campus Events, Longh...
	2012_000241.CR2	24.8 MB	Campus Events, Longh...
	2012_000242.CR2	25.3 MB	Campus Events, Longh...

**Main Grid (Bottom Row):**

Thumbnail	Filename	File Size	Metadata
	2012_000243.CR2	24.1 MB	Campus Events, Longh...
	2012_000244.CR2	24.3 MB	Campus Events, Longh...
	2012_000245.CR2	25.0 MB	Campus Events, Longh...
	2012_000246.CR2	24.9 MB	Campus Events, Longh...

**Right Sidebar (Filtered Fields):**

- Filename
- Directory Path
- File Size
- Created
- Modified
- Description
- Keywords

**Actions:**

- Append
- Replace
- Add Values...
- Remove Values...
- Replace Values...



# User Accounts and Permissions

User accounts will be created by the Digital Asset Manager. All users in the department will have accounts as well as designated users in the CSUs. Permissions will depend on user needs.

## Access Levels

- **Catalog Administrator:** This level allows access to all functionality available. Catalog Administrators have access to advanced operations in the Portfolio Desktop Client, like editing custom fields, metadata mappings, and AutoSync folder settings. Catalog Administrator access should not to be confused with the Portfolio Server Administrator, who has access to all server settings.
- **Publisher:** Publishers are able to upload and delete items from a catalog as well as update all metadata for files in the catalog. Publishers can also create galleries.
- **Editor:** Editors are able to modify metadata, such as entering keywords and custom field values. Editor level and above can batch process, or, download files to their computer.
- **Reader:** Readers may only view items in the catalog and download files. They cannot add or remove items or edit metadata.
- Most users in the University Marketing and Creative Services department will be designated as Publishers or Editors. CSUs will each have their own Catalog Administrator to manage their assets.

# Questions?

- Please contact Rachel Appel, Digital Asset Manager, with any questions or feedback
- [rappel@austin.utexas.edu](mailto:rappel@austin.utexas.edu)
- 512-232-2324