Extensis™
PortfolioServer11

DESKTOP CLIENT
USER GUIDE

Portfolio Server Desktop Client 11.0.0

Contents

Welcome to Portfolio Server

Portfolio Server improves your efficiency by providing fast, easy access to the correct files in the right formats. It helps you centralize all your documents, photos, and audio and video files to provide a single location for your organization's important files and related information.

Portfolio Server includes the Server Admin web application, Web Client for browser-based access, and Desktop Client and Express applications for Mac and Windows systems.
- The Server Admin application lets you administer your server, create catalogs and user accounts and manage user access.
- The Portfolio Web and Desktop Clients let users add and organize assets in catalogs, apply metadata, perform searches and download assets in a variety of formats for use in their workflow.
- The Portfolio Express application provides drag and drop access to assets, across applications.

Each application has extensive, searchable online help. In the browser-based Server Admin and Web Client applications, click **Help** in the top right of the browser window to open the Help system. In the Desktop Client application, pull down the **Help** menu to open the Help system.

In the Help system, use the panel on the left to browse through the Contents or Index, or search for a specific word. Many pages also have hyperlinks to related topics.

Portfolio Desktop Client

The Desktop Client lets you catalog and access assets from the familiar environment of an application created specifically for OS X or Windows.

Depending on your Access Level for a catalog, here are the most common tasks you will perform in the Portfolio Desktop Client:
- **Cataloging files**
- **Editing file information:** Add keywords and metadata to cataloged items.
- **Organizing assets using Galleries and Smart Galleries**
- **Finding assets**
- **Access original files:** Preview files, copy them, drag them directly into your documents, or edit them in the application that created them.
- **Distribute assets:** Send automatically resized files via email, collect assets locally, burn files to disc, or publish them to a NetPublish website.

Catalog Administrators can use the Desktop Client to perform these tasks:
- **Configure Metadata Mappings**
- **Configure Advanced Cataloging options**
- **Configure AutoSync folders**
- **Create and Edit Custom Fields**

Portfolio Express

Portfolio Express provides a floating palette where you can access assets in your catalogs. Use the Express palette to find an asset, open it for editing, or drag it into another application (such as a word processing document or email message).

Here is what you should know about using Portfolio Express:
- **Launching Portfolio Express**
- **Setting Portfolio Express to start automatically**
- **Opening a catalog**
- **Setting the Portfolio Express hot key**
- **Searching with Portfolio Express**

What's New

Portfolio Desktop Client supports new features in Portfolio Server.
- **More metadata:** Portfolio now supports metadata defined in the IPTC Photo Metadata (Iptc4xmpExt) standard and PLUS (Picture Licensing Universal System) XMP namespaces.
- **Enhanced keyword generation:** The Advanced Cataloging Options dialog now allows you to choose more granular options for generating keywords from item paths: Filename, Parent folder, Folder tree, Volume, and Server name.
- **New file formats:** Panasonic P2 MXF video and new Camera Raw formats.
  For details on supported files and cameras, download the "Supported File Formats and Camera Models" PDF from the Extensis website (***http://www.extensis.com/downloads/documents/supported-file-formats-camera-models/***).

For detailed release notes, system requirements, and document downloads, see the Portfolio Server 11 support page (***http://www.extensis.com/support/product-support/portfolio-server-11/***) on the Extensis website.

Previous Releases

These features were added in recent releases of Portfolio Server and Portfolio Desktop Client.
- Expanded file processing for improved cataloging of Office documents and PDFs.
- New camera raw formats and pro video codecs.
- Desktop client incorporates an updated preview method, using helper apps to preview more video and audio formats.
- LDAP support allows users to connect to catalogs using their network login credentials.
- Faster AutoSync cataloging and metadata embedding using NetMediaMAX.
- Automatically generate video thumbnails.

Getting Started

Portfolio helps you organize your digital files by storing information about them in easy-to-use visual catalogs. Instead of burrowing through nested folders looking for files, or opening document after document to find a needed image, you can quickly browse thumbnail-sized previews in your Portfolio catalog or perform a search for a needed item using Portfolio's powerful search engine.

Catalog: You need to "catalog" your files—add them to a Portfolio catalog—so that Portfolio can find them, preview them and track them.
- ***Creating a New Catalog*** (see the *Portfolio Administration Guide* or Portfolio Server Admin online help)
- ***Adding Items to a Catalog*** (page 13)

Customize: Give your catalogs the look and style you want to make information easy to find and display.
- ***Creating a New Gallery*** (page 23)
- ***Customizing Gallery Views*** (page 28)

Access: Preview files right in Portfolio, copy them to another disk, drag them into programs such as Photoshop® or QuarkXPress® or edit them by opening them in the application that created them.
- ***Previewing Items*** (page 33)
- ***Editing Original Files*** (page 34)

Organize: Using tools within Portfolio you can group, organize and categorize your files by adding keywords, descriptions, and other custom data.
- ***Keywords*** (page 53)
- ***Custom Fields*** (page 56)
- ***Categories*** (page 59)

Find: Type a word or phrase to access any cataloged file instantly. Search using a wide variety of criteria automatically stored in Portfolio.
- ***QuickFind*** (page 39)
- ***Using the Find Command*** (page 39)

Distribute: Send automatically resized files via email, burn them directly to CD or DVD, or publish them as web pages. Portfolio automates most distribution-related tasks.
- ***Emailing Files*** (page 61)
- ***Burning Files to Disc*** (page 61)
- ***Creating Webpages*** (page 63)
- ***Collecting Files*** (page 63)
- ***Slideshows*** (page 69)

System Requirements and Installation

For the most up-to-date information about the latest release of Portfolio Server, please visit the Portfolio Server 11 support page (***http://www.extensis.com/support/product-support/portfolio-server-11/***) on the Extensis website.

To install the Portfolio Desktop Client:
1. Download the installer from the Portfolio Server 11 support page (***http://www.extensis.com/support/product-support/portfolio-server-11/***) on the Extensis website.
2. Double-click the installer icon.
3. Follow the on-screen instructions to complete the installation.

You can install the Desktop Client on as many systems as you like; there is no serial number required.

The Portfolio User Interface

The Portfolio user interface is designed to allow you to quickly catalog, find, and use your files. The main areas of the Portfolio user interface are described below.
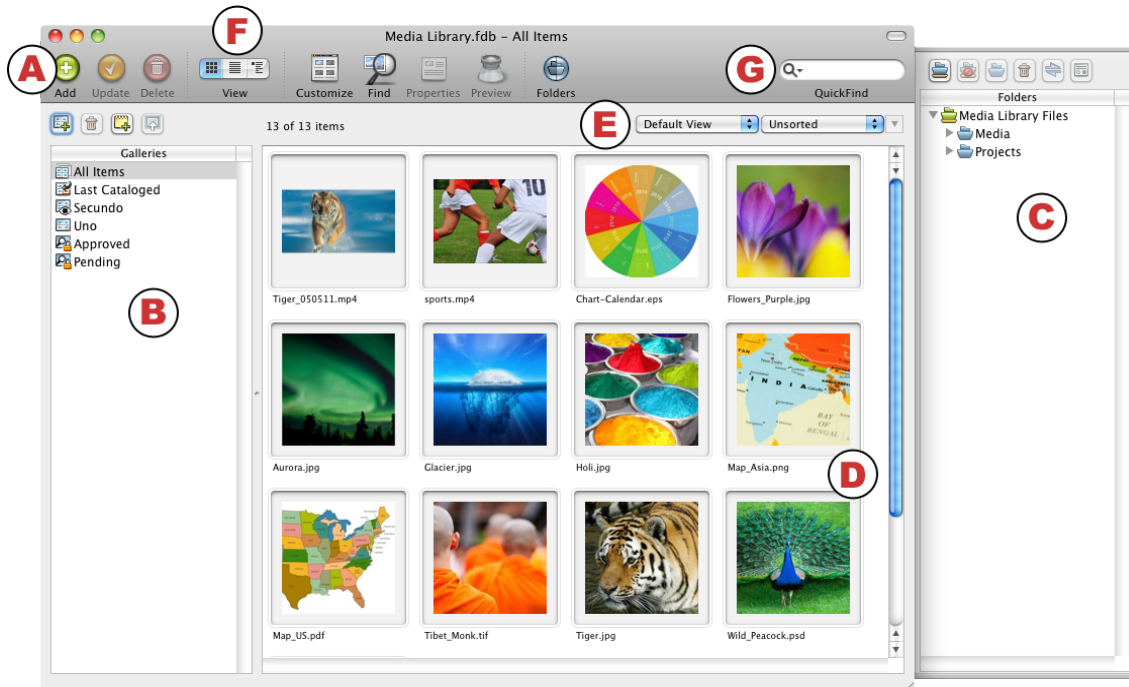
A	Toolbar	E	**Saved View** and **Sort** menus
B	Galleries pane	F	**View** buttons
C	Folder view drawer/pane	G	QuickFind
D	Main window		

The Toolbar

The toolbar is where you access the most commonly-used commands with the click of a button. You can customize the toolbar to include as many or few buttons as you wish. For more information, see *Customizing the Toolbar* on page 82.

The Galleries Pane

Everything contained in your Portfolio catalogs is listed in at least one gallery. Galleries are containers in which you can create logical collections of files within your catalog. Galleries can be made available to all users of a catalog, or kept private. A gallery can also be converted into a special Smart Gallery in which Portfolio automatically locates and updates the gallery based on saved search criteria. For more information, see *Galleries* on page 22.

The Folder View Drawer/Pane

The Folder View drawer (Macintosh) or pane (Windows) allows you to access folders and files as you would through the OS X Finder or Windows Explorer. On OS X, the Folder View is displayed as a drawer on the side of the Portfolio window. On Windows, it is displayed in a pane just below the Galleries pane. Folders added into Folder View can be automatically synchronized with your catalog through a process called AutoSync. For more information about Folder View and AutoSync, see *AutoSync* on page 48.

The Main Window

Items within the currently selected gallery or folder view folder are displayed in the main window. On Windows, when you preview an item, or double-click to open a gallery, it is displayed in a tab at the top of the main window. On OS X, when you preview an item or double-click to open a gallery, it will be displayed in a new window.

Saved View Menu and Sort Menu

The Saved View and Sort menus are located in the upper right corner of the Main Window. These menus allow you to change the look and sort order of the currently open gallery. For more information about creating custom views, see *Saving Custom Views* on page 31. For more information about using the **Sort** menu, see *Sorting a Gallery* on page 24.

The View Buttons

The view buttons on the toolbar allow you to quickly switch between the three basic gallery view types: Thumbnail, List and Item. The view of each gallery can be completely customized to display any field data tracked by Portfolio. For more information, see *Views* on page 28.

QuickFind

The **QuickFind** field on the toolbar allows you to quickly search for files in your catalog by quickly searching common field values. Based on your specific needs, QuickFind can be customized to search most Portfolio fields. For more information, see *QuickFind* on page 39.

Catalogs

Opening a Served Catalog

To open a catalog served by Portfolio Server, you must first connect to the server, and then open the catalog.

1. Choose **File > Connect to Server**.
2. If you haven't added the Portfolio server to your list of servers, click **Add Server**, enter the name and IP address of the Portfolio Server, and click **Add**. Contact your Portfolio Server administrator to get the IP address of your server.
3. In the Connect to Servers dialog, click the ⊞ (Win) or ▷ (Mac) icon next to the server name to display a list of the catalogs being served.
4. Select the catalog that you want to open.
5. Click **Open Catalog**.

Viewing Catalog Properties

You can view general information and statistics about any catalog by choosing **Catalog > Properties**. Here's what you can do within the Catalog Properties dialog:

- Get details such as the total number of items in your catalog, total number of keywords used, catalog size on disk, creation date, and so on.
- View and copy the path to the catalog file on disk.
- View all the keywords used in the catalog, along with their frequency. To do this, click the **Statistics** tab, then click **Calculate** (Mac) or **Calculate Now** (Windows). Portfolio lists all keywords and indicates how many cataloged items have each keyword assigned.
- Save all the keywords used in a catalog to a text file. First click **Calculate** to generate the keywords list. Then click **Export Keywords** (Mac) or **Save Keywords to File** (Windows) to save the list as a text file.
- View the sort language of your catalog.

Understanding and Changing Access Levels

Access Levels

There are four possible levels of catalog access: Reader, Editor, Publisher, and Catalog Administrator. Users at each level have access to a different set of Portfolio functionality.

Reader

Readers can view, search, preview, and copy items, but can't make any changes in the catalog. It's a "read-only" mode.

Editor

Editors can search, preview, access, and edit information about cataloged items, but can't add new items to a catalog, rename files, or export items to the web or QuickTime movies.

Publisher

Publishers can add, remove, export, and edit items in a catalog, but can't access administrative functions such as creating a new custom field or creating a master keyword list.

Catalog Administrator

A catalog administrator has full access to all features and can create custom fields and control cataloging options that other users can't. When a catalog is opened by a Catalog Administrator, no one else can use it.

Changing the Catalog Access Level

To change access levels:

1. Choose **Catalog > Access Level**, or press *COMMAND-J* (Mac) or *CTRL-J* (Windows) to open the Catalog Access dialog.
2. Choose an access level from the **Level** drop-down menu.

   NOTE
   If you get an error indicating that you can't change your access level because the catalog is already opened by another user and you know that you are the only user in the catalog, close any catalogs you have open in the Portfolio Express Palette.

3. If necessary, enter a password and click **OK**.

Cataloging Files

Adding Items to a Catalog

In order to organize and track your files with Portfolio, you must first add those files to a Portfolio catalog. To add items to a Portfolio catalog, you must have Publisher or Administrator access to the catalog.

You can catalog individual files (such as a JPEG image, or an EPS graphic), or folders, or entire volumes (such as your hard drive, a CD-ROM or a DVD). There are four different ways you can start adding items to a Portfolio catalog.

IMPORTANT
Portfolio Server must have access to the files you're cataloging.

Drag and drop

1. Drag a file, folder or disk into an open catalog window to catalog it.
2. Set the appropriate Cataloging Options and click **OK** to add the files to the catalog.

AutoSync

1. Add a folder from your computer or network to Portfolio's Folder View by clicking **Add Watch Folder** 🖥 in the Folder View drawer/pane.
2. Click **Sync** ⇔ to catalog the contents of the selected folder. For more information, see *AutoSync* on page 48.

Add button

1. Click **Add** 🞢 in the toolbar.
2. Select any file, folder or disk in the Open dialog. If you select a folder or disk, you can enable the Include Subfolders option to catalog any files that are inside folders nested within the selected folder or disk volume.
3. Set the appropriate Cataloging Options and click **OK** to add the files to the catalog.

Catalog menu
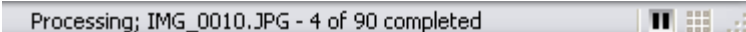
1. Choose **Catalog > Add Items**.
2. Select any file, folder or disk in the Open dialog. If you select a folder or disk, you can enable the Include Subfolders option to catalog any files that are inside folders nested within the selected folder or disk volume.
3. Set the appropriate Cataloging Options and click **OK** to add the files to the catalog.

Fast Cataloging

When adding files using any of the above methods, Portfolio adds the files to the catalog using a two-step fast cataloging process. In the first step, all files are quickly scanned and added to the catalog. As Portfolio scans each file, it displays the file thumbnail with an added yellow dot in the catalog. This display shows you that the files are available, but haven't been completely cataloged.

The second phase of cataloging happens in the background, so you can continue to work in the catalog. In the second step, Portfolio creates preview files and performs any necessary text indexing. After this phase of fast cataloging is complete, the yellow icon is removed from each item thumbnail.

As files are cataloged, Portfolio displays the cataloging progress in the status bar. The status bar also contains controls that allow you to stop and start cataloging during the first phase, or pause and continue cataloging during the second phase.

Processing; IMG_0010.JPG - 4 of 90 completed	‖ ▦ ⠿

WARNING
If the fast cataloging process is being run by AutoSync, and the process is interrupted, items may remain partially cataloged. To fully catalog the items, select the partially cataloged items and choose **Item > Update**.

Fast cataloging can be enabled and disabled with an Advanced Cataloging option (**Catalog > Advanced Options > Thumbnails** tab).

Yellow indicator dot

A yellow dot 🟡 on a catalog thumbnail indicates a partially cataloged item. During the first cataloging pass Portfolio generates thumbnails and extracts any easily accessible metadata. This is an indication that the file still requires additional processing by Portfolio. The yellow dot will clear once the second stage of processing is complete.

Red indicator dot

A red dot 🔴 on a cataloged item indicates that the file in question may be corrupt, in-use, or that the file permissions may be such that it is unreadable by Portfolio.

The red dot can also appear if either the Previews folder cannot be found or Portfolio (or Portfolio Server) does not have the right permissions to access the folder and update the files.

Removing Items from a Catalog

Portfolio provides several easy ways to remove items from a catalog. Keep in mind that deleting an item from a Portfolio catalog does not delete the original image; it just removes Portfolio's internal record about the file. Your original file remains untouched.

> **NOTE**
> You can delete original files using Portfolio, too. Use **Item > Original > Delete**. This will remove the item from Portfolio and move the original file to the Trash (Mac) or Recycle Bin (Windows). On OS X, items on a network volume deleted in this manner will be deleted immediately without moving them to the Trash.

To remove an item from a catalog:
- Click **Delete** 🗑 on the toolbar.
- Press the *DELETE* key.
- Choose **Item > Delete**.
- Right-click on a thumbnail and choose **Delete** from the shortcut menu.

The Confirm Delete warning

Whenever you delete an item from the All Items gallery using any of the methods listed above, Portfolio presents a confirmation dialog to make sure you're performing the action you intended. The dialog gives you the choice of deleting the item from the gallery or deleting it from both the gallery and the catalog.

Cataloging Options

When you add items to Portfolio, there are many options available that determine exactly how Portfolio stores information about your files. You can control these various options by choosing the **Cataloging Options** command from the **Catalog** menu.

After opening the Cataloging Options dialog, you can choose options that allow you to rename, copy and move files, as well as add descriptions, keywords and custom data for items added to your catalog.

To rename files:
1. Enable the **Rename Files** option.
2. Choose a naming scheme using the three drop-down menus. The naming options available are:
   - **Text:** Type a descriptive text string up to 31 characters long.
   - **Number from:** Enter any number. If you catalog more than one file, Portfolio will increment the number by one when naming each file. If you enter the number 001, for example, and catalog three images, their names will contain the numbers 001, 002, and 003.
   - **Original File name:** Includes the original file name within your new naming scheme.
   - **None:** Does not apply any renaming scheme to your files.

You can apply these options in any order and combination to make up the front, middle and end of the new naming scheme.

To copy or move files to a new location:
1. Enable the **Copy or Move Files to a Location** option.
2. Choose to either the **Make a Copy of the Originals** or **Move the Originals** radio button.
3. Browse to new location where you would like to place the files.

To add a description:
1. Enable the **Assign Properties** option.
2. Click the **Description** tab and enter your description in the text box.

To add keywords:
1. Enable the **Assign Properties** option.
2. Click the **Keywords** tab.
3. Enter your keyword in the text box and click [+] to add a new keyword to the list.
   If your catalog has a Master Keyword list, you can select a keyword in the list and click **Assign**.

Remember, the keywords you enter here will automatically be applied to all the items you catalog.

To add custom field data:
1. Enable the **Assign Properties** option.
2. Click the **Fields** tab.
3. To choose a value for any custom field, double-click the field name.
4. Enter the appropriate custom field data and click **OK**.

Saving a Cataloging Options Preset

When cataloging files with Portfolio, there are so many things that you can do, so Portfolio gives you the option to save your settings to use again later.

For example, you may have a project about race cars where you want to add the keywords "car" and "race" as well as move the new files to a specific project directory. If you save these cataloging options, in the future you will only need to choose the preset from the **Dialog Presets** drop-down menu and click **OK**.

Saved cataloging options can also be used in conjunction with a AutoSync watched folder, files can automatically be moved, catalogued, and have keywords added without any interaction from you.

To save a cataloging options preset:
1. Choose **Catalog > Cataloging Options**.
2. Enter your chosen cataloging options.
3. At the top of the dialog, click **Save** to save settings to the current dialog preset, or click **Save As** to save the options to a new dialog preset.
4. Click **OK** to dismiss the Cataloging Options dialog.

Using a Cataloging Options Preset

Cataloging options presets are quick ways to reuse settings in the **Cataloging Options** dialog . Cataloging options presets can be used during when manually adding items to a catalog or with an AutoSync folder.

To use a cataloging options preset:
1. Begin cataloging items as you would normally. For more information, see *Adding Items to a Catalog* on page 13.
2. Choose your cataloging options preset from the **Dialog Presets** drop-down menu at the top of the **Cataloging Options** dialog.
3. Click **OK**.

Hiding the Cataloging Options Dialog

By default, the Cataloging Options dialog opens each time you catalog files, unless you specifically tell it not to do so by enabling the **Don't show this dialog when cataloging** option in the **Cataloging Options** dialog.

To hide the cataloging options dialog:
1. Choose **Catalog > Cataloging Options**.
2. In the **Cataloging Options** dialog, enable the **Don't show this dialog when cataloging** option.
3. Click **OK**.

Presets Palette

The Presets palette allows you to update a number of different data fields at the same time by utilizing a cataloging options preset. This includes keywords, descriptions and an unlimited number of custom fields.

When you are cataloging items manually, you are typically presented with the cataloging options dialog. With the Presets Palette, you can apply the saved cataloging options configured with a single click after the assets have already been cataloged, making it easy to update massive amounts of metadata with a single click.

It's important to note that when applying a preset, only the Assign Properties options are utilized. Any copy, move or rename options are ignored. When a preset is applied, changes to fields that can hold multiple values, such as keywords, are appended to the item record. Changes to single-value fields, such as the Description will replace the current setting in the catalog.

To display the Presets palette, choose **Window > Presets**.

To create a new preset:
1. Choose **Window > Presets**.
2. Click **Options**.
3. In the Cataloging Options dialog, select any of the Assign Properties options.

    > **NOTE**
    > Copy, Move, and Rename operations are ignored when applied as a preset.

4. Choose **Save As** from the drop-down menu (Mac), or click **Save As** (Windows).
5. Give your preset a name and click **OK**.
6. Click **OK** to close the Cataloging Options dialog.

To apply a preset:
*   From the Presets palette, click and drag the preset name onto any single item or group of highlighted items in a gallery.

    —OR—
*   Highlight any single item or group of items in a gallery, then in the Presets palette, highlight a preset name and click **Assign**.

Click **OK** to assign the preset to the selected items.

> **WARNING**
> Assigning a preset cannot be undone.

Placeholders

Normally, Portfolio creates an item (also called a record or entry) for each digital file that you catalog. But, in some cases, you may want to enter an item in a Portfolio catalog for a file that doesn't exist—perhaps one that you haven't yet received or created. This is called a Placeholder. Think of a Placeholder as a stand-in for a file that you know you'll be including in your catalog, but that you don't have yet.

Placeholders behave just like other items in a Portfolio catalog. You can assign them keywords, add descriptions to them, perform searches for them, and so on. The only difference is that the Placeholder doesn't yet have a specific media file associated with it. At any point in the future, you can link a Placeholder to an actual file on disk, turning it into a regular Portfolio catalog item.

If you give the Placeholder the same name as the file you eventually link it to, Portfolio can automatically find the file and catalog it when you update the Placeholder.

Linking a Placeholder

Linking a placeholder to an actual file on disk turns it into a regular Portfolio catalog item.

To link a placeholder to a file:
1. Select the placeholder.
2. Click **Update** on the toolbar, or

    Press *COMMAND-U* (Mac) or *CTRL-U* (Windows), or

    Choose **Item > Update**.
3. If the name of the placeholder exactly matches the name of the file you're linking to, and you've specified the right folder in which to find it, the **Update** command automatically links the item to the matching file.

    If Portfolio doesn't see a file with the same name as the placeholder in the current directory, you'll be presented with an Open dialog. Locate the file you want and click **Open**.

Creating a placeholder item

To create a Placeholder:
1. Choose **Catalog > Create Placeholder**.
2. Name the Placeholder. Type the name into the Filename field. If possible, this should be the name of the file that the Placeholder is standing in for—the one that you'll eventually use to replace the Placeholder. This will make updating much easier later on.
3. Specify a location (Optional). Check the **Specify Folder on Disk** option to set the location where you will eventually place the file that the Placeholder is standing in for. If you don't know where you're going to put the file, you can leave this blank. If you do know it, setting this location makes updating the Placeholder much easier.
4. Click **OK**. A new item with a thumbnail containing the word Placeholder appears in your catalog.

Advanced Cataloging Options

Advanced Cataloging Options are applied at the catalog level and will affect all users who add items to the catalog. The Advanced options allow you to control a number of the powerful features in Portfolio, whether it's creating keywords from an item's path or selecting files to catalog based on filename.

To set Advanced Cataloging Options:
1. Choose **Catalog > Advanced Options**.
2. In the Advanced Cataloging Options dialog, choose new settings.
3. Click **OK** to accept the new settings.

See the *Portfolio Server Administration Guide* for information about creating custom Catalog Types.

Creating keywords from a path

Sometimes the way you store items on disk reflects information about the items themselves. A filename often describes the contents of the file:`three-puppies.jpg` or `Annual Report 2012.pdf`. A single folder may hold all the assets of one client (`James Place Furniture`), or all the files for a specific project (`Blues Documentary`).

You can attach this information to the assets as you catalog them by allowing Portfolio to generate keywords from the relevant portions of an asset's path.

To enable keyword creation from a path:
1. Choose **Catalog > Advanced Options**.
2. In the **Advanced Cataloging Options** dialog, click the **Properties** tab.
3. Enable the **Create Keywords from Path** option.
4. Select one or more path components to include as keywords:
    - **Filename:** The name of the file, without the extension.
    - **Parent folder:** The name of the folder that the file is in.
    - **Folder tree:** The name of each folder in the file's path, not including the volume name or parent folder.
    - **Volume:** The name of the disk that the file resides on.
    - **Server name:** The name of the server that the file resides on.

NOTE
If items move to a different location, the original generated keywords will be retained. If you want to generate new keywords based on the new location, choose **Item > Extract Properties**, which will append new keywords, as well as update other metadata contained in the files.

Tips for effective path keywords

- You can modify your path keywording options based on the content you are cataloging. For example, if you are cataloging a collection of archival discs, you may wish to only include Filename and Volume information as keywords.
- Portfolio uses the space character to identify word breaks. If you want to use a phrase or longer term as a single keyword, separate the words in the phrase with a dash or underscore.
  Example: You could name a series of archival DVDs "Video-Archive-2012 ###" (where ### is the number of the disc in the series); in this case, "Video-Archive-2012" becomes one keyword, and the disc number becomes another. This allows a search to quickly identify all the files archived on a single disc or on all the discs in the series.
  Example: If you use a customer name or number as a folder name to separate client jobs, use something like "custnum-#####" or "Berkeley-Square-Photography" so that searches will more easily identify the specific customer.
- Don't use words in file or folder names that will not be useful as keywords. If all your assets are images, then including the word "image" in the path would be redundant. If you have assets divided among "images," "documents," and "videos," however, these would make a sensible way to organize your asset and provide a quick way to narrow down files by general type.
- Path keywords are convenient but are not the only or best way to add keywords to assets. Consider using a Master Keywords list (page 54) to allow users to quickly add only approved keywords to assets.

Indexing document text

With the Index document text option turned on, Portfolio indexes the text of Adobe PDF (Portable Document Format) files, as well as plain text documents, when they are cataloged. Each word in the cataloged documents is saved in the catalog index, allowing fast searches and retrievals.

NOTE
Turning on text indexing slows down the cataloging of PDF files. We recommend that you turn this option on only if searching PDF text is critical when using Portfolio to retrieve documents.

To enable document text indexing:
1. Choose **Catalog > Advanced Options**.
2. In the **Advanced Cataloging Options** dialog , click the **Properties** tab.
3. Enable the **Index Document Text** option.

To exclude words from document text indexing:
1. From the **Properties** tab of the **Advanced Cataloging Options** dialog, click **Edit Word Exclusion List**.
2. In the entry field, type a word that you want Portfolio to ignore when indexing.
3. Click **Add**.
4. Repeat the above steps to add as many words as necessary to the exclusion list.
5. Click **OK**.

Setting Thumbnail options

Thumbnail options are set in the **Advanced Cataloging Options** dialog. These settings are catalog-wide, and changes will affect all users who add items to the catalog.

NOTE
- Portfolio generates thumbnail images when possible. For InDesign documents, Portfolio will use the embedded thumbnail if there is one.
- Portfolio generates video thumbnails from the poster frame if available, or a frame from the middle of the video otherwise.

To change thumbnail creation options:
1. Choose **Catalog > Advanced Options**.
2. Click the **Thumbnails** tab.
3. Choose a thumbnail size from the drop-down menu. This setting determines the size (in pixels) of the thumbnails created and stored by Portfolio—either 112 x 112 pixels, or 256 x 256 pixels.
4. Enable the **Enable Fast Cataloging** option to catalog your files in two phases. This option allows you to more quickly view and manipulate your cataloged files immediately after the first phase of cataloging. For more information about Fast Cataloging, see *Adding Items to a Catalog* on page 13.

Thumbnails in InDesign documents

Portfolio cannot generate thumbnails Adobe InDesign files. However, InDesign allows you to save a preview thumbnail with the document.

To save a preview in Adobe InDesign:
1. Choose **InDesign > Preferences > File Handling** (Mac) or **Edit > Preferences > File Handling** (Windows).
2. Check **Always Save Preview Images with Documents**.
3. Specify the pages to use for the preview from the **Pages** pop-up menu
4. Click the **Preview Size** pop-up menu and choose **Extra Large 1024 x 1024**.

   Since Portfolio will use this image as the document preview as well as the thumbnail, using the largest size provides the best available preview.
5. Click **OK**.

Including and excluding file types

Portfolio is capable of cataloging virtually every type of digital file, and by default the program is set up to catalog all file types. But if you want Portfolio to catalog only specific types of files—such as JPEG or TIFF files—or to ignore (and therefore not catalog) certain types of files, you can set such limitations up in the File Types tab of the Advanced Cataloging Options dialog.

To exclude certain file types from being cataloged:
1. Choose **Catalog > Advanced Options**.
2. In the **File Types** tab of the **Advanced Cataloging Options** dialog, choose the **Catalog only the Following Type** option.
3. In the **File Types** list, clear the checkmark next to each file type that you don't want Portfolio to catalog.

Updating the file type list

The File Types list allows you to choose which types of files to catalog. You can choose between cataloging all files regardless of type, or cataloging only specific types of files.

The File Types list includes many common file types. However, you may need to add a file type that corresponds to a document from a very new application, a very old application, or a custom application.

To add a File Type to the list:
1. Choose **Catalog > Advanced Options**.
2. Click the **File Types** tab.
3. Click **Add**.
4. Enter the file type information, or click **Same As** and locate a file of the same type. Portfolio copies the parameters of this file type into the fields.
   Macintosh users: The **Mac File Type** field was used by older applications. You can safely leave this field empty.
5. Choose where to store the file type preferences.
   - **Store in Preferences** (Mac)/**Store "Locally"** (Windows): With this preference, your decision to catalog certain file types will not affect other Portfolio users who choose to add items to the catalog.
   - **Store in Catalog**: The setting for this file type will be stored in the catalog. Any user cataloging files will be subject to the cataloging setting for this file type.
6. Click **OK** to add this file type to the list.

Excluding Files by name

Portfolio can be forced to ignore files with a specific filename by creating an "exclusions" list that specifies an explicit set of file names or patterns.

To exclude files by name:
1. Choose **Catalog > Advanced Options**.
2. In the **Exclude Filenames** tab, select the file name search parameter from the drop-down menu: **Begins With**, **Contains**, or **Ends With**.
3. Enter the filename or partial name that you want to exclude from cataloging.
   Letter case (uppercase/lowercase) is ignored.
4. Click **Add**. Portfolio searches each path name and each segment of the path for text strings matching any of the parameters you enter. For example, if you enter `Begins with: DUP` and `Ends with: 97`, Portfolio will exclude `Duplicate_PH050`, `Report_97`, and `C:\Duplicates\Image.jpg`.

Mapping Metadata Settings

In the Metadata Properties Settings dialog you can define which metadata fields are extracted, and map exactly where in the catalog the information is stored by Portfolio.

There are two important lists that control how Portfolio maps metadata.
- The Metadata List is a list of all of the potential metadata fields that Portfolio can accept.
- The Catalog Field List is a list of all of the default and custom fields where Portfolio can store metadata in the catalog.

For each piece of metadata that you want to extract, you must have an appropriate Catalog Field mapped in the dialog. By default, Portfolio extracts the most common metadata and stores it in the catalog.

It is also possible to embed metadata back into your original JPEG or TIFF files. On the Embedding Data tab of the dialog, you can map any Portfolio catalog field to an XMP or IPTC metadata field in your original file.

NOTE
If you created custom metadata fields for a Portfolio 7 catalog, you may need to recreate some of these mappings in your converted Portfolio 8 catalog.

To open the Metadata Properties Settings, choose **Catalog > Metadata Settings**.

Extracting Metadata while Cataloging

Many digital cameras, software programs and other devices embed specific information into a file when that file is created. For example, a digital camera typically embeds EXIF data such as aperture, shutter speed, date taken, etc. Portfolio can automatically detect and extract embedded EXIF, XMP, IPTC and TIFF metadata and add it to your catalog, saving you the trouble of having to re-enter the information manually. Portfolio can extract metadata from JPEG and TIFF files.

By default, Portfolio extracts a wide range of embedded metadata, you can further expand the metadata fields and choose where Portfolio stores this information in the catalog. Click the Settings button to open the Metadata Properties Settings dialog.

To enable metadata extraction:
1. From the Cataloging Options dialog, click **Advanced**.
2. In the Advanced Cataloging Options dialog, click the **Properties** tab.
3. Enable the **Extract Metadata** option.
4. To configure where Portfolio stores metadata in the catalog, click **Settings**. This opens the Metadata Settings dialog where file metadata is mapped into Portfolio fields. After you are finished configuring the mapping, click **OK**.
5. Click **OK** to close the Advanced Cataloging Options dialog.

Adding a New Metadata Field

NOTE
The most commonly used metadata fields are already defined in the metadata list. Most users can use the current fields and do not need to add new metadata fields to the list.

To add a new metadata field to the metadata list:
1. Choose **Catalog > Metadata Settings**.
2. In the Metadata Properties Settings dialog, click **Edit Metadata List**.
3. In the Metadata List dialog, click **New**.
4. Enter a new Metadata Name and Metadata Code.

    The Metadata Name can be anything that adequately describes the data, but the Metadata Code must specifically match the code in the file. This code can typically be obtained from the manufacturer of the device that created the file. Many of these codes can also be readily found on the Internet.

    NOTE
    IPTC codes must be converted so that Portfolio can understand them. If your IPTC code is comprised of two numbers separated by a colon, use the following formula to obtain the value to enter: (First Number * 256) + Second Number = Portfolio Metadata Code.

5. Click **OK** to save your changes to the Metadata List.

Updating Metadata Mapping

To change where Portfolio stores specific metadata:
1. Choose **Catalog > Metadata Settings**.
2. Click the **Extracting Data** tab in the **Metadata Properties Settings** dialog.
3. Click to highlight the specific **Metadata to Extract** field to update.
4. On the right side of the dialog, click the corresponding **Catalog Field** to change.

Extracting Metadata

If you did not have metadata extraction enabled when you cataloged your files, you can extract the metadata after the fact.

To extract metadata from cataloged files:
1. Click to highlight files to process in any of your galleries.
2. Choose **Item > Extract Properties**. This extracts the metadata mapped in the Metadata Properties Settings dialog into the appropriate Portfolio fields.

Embedding Metadata

Portfolio can also embed metadata and other information back into your files. This way you'll never lose the work you put into properly adding keywords and tags to your files.

NOTE
For the most up-to-date file formats supported by Portfolio, please see the Extensis website at
http://www.extensis.com/downloads/documents/supported-file-formats-camera-models/.

To embed metadata:
1. Click to highlight files to process in any of your galleries.
2. Choose **Item > Embed Properties**. This embeds the metadata mapped in the Metadata Properties Settings dialog into the appropriate locations in the original files.

Galleries

A gallery can display all of the items in your catalog or a subset of them. Suppose you have 5,000 images in your catalog. Using one of Portfolio's search tools, you locate all images tagged with the keyword "ocean" and find 135 matching images. In this case, you have a catalog of 5,000 images, but a gallery of 135 images.

A gallery is a good way to organize and view only certain files within your catalog. A photographer may create a catalog of his entire body of work, but have one gallery that displays only portrait photos, and another gallery that contains landscape photos.

How each item is displayed within a gallery is defined by a View. To find out how to set up a view, see **Views** on page 28.

The default galleries

You access galleries from the Galleries pane of the main window. There are three default galleries in every catalog, which include the Find Results, Last Cataloged and All Items galleries.

- The **All Items** gallery displays all items in your catalog.

- The **Find Results** gallery shows matching items from your most recent search.

- The **Last Cataloged** gallery displays the files that you most recently cataloged. For catalogs shared with Portfolio Server, Portfolio displays only the files that in the catalog were cataloged by current user.

With a single click on a gallery name, that gallery is opened and displayed in the main window. Double-click the name to open the gallery. On OS X the gallery is opened in a new window. On Windows, a double-click opens the gallery within the main window; you can still access other open galleries by clicking on the tab in the main window for other gallery.

NOTE
You must have a username set on the **General** tab of the **Preferences** dialog, otherwise Portfolio displays all files with the most recent date and time in the **Last Cataloged** gallery.

Normal galleries

In addition to the default galleries, you can create galleries that are automatically saved within the catalog. To find out how to create a gallery, see **Creating a New Gallery** on page 23.

Public, private, and read-only settings

When created, galleries are **Public** and available to all users of a catalog, including Web Client users. You can specify gallery access settings so that a gallery can be **Private** so that only you can see it, or make it **Read-only** so other users can view it but not edit it. To find out how to change the gallery access level, see **Making a Gallery Public or Private** on page 27.

Scratchpad galleries

You can also create temporary collections of files called **Scratchpad** galleries. These galleries are not automatically saved in the catalog, and are temporary in nature. When you close the catalog you are prompted to save any Scratchpad galleries and thus convert them to normal galleries. To find out how to create and use Scratchpad galleries, see **Scratchpad Galleries** on page 23.

Smart galleries

When you open a smart gallery, Portfolio automatically searches the catalog and selects the appropriate files to display. Smart galleries can be configured to search and select files based on any item properties. For more information about creating and using smart galleries, see **Creating a Smart Gallery** on page 26.

Open Gallery in New Window (Mac only)

In the Macintosh version of Portfolio, an additional button is available in the galleries pane. This button immediately opens the selected gallery in a new window.

Gallery icon reference

	All Items Gallery		Last Cataloged Gallery
	Normal Gallery		Smart Gallery
	Private Gallery		Private Smart Gallery
	Read-only Gallery		Read-only Smart Gallery
	Scratchpad Gallery		Find Results Gallery

Creating a New Gallery

NOTE
Creating multiple galleries has no effect on the number of items in your catalog; a gallery is just a way to view a subset of a catalog.

To create a new gallery:

1. Click **New** in the **Galleries** pane, or

   Press *COMMAND-G* (Mac) or *CTRL-G* (Windows), or

   Choose **Gallery > New**.
2. On OS X, enter a name in the dialog and click **OK**. On Windows, enter a name in the **Galleries** pane and press *ENTER*.

NOTE
Normal galleries are automatically saved. The only time need to save a gallery is when you choose to keep a Scratchpad gallery. To save a Scratchpad gallery, choose **Gallery ;> Save As**.

Adding items to a gallery

To add items to a gallery:
- Drag thumbnails from another gallery into the new gallery.
- Choose **Edit > Copy** and **Edit > Paste** commands to copy and paste thumbnails from another gallery into the new gallery.
- Use **Cut** and **Paste** commands to cut items from one gallery and move them into the new one. (Remember, cutting items from a gallery doesn't delete them from the catalog; it just removes them from the current gallery.)
- Perform a search for a selected set of items, such as those containing a particular keyword. Choose **Gallery > Save As** to create a new gallery that contains the find results.

Scratchpad Galleries

Unlike normal galleries, Scratchpad galleries are not automatically saved within a catalog. This type of gallery is meant to be used as a temporary collection space for files. If you are logged in with a Publisher or Administrator access level, you can save a scratchpad gallery, at which point it becomes a normal gallery. In all other ways, scratchpad galleries are identical to normal galleries. You are warned that unsaved scratchpad galleries will be deleted when you exit Portfolio.

Creating a New Scratchpad Gallery

To create a new scratchpad gallery:

- In the Galleries pane, click **New Scratchpad** .
- Choose **Gallery > New Scratchpad**.
- Right-click the **Find Results** gallery and choose **New Scratchpad** to save the results of a QuickFind or Find search to a new scratchpad gallery.
- Select one or more items, right-click any of the selected items, then choose **Create New Scratchpad** from the shortcut menu. The selected items will be added to a new scratchpad gallery.

Saving a scratchpad gallery

Saving a scratchpad gallery converts that gallery into a normal gallery. You must have a publisher or administrator access level to be able to save a scratchpad gallery.

From the **Galleries** pane, select the scratchpad gallery, and do one of the following:
- Press *COMMAND-S* (Mac) or *CTRL-S* (Windows).
- Right-click the scratchpad gallery and choose **Save As** from the shortcut menu.
- Choose **Gallery > Save As**.

Deleting Items from a Gallery

When items are deleted from a gallery, they are removed only from the current gallery, not from the catalog. If you have a gallery that contains a few images that you don't want to display with the others, you can delete the ones you don't want in the gallery without removing them from the catalog.

To delete items from a gallery, select the items that you want to delete, and do one of the following:

- Click **Delete** on the toolbar. Choose the **Delete from Gallery** option in the dialog, then click **OK**.
- Choose **Item > Delete**. In the **Confirm Delete** dialog, choose **Delete from Gallery**, then click **OK**.

Sorting a Gallery

To sort files, use the **Sort** menu available in the upper right corner of the status bar at the top of each gallery window (below the toolbar). Initially, this menu says **Unsorted**. Choose any of the criteria in the menu to apply a sort order to the current gallery. By default, galleries are always sorted by the order in which items were cataloged.

After you've sorted a gallery using the **Sort** menu, the sort option remains displayed in the menu, so you can see the sort order for any gallery window at a glance. If you drag items to create a custom sort order, the **Sort** menu displays **Custom**.

Automatically sorting a gallery

A gallery can be automatically sorted on any field in the Portfolio database.

> *NOTE*
> Setting a default sort overrides the sort menu in the upper right corner of the gallery window.

To automatically sort a gallery:
1. Open the gallery to sort.
2. Choose **Gallery > Settings**.
3. In the **Sorting** group box, check the option to **Sort the Gallery**.
4. Choose a **Sort by Field** and sort **Direction** from the drop-down menus.
5. Click **OK**. When you first open this gallery, the items are automatically sorted using the specified sort order. The items stay sorted with the assigned sort method until you choose a new sort from the drop-down menu.

Applying a custom gallery sort

Galleries can also be sorted in any order by clicking and dragging files within a gallery. This creates a custom sort order for your gallery. A custom sort order is automatically saved for normal as well as smart galleries.

Custom sort orders are applied at the catalog level. When the custom sort order of a gallery is modified by multiple users at the same time, the sort order of the last user to have the catalog open is applied. Other users will see the updated sort order the next time they open the catalog.

NOTE
Custom gallery sorts are not visible to Web Client users.

To apply a custom sort order to a gallery:
1. Open the gallery to sort.
2. Click and drag the files to a new sort order.

   NOTE
   For a custom sort order to be saved, you must not have a default sort order designated in the Gallery Settings dialog. Choose **Gallery > Settings** to display this dialog.

Opening a gallery at startup

To set the gallery to open at startup:
1. Open the gallery.
2. Choose **Gallery > Settings**.
3. In the **Gallery Settings** dialog, enable the **Open this gallery when the catalog is opened** option.
4. Click **OK**. The specified gallery will open automatically whenever the catalog is opened.

Deleting a gallery

To delete a gallery:

1. In the **Galleries** pane, select the gallery name and click **Delete Gallery** .

   You can also right-click the gallery name and choose **Delete** from the shortcut menu.
2. Click **OK** to confirm the deletion of the gallery.

Renaming a gallery

To rename a gallery:
1. In the galleries pane, click to highlight the gallery name.
2. Click the highlighted gallery name again to edit the gallery name.

Copying a gallery

To copy a gallery:
1. In the galleries pane, click to highlight the gallery name.
2. Choose **Gallery > Save As**.
3. Enter a new gallery name and click **OK**. The new gallery is added to the gallery list and contains all of the same items as the previous gallery.

Creating a Smart Gallery

A smart gallery ![icon] is one that automatically performs a saved find each time the gallery is selected.

To create a new smart gallery:
1. Open the **Find** dialog by choosing **Edit > Find > Find** (Mac) or **Catalog > Find** (Windows).
2. Enter your find criteria. These criteria will be used to find items for your smart gallery each time the gallery is selected.
3. From the **Saved Finds** drop-down menu, choose **Save as a Smart Gallery**.
4. Enter a name for your smart gallery and click **OK**.

Portfolio creates a new smart gallery. Each time your smart gallery is opened, the items will be searched and selected using the Find criteria in the saved find that you designated in step 3.

> **NOTE**
> Portfolio uses the same name for your smart gallery and your saved find.

To convert a normal gallery to a smart gallery:
1. Open the gallery.
2. Choose **Gallery > Settings**.
3. In the **Gallery Settings** dialog, enable the **Smart Gallery** option.
4. Choose your Saved Find from the drop-down menu.
5. Click **OK**.

Each time your smart gallery is selected, the items will be searched and selected using the Find criteria from the Saved Find you selected.

Making a Gallery Public or Private

When many people have access to a single catalog, it can be beneficial to create galleries in a catalog to which a single user has access. With the Public and Private gallery feature in Portfolio, you can protect a gallery so that only you can see it, or even choose to make a gallery private but read-only so that only you can make changes.

Since private galleries are owned by a single user, to designate galleries as public or private you must be working in a catalog that has been configured for user-based access. If a username and password are required when you open a catalog, then your catalog is set up for user-based access. To set up a catalog for user-based passwords, see Setting user-based passwords.

A gallery that is *private* has an "eye" on the gallery icon: .

A gallery that is *read-only* has a "lock" on the gallery icon:

To change the privacy settings of a gallery:
1. Choose **Gallery > Access**, or right-click the gallery name and choose **Access** from the shortcut menu.
2. In the dialog, designate the access level by choosing either **Public Gallery** or **Private Gallery**.
3. If you are making the gallery public, you can also make the gallery read-only, so that only you can make changes. To do so, enable the **Read-only Gallery** option.
4. Click **OK** to apply the new gallery access settings.

To change a gallery owner:

NOTE
To change the ownership of a gallery, you must currently own the gallery, or be logged in as a catalog administrator. The new owner of the gallery must already have a user-based login name and password to the catalog.

1. Choose **Gallery > Access**, or right-click the gallery name and choose **Access** from the shortcut menu.
2. In the dialog, choose a new user from the drop-down menu.
3. Click **OK** to apply the new gallery access settings.

Views

One catalog can contain multiple galleries, and each gallery can be displayed using many different saved views. You can easily define the attributes of the display—background color, fonts, font color, thumbnail size, grid spacing, and field data—and then save these settings to a Saved View.

There are three main "types" of views available in Portfolio, each of which can be customized to create any number of unique saved views. After you choose a view type, customize it and save it to a saved view. You can then apply that view to any of your galleries.

The three views are immediately available from the **View** buttons on the toolbar.

Macintosh **View** buttons   Windows **View** buttons
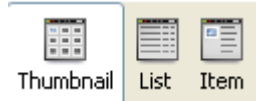
Thumbnail view

Thumbnail view, the default view in Portfolio, displays your cataloged items in an adjustable grid of small thumbnail-sized previews. Information about each cataloged item appears under each thumbnail.

You can switch to Thumbnail view by clicking **Thumbnail View** on the toolbar or by pressing *COMMAND-T* (Mac) or *CTRL-T* (Windows).

You can choose to display the contents of any Portfolio fields under the thumbnails. Choose the **View > Customize** command, to choose from four different sizes of thumbnails, select the font, size, formatting and data fields to display.

List view

List view displays the information you have stored in your Portfolio catalogs in a spreadsheet-style list format. By default, fields such as the filename, file size, modification, and directory path are listed, but this set of fields can be edited with the **View > Customize** command, where you can specify exactly what field information you want to appear in the columns of the list.

To switch to list view, click **List View** on the toolbar, or press *COMMAND-L* (Mac) or *CTRL-L* (Windows).

Item view

Item view allows you to view each cataloged item along with any stored data associated with it. In this view, you can see the list of all the keywords associated with a file, for example, or view an entire description, along with any other custom field data you may have entered. Choose Item View when you want to access numerous details about a set of items without having to open and view the properties of each item one at a time.

The fonts, colors, thumbnail sizes, etc. of item views can also be customized with the **View > Customize** command.

Switch to item view by clicking **Item View** on the toolbar, or by pressing *COMMAND-R* (Mac) or *CTRL-I* (Windows).

Customizing Gallery Views

To customize thumbnail, list and item views, do one of the following:

- Click **Customize View** on the toolbar.
- Press *COMMAND-D* (Mac) or *CTRL-D* (Windows).
- Choose **View > Customize**.

In all three types of views—**Thumbnail**, **List**, and **Item**—you can choose exactly which data fields are displayed on screen and the field formatting. You can also determine the order in which those fields are displayed.

Check the fields you want included in a view from the scrolling list of fields in the **Customize View** dialog.

Customizing the Field Display

Field display

In all three types of views—**Thumbnail**, **List** and **Item**—you can choose exactly which data fields are displayed on screen and the field formatting. You can also determine the order in which those fields are displayed.

Some fields, such as **Description** and **Keyword**, can consist of multiple rows of text. When customizing an item view, you can control how many rows of text will be displayed on screen without scrolling.

To show or hide fields:

1. Click **Customize View** on the toolbar, or

   Press *COMMAND-D* (Mac) or *CTRL-D* (Windows), or

   Choose **View > Customize**.
2. In the **Field Display** list of the **Customize View** dialog, select the fields you want to show. A check mark to the left of each field name indicates that a field is activated; click in the check mark column to toggle fields on or off.

To change the order of fields:

1. Click **Customize View** on the toolbar, or

   Press *COMMAND-D* (Mac) or *CTRL-D* (Windows), or

   Choose **View > Customize**.
2. In the **Field Display** list of the **Customize View** dialog, click and drag the field names in the list into the order you want.

To change the field formatting:

You can choose the font type, size and field name for each field. Each field can have a unique formatting, giving you the flexibility to be creative with your view settings.

1. Click **Customize View** on the toolbar, or

   Press *COMMAND-D* (Mac) or *CTRL-D* (Windows), or

   Choose **View > Customize**.
2. In the **Field Display** list in the **Customize View** dialog, choose a font, font size and type from the drop-down lists.
3. To display the field name, enable the **Show Field Name for this Field** option.

Thumbnail options

Customizing Thumbnail Options

In Thumbnail or Item view, choose from four different standard sizes, from 32 pixels by 32 pixels up to 256 pixels by 256 pixels. Note that Portfolio can't display thumbnails that are larger than the ones you generated when you first cataloged your files. By default, Portfolio generates thumbnails that are 112 by 112 pixels, so if you want to display 256 x 256 thumbnails in your catalogs, you must set the Thumbnail size to the higher setting in the Advanced Cataloging Options dialog before items are cataloged.

To generate larger thumbnails for items already cataloged, set the Advanced Cataloging Options (**Catalog > Advanced Options**) the way you want, then choose **Item > Regenerate Thumbnail** to force Portfolio to build new thumbnails.

Creating a custom thumbnail border

In Thumbnail and Item views, you can apply a graphic border, or frame, around each thumbnail to give your Portfolio catalog a unique look. To apply a border, choose one of the pre-defined borders from the Border drop-down menu. You can also create your own borders in any graphics application.

You can create a custom border from any bit-mapped image, such as a PICT, TIFF or BMP file. Create the border in a graphics program such as Photoshop, then copy and paste the border into Portfolio to apply it in a custom view.

To add a custom border:

1. Create the border in a graphics application. To create borders that fit nicely around the thumbnails, follow the pixel dimensions shown in the following table:

Thumbnail size	Border size
32 x 32	40 x 40
64 x 64	80 x 80
112 x 112	140 x 140
256 x 256	320 x 320

2. Set the transparency "color" of the border. Portfolio looks at the center pixel of your border image and sets that as the designated transparency color. Any part of your border that is the same color as the center pixel will appear transparent. This allows you to create borders that allow portions of the background color to show through. If you don't want the background color to show through any portion of your border, make sure the center pixel is a color that isn't used anywhere else in your border design.
3. Copy the finished border image to the clipboard in your graphics program. If you've edited the image in a program such as Photoshop, make sure you've flattened the final image and that you're copying the whole image, not just a single layer of it.
4. Paste the new border into Portfolio. Open the **Customize View** dialog if it's not already open (*COMMAND-D* on Mac, *CTRL-D* on Windows) and from the **Border** drop-down menu choose **Edit**. Click **New** to open the **Define Borders** dialog. Then, click **Paste** to paste the border image. Alternatively you can save the border image from your image-editing program as a standalone PICT, TIFF or BMP file, and then import the border into Portfolio using the **Import** button in the **Define Borders** dialog.
5. Name the border and save it. Type a name into the **Border Name** field and click **Save**. Click **OK** in the **Borders** list to return to the **Customize Gallery** dialog.
6. Apply the border to a view. Choose your newly-saved border from the **Border** menu and click **Apply**.

Adding new default borders to catalogs

The default thumbnail borders are added to catalogs when the catalog is created by Portfolio Server. All of the default thumbnails exist in the following location on the server:

Macintosh servers: `/Applications/Extensis/Portfolio Server/data/catalog-settings/English/borders/`

Windows servers: `C:\Program Files\Extensis\Portfolio Server\data\catalog-settings\English\borders\`

To have your border included by default with all new catalogs, you can add your image file to the above location. Border file formats must be saved into a specific format for each platform. For Windows servers, save your border as a GIF file, and for Macintosh servers, save your border as a JPG.

Copying and Pasting Thumbnail Borders

You can copy custom borders from one Portfolio catalog to another, allowing you to transfer your favorite borders into a new catalog.

To copy a border to another catalog:

1. Click **Customize View** on the toolbar, or

    Press *COMMAND-D* (Mac) or *CTRL-D* (Windows), or

    Choose **View > Customize**.
2. In the **Field Display** list of the **Customize View** dialog, choose **Edit** from the **Border** drop-down menu.
3. Select the border you want to copy from the saved borders listed in the **Borders** dialog. Click **Edit**.
4. In the **Define Borders** dialog, click **Copy** to transfer the border image to the Clipboard.
5. **Paste** the border. You can paste the border into another catalog or into an image-editing program in order to modify it.

Saved views

Saving Custom Views

Once you've customized your view—changing fonts, background color, border, hiding or showing various fields—you can save all these attributes as a saved view. You can then apply this view to any gallery in your catalog at any time, using the **Saved Views** menu. Several pre-defined saved views are included as part of Portfolio's default catalog configuration. The **Saved Views** menu is located in the upper right corner of the main window, to the left of the **Sort** menu.
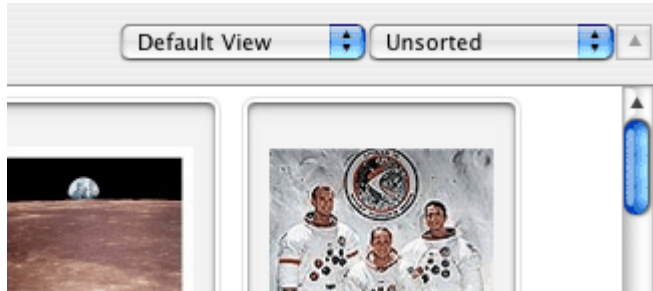
To save a view:
1. Choose **View > Customize** or press *COMMAND-D* (Mac) or *CTRL-D* (Windows).
2. Set up the view exactly as you want and apply your settings to the current gallery window.
3. Choose **Save** (or **Save As**) from the **Saved Views** drop-down menu.
4. Name the view and click **OK**.
5. The name of the saved view now appears in the **Saved Views** menu.

Renaming or Deleting a Saved View

To rename or delete a saved view:
1. Choose **Edit List** from the **Saved Views** menu.
2. Select the view that you want to rename or delete from the list, then click **Rename** or **Delete**.

Applying a Saved View

To apply a saved view, choose the view name from the **Saved Views** menu in the upper right corner of the main window, to the left of the **Sort** menu.
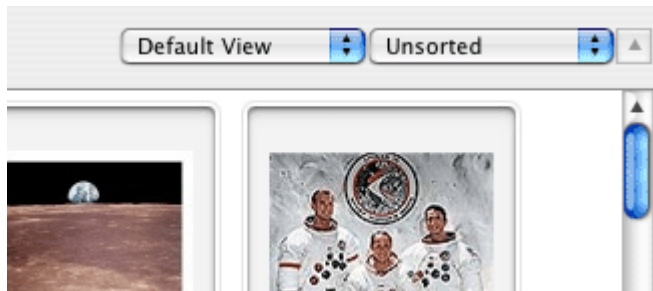
Saving a Custom View as the Default

You can assign your current view settings as the new default view for a catalog, so that each time a new catalog or gallery within a catalog is created, it uses that view. These saved settings are called default settings, and can be customized in any way that you wish.

To save the current view as the default:

1. Click **Customize View** on the toolbar, or

    Press *COMMAND-D* (Mac) or *CTRL-D* (Windows), or

    Choose **View > Customize**.
2. In the **Field Display** list of the **Customize View** dialog, click **Save as Default** (in the lower left corner).

> *NOTE*
> When you save the default settings, they are saved for all of the **Thumbnail**, **List**, and **Item** types.

To load the default settings:

1. Click **Customize View** on the toolbar, or

    Press *COMMAND-D* (Mac) or *CTRL-D* (Windows), or

    Choose **View > Customize**.
2. Click **Apply Defaults**. This loads the default settings into the **Customize View** dialog.
3. Click **OK** to apply the default settings.

Exporting a Saved View

To export a saved view:

1. From the **Saved Views** drop-down menu (in the upper right corner of each gallery windows) choose **Edit List**.
2. In the **Saved Views** window, select a view that you want to export.
3. Click **Export**.
4. Choose a name and destination for the exported view, which will be saved as a `.pvw` file. Click **Save**.

Views saved into the Saved Views folder in the Portfolio application folder are automatically included in all new catalogs.

Importing a Saved View

You can transfer saved views and thumbnail borders from catalog to catalog using Portfolio's import and export capabilities.

> *NOTE*
> The saved view and border files that you place in the respective Saved Views and Borders directories in the Portfolio application folder are automatically included in each new catalog that you create.

To import a saved view:

1. Choose **Edit List** from the **Saved Views** drop-down menu (in the upper right corner of each gallery windows).
2. In the Saved Views window, click **Import**.
3. Choose a saved view (`.pvw` file format) from the Saved Views folder (in the Portfolio folder) or from another location where you've exported view files.
4. Click **Done**.

Managing Files with Portfolio

Once you've created a Portfolio catalog and filled it with your own digital files, there are many tools at your disposal that make it easy to view, organize and manage your work. This includes the following tasks:
- Preview images, audio and video clips, and other documents
- Get detailed information about each file
- Edit original files
- Rotate images
- Batch convert files to a new file format
- Rename files
- Keep your catalog up to date
- Easily drag cataloged files to another program
- Print images in a gallery

Previewing Items

Portfolio quickly creates preview images or media preview clips from cataloged files. You can open these preview files by double-clicking a thumbnail in the Portfolio Desktop Client.

When you are previewing an item, you can open the original file; click the **Switch to Original** button at the top of the **Screen Preview** window. If Portfolio can open the file directly, it will be displayed in the same window; otherwise, it will open in whatever program your computer uses to open files of that type.

Items that have a multi-page icon on their thumbnail include multiple pages or layers. If Portfolio can display these in the **Screen Preview** window, you can use the buttons to view different pages or layers.

To preview an item:
- Double-click a thumbnail in any gallery window.
- Select the item, then press *COMMAND-OPTION-I* (Mac) or *CTRL-SHIFT-I* (Windows).
- Double-click a thumbnail in an **Item Properties** window.
- Right-click a thumbnail and choose **Preview** from the shortcut menu.

> **NOTE**
> By default, Portfolio previews a file when a you double-click a thumbnail, but you can change this behavior. Choose **Portfolio > Preferences** (Mac) or **Edit > Preferences** (Windows); on the **General** tab set the result of a double-click to **Show Preview**, **Show Properties**, or **Edit Original**.

Viewing and Editing Item Properties

Portfolio stores very detailed information about every file that you catalog. This information includes data that Portfolio itself collects during cataloging, such as each file's creation date, file size, image dimensions, file type, and so on. It also includes metadata information that you may add to a Portfolio item, such as a description, keywords, or other data that you may add using custom fields. All of this information is available in the **Properties** dialog.

To open Item Properties:
1. Select a thumbnail.
2. Click **Properties** on the toolbar, or
   Press *COMMAND-I* (Mac) or *ALT-ENTER* (Windows).
3. Switch between the **General**, **Keywords**, and **Fields** tabs to view the details for each file.

Editing Properties

General

In the **General** panel of the **Item Properties** dialog, you can edit the item's Name and Description. The item name is its name in your catalog; initially it is the same as the filename. However, changing the name in the catalog does not affect the name of the file on disk.

The **Description** field does not have a practical limit to the number of characters allowed; however, to keep it useful, you should keep the description short, describing the *contents* of the cataloged item, rather than its characteristics.

Keywords

To add a keyword to the item, type it into the field and click .

If Master Keywords are available for your catalog, click a Master Keyword, then click **Assign**.

To remove a keyword from the item, select it in the list and click .

Double-click a keyword to find all items that have that keyword assigned.

Fields

In the **Fields** panel, select a group of fields to view from the drop-down menu.

To edit a field's value, double-click the field name in the list, or select the field and click **Edit**.

Item Properties navigation

The four navigation buttons at the bottom of the **Item Properties** dialog—**First**, **Next**, **Previous**, and **Last**—allow you to navigate between selected items. This makes it easy to access information about a series of items, without having to repeatedly open and close the Item Properties window.

You can also navigate from item to item in Item Properties using the following keyboard shortcuts:

To do this	Windows shortcut	Mac shortcut
Move to the next item	*CTRL-RIGHT ARROW*	*COMMAND-RIGHT ARROW*
Move to the previous item	*CTRL-LEFT ARROW*	*COMMAND-LEFT ARROW*
Toggle between **General**, **Keyword**, and **Fields** tabs	*CTRL-TAB*	

Editing original files

You can jump directly from Portfolio into any other program in order to edit your cataloged files.

To edit an original file:
1. In any Portfolio gallery, select the item you want to edit.
2. Choose **Item > Original > Edit**, or press *COMMAND*-E (Mac) or *CTRL*-E (Windows).
3. Portfolio launches the program needed to edit the original file and opens the file in that program.

Portfolio generally remembers the name and location of the program last used to edit any particular type of file. If necessary (such as the very first time you attempt to edit a file of a particular type) you'll be prompted to choose an application. Portfolio will remember the choice in the future.

Moving, Copying, and Deleting files

You can move, copy, rename, and delete your original files, all from within Portfolio. All of the actions that you perform on your original files can be accessed from the Original submenu in the Item menu.

To copy a file:
1. In any Portfolio gallery, select the items you want to copy.
2. Choose **Item > Original > Copy**.
3. In the dialog, choose a destination folder for the copied items, then click **Choose** (Mac) or **OK** (Windows). Portfolio copies the files you selected to the folder you specified. The original files remain untouched.

To move a file:
1. In any Portfolio gallery, select the items you want to move.
2. Choose **Item > Original > Move**.
3. In the dialog, choose a destination folder for the moved items, then click **Choose** (Mac) or **OK** (Windows). Portfolio moves the original files to the new folder location you specified and updates the catalog, automatically recording the new location of the cataloged items.

> **NOTE**
> Copying items has no effect on your catalogs. Moving a file, however, updates it in Portfolio, with the path now pointing to the file's new location.

To delete a file:
1. In any Portfolio gallery, select the items you want to delete.
2. Choose **Item > Original > Delete**.
3. In the warning dialog, click **Delete** or **Delete All**. Portfolio deletes the original file from disk.

Batch converting images

Portfolio has the power to batch convert images from supported file formats into JPEG or TIFF. When converting files to JPEG or TIFF format, you can change the image resolution, size, color mode, location on disk, and also automatically add the converted files to disk.

Metadata embedded in the original file will also be embedded in the new file when supported by the new file format. Embedding EXIF metadata into TIFF files is not currently supported.

> **NOTE**
> All batch conversion processing is done by Portfolio Server, freeing up your computer from processing. Thus, Portfolio Server must have access to all of the files that you want to process. Typically it is best to choose files that reside on a network share.

To batch convert a group of images:
1. Select one or more items to convert. You can select an individual thumbnail or select multiple thumbnails.
   To select multiple thumbnails, hold down the Command key (Mac) or Ctrl key (Windows) while clicking on each selection.
2. Choose **Item > Batch Convert Images**.
3. In the **Batch Convert Images** dialog, choose the destination file format. If you choose JPEG, click **Settings** to set the compression rate or quality level.
4. Choose a color mode from the drop-down box.
5. To change the image resolution, enable the **Resolution** option and specify a new DPI.
6. To change the image size, enable the **Resize** option and then specify how you want to determine the new size:
   - **By Percentage:** Scales from 1% to 500%.
   - **Fit Within:** This option proportionally scales the image to fit within the chosen height and width.
   - **Expand and Crop:** This option expands the image to fit all four sides of the new area while maintaining the original aspect ratio. Equal parts of the image are cropped from the sides that extend past the defined area.
7. Choose how to save the new images:
   - **Prompt for a location:** When you click **Convert**, Portfolio will prompt you to specify a directory.
   - **Replace the original files with new ones**.
   - **In the same folder as the Originals:** If the new file extension causes the files to be named the same as current files, the files are renamed appropriately. For example bunny.jpg would be converted to bunny1.jpg.
8. Enable the **Add New Images to Catalog** option if you want to add the converted images to the current Portfolio catalog.

   > **NOTE**
   > You must have Administrator or Publisher access level to add the new images to the catalog.

9. Click **Convert**.

Rotating images

Portfolio can rotate JPEG images at right angles without data loss, making it easy for you to switch your digital photos from portrait to landscape orientation (or vice versa) without having to open and edit the files individually. This is especially useful if you've cataloged a number of photos from a digital camera and have a combination of horizontally or vertically aligned photos that need to be adjusted.

NOTE
Portfolio only rotates JPEG images. To rotate images saved in other formats, you must open the files in an image-editing program and perform the rotation in the editing application.

To rotate a JPEG image:
1. Select the items you want to rotate.

   You can select an individual thumbnail or select multiple thumbnails.
2. Choose **Item > Rotate JPEG Original** and select one of the three submenu options:
   - **90 degrees clockwise**;
   - **90 degrees counterclockwise**;
   - **180 degrees**.
3. A progress dialog appears as each item is rotated.

For quicker image rotation, you can press *COMMAND-]* (Mac) or *CTRL-]* (Windows) to rotate a selected image clockwise, and *COMMAND-[* (Mac) or *CTRL-[* (Windows) to rotate a selected image counterclockwise.

Rotating thumbnails only

Portfolio gives you the option of rotating only the thumbnail of any image, leaving the original untouched.

To rotate an item's thumbnail:
1. Select the items for which you want to rotate the thumbnail. You can select an individual thumbnail or select multiple thumbnails. To select multiple thumbnails, hold down the Command key (Mac) or Ctrl key (Windows) while clicking on each selection.
2. Choose **Item >Rotate Thumbnail** and select one of the submenu options:
   - **90 degrees clockwise**
   - **90 degrees counterclockwise**

Renaming files

Portfolio provides five ways to easily rename the original files that you catalog:
- You can rename files as you catalog them, using the **Rename** feature in **Cataloging Options**. This is useful for naming batches of files imported from a digital camera or scanner.
- Rename an individual file by selecting a thumbnail and choosing **Item > Original > Rename**, and typing a new name in the **Rename File** dialog.
- Select a thumbnail and press *COMMAND-OPTION-N* (Mac) or *CTRL-SHIFT-N* (Windows), then type a new name in the **Rename File** dialog.
- Open the **Item Properties** window for any item in your catalog and to type a new name in the Name field. To open **Item Properties**, select a thumbnail and click **Properties** on the toolbar, or press *COMMAND-I* (Mac) or *ALT-ENTER* (Windows).
- During a Slideshow, click the **Rename** button on the Slideshow controller and type a new name in the **Rename File** dialog.

Linking to a new file

In certain situations, you may want to retain a Portfolio item—including its description, keywords, and other data—but link the item to a completely different file. For example, you might edit an image, then use the **Save As** command to save the file under a new name. You want Portfolio to point to the new version of the file, but still retain all the information you stored in the old item.

You can do this using the **Link to New File** command, which lets you hook up any existing item to a different original file.

To link an existing item to a new original file:
1. Select the thumbnail of the item you want to re-link.
2. Choose **Item > Original > Link to New File**.
3. Specify the new file.
4. Portfolio catalogs the file, which is now linked to the existing item in your catalog, and updates the item with any new information (such as the new thumbnail image).

NOTE
After linking to a new file, you can embed the metadata in the Portfolio catalog to the new file. See *Embedding Metadata* on page 21 for more information.

Dragging cataloged items to other programs

While Portfolio is the perfect tool for managing and organizing your files, most of your creative work probably happens outside of Portfolio, in other programs that you use to edit images, build documents, create presentations, lay out pages for print publication, develop web content, and so on.

Moving from Portfolio to these other applications can usually be accomplished using drag and drop. Here are some of the ways that you can easily use Portfolio to work with images in other programs:
- Drag a thumbnail into a drag-and-drop savvy document to place a copy of the image in that document.
- Drag a thumbnail on top of an alias (or shortcut) of an editing program such as Adobe Photoshop, Illustrator, or Corel Paint Shop Pro to open the image with that program.
- Drag a thumbnail to the desktop or a folder window to make a copy of the original file in that location.
- Drag a thumbnail into an email message to send a copy of the original image as an attachment.
- On OS X, drag a thumbnail into a QuarkXPress document to place the image in a layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box; otherwise, Portfolio creates its own new picture box for the image.

Updating items

Updating all cataloged information

The Update command performs a complete update of each selected item that has been modified since you originally cataloged it, confirming the location of each file (or asking you to find it, if necessary), extracting properties from it, and generating a fresh thumbnail. The **Update** command only updates items that have been modified since they were cataloged (as indicated by a newer modification date).

To update all cataloged information:
1. Select the items you want to update.
   To update all items open the **All Items** gallery in the **Galleries** pane.
2. Choose **Edit > Select All**, or
   Press *COMMAND*-A (Mac) or *CTRL*-A (Windows).
3. Click **Update** on the toolbar, or
   Press *COMMAND-U* (Mac) or *CTRL-U* (Windows), or
   Choose **Item > Update**.

Portfolio searches for each item's source file using the path name stored in the item. If the source file is found, and its modification date is more recent than the one originally recorded in Portfolio, the item is updated. If the source file cannot be found, you are prompted to locate it. If you select a new file for the selected item, the item is updated with information from the new file, based on your current **Advanced Cataloging Options** settings.

If the source file cannot be found and you click **Skip File** when prompted to locate the file, the selected item is left untouched.

Updating the original file location

When a file has been moved to a new location, but nothing else about it has changed, you can update it quickly using the Change Path command.

1. Select the items for which you want to update the path.
2. Choose **Item > Change Path**.
3. The Update dialog opens, prompting you to find the new location for the designated file.
4. Select the file, then click **Select** (Mac) or **Open** (Windows). The item in Portfolio now points to the correct location of the original file.

When you update a file using this method, Portfolio automatically searches for other files that need to be updated in the same directory and offers to update them as well. If you enable the Search Subdirectories option in the Update Location dialog, Portfolio looks for matching files in the subfolders as well.

Updating path via drag-and-drop

If you know that you've moved some files that are in your catalog, there's an even easier way to update the catalog with the new path information using drag and drop. This method will work only if you've moved cataloged files to a new location and have not changed the filenames.

1. In the Macintosh Finder or Windows Explorer select the icons of the files that have been moved.
2. Hold down the *OPTION* key (Mac) or *CTRL* key (Windows) while dragging the icons into the Portfolio catalog. Make sure you're dragging the files into the same catalog in which they were originally cataloged before they were moved.
3. Portfolio presents a dialog, confirming that you want to update the path of these files.
4. Click **OK**. Note that this updates the *path* of the file only, not its thumbnail or any other properties.

Updating to regenerate thumbnails

This update command makes Portfolio re-examine each selected file and build a new up-to-date thumbnail image. It's useful if you originally cataloged items with the 112-pixel thumbnail setting and now would prefer to have 256-pixel thumbnails instead.

To regenerate thumbnails:
1. Select the items for which you want to generate thumbnails.
2. Choose **Item > Regenerate Thumbnail**.
3. Portfolio re-examines each file in your selection and generates a new thumbnail for it.

Finding Files

One of Portfolio's most important functions is to help you search for and retrieve your digital files when you need them. You've got several tools available to perform deep searches of your cataloged data.

QuickFind

The easiest and most accessible search tool in Portfolio is the QuickFind box, located on the right end of the toolbar. QuickFind allows you to search for files in the current gallery. With QuickFind you need not click a button, pull down a menu or open a Find dialog. It's the fastest, easiest way to perform a file search.

To perform a QuickFind search:
1. Click in the QuickFind box.

2. Type a word or phrase in the box and press *RETURN* (Mac) or *ENTER* (Windows). By default, QuickFind searches the filename and description fields using a "contains" search, and uses a "starts with" search on multi-value fields such as keywords.
3. Matching items appear in the Find Results gallery .

NOTE
The text you've typed in the QuickFind box remains selected after you've performed a search. To perform another QuickFind, just type another search word and press *RETURN* or *ENTER* again.

Searching the same gallery multiple times

Since QuickFind searches only the current gallery, you can quickly refine your search for specific items.

For example, if you wanted to find all of the items that contained the keyword *bird*.

1. Click to select the **All Items** gallery from the Galleries pane.
2. Type `bird` into the **QuickFind** field and press *ENTER*. The search results are displayed in the Find Results gallery.
3. Next, refine your results to only include birds that have the keyword *red*. Type `red` into the **QuickFind** field and press *ENTER*. Portfolio searches only the current gallery (that contains the *bird* QuickFind results) and displays the found items in that gallery.

Using the Find Command

For many Portfolio users, the simple multi-field search possible using the QuickFind box is all that is needed. However, Portfolio's sophisticated search engine can also perform complex searches using multiple criteria. Complex searches can be saved so that queries can be performed again with a minimum of effort. Saved searches can also be applied to galleries to create "smart galleries" that automatically execute the saved find each time opened. Portfolio's Find command allows you to search any fields in any combination, with specific search parameters.

To access the Find dialog:
- Click **Find** on the toolbar.
- Press *COMMAND*-F (Mac)or *CTRL*-F (Windows).
- Choose **Edit > Find > Find** (Mac) or **Catalog > Find** (Windows).

Searching for Specific Items

To search for specific items:

1. Click **Find** on the toolbar, or
   Press *COMMAND*-F (Mac) or *CTRL*-F (Windows), or
   Choose **Edit > Find > Find** (Mac), or **Catalog > Find** (Windows).
2. Select the criteria you want to use for the search by choosing a search field from the **Field** menu.
3. Select a match option from the middle menu. There are anywhere from 8 to 14 different options, depending on the field you're searching. You can look for the exact term with "equals" or "matches" or be less rigid and use "contains" or "does not end with").
4. Select any additional Find options:
   Find in Current Gallery: Choose this option to search only the items that are in your current gallery, ignoring all other items in your catalog. This is useful for doing progressively narrower searches to zero in on a target file. If you want Portfolio to scan every item in your catalog for possible matches, make sure this option remains unchecked.
   Find in Multiple Catalogs: This option is disabled unless you have more than one catalog open. If you do have two or more catalogs open, you can choose this option to have Portfolio search all open catalogs. See **Searching Across Multiple Catalogs** on page 43 for details.
   Display Results in New Scratchpad Gallery: Choose this option to create a new gallery to view the find results. By default, results are displayed in the Find Results gallery.
5. Click **Find** to start the search.

Searching Using Multiple Criteria

The Find dialog allows you to perform complex searches based on multiple criteria: matching file type, creation date, and keyword.

To perform a complex search:

1. In the **Find** dialog, click (Mac) or **More Choices** (Windows) to expand the dialog to include addition criteria. You can expand the dialog to include up to five different lines of search criteria. After expanding, you can click (Mac) or **Fewer Choices** (Windows) to shrink the dialog for simpler searches.
2. Select the criteria you want to use for the search by choosing a search field from the **Field** menu.
3. Select a match option from the middle menu. There are anywhere from 8 to 14 different options, depending on the field you're searching. You can look for the exact term with "equals" or "matches" or be less rigid and use "contains" or "does not end with").
4. Select any additional Find options:
   Find in Current Gallery: Choose this option to search only the items that are in your current gallery, ignoring all other items in your catalog. This is useful for doing progressively narrower searches to zero in on a target file. If you want Portfolio to scan every item in your catalog for possible matches, make sure this option remains unchecked.
   Find in Multiple Catalogs: This option is disabled unless you have more than one catalog open. If you do have two or more catalogs open, you can choose this option to have Portfolio search all open catalogs. See **Searching Across Multiple Catalogs** on page 43 for details.
   Display Results in New Scratchpad Gallery: Choose this option to create a new gallery to view the find results. By default, results are displayed in the **Find Results** gallery.
5. Set the **And/Or** menu for each search line as needed to refine your search.
6. Click **Find** to start the search.
7. The find results are displayed in the **Find Results** gallery.

Find Criteria Options

The following tables list the most common built-in catalog fields that you can search on. If your catalog has custom fields, you will be able to search those fields as well.

When items are cataloged, some information is extracted from metadata associated with the file. Many files, especially those produced with Adobe applications, include XMP metadata: a rich variety of information about the file and the conditions of its creation. Portfolio extracts that information if available to populate many basic information fields.

Basic Fields

These fields are common to many types of documents.

Field Name	Description
Filename	The name of the cataloged file.
File Size	The size of the file.
Created	The date the original file was created. See the note about Date and Time fields below.
Modified	The date that the original file was most recently modified before being cataloged. See the note about Date and Time fields below.
Description	A description of the file.
Keywords	Keywords assigned to the item.

A NOTE ABOUT DATE AND TIME FIELDS
Date and Time fields always include both a date and time, even if the display only shows a date. If you only know the date, but not the time, that you need to search for, then you should use two search criteria to search a date range. For example, if you are looking for photos taken on February 14, 2012, then you can use the search criteria "Created on or after 02/14/2012 12:00 am" and "Created on or before 02/15/2012 12:00 am" to locate files created any time within the 24-hour period.

File Information fields

These fields contain information about an asset's location on disk and its dimensions.

Field Name	Description
Directory Path	The full directory path for an item, not including the filename.
Volume	The physical drive or disk on which the item resides.
Height	The item's height, in pixels (empty if thumbnails were extracted).
Width	The item's width, in pixels (empty if thumbnails were extracted).
Horizontal Resolution	The item's horizontal resolution, in dots per inch.
Vertical Resolution	The item's vertical resolution, in dots per inch.
Bit Depth	The number of bits used to store color information in an image file.
Color Mode	The Color Mode is the way that colors are stored in an image. Portfolio extracts color mode information directly from the image. The color modes that Portfolio understands are: Black & White, Grayscale, RGB, CMYK, YUV, Lab, and YCCK. Anything else will be labeled as "unknown."
Color Profile	The embedded model of the color space for the device or application that created the image file. Examples: sRGB, Adobe RGB (1998), or a profile for a calibrated monitor.
Number of Pages	The number of pages in a multi-page document.

Catalog Information fields

These fields provide information about an asset's catalog record. They are always present and cannot be modified by users.

Field Name	Description
Cataloged	The date and time that the item was first cataloged in Portfolio.
Cataloged By	The user name of the person who cataloged the item in Portfolio.
Changed	The date and time that the item was recently changed.
Changed By	The user name of the person who most recently changed the item.
Item ID	The unique ID of the item in the catalog.
Thumbnail Size	The size of the item's thumbnail in the Portfolio catalog. This can be 32 pixels (for icons), 112, or 256.

Workflow fields

These fields are provided in Portfolio catalogs for help managing workflows. They also serve as examples of the types of information you might add in custom fields.

Field Name	Description
Approved	The date and time that the asset was approved. See the note about date and time fields above.
Approved By	The user name of the person who approved the asset.
Client Name	The name of the client the asset is associated with.
Job Name	The name of the job or project that the asset belongs to.
Job Status	The overall status of the job.
Routed To	The user name of the person that an asset is routed to for work or review.
Routing Notes	Notes to the person the asset is routed to.
Website	A website associated with the asset in the workflow.
Work Needed	A description of the work that needs to be done with or to the asset.

Other fields

In addition to the above searchable fields, Portfolio extracts a variety of metadata from files. These types of metadata include IPTC and EXIF metadata (usually included in digital photos and other image files), GPS location fields from digital photos and videos, movie-specific metadata included in a variety of video and animation files, and MS Office metadata, incorporated into Microsoft Office and compatible documents. Most of these fields can be used in your searches; the field names will start with EXIF, GPS, IPTC, Movie, or MS (for Office file metadata).

Saving find criteria

If you routinely need to locate particular types of items in a catalog, you can name and save a Find that will retrieve those items.

Your saved finds appear in the **Saved Finds** drop-down menu in the **Find** dialog. Whenever you want to use a Saved Find, choose its name from the menu, double-click the saved find on the **Saved Finds** palette, or on Windows select **Find** from the drop-down menu using the **Saved Finds** button on the toolbar.

To save a Find:
1. Set up your search in the **Find** dialog.
2. Choose **Save As** from the **Saved Finds** drop-down menu.
3. Type a name for the new find in the **Save Find** dialog.
4. Click **OK** to return to the **Find** dialog. Portfolio stores the search definition you just created in the catalog.

To use a Saved Find:
- Choose the Saved Find from the **Saved Finds** drop-down menu in the **Find** dialog.
- On Windows, choose the Saved Find from the **Find** drop-down menu on the toolbar.
- Open the Saved Finds palette (**Window > Show Saved Finds**) and double-click the name of a Saved Find on the palette.
- Select a Saved Find on the **Saved Finds** palette, then either click **Find**, or choose **Find** from the palette's fly-out menu.
- "Attach" the Saved Find to a Gallery to create a Smart Gallery (**Gallery > Settings > Smart Gallery**). Opening a smart gallery automatically executes the find.

Renaming, duplicating, or deleting a Saved Find

1. In the **Find** dialog, choose **Edit List** from the **Saved Finds** drop-down menu.
2. In the **List Saved Finds** dialog, select the Saved Find that you want to edit.
3. Click the appropriate button to **Rename**, **Duplicate** or **Delete the Find**.
4. Click **OK** to return to the Find dialog.

—OR—
1. From the **Saved Finds** palette, select the Find that you want to rename or delete.
2. From the fly-out menu, choose **Delete Find** or **Rename Find**.

The Default Find

Each time you open the Find dialog (or choose **Default** from the **Saved Finds** drop-down menu) Portfolio populates the search fields with the attributes specified in the **Default Saved Find**.

You can edit the Default Find so that the Find command will be preset to retrieve the items you use most often.

To change the Default Find:
1. Open the **Find** dialog and set up the search fields as you want them to be by default.
2. Choose **Save as Default** from the **Saved Finds** drop-down menu.

Searching from Palettes

The Master Keywords palette and any other palettes you may have created from custom fields also provide an easy way to perform simple searches without having to open a window.

To search from a palette:
1. Double-click the desired keyword on the palette.
2. All items with the selected keyword are displayed in the Find Results gallery .

NOTE
To quickly move through a long list of keywords, type a letter in the text entry field of the Master Keywords palette to move the cursor to keywords starting with that letter.

Searching Across Multiple Catalogs

To search multiple catalogs:
1. Open all catalogs that you wish to include in the search. Open catalogs are displayed on the **Catalogs** palette. You do not need to include a catalog in a search just because it is open, but you cannot search through closed catalogs.
2. On the **Catalogs** palette, a magnifying-glass icon to the left of a catalog name indicates that the catalog will be included in the search. Click to the left of a catalog name to add or remove the catalog from multi-catalog searching.
3. In the **Find** dialog, enable the **Find in Multiple Catalogs** option.
4. Configure the search parameters in the **Find** dialog (just as you would for a standard one-catalog search) and then click **Find**.
5. The results of the multi-catalog search are displayed in a new **Multi-Catalog Find Results** gallery. Because this gallery now contains items from more than one catalog, it can't be customized, used to create webpages, or to burn items to disc.

   (If the results of a multi-catalog search are all from a single catalog, then the results are shown in the **Find Results** gallery for that catalog.)

Saving the results of a multi-catalog find

You can save the results of a multiple catalog find by dragging the images into another gallery. Since galleries are tied to specific catalogs, when you drag a file into a gallery if it was found in another catalog, it is copied to the catalog that owns the gallery.

To save the results of multi-catalog find (Windows):
1. Choose a catalog and create a new gallery to contain the multi-catalog find results.
2. If the **Multi-Catalog Find Results** gallery is maximized, click the **Restore** button in the upper right hand corner to show the gallery windows.
3. Drag the files from the **Multi-Catalog Find Results** gallery window to the new gallery window.

To save the results of multi-catalog find (Mac):
1. Choose a catalog and create a new gallery to contain the multi-catalog find results. Remember that any files that are housed in other catalogs will be copied to the new gallery and catalog.
2. Portfolio on OS X displays galleries as separate windows, so copying files is easy. Drag files from the **Multi-Catalog Find Results** gallery to either the gallery window, or onto the gallery name in the **Galleries** pane.

Finding files by cataloging status

Portfolio makes it easy for you to locate items based on the item's cataloging status. For example, if the cataloging process was interrupted, your catalog might contain a number of partially cataloged items.

To find partially cataloged items (yellow dot):
- Choose **Edit > Find > Partially Cataloged Items** (Mac)

    —OR—
- Choose **Catalog > Find Other > Partially Cataloged Items** (Windows)

After locating the partially cataloged items, you can select all of the items with this status and choose **Item > Update** to complete the cataloging process.

To find unreadable items (red dot):
- Choose **Edit > Find > Unreadable Items** (Mac)

    —OR—
- Choose **Catalog > Find Other > Unreadable Items** (Windows)

After locating unreadable items, you can use the **Item > Original > Reveal in Finder** (Mac) or **Item > Original > Find in Explorer** (Windows) command to locate the file so that you can resolve any file-integrity or permissions issues.

Finding placeholder items

You can easily locate all of the placeholders that you created to keep track of which placeholders you have created, need to update or delete.

To find all placeholders:
- Choose **Catalog > Find Other > Placeholder Items** (Windows).
- Choose **Edit > Find > Placeholder Items** (Mac).

Finding Document Text

The **Find Document Text** command allows you to find words or phrases within the text of cataloged documents, as opposed to in the catalog item.

NOTE
Portfolio only indexes text found in plain text files and PDF documents. When cataloging these files, you must also have the **Index Document Text** option selected in the **Advanced Cataloging Options** dialog.

To find text in a cataloged document:
1. Choose **Edit > Find > Document Text** (Mac), or **Catalog > Find Other > Document Text** (Windows).
2. Enter the words or phrases that you wish to search for in the **Words to Find** text box.
3. From the **Any/All** drop-down menu:
    - Choose **All** to find documents that contain all of the search words.
    - Choose **Any** to find documents that contain any of the search words.
4. Choose the match option from the drop-down menu.

    These options are the same as the regular **Find** command. See *Searching for Specific Items* on page 40 for details.
5. To restrict your search to the current gallery, or to find across multiple catalogs, choose the appropriate options.
6. Click **Find** to start the search.

Finding missing originals

If your files get moved, renamed, or deleted after you catalog them, it's possible for Portfolio to lose track of them. With the Find Missing Originals command, you can easily locate any such "lost" files and then either re-link them to Portfolio or delete them from of your catalog.

NOTE
Portfolio searches for missing files on mounted volumes only. If a volume containing cataloged item source files is not mounted, Portfolio will not report on those files.

To check for missing files:
1. Choose **Edit > Find > Missing Originals** (Mac), or **Catalog > Find Other > Missing Originals** (Windows). Portfolio compares each item's path name as stored in the catalog against all mounted volumes and disks to see if the source file can be found at that location. The results are reported in the Missing Originals dialog.
2. If Missing Files are located, select each item.
3. If you want to re-locate the missing files, click **Find** and browse to the new location for the selected item. If Portfolio finds more than one missing file in the new location, it will automatically update all found files.

    If you want to remove the missing items from the catalog, then click **Delete from Catalog**.

Printing

Although you will typically find and select a catalog item either to edit the source file, view it, or use it in another document, you might want to print from the catalog itself—to show a selection of images to a client, for example, or to evaluate items for possible use in a document.

When you customize the view of your galleries on screen, your view settings are also used when you print items from that gallery.

Printing options

The **Print** dialog contains the standard Printer selection, Page Range, and number of Copies controls as well as options that allow you to specify how items are displayed on the page.

To access the Portfolio printing options on OS X, choose **Portfolio** from the **Options** drop-down menu.

Printer: Choose a printer from the drop-down box and click **Setup** to set printer-specific options.

Print Current Gallery View / Specific number of items per page: This drop-down box allows you to specify how many images are placed on a page, and whether to use the current view settings. Print Current Gallery View is the only setting that uses any saved view data from your gallery. All other settings print a specific number of items per page without any borders or text.

Number of items per page: When you choose to print the current gallery view, you can specify how many items are on a page.
- **As Many as Possible:** This option prints as many items as possible at the actual thumbnail size, including any item borders and text.
- **Fit to Grid:** This option resizes the thumbnails and places them on a grid. Note that borders are not printed with this setting.

Print Using: You can opt to have Portfolio print just the low-resolution thumbnails that you have stored in your catalog (by choosing **Thumbnails**) or full-resolution images (by choosing **Originals**).

Image Quality: This setting determines how much high-resolution data Portfolio uses when printing original images. The Best setting is a printer-intensive task. Some printers are not equipped with enough memory to support the amount of data being downloaded to the printer. If you experience problems, try switching to the "Better" or "Good" setting.

Scale Images to be Similar Size: This option is available when you choose the **Fit to Grid** option or choose a specific number of items per page. This option helps make the layout of horizontal and vertical images look more consistent. For example, if choose a layout of four images per page on letter-sized paper, vertical images will all be the same size on the page, but a horizontal image would be smaller because it needs to fit within the smaller width. When you choose this option the vertical images are resized to be a more similar size to the horizontal images.

Page Margins: Set page margins in inches. The default is 0.5 inches on the top, bottom and sides of the page.

Header/Footer: The header or footer includes any text that you'd like to appear at the top or bottom of the printed page.

Page Numbering: You can turn page numbering on or off, or set a starting page number by typing a number in the **Number Pages From** text box.

Printing a single file

You can print a single full-size image by choosing **File > Print** from a Preview window. However, for best results we recommend that you use the Edit Original command to open a cataloged image in its original application and print it from there.

Printing contact sheets

A "contact sheet" is a page that displays a group of reduced-size images. Contact sheets can be given to clients so that they can choose between many images, as well as just serve as a good printed reference of what is contained in a specific gallery.

To print contact sheets:
1. Select the gallery to print as a contact sheet from the **Galleries** pane. There is no need to specifically customize the view; the images are printed "as is" without any borders or text.
2. Choose **File > Print**.
3. On OS X, click the Show Details button at the bottom of the Print dialog.
4. Click the **Print Current Gallery View** pop-up menu and the number of images to include on each printed page.
5. Enter the minimum amount of space between items into the text box.
6. To make all of the images roughly the same size, enable the **Scale Images to be Similar Size** option.
7. Choose an image quality. Higher quality images may take longer to print.
8. Enter page numbering, margins, and header and footer information.
9. Click **OK** (Windows) or **Print** (Mac).

Printing items from a gallery

To print thumbnails or a list of catalog items:
1. Select the items you want to include and place them into a gallery window.
2. Apply a saved view, or customize the view just the way you want it to appear, including sorting, manually reordering items, borders, background color, and so on. The view "type" you choose—thumbnail, item or list—directly affects how images are placed on the printed page.
3. When the gallery is set up just the way you want it, choose **File > Print**.

AutoSync

AutoSync is one of the most important and powerful features in Portfolio—a dramatic tool that lets you synchronize the contents of any folder on your network with your Portfolio served catalogs.

AutoSync creates a link between specific folders on your computer system and items in a Portfolio catalog. Once you add a folder to AutoSync's Folder View, you can move items into that folder by dragging thumbnails into the folder from within Portfolio. Conversely, files that are moved into that folder on your computer system (using either the Mac's Finder or Windows Explorer) can automatically be cataloged in Portfolio, so that the contents of your Portfolio catalog exactly match the contents of your folders on disk.

AutoSync does more than just display the folders and files you have on disk; you can use it to create, move and delete folders, too, so that you can actually manage your disk files from within Portfolio, putting your cataloged files exactly where you want them.

Here are some of the typical ways that you might use AutoSync:
- Use Portfolio to organize files on disk by dragging thumbnails into folders from within a Portfolio catalog.
- Add an existing set of nested folders from your hard drive (or network) to Portfolio's Folder View and then catalog the contents of all the folders with one click of the Sync button.
- Have Portfolio watch any number of folders on your network and provide a visual alert every time a file has been added, modified or deleted from those folders.
- Move cataloged files from one folder to another on your network, without having to leave Portfolio or manually update your Portfolio catalogs.
- Have other users in your workgroup add items to a catalog by dragging files into folders that are being watched by AutoSync; click **Sync** to bring them into your catalog.

NOTE
AutoSync folders are required for Web Client users that need to upload files to Portfolio Server.

Displaying the Folder View Drawer or Pane

In order to use AutoSync, you must have the **Folder View** drawer (Mac) or pane (Windows) displayed.

If it isn't already visible, click **Folders** on the toolbar or choose **View > Folders** to make the drawer/pane visible.

Initially, the Folder View is blank. Any folders on your hard drive or computer network that you want to keep synchronized with Portfolio will appear in this drawer/pane after you add them.

Adding a New Watch Folder

To begin using AutoSync, you must tell Portfolio which folder (or folders) that you want it to "watch." If you want Portfolio to monitor a hierarchy of nested folders, point Portfolio to the topmost of the folders.

IMPORTANT
For all users to have access to files cataloged by Portfolio Server, an AutoSync folder must be accessible to both Portfolio Server, and all Portfolio Desktop Client machines.

To add a new watch folder to Folder View:

1. Click **Add Watch Folder** at the top of the **Folder View** drawer/pane.
2. Select the folder that you would like to keep synchronized with Portfolio Server. If you want Portfolio to monitor an entire hierarchy of nested folders, select the topmost folder of the hierarchy. Portfolio automatically "sees" the subfolders and includes them in Folder View. Click **Choose** (Mac) or **OK** (Windows) to select the folder.
3. In the **AutoSync Settings** dialog, choose the options that control how Portfolio Server watches the folder and what happens when a new file is found or removed.
   - The **Continually watch folder for changes** option allows you to decide when the AutoSync folder is scanned for changes. When changes are found,the folder name is highlighted in the **Folder View** drawer/pane.
   - The **When to Sync** option allows you to set a specific interval when items in the AutoSync (root folder) are added or removed from the catalog.
   - Enable the **Use cataloging options preset when syncing** option to use a saved preset when cataloging.

     You must have previously created and saved a cataloging options preset for it to be included in the drop down list.

     Only the property assignments (field names, descriptions and keywords) of a cataloging options preset are used; presets that contain copy, move and rename functions can be chosen, but those functions of the preset are ignored. If a saved preset does not contain property assignments, it is not available as a choice from the drop down box.

     See *Saving a Cataloging Options Preset* on page 15 for more information.
   - The **When Original is not Found for an Item in the Catalog** option allows you to decide whether to keep or delete items in a catalog when original files can no longer be found by the AutoSync process.
4. Click **OK** to accept the AutoSync Settings, and **OK** again to create the AutoSync folder. The folder (or folders) you selected will now appear in a hierarchical listing in the **Folder View** drawer/pane. A watch folder appears in Folder View with a small "filing box" icon. Any subfolders appear with a "subfolder" icon.
5. Click **Sync** to synchronize the contents of the newly-added folders with the current Portfolio catalog. Whenever you add a new folder to the **Folder View** drawer/pane, its name initially appears in bold, indicating that it contains files that have not yet been synchronized with Portfolio. Clicking **Sync** forces Portfolio to examine the contents of the selected folders and catalog any uncataloged items that are in the folder.

   NOTE
   If you add empty folders to the Folder View, they don't appear in bold, because there are no files within them that need to be synchronized with Portfolio.
6. The **AutoSync** dialog appears, listing all the files Portfolio will catalog in order to synchronize with the folder. Click **Sync** to continue the cataloging process.

Editing AutoSync settings for a watch folder

You can edit the settings for a AutoSync watch folder at any time.
1. Select the watch folder you want to edit.
2. Click **Watch Folder Settings** at the top of the Folder View drawer/pane.
3. Edit the settings in the **AutoSync Settings** dialog and click **OK**.

Removing a watch folder

When you remove a watch folder from the Folder View, Portfolio stops monitoring the folder on disk, and no longer keeps the folder synchronized with the contents of your catalog.

To remove a watch folder from Folder View:
1. Select the watch folder you want to remove in the **Folder View** drawer/pane. Make sure you've selected the watch folder and not a subfolder.
2. Click **Remove Watch Folder** ![icon] at the top of the Folder View drawer/pane.

   NOTE: Be sure to click **Remove Watch Folder** and not **Delete Folder** ![icon] .
3. Portfolio presents a warning that it will no longer watch the folder that you are removing from the **Folder View** list. Click **OK**.
4. The watch folder no longer appears in the **Folder View** list, meaning Portfolio will no longer track its contents for you. The items that were stored in the removed folder are not deleted from the catalog.

Viewing the contents of a watch folder

Once you've added a watch folder (from your hard drive or network) to Folder View, you can use Portfolio to quickly view the contents of any available folder inside that folder, or in the watch folder itself.

To view the contents of a folder and its sub-folders:
1. Click on a folder in the Folder View drawer/pane.
2. Files in the selected folder and all of its sub-folders appear in the current Portfolio gallery.

To view the contents of only one folder:
1. Hold down the Option key (Mac) or Ctrl key (Windows) and click a folder in the Folder View drawer/pane.
2. Only files in the selected folder appear in the current Portfolio gallery.

Moving files using Folder View

You can use Portfolio to easily move and copy cataloged files in or out of any of the folders that appear in Folder View. In other words, there's no need to switch to the Macintosh Finder or Windows Explorer to move files from folder to folder as you organize them; Portfolio does it for you.

To move an item into a folder using Folder View:
1. Drag the thumbnail of any cataloged item into a folder displayed in the Folder View drawer/pane.
2. Portfolio automatically moves the file into the corresponding folder on your computer system and updates the Portfolio catalog to reflect the file's new location.

To move files from one folder to another:
1. Double-click a folder in Folder View so that the files in the selected folder are visible in the current Portfolio gallery.
2. Drag the thumbnail of any cataloged item into another folder displayed in the Folder View drawer/pane.
3. Portfolio automatically moves the file into the corresponding folder on your computer system and updates the Portfolio catalog to reflect the file's new location.

Creating new folders using AutoSync

With AutoSync, you can create new folders—or new subfolders of existing folders—right in Portfolio and use these folders to group and categorize your images. There's no need to switch to the Macintosh Finder or Windows Explorer to set up these folders. You can add, delete and move folders on your hard drive or network right in Portfolio's **Folder View** drawer/pane.

To create a new watch folder:
1. Make sure that you don't have any existing folders selected in the **Folder View** drawer/pane.
2. Click **Add Watch Folder** at the top of the **Folder View** drawer/pane.
3. Navigation to the location for the new folder and click **New** (Mac) or **New Folder** (Windows).
4. Click **Choose** (Mac) or **OK** (Windows) to confirm your selection.
5. The folder you created will now appear as a new watch folder in the Folder View.

To create a new subfolder:
1. Select one of the folders already visible in Folder View.
2. Click **New Subfolder** at the top of the **Folder View** drawer/pane.
3. A new folder is created as a subfolder of the one you had selected.

Synchronizing folders

When the name of a folder in the Folder View drawer/pane turns bold and the folder icon contains an exclamation mark, it means that the files in that folder have somehow changed since the last time you synchronized the folder with Portfolio.

Among the possible changes that may have occurred:
- A cataloged file was modified.
- A file was removed from the folder using the Finder (Mac) or Explorer (Windows).
- A new file was added to the folder.
- An existing file was renamed.

To update your Portfolio catalog to reflect any of these changes:
1. Select the folder that needs to be synchronized. Only folders with bold names require synchronization. To select multiple folders that need to be synchronized, just select the parent folder; the subfolders will be included in the sync automatically.
2. Click **Sync**.
3. The selected folder in the Folder View drawer/pane should no longer be bold, as the contents are now synchronized with the Portfolio catalog.

Important notes on using AutoSync

- Synchronized folders may stay "bold" for a few moments as Portfolio re-scans the folders to confirm the changes resulting from a sync. This delay may be longer if many folders and files are in the directories that are being synced.
- If files have been removed from a folder and you don't enable the **Delete Items for Missing Source Files** option in the **AutoSync** dialog when using the **Sync** command, your folder will remain unsynchronized and in bold. This is because Portfolio still contains an item for a file that is no longer in that folder. To fully sync up the folder, enable the **Delete Items for Missing Source Files** option and re-sync the folder.
- When you rename a file outside of Portfolio (using the Macintosh Finder or Windows Explorer), the renamed file will be considered a "new" file by Portfolio when synchronizing. When you sync the folder containing the renamed file, the catalog item for that file—including its keywords, description and any other stored data—will be deleted and a new item will be created for the newly-named file. For this reason, we recommend using the renaming features within Portfolio to make such changes.
- When you move a file from one AutoSync folder to another outside of Portfolio, Portfolio recognizes the file has moved and turns two folders bold: the one from which the file was removed and the one to which it was added. You must synchronize the parent folder of both of these folders at the same time in order for Portfolio to properly update the catalog. Otherwise, Portfolio will delete the item for the file's original location and create a new item for the file in its new location. While this will keep your catalog up to date, it could result in you losing information that was stored in the original item. Portfolio will always update items properly when you move files from one AutoSync folder to another within Portfolio.
- If you do not have network access to a AutoSync folder, the folder appears dimmed in the folder view list. You can see thumbnails for items in that folder that are part of the catalog, but are not be able to open or modify the items.

Switching to the Macintosh Finder or Windows Explorer

You can easily switch from Portfolio's Folder View to the Windows Explorer or Mac Finder to see how your files appear in their actual folders on disk.

Macintosh: Right-click on the name of any folder in the **Folder View** drawer and choose **Reveal in Finder** from the shortcut menu.

Windows: Right-click on the name of any folder in the **Folder View** pane and choose **Explore** from the shortcut menu.

Keywords

Keywords are descriptive words and phrases that you can assign to your cataloged files in order to categorize and classify them. If you had an image of a tropical beach at sunset, for example, you might assign it keywords such as Sand, Beach, Ocean, Sunset, Tropical, Vacation, Recreation, Outdoor, and so on. Any of these terms would make it easier to group the image along with other related images, and also make it easier to search for the file. In Portfolio, there's no limit to the number of different keywords that you can assign to an item.

How to avoid typing keywords

If you find typing and entering keywords tedious—and most users do!—take note that several of the techniques referenced in this section are specifically designed to keep manual keyword entry to a minimum:

- Convert file and folder names into keywords when cataloging.
- Assign keywords during cataloging using Cataloging Options.
- Import an existing Master Keywords list into the Master Keywords palette.
- Drag keywords onto thumbnails to assign them.
- Use the **Edit Field Values** command to assign a keyword to multiple items.

Adding Keywords

Portfolio provides several convenient ways to add keywords to the items in your catalog.

Add keywords during cataloging

Using the Portfolio Cataloging Options, you can assign keywords to multiple items as they are being cataloged. For details, see ***Cataloging Options*** on page 14.

Use the Edit Keywords command

This method is useful if you have to add the same keywords to a number of different files.

1. Select the items to which you want to assign keywords in a gallery window.
2. Choose **Item > Edit Keywords**, or press *COMMAND-OPTION-K* (Mac) or *CTRL-SHIFT-K* (Windows). The **Edit Keywords** dialog opens. The keywords that have already been assigned to at least one of the selected items are displayed in the keywords list.
3. Type a keyword in the text box, then click **Add**. The "State" of the keyword is changed to "Add," indicating that it will be added to the catalog and assigned to the selected items. You don't have to click **Assign** after you add a keyword—Add implies Assign (that is, all keywords with either Add or Assign in the State field will be assigned to all selected items in the active Gallery when the dialog is closed. Add just tells you it's a new keyword).
4. Click **OK** to when you're done adding keywords.

The Properties dialog

You can add keywords to each individual item through the Properties dialog (**Item > Properties**). This method works particularly well if you have different keywords that you'd like to assign to each item. See ***Viewing and Editing Item Properties*** on page 33 for details.

Use Item View

You can also edit the keywords for any item directly when you're in Item View.

1. Click anywhere in the **Keywords** field of the item to activate keyword editing.
2. To add a keyword, type it in the text entry field, then click to add the keyword. You can edit any editable data field in Item View using this same approach.

Keywording with Edit Field Values

The **Edit Field Values** command makes it easy to add, remove or replace keywords across an entire selection of items.

Use the Master Keywords palette

If the administrator of your catalog has created a set of master keywords, these are available on the **Master Keywords** palette.
To display the palette, choose **Window > Show Master Keywords**, or press *COMMAND-SHIFT-K* (Mac) or *CTRL-K* (Windows).

To assign a keyword from the Master Keywords palette:
1. Select the items to which you want to add a keyword.
2. Select the word on the **Master Keywords** palette that you'd like to assign to the items.
3. Click the **Assign** button on the palette.

You can also drag and drop keywords from the **Master Keywords** palette to assign them.
1. Drag a keyword from the **Master Keywords** palette and drop it on any thumbnail to assign the keyword to that item.
2. To assign keywords to multiple items, first select the items in the gallery, then drop a keyword on any one of the selected items. The keyword is automatically assigned to all the selected items.

Drag and drop text

You can select text from any drag-and-drop savvy program (such as Microsoft Word) and drag the selection onto a Portfolio thumbnail to assign the words in the selected text as keywords.

Removing keywords

There are four quick ways to remove unwanted keywords:
- Use the **Edit Field Values** command to remove a keyword from a selected group of items. See *Using the Edit Field Values Command* on page 58.
- In the **Keywords** tab of the **Properties** dialog, select a keyword, then click **Remove**.
- In the **Edit Keywords** dialog, select a keyword, then click **Delete**.
- Windows users can delete keywords in the **Item** view: click in the keywords, select a keyword in the list, then click ⊟ to remove the keyword from the item.

Viewing keywords

You can view the keywords associated with a selected item in the following locations:
- In any thumbnail, item or list view (**View > Item**), if keywords have been included in the view.
- In the Keywords tab of the Properties dialog (**Item > Properties: Keywords**).
- In the Edit Keywords dialog (**Item > Edit Keywords**).

When keywords are shown, the number beside each keyword indicates how many items in the catalog have that keyword assigned.

The numbers that appear in keyword lists tell you how many times each word is used in the catalog.

Master Keywords

Establishing a Master Keywords list for a catalog can help you maintain consistent keywords among the items in the catalog, or across catalogs. With a Master Keyword list, you can ensure that only the keywords in the list are used in the catalog.

One of the best ways to ensure consistent use of keywords is to set up a list of Master Keywords as a catalog administrator.

Once you've set up a Master Keyword list, your list automatically appears in a number of places within Portfolio:
- On the Master Keywords palette (visible by choosing **Window > Show Master Keywords**).
- In the Keywords tab of the Item Properties dialog.
- In the Keywords tab of the Cataloging Options dialog.

You can enter Master Keywords manually, or you can import them from an existing text file.

General keyword tips

When developing a list of master keywords, it is important to consider the end users who will be searching your catalog. Are they more likely to refer to an object as a "car" or an "automobile?" Each word can correctly describe an object, but one may be slightly better for your situation. Choose one keyword and stick to it.

Defining a master set of keywords and sticking to them will make the art of searching for files much easier. Also, as a Portfolio catalog becomes larger, the tendency is to include more and more keywords. Carefully following some guidelines and only using Master Keywords will help users more accurately catalog and retrieve files.

Consistency is also important with the use of plurals. You don't want your catalogs filled with multiple and potentially confusing keywords. For example: fly / flies, mouse / mice, or goose / geese.

Creating a Master Keyword List

To add keywords to the Master Keywords list:
1. Choose **Catalog > Administration**, or press *COMMAND-OPTION-J* (Mac) or *CTRL-SHIFT-J* (Windows).
2. Click the **Keywording** tab of the **Catalog Administration** dialog.
3. Type new keywords into the text box at the top of the dialog, then click **Add**.

   If you enter a word that is already on the list, the **Add** button is dimmed.
4. When you have finished adding Master Keywords, click **OK** to save the changes and close the dialog.

Importing and Exporting Master Keywords

You can export the Master Keywords list from one catalog and import it into another. This is handy if you want to share keywords across multiple catalogs. You can also export the standard keywords from any catalog, import it into the Master Keywords list of another catalog, then work with the list to rename, add, or remove keywords to build a suitable Master Keywords list.

Portfolio exports keywords to a file in which each keyword is delimited by a Return character, so you can also import lists of Master Keywords from any similarly formatted text file.

To export a list of Master Keywords:
1. Choose **Catalog > Administration**, or press *COMMAND-OPTION-J* (Mac) or *CTRL-SHIFT-J* (Windows).
2. From the **Keywording** tab, click **Export**.
3. Specify a name and location for the exported file, then click **Save**.

To import any list of keywords to the Master Keywords list:
1. Choose **Catalog > Administration**, or press *COMMAND-OPTION-J* (Mac) or *CTRL-SHIFT-J* (Windows).
2. From the **Keywording** tab, click **Import**.
3. Navigate to the file containing the keywords to import. The keyword list must be a plain text file with a hard Return character separating each keyword entry.
4. Click **Open**. The keywords are added to the Master Keywords list.

Renaming Master Keywords

To rename a Master Keyword:
1. Choose **Catalog > Administration**, or press *COMMAND-OPTION-J* (Mac) or *CTRL-SHIFT-J* (Windows).
2. Click the **Keywording** tab of the Catalog Administration dialog.
3. Click to highlight the keyword that you want to rename and then click **Rename**.
4. Enter a new name for the keyword.
5. When you have finished working with Master Keywords, click **OK** to close the dialog and save the changes.

Deleting Master Keywords

To delete a Master Keyword:
1. Choose **Catalog > Administration**, or press *COMMAND-OPTION-J* (Mac) or *CTRL-SHIFT-J* (Windows).
2. Click the **Keywording** tab of the **Catalog Administration** dialog.
3. Click to highlight the keyword that you want to remove, then click **Delete**.
4. When you have finished working with Master Keywords, click **OK** to close the dialog and save the changes.

NOTE
Deleting a keyword from the Master Keyword list does not remove it from any items that have that keyword assigned to them. If you want to change keywords that have already been applied to items (changing all occurrences of "Fast" to "Rapid," for example) use the **Edit Field Values** command to replace one keyword with another.

Custom Fields

Custom fields allow you to store just about any type of information you want—a date, a number, a block of text, or a URL—about the items you catalog, giving you much more flexibility when it comes to organizing, categorizing and searching for your files.

Custom fields are perfect for organizing your files based on information that isn't strictly a keyword or a description. For instance, you might want to add a field for a URL that points to a website related to the cataloged file, or a "Photographer" field to a catalog of digital photos, or a field to hold price information or stock numbers.

The six types of custom fields in Portfolio:
- **Date/Time:** Enter date and/or time values. You could use this field type to create a Custom Field for image publication dates, for example.
- **Decimal:** Enter decimal point numeric values. This field type would be useful for custom fields containing stock image prices.
- **Number:** Enter regular numeric values. This field type is ideal for custom fields containing catalog part or stock numbers, as long as they contain only numeric values.
- **Text:** Enter single line text values. Can be used for any number of custom fields, including photographer or artist names.
- **Text Block:** Enter multiple lines of text with line breaks.
- **URL:** This field type is used for Web and other URL addresses. When an URL field is displayed in the Web Client's Grid view, it becomes an active, clickable hyperlink that will open a new browser window or tab.

Keywords vs Custom Fields

Portfolio users often wonder when to store information in a custom field, and when keywords are more appropriate. In general, keywords should be used to describe the content of a file, and custom fields for specific properties of the file.

Custom fields are particularly useful for tracking any information about the file that is pertinent to the business model. It would be best to use a custom field to track the following information types: job number, part number, SKU, pricing, any information with a Yes/No option, or any data where predefined variables are possible.

For example, a graphic designer has recently completed a project for a frozen foods packager. The project contains an Adobe Illustrator file and a number of related images. She catalogs the files and uses custom fields to track the client name and job number. Because the project is a pizza box design, she also adds the keywords "pizza," "pepperoni," and "frozen."

While custom fields take a few extra steps to configure, they have a definite search speed advantage over keywords. Custom fields are indexed to provide the fastest information retrieval from the Portfolio catalog.

For more information about adding and utilizing keywords, see *Adding Keywords* on page 53. For more about setting up and using custom fields, see *Adding a Custom Field to a Catalog* below.

Adding a Custom Field to a Catalog

To add a custom field to a catalog:
1. Change your access level to Administrator mode. Choose **Catalog > Access Level**, change the Catalog Access level to **Administrator** and enter the password if necessary, then click **OK**.
2. Choose **Catalog > Custom Fields**.
3. In the **Custom Fields** dialog, click **New**. The **New Field** dialog is displayed.
4. Enter a name for the field in the **Name** text box.
5. Choose the field type. The field type determines the values that can be entered into this field. Field types cannot be changed once they are defined.
6. Select the appropriate remaining options for the field type you selected, then click **OK** to return to the **Custom Fields** dialog.
7. When you have finished adding Custom Fields, click **OK**.

Custom Field Types

The following is a complete guide to the attributes associated with each of the custom field types you can create in Portfolio.

Date/Time

This field type allows you to enter date and/or time values into your items. You can elect to have Time values not displayed by deselecting the Display Time option in the Date/Time Custom Field Definition dialog. Date/Time fields include multiple values, and/or can be configured as a predefined list.

> ***NOTE***
> Times are always assumed when searching on Date/Time fields. That is, if a time value has been entered into the field (either by extraction from the source file when the item was cataloged, or by entering a time in the field) and then hidden by turning off "Display Time," the time will still be noted by Portfolio when a search is generated. For example: Searching for "5/20/02" will not find an item which contains "5/20/02 3:00 PM" because the request is interpreted as "5/20/02 12:00:00." This is true even if the time is not being displayed.

Decimal

In this field type, you can enter decimal point numeric values with a precision up to 8 decimal points. Decimal fields can include multiple values, and/or be configured as a predefined list. To set the Precision, select it from the drop-down menu.

Number

For regular numeric values. Number fields include multiple values, and/or can be configured as a predefined list.

Text

This field type is designed for single line text values. You can specify a maximum length for the field by entering the number of allowable characters in the Length text box. The data in a Text Field can be from 1 to 249 characters long, and include multiple values, and/or be configured as a predefined list. Fields cannot contain multi-lined text (for multi-line text, use Text Blocks).

Text Block

Text Blocks are multi-lined fields that can be any length up to about 32,000 characters. This field type allows you to add multiple lines of text to items; you can include line breaks or carriage returns. Text blocks are word-indexed, allowing even these longer fields to be searched extremely quickly. The Text Block field cannot be sorted or phrase-searched.

Displaying custom fields as palettes

To make using custom fields even easier, Portfolio has the ability to display the values you set up in a predefined list as a palette, similar to the Master Keywords palette. This allows you to easily assign field values with just a few clicks, and without having to open individual items.

When you create a custom field with a predefined list of values, a new palette bearing the name of that custom field automatically appears in the Windows menu, under the **Custom Field Palettes** submenu.

To use the example given earlier, creating a custom field called Status with a list of four predefined values would add a **Show Status** command to the **Window > Custom Field Palettes** submenu.

Choosing the **Show Status** command opens a new palette called **Status**, containing the predefined list of values that you can use in the custom field.

Assigning field values with a palette

To assign custom field values using a palette:
1. Select the items for which you want to fill in a field value.
2. Select the entry on the custom field palette that you'd like to assign to the items.
3. Click the **Assign** button on the palette.

To drag and drop the entries from custom palettes:
1. Drag a value from a custom field palette and drop it on any thumbnail to assign the entry to the corresponding custom field for that item.
2. To assign values to multiple items, first select the items in the gallery, then drop a custom field palette entry on any one of the selected items. The value is automatically assigned to all the selected items.

Using the Edit Field Values command

The Edit Field Values command is designed to speed up the process of adding, removing and editing values in virtually all editable Portfolio fields, including Keywords, Description, and any of your custom fields.

To edit field values:
1. Select the thumbnails of the items you want to edit. The **Edit Field Values** commands operate only on selected items. If you want to edit values in all the items in a gallery, choose **Edit > Select All** to select the entire gallery.
2. Choose **Item > Edit Field Values** to open the **Edit Field Values** dialog.
3. Select the field you want to edit from the **Field to Edit** menu. All editable fields, including your custom fields, are displayed in the menu.
4. Select an action from the Action radio buttons. Depending on the field you choose to edit, you can **Replace**, **Delete**, **Add** or **Append** data.
5. Specify the value that you want to add, change, or delete in the **Value** field. In the case of a Replace action, you have to specify both the value you're replacing and the value you're replacing it with.
6. Click **Apply**.

Categories

Portfolio offers the ability to organize groups of items visually, using a folder-like hierarchy which is accessible through the Categories palette. For example, you might want to use this feature to:

- Organize all the versions of a job file, such as low and high resolution images, RGB version, CMYK files, etc.
- Arrange all the elements of a print job, such as the document files, images, and fonts.
- Categorize your image content using a system of hierarchical keywords so that you have a general category, (such as Animals) within which is nested narrower topics (Birds) and sub-topics (Waterfowl).

The Categories palette consists of a hierarchy of folders that are linked to items in the catalog. By double-clicking a folder icon on this palette you can display all the cataloged items in a folder and, optionally its subfolders.

Using options on the Categories palette you can create the folder hierarchy manually, then drag items from the catalog onto the Categories palette folders to link them.

You can also drag folders from the Categories palette to the Macintosh Finder or Windows Explorer to create a copy of an entire job (folders, subfolders, and the cataloged contents), or any number of individual folders and contents, to any local or network volume in one easy step.

Categories vs. AutoSync

Both Categories and AutoSync help you organize your digital files into an hierarchical folder structure, but they take very different approaches to these tasks.

The Categories feature uses a nested folder structure to help you organize your files. But the folders you see on the Categories palette are virtual folders. While they can be based on a set of folders from your computer system, they aren't real folders that exist on your network or hard drive. They provide a way for you to mentally group and organize files within the Portfolio environment. There's no "live" link between the folders on your computer and the "folders" in the Categories palette. When you drag items into folders on the Categories palette, nothing happens to the original files on disk; they stay where they are.

The Categories palette also can generate a brand new set of folders on disk that exactly mirror the hierarchy that you set up on the palette, but it can't move files into existing folders on your system.

AutoSync, on the other hand, allows you to organize your files in real folders on disk. Double-clicking a folder in Portfolio's Folder View shows you the actual contents of that folder on disk. With AutoSync, there is always a "live" connection between Portfolio and the folders on your network. When you move and group files in Portfolio using AutoSync, you are moving the original files, in real time, on your network. AutoSync isn't just a categorization tool, it's a file management tool.

NOTE
While the Categories feature is a powerful organizational tool, most users are best served by using AutoSync, which organizes files both logically and physically on disk.

Creating a new category

To create a new category using the Categories palette:

1. Change your access level to Administrator mode. Choose **Catalog > Access Level**, change the Catalog Access level to **Administrator** and enter the password if necessary, then click **OK**.
2. On the **Categories** palette, click **New** or choose **New** from the palette fly-out menu. You will be prompted to enter a name for the folder.
3. Enter the folder name, then click **OK**. A folder is created at the selected level (below the currently selected folder) on the **Categories** palette.
4. Continue creating folders (steps 1 and 2) until all the folders have been created.
5. Drag the folders up and down as necessary until the folder hierarchy is as you like it. On OS X, use the insertion bar to gauge exactly where to drop each folder.

Removing a category

To remove a category, do one of the following:

- On the **Categories** palette, select the category that you want to delete, then click **Delete** at the bottom of the palette.
- Choose **Delete Category** from the fly-out menu.

Linking items to a category

Once you have established categories, you can use them to group cataloged files.

To link cataloged items to an existing category:
1. Make sure you've got the **Categories** palette open.
2. Select the items that you want to categorize, then drag and drop them into the desired category on the **Categories** palette.

   The selected items will be linked to the folder.

—OR—
1. Select the items in the gallery.
2. On the **Categories** palette, select the target category.
3. From the **Categories** palette fly-out menu, choose **Apply Items to Category**.

   The selected items will be linked to the category "folder."

Displaying items in a specific category

To display cataloged items in a specific category:
1. Double-click the desired category folder on the **Categories** palette.
2. Items in the selected folder will be displayed in the Gallery.

   If you want to display items in a Category and all sub-categories, choose **Show Items in Sub-categories** from the palette fly-out menu. Items in the selected folder and all sub-folders will be displayed in the Gallery.

Removing items from a category

To remove cataloged items from a category:
1. Select the items that you want to remove from the category.
2. Click **Remove** on the **Categories** palette, or choose **Remove Items from Category** from the fly-out menu. The selected catalog items will be removed from the category folder, but not from the Gallery or Catalog.

Creating folders based on categories

After you've categorized you files, Portfolio can replicate your organized folder structure on disk. Note that this process doesn't move your original files; it makes copies of your files in a new location, based on the folder structure on the Categories palette.

To create a category-based file and folder structure on disk from your Categories:
1. On the Categories palette, select the top-level folder that you want to create the Category from.
2. Drag the folder to the Finder (Mac) or Explorer (Windows). A dialog is displayed asking if you want to create one folder for all the items, or if you prefer to maintain the folder hierarchy.

—OR—
1. Choose **Create on Disk** from the palette fly-out menu, then choose a folder where you want the items to be stored.
2. Click **Create one folder** to have all items placed in a single folder, or **Create all folders** to maintain folder hierarchy.

   Portfolio will create new "real" folders on disk that correspond with each of the folders on the Categories palette and a copy of each original file will be placed in the appropriate folder.

Distributing files

Emailing Files

Portfolio makes it possible to email images, low resolution previews, and other digital media files to other users from within a Portfolio catalog. Portfolio connects directly to your computer's email program. This provides a convenient way to distribute images or send out proofs without having to manually launch your email program or open an image editing program to change the image resolution.

To email a file from Portfolio:
1. Select the item (or items) that you want to send from the current gallery window.
2. Click **Email** on the toolbar. Portfolio prompts you to choose how to transfer the file:
   - Send the original file;
   - Send a low-resolution preview;
   - Send a preview of specific pixel width.
3. Choose an option and click **OK**. Portfolio launches the default email program on your system, creates a new email message, generates previews if the preview option is chosen, and adds the files you selected as an attachment.
4. Address the email and fill in the subject and body text as usual.

NOTE
While there's no inherent limit to the size or number of items that you can attach to an email from within Portfolio, your email client software, network email server and/or your internet service provider may have limitations on the size of attachments. If you have very large attachments, it might be better to collect these together using Portfolio's Collect command, and then transfer them over the internet using FTP.

Burning Files to Disc

Portfolio contains the ability to burn a CD or DVD directly from Portfolio—no other CD/DVD creation software is required.

NOTE
The Burn to Disc feature is operating system dependent. You can also use Portfolio to collect files that can be burned later onto a disc.

The Burn to Disc feature can be used to create archives of original files in your catalog, create a disc of preview images for a client, or even publish copies of your original files.

Publishing Original or Preview Files to Disc

1. If necessary, confirm that any external CD or DVD burning devices are connected to your computer.
2. Insert a blank disc into the drive.
3. In the Galleries pane, open a gallery of the items that you want to burn to disc. All items in the gallery will be used to create your disc. Portfolio supports burning files that are in only one catalog. This option is unavailable for a gallery that contains items from more than one catalog.
4. Click **Burn to Disc** on the toolbar, or choose **Gallery > Burn to Disc**.
5. In the Burn to Disc dialog, enter a volume name for your disc. This is the name that is displayed in the Windows Explorer and Macintosh Finder when you insert the disc into a drive.
6. Choose one of the following three file options:
   - **Original files, unmodified:** include the original full-size files
   - **Low Res JPEGs the same size as original**
   - **Low Res JPEGs that fit within X:** choose this option to re-size files and make them fit within a specified pixel width or height. Images will be resized proportionately and the longer side will not be larger than the specified number of pixels.
7. Do not choose to **Link Paths in Catalog to Files Burned to Disc**. This option is used only to create an archive disc.
8. Enter a folder name within which to include the files.
9. If desired, check the option to **Organize files into a matching folder hierarchy**. This option creates a subfolder hierarchy on your disc that matches the subfolders of the original files.
10. Note the total size of your collection (in megabytes) in the **Estimated Size** field near the bottom of the window to make sure you have sufficient room on the target volume for the collection.
11. Click **Burn** to create your archive disc. When the burn process is complete, the burn session is closed and no other files can be added to the disc.

Archiving Original Files to Disc

At times you may want to create archive discs of your original files. When you create an archive disc, your original files are copied to disc and your catalog is updated so that it now points to the archive disc. Your catalog still contains thumbnail and preview images of archived files, but when you choose to open an original file, Portfolio prompts you to insert the archive disc.

To archive files to disc:
1. If necessary, confirm that any external CD or DVD burning devices are connected to your computer.
2. Insert a blank disc into the drive.
3. In the Galleries pane, open a gallery of the items that you want to burn to disc. All items in the gallery will be used to create your disc. Portfolio supports burning files that are in only one catalog. This option is unavailable for a gallery that contains items from more than one catalog.
4. Click **Burn to Disc** on the toolbar, or choose **Gallery > Burn to Disc**.
5. In the **Burn to Disc** dialog, enter a volume name for your disc. This is the name that is displayed in the Windows Explorer and Macintosh Finder when you insert the disc into a drive If you plan to create many archive discs, it is wise to choose a logical volume naming convention for your archive discs, for example `ARCHIVE001`, `ARCHIVE002`, etc. This allows you to effectively organize and quickly locate your archive discs. The volume name length is limited to a maximum of 16 characters.
6. On OS X, choose **Original Files, and Link Paths in Catalog to Files Burned to Disc**. On Windows, choose **Original Files** and check the option to **Link Paths in Catalog to Files Burned to Disc**.
7. Enter a folder name within which to organize the original files on disc.
8. If desired, check the option to **Organize files into a matching folder hierarchy**. This option creates subfolders on your disc that match the subfolder locations of the original files.
9. When you create an archive disc, the source catalog is updated to point to the new location of the original files.
10. Note the total size of your collection (in megabytes) in the **Estimated Size** field near the bottom of the window to make sure you have sufficient room on the target volume for the collection.
11. Click **Burn** to create your archive disc. When the burn process is complete, the burn session is closed and no other files can be added to the disc. If your final disc requires more space than allowed on your disc, the burn process cannot be completed.

After you burn your archive disc, the original files still remain on your system and the catalog now points to the archive disc. If desired, you can now manually delete the original files from your system using the Finder (Mac) or Explorer (Windows).

Collecting Files

As a Portfolio user, you might frequently find it useful to collect together a group of cataloged files, copying the files from their various locations on your computer system or network into a single location. Much like the **Burn to Disc** command, the **Collect** command copies and collects files.

Suggested ways to use the Collect feature

- Copy files scattered across your network on to a single location.
- Copy a select set of files to a new folder on the network so others can use and access them.
- Gather files to a single location for inclusion on a CD or DVD that includes your Portfolio files as well as any other desired content. This is a benefit of using the **Collect** command over the **Burn to Disc** command.
- Gather low resolution JPEG images for distribution and review.

To collect files:
1. Make sure the files you want to include in your collection are in the current gallery.
2. Click **Collect** on the toolbar, or choose **Gallery > Collect**.
3. Choose the type of file to collect:
   - Original files
   - Low Res JPEGs
   - Low Res JPEGs that fit within a specific size.
4. Choose a destination for the collection.
5. Click **Folder** (Mac) or **Browse** (Windows) to select a folder into which your new collection will be copied. You can select an existing folder, or create a new one in the **Choose a Folder/Browse for Folder** dialog.
6. On OS X: If you want to burn the collected files to a CD, and have any included catalogs function properly, insert the CD into the drive, and choose the mounted volume as the destination. This is action only collects the files in a specific location and does not finalize the disc.
7. Check the option to organize files into matching folder hierarchy if you want Portfolio to copy the collected files into hierarchical folders. Leave this unchecked if you want the files collected into a single folder.
8. On Windows: If you are burning the collection to a CD, enable the **Use this Volume name in the new Catalog** option and fill in the name that you will ultimately give to the CD, so that the paths in your archive catalog will work correctly.
9. Note the total size of your collection (in megabytes) in the **Estimated Size** field near the bottom of the window to make sure you have sufficient room on the target volume for the collection.
10. Click **Collect**. Portfolio makes copies of all the items in the current gallery.

Creating Webpages

Create Webpages Assistant makes it extremely easy to create webpages from your Portfolio catalogs without having to build pages from scratch or work directly with HTML code. The webpages generated using the Create Webpages Assistant are static webpages—a frozen "snapshot" of your Portfolio content at the moment you export it.

The Create Webpages feature is designed to help you turn your catalogs into polished webpages with just a few clicks. The intuitive Create Webpages Assistant walks you through each step to create professional-looking webpages.

You can use this feature in many ways. For example, you can use the Create Webpages assistant to create a record of the items that you're burning onto a disc, and then include the HTML files when you burn the final disc.

Depending upon the site template that you choose, there can be up to five easy steps to create your site. The Assistant walks you through the following steps to configure each page of your site.

Create Webpages steps

- **Welcome:** lists the catalog name and number of images selected to export.
- **Start:** choose a website layout for your site.
- **Site:** set global settings for all of the pages of the site here. You can also add a "Welcome page" to your site.
- **Gallery:** configure how your images are displayed in the web page.
- **Detail:** configure the detail page where typically a single higher resolution image and other detailed information is displayed.
- **Export:** set the export location and save any template modifications for later.

Create webpages - Start step

To create webpages of selected images in a Portfolio gallery:
1. Select the thumbnails of the images that you want to include on your webpages. The Create Webpages command acts only on selected items. If you want to include all the images displayed in your gallery window, choose **Edit > Select All**.
2. Choose **Item > Create Webpages**.
3. The Create Webpages Assistant is displayed. The Assistant guides you through each step of the process. The following pages include detailed information about each step.

> **NOTE**
> As with any HTML code, results will vary based on what platform and browser the viewer is using. You should test the generated results with any browsers and platforms that you think your visitors might use to access the pages.

The Start step

In the Start step you have the opportunity to choose from eight professionally designed templates. You can also duplicate and then customize those templates to your specific needs.

At the top of the step, the Assistant path tells you where you are in the export process. When you click on each site icon, a detailed description of that template is displayed.

Each template contains specific page layout and design information, so the Assistant displays only the options and pages that you can configure for that template.

During any step from this point forward you can click **Export**. This accepts the default settings for all of the subsequent steps up to the Export step of the process.

To use one of the pre-designed templates:
1. Click to highlight the template icon.
2. Click **Export** to accept the site with all of the default settings, or click **Next** to customize the pages of the template.

Create webpages - Site step

In the Site step you designate global site options. These are items that are displayed on all of the pages of your site.

Site settings

In the site settings box, enter text that you want to appear in the title bar of the browser when viewing the site.

Site logo

You can choose a custom graphic that appears on all pages. This could be a graphic of your business name, or a graphic description of the group of images being exported. You can use a JPG, GIF or PNG file with a recommended maximum size of 150 x 90 pixels.

To change the default logo graphic, click **Browse** and navigate to the location of the graphic.

> **NOTE**
> Graphics, HTML, and other files can be located anywhere on your computer. The Assistant automatically collects all of the pieces when you export the site.

Site header and footer

The site header and footer can contain text or HTML. This can be used to create a look that matches other sites currently in use, to include website navigation buttons, or whatever you choose. The recommended maximum dimensions of the header and footer is 600 x 90 pixels.

To change the Header or Footer file, click **Browse**. The file you choose is automatically copied and renamed header.html or footer.html.

> **NOTE**
> Even though not listed specifically in the Assistant, when using a default template, a header, footer and site logo are always included, unless you browse to new headers, footers or logos.

Welcome page

The Welcome page is the first page displayed to users of your site. It can contain instructions about how to navigate your site, or any other important information. The Welcome page can be up to a recommended maximum size of 480 x 480 pixels and can contain text or HTML.

Include link to homepage

Check this option to include a link to your homepage on every page. In most templates, the logo graphic is a link itself, and uses the URL that you enter into this text box.

Create webpages - Gallery step

The Gallery step is where you define the page that displays thumbnails of items in your web site. In this step you designate the page design, thumbnail size, data field information displayed, and more.

Page style

The first step is to choose a gallery page style. Page styles define the general functionality of the page as well as the "look and feel" of the page. The page style determines what items are displayed where. The default page style is selected until you choose an alternate.

To choose a page style, click to highlight a page style icon.

Style sheet

Depending upon the site you choose, there can be multiple style sheets from which to choose. Style sheets control the color scheme of the site, typically the background and text color of each item on your final page.

Thumbnail options

Use the thumbnail options to set the size of the images displayed, layout in rows and columns, and what happens when the user clicks on an image.

Thumbnail size is directly dependent upon the size of thumbnails in your catalog. If you choose "Original Size," then the thumbnail size in the catalog is used.

> **NOTE**
> If you choose a thumbnail size larger than that in your catalog, you will likely have degradation in the display quality of the thumbnail. So, if thumbnails in your catalog are created at 112 pixels, you should not enter a thumbnail size larger than 112. Make sure to preview your page as you choose new settings.

From the drop-down menu, choose what should happen when a user clicks the thumbnail. Choose **Detail** to have the **Detail** page displayed. The other options are self explanatory.

Display fields

Depending upon the page style, a wealth of data fields can be displayed. Check each data field that you would like to include, then click and drag them into an appropriate display order.

> **NOTE**
> When choosing an order for display fields, it is best to group fields by how they will appear to a user on the page. Fields can be displayed as a Text Box, Pull-down menu, or hyperlink depending upon the data type. The default template settings typically group the fields in this order:
> 1. Text Box
> 2. Pull-down
> 3. Hyperlink

Create webpages - Detail step

A detail page is a page where only one image is displayed, typically at a larger size and better quality than the thumbnails shown on other pages. In this step you choose the detail page options.

Page style and style sheet

The page style and style sheet options operate like those on the previous page. Click to highlight a page style and choose a style sheet from the drop down list.

Image options

You can choose what image is displayed, the size of that image, and what happens when a user clicks the image.

The image **Source** refers to what image is used to create the image for the user. Choose one of the following:
- **Original** to display the original image. If you use this setting, be sure to set a specific image size in the next field.
- **Preview** to use a screen preview from the catalog.
- **Thumbnail** to use the default thumbnail from the catalog.

When you set a size other than Original, the image is resized by Portfolio and displayed at the chosen size.

NOTE
If you choose **Original** for both the image size and source, files that cannot be displayed by a web browser (such as TIFF, PSD, etc.) will not display a detail image. To fix this issue, choose a specific image size, so Portfolio can automatically create an appropriate detail image.

To add a link or button that allows the user to open the original file enable the **Clicking on image shows original** option.

Display fields

Depending upon the page style, a wealth of data fields can be displayed. Check each data field that you would like to include, then click and drag them into an appropriate display order.

Create webpages - Export step

In the Export step you indicate where to export your site and also save a copy of your template.

Saving a copy of your template settings

After you have made all of your selections, you may want to save what you've selected so you can use the same settings again. To do so, enter a description of your site and click **Save a Copy**. The next time you use the Create Webpages Assistant, your template will be listed along with the other default templates.

Exporting your site

1. Accept the default directory in the Location box, or click **Choose** and navigate to the desired directory location.
2. Click **Export Webpages**.

NOTE
Depending upon the number of items selected, exporting your site can take a great deal of time.

Creating your own webpage template

To save any custom changes to a Create webpages template:
- Duplicate the template in the Start step
- Click **Save a Copy** in the Export step
- Click **View Source** at each step of the Create Webpages Assistant to view and edit the source code.

You cannot save template changes directly to the default templates. This ensures that you always have access to the default templates.

To duplicate a template:
1. In the Start Step of the Create Webpages Assistant, right-click the site icon and choose **Duplicate** from the shortcut menu.
2. In the dialog, enter a name for the new template and click **OK**.
3. Click to highlight the new site template icon.
4. Click **Next** to start customizing the pages of the template.

NOTE
On the Export step of the Assistant, you are given the option to save your template. Be sure to click **Save** to make it available to reuse in the future.

Hiding and unhiding webpage templates

In the Start Step of the Create Webpages assistant, there may be a number of templates that you don't think you'll ever use. To clean up the interface, you can hide them from view. Hidden templates are not deleted and can be unhidden at any time.

To hide a template:
- Right-click the site icon and choose **Hide** from the shortcut menu.

To unhide a template:
1. Right-click any site icon.
2. Point to **Unhide** on the shortcut menu and choose:

- **Unhide All** to show all hidden templates.
- The specific template name to unhide.

Editing webpage source code

If you have some HTML knowledge, you can edit your own source code directly from within the Create Webpages Assistant.

To view the source code, from the Gallery or Detail steps, click **View Source**. This tool can be handy to make minor adjustments to the predefined code.

In the source code editor, you can:
- Directly edit the source code for the page.
- Preview your changes in the default web browser.
- Export the current source code to a file.
- Import a file to replace the current source code.
- Save the edited source file.
  You can choose **Save** or **Save As** if you are working on a duplicated, customizable site. When working with one of the professionally designed sites, you must choose **Save As** and create to a new file.

NOTE
When editing the source file, it is possible to break functionality and cause the resultant site to not function properly. Edit the source files with caution. You should choose all of your page settings before you view the source so that you can better understand the parameters set by the Assistant, and be less likely to break page functionality.

Click **Close** to return to the Create Webpages Assistant.

NetPublish

NetPublish gives you the ability to dynamically publish your portfolio catalogs to the web. With NetPublish websites, as you add and modify files in your catalog, web users can see your changes on the web in real time. The Portfolio NetPublish Assistant is automatically installed with the Portfolio Desktop Client. For more details about system requirements and installation, see the Portfolio Administration Guide.

Distributing webpages

Once you have used the **Create Webpages** tool, you can make the output available to other people.

Upload to a web server

You can upload your exported webpages to a web server and make them available to anyone with access to that server.

Use an FTP program such as Cyberduck (*http://cyberduck.ch*), or use Windows Explorer to upload files to your web server.

Sharing HTML files over a network

You can share your exported webpages with other users on your network using your computer's built-in file sharing capability.

TIPS
- If you export your webpages to a single location, then share that folder, all of the webpages you export in the future will automatically be shared on your network.
- When you export your webpages, the starting page of the set of pages is inside your export folder, in a folder called **Webpages**. The file name is **index.html**.

Copy HTML files to a removable disk

Since the **Create Webpages** command creates an entirely encapsulated web site, you can copy the folder containing the HTML and associated files directly onto a flash drive,DVD, or other removable media. Users can then directly open the **index.html** file with any web browser.

Slideshows

The Portfolio Slideshow feature lets you create slide shows from your catalog images (not thumbnails) that can run automatically—with the images being advanced in specified intervals—or that can be manually advanced. You can even save slideshows as standalone QuickTime movies, so that you can distribute them to other users.

Portfolio uses the files in the active gallery for the slide show. The screen is blanked and the images are displayed against the background color of the current gallery view. You can elect to show images at their actual image size, or to have them scaled up to fit as much of the display screen as possible. (If an item is too big for the screen, it is automatically scaled down.)

When locating items for a Slideshow, if a screen preview is available, it will be displayed. If no screen preview is found and the source file cannot be found, the item thumbnail is displayed.

Creating a Slideshow

To create a slideshow:
1. Create a gallery that contains all of the items that you would like in the slideshow.
2. Drag the items in the gallery into the order in which you want them to be shown. A slideshow can contain still images, 3D images, movies, and sounds. Anything that can be previewed in Portfolio can be displayed in the slideshow.
3. Choose **View > Slideshow**, or press *COMMAND-SHIFT-S* (Mac) or *CTRL-;* (Windows).
4. For manually run slide shows, use the arrows on the controller to move to the next or previous item. Alternatively, you can use the left or right arrow keys on your keyboard to move back and forth through a show. Use the Home or End keys to move to the beginning or the end of the show.
   Timed slideshows begin automatically, but you can stop and start the presentation and restart using the Pause button on the mini-controller. If the Slideshow is not on **Continuous Loop** it will end when the last item has been displayed.
5. To stop the slideshow and return to the gallery window, click the Stop button on the controller, or press *ESC* on your keyboard. Keep in mind when using a timed delay that images do not start loading until after the delay period and it can take up to a few seconds for larger images to load.

Setting Slideshow Options

To set Slideshow options:
1. Choose **View > Slideshow Options**.
2. In the **Slideshow Options** dialog, choose from **Manual** or **Timed** in the **Control** section. With a manual slideshow, you advance from image to image using the arrow keys, or the VCR-like onscreen slideshow controls. A timed slideshow advances from slide to slide automatically. You can set a time delay of up to 99 seconds.
3. Choose a display size. **Actual Size** displays the images at the actual size of the source file image. **Full screen** allows Portfolio to scale the image up to fit the display screen. In all cases, if the image is too large, it is scaled down to fit.
4. Set the other slideshow options. Check **Continuous Loop** if you're creating a slideshow and want it to loop continuously. If you want to display a field with the images in the slideshow—the filename, for example, or a caption saved in a custom field—enable the **Display Field** option and select the field from the drop-down menu. When you run the slideshow, the field text appears along the bottom of the screen (in the font being used in the current gallery) under the images.
5. Click **OK** when you've adjusted all the settings. You're ready to run your slideshow.

Editing Files During a Slideshow

The manual controller that is displayed during a slideshow allows you to quickly edit items in the Portfolio catalog. These controls can be used to quickly remove undesired items, rename files, and other handy functions.

	Deletes the item from the Portfolio catalog.		Deletes the original file.
	Copies the original file.		Moves the original file.
	Renames the original file.		

Auto-starting a slideshow

To start a slideshow automatically when a catalog is opened:
1. Choose **Catalog > Administration**.
2. From the **Startup** tab, enable the **Run Slideshow** option.
3. The next time the catalog is opened, a slideshow of the **All Items** gallery is automatically launched.

Saving a slideshow as a QuickTime movie

The **Create QuickTime Movie** option exports items in your catalog and saves them in QuickTime movie format. Transitions for the movie are designated when the slideshow is exported.

To export a slideshow as a QuickTime movie:
1. Open the gallery that you'd like to export as a QuickTime slideshow.
2. Select items to include in the movie.
3. Choose **Item > Create QuickTime Movie**.
4. Set the movie size (in pixels), the time between slides, and choose a **Transition Effect** from the drop-down box.
5. Click **Choose** (Mac) or **Edit** (Windows) to configure the transition effect.

   Each effect has options specific to that effect. Set the transition options and click **OK**.
6. Click **OK** to accept the QuickTime movie settings.
7. Choose a file location and name for movie file.
8. Click **Save**.

NOTE
If the original image (the item's source file) cannot be found when the Slideshow is exported, the catalog thumbnail is exported instead.

Portfolio Express

The Portfolio Express palette is a floating palette that makes the contents of your Portfolio catalogs instantly available within any application, at any time, via a global keyboard shortcut. It allows you to find, copy, open, and use any file you've cataloged, without even opening Portfolio. The palette displays a small thumbnail of each item in your catalog along with its filename.

Some of the ways you can use the Portfolio Express palette include:
- Locate images quickly using the palette, then double-click them to open them in Adobe Photoshop, or any other image-editing software you specify.
- Open the palette and drag an image into any drag-and-drop sensitive application, such as Microsoft Word or Adobe InDesign.
- When writing an email message, grab a file from the palette and drag it on to the message to attach the original file.
- Grab logos, clip art, or other images from the palette and drag them straight into a PowerPoint slide or Word document.
- Find any image on disk with unprecedented speed: press the Portfolio Express hot key, select the image on the palette, and choose **Reveal in Finder/Reveal in Explorer**.

The Portfolio Express palette is designed to provide quick, easy access to your images from anywhere on your system. It doesn't allow you to catalog new items in Portfolio, edit existing Portfolio records, add keywords, or perform any other file management tasks.

The job of the Portfolio Express palette is make it easy for you to grab cataloged items and use them. To edit your Portfolio catalogs and do any other file management, use the main Portfolio application (which you can launch from the palette).

The Portfolio Express palette runs entirely in the background, so you won't see an icon appear for it in the Macintosh Dock or the Windows taskbar.

Launching Portfolio Express

The Portfolio Express palette is a separate and distinct application from Portfolio. By default, it is installed in the same folder as the main Portfolio application.

Macintosh: To launch Portfolio Express, double-click the Portfolio Express icon. On OS X, Portfolio Express is installed as an auto-start application by default.

Windows: The Portfolio Express palette is installed as a startup application, and should be running in the background. Press the default hot key (*CTRL-SHIFT-P*) to make the palette visible, or double-click the Portfolio Express icon in the System Tray.

If the Portfolio Express application isn't running in the background, choose **Start > Programs > Extensis > Portfolio > Portfolio Express**.

Opening Catalogs in Portfolio Express

The first time you launch the Portfolio Express palette, the palette is blank, with the words "no open catalogs" displayed in the catalog menu.

To open a catalog in Portfolio Express:
1. Choose **Open Catalog** from the fly-out on the right side of the palette.
2. Navigate to the catalog and click **Open**.

To open a recently-used catalog, choose the catalog name from the catalog drop-down menu on the palette.

The Portfolio Express palette remembers the last several catalogs you have opened. If the catalog you want to open is not listed in the menu of recently-used catalogs, choose **Open Catalog** from the menu and navigate to the catalog.

Once you've opened catalogs using the palette, you can switch among them using the catalog menu at the top of the palette. (Open catalogs are always listed at the top of the menu.)

NOTE
Opening a Portfolio catalog with the Portfolio Express palette is just like opening a catalog with the main Portfolio application. If the catalog is password-protected, you are prompted to enter the appropriate password in order to open the catalog from the palette.

Searching with Portfolio Express

Once you have a catalog open in the Portfolio Express palette, you can search for any item using the QuickFind box located near the top of the palette, just below the catalog drop-down menu.

The **QuickFind** box in the Portfolio Express palette works exactly like the **QuickFind** box in the main Portfolio application. It allows you to search for files based on the content of any combination of fields.

NOTE
The QuickFind tool in Portfolio Express uses the same search parameters defined by your Portfolio Server Administrator.

To perform a QuickFind search using the Portfolio Express:
- Click in the Portfolio Express **QuickFind** box, type a word or phrase in the box and then press Enter. Matching items appear in the palette.
- Click the magnifying glass and choose a recently used QuickFind search from the drop-down menu.

To display all items in a catalog in Portfolio Express, click the magnifying glass to the right of the **QuickFind** field and choose **Show All** from the menu.

Accessing Files with Portfolio Express

NOTE
In order to access files that are located on a network share, be sure you have the share mounted.

You can use the Portfolio Express palette to directly access cataloged items in any of the following ways:
- Double-click a thumbnail to edit the original file. You can also do this by selecting a thumbnail and choosing the **Edit Original** command from the fly-out menu.
- Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe Photoshop, Illustrator or Paint Shop Pro to open the image with that program.
- Drag a thumbnail into a document (such as Microsoft Word or Adobe InDesign) to place a copy of the image in that document.
- Right-click on a thumbnail and choose **Reveal Original** (Mac) or **Find in Explorer** (Windows) from the shortcut menu.
- Select a thumbnail and from the fly-out menu choose **Reveal in Finder** (Mac) or **Find in Explorer** (Windows).
- Click the Portfolio button in the upper right corner of the palette, or choose **Switch to Portfolio** from the fly-out menu to open the currently-open catalog in Portfolio.
- Drag a thumbnail from the palette into an email message to send a copy of the original file as an attachment.
- On OS X, drag a thumbnail into a QuarkXPress document to place the image in a layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box, otherwise Portfolio Express will create a new picture box for the image.

Setting the Portfolio Express hot key

As long as the Portfolio Express palette is running in the background, you'll be able to access cataloged images by pressing the Portfolio Express hot key.

To set the hot key for the Portfolio Express palette:
1. Choose the **Set Hot Key** command from the fly-out menu on the right side of the Portfolio Express palette.
2. On Windows, make sure the **Hot key enabled** option is enabled. Then, click in the **Hot Key** field and press the key combination you want to use. On OS X, press the desired key combination when the dialog opens.
3. Click **OK** to activate the new hot key. The hot key both hides and shows the Portfolio Express palette.

Launching Portfolio Express automatically

Portfolio Express is set to run automatically when it is installed. If for some reason it is removed from the startup items, follow these steps to re-add it.

To make Portfolio Express auto-start on OS X:
1. Open System Preferences.
2. Click **Users & Groups**.
3. Click **Login Items**.
4. Click the **Add** + button.
5. Navigate to the Portfolio Desktop Client folder.
6. Select the Portfolio Express icon and click **Add**.

Portfolio Express will start automatically the next time you log in to your computer.

To make Portfolio Express auto-start on Windows:
1. Click the **Start** button , click **All Programs**, right-click the **Startup** folder, and then click **Open**.
2. Open `C:\Program Files\Extensis\Portfolio Desktop Client\`.

   (On 64-bit versions of Windows, open `C:\Program Files (x86)\Extensis\Portfolio Desktop Client\`.)
3. Right-click the Portfolio Express icon, and then click **Create Shortcut**.

   The new shortcut appears in the same location as the original item.
4. Drag the shortcut into the Startup folder.

The next time you start Windows, the program will run automatically.

Best Practices

Defining an efficient workflow

An efficient workflow is imperative to keeping track of your assets. Portfolio is designed to help you organize, track and share assets. It is powerful and flexible enough so that you aren't pigeonholed into a limited workflow.

That flexibility of Portfolio is a bit of a double-edged sword. You can approach asset management from many different angles, yet deciding the best way for your situation can be challenging.

Since needs can vary wildly from user to user, this information can help you understand some good approaches to asset management so you can create a workflow that is tailored to your specific needs.

Most workflows follow a fairly standard path:
1. Obtain files to catalog.
2. Catalog files.
3. Share files with other users.
4. Archive files.

It's in the details of those steps where each workflow varies. Whether you are using Portfolio in a workgroup environment, or as a standalone user your needs will differ.

Portfolio in a workgroup setting

There are many questions that you should think about before you set up a workflow. This guide will help you answer some of the following questions, and develop standards that will keep your workflow tight and efficient.

Cataloging

Will you create multiple catalogs for assets that are in different stages of the workflow?

Keywording

What are the most commonly used words used to describe the assets you catalog?

Progress tracking

What types of custom fields will you create? Perhaps create a custom field called **Status** and use a predefined list of your stages of production.

User access

Will users obtain files from a published web page or have direct access to the catalog through Portfolio? How many users will access your catalogs? What level of access will each user have?

Sharing

How do you plan to share files with multiple users? Will you publish web sites for users to download files, or will they have direct access to the catalog through Portfolio? Will you email files to other users from within Portfolio?

Routing files

How will files be routed between Portfolio users? Will you use a custom field and a predefined list to mark files routed to each user? Will you create smart galleries to display files tagged with specific metadata?

Metadata recording

How will file metadata be captured, recorded and utilized? Will metadata be extracted when files are cataloged? Will information be recorded into custom fields? Is EXIF, IPTC or XMP metadata more important to your process?

Consider including a librarian

In a workgroup or corporate environment where there are many users of an asset management system, consistency is of the utmost importance. Someone who carelessly catalogs and keywords assets in a large shared system can wreak havoc on the system. Key information may be omitted or misspelled, thus preventing easy access to the information in the future.

Having one person, or a small number of people, consistently catalog and update information in the Portfolio database can help minimize file cataloging and keywording errors.

How many catalogs to use

The number of catalogs that you create will vary depending upon your workflow and the types of data being stored.

Portfolio catalogs are designed to hold up to 250,000 files. It is possible that a single catalog can easily meet your needs. That being said, grouping files into separate catalogs creates a higher level of organization, and can help you have a higher degree of success quickly finding the appropriate asset.

Portfolio has the ability to search multiple catalogs at once, so when an item cannot be found in one catalog, if a broader search is required users can always search multiple catalogs.

There are many strategies for grouping items, but anything that is logical and fits well into your specific needs is acceptable. All of the following methods of organization have been used to help simplify the asset management in various situations.

Grouping items by subject

If you have logically definable subjects that aren't likely to overlap, that can be a good way to divide files into multiple catalogs.

For example, a publisher who prints many different magazines would likely have a unique Portfolio catalog for each magazine.

A professional photographer who shoots exclusively weddings and auto shows would likely choose to put images from these two distinct categories into separate catalogs.

Grouping items by process

Sometimes there are clearly definable states for files in a workflow. Separating items by their state can help direct users to the asset that is in the correct form.

Let's use the professional photographer as an example. He shoots thousands of images and only a select few will be up to his high standards for sale. After images are sold, or no longer relevant, he wants to remove them from his system and archive them to CD, yet still know where to find the original files.

In the previous setting, the photographer could create three catalogs: Processing, Current and Archive. After he shoots all of his images they immediately go into the Processing catalog. When they are ready for sale/use he drags them over to the Current catalog. And after they are sold or irrelevant, he moves them to the Archive catalog from which he burns the original files to CD/DVD.

For more information, see **Archiving Original Files to Disc** on page 62.

Grouping by file type

Some organizations may wish to group files into catalogs based on file type.

Portfolio has the ability to index and search the text of PDF files. This is a handy feature for many users who have large numbers of PDF files. When PDFs are mixed in with other files (images, presentations, etc.), including indexed PDFs can slow down searches for the other files. So a user that has many indexed PDFs could create a catalog to house the PDFs and another to house all other files.

Grouping items for security

Protecting confidential information is critical to the livelihood of most businesses. Allowing only authorized users to access Portfolio catalogs can be an effective way to control the distribution of sensitive files.

For example, a marketing group may be rolling out a hot new campaign which will be used to undercut the competition. The campaign must be kept under wraps to keep the competition off guard. All of the partners must have the most current images, copy and web assets to roll out the campaign. The marketing group uses Portfolio Server to serve password-protected catalogs that gives access to those involved, and keeps out casual Portfolio users.

For more information see **Understanding and Changing Access Levels** on page 11.

Organizing files

Portfolio provides an excellent visual window to your files. Many users are also very concerned about the physical organization of files on disk. Having files organized in a coherent and understandable way on disk can assist in an efficient workflow.

If you have already created a catalog, or know that your files aren't well organized, there's no need to be concerned. You can add all of your messy directories Portfolio and then organize files and add new directories on disk using AutoSync within Portfolio.

Organizing Files on Disk

Portfolio provides an excellent visual window to your files. Many users are also very concerned about the physical organization of files on disk. Having files organized in a coherent and understandable way on disk can assist in an efficient workflow.

If you have already created a catalog, or know that your files aren't well organized, there's no need to be concerned. You can add all of your messy directories to Portfolio and then organize files and add new directories on disk using AutoSync.

Creating Folder Hierarchies

Portfolio can automatically create keywords directly from a folder path as a file is cataloged. The name of each nested folder can be added as a keyword for each folder in the hierarchy. Turn on path and volume name keywords from the Properties tab of the Advanced Options dialog, see **Creating Keywords from a Path** on page 17.

In this example, an image cataloged from the hatchback folder will automatically have the keywords "images," "cars," and "hatchback." With a workgroup, setting up an effective folder hierarchy is practically a necessity.

We suggest that you keep files organized into one root directory. In the example, the "images" directory is the root directory. As many sub-directories as desired can be created in this root directory. This can be an important organizational method, especially for catalogs used by workgroups.

If you have already spread your files across multiple directories, you can clean up your files with the AutoSync drawer/pane. Add your directories to AutoSync and then use Portfolio to create new directories, move and organize your files. For more information, see **AutoSync** on page 48.

Creating a Naming Convention

When cataloging files in Portfolio, cataloging options allow you to easily move and change the name of files on disk. If you create a specific strategy for how your original files are named—and stick to it—you will be able to more easily identify, locate and share those files.

You may consider including pertinent file information such as client name, project, product number, and date into the file name.

The following are examples of easily replicated naming conventions:

Filename	Naming includes
jones_newsletter04_001.jpg	Company name, project, and sequential numbering
axle_756452j_002.jpg	Part name, part number, sequential numbering
smith_040623_066.pdf	Company name, date (in YYMMDD format), and sequential numbering

For complete network compatibility across Mac, Windows, Linux, and Unix, you should consider using file names that are compatible with all platforms.

- Limit file name length to 32 characters, including extensions.
- Avoid using any characters that are reserved, may have special meaning, or may be hard to distinguish. This includes punctuation (except periods and dashes), accented characters, and symbols like *, %, @, and $.

  Also remember that some OSes are case-sensitive, so a file named wrench_111213.png is different from WRENCH_111213.png.

  A good rule of thumb is to only use unaccented lowercase letters, digits, periods, underscores, and dashes.
- Use underscores to separate words instead of spaces.
- Format dates in file names in a simple manner. For example, the date June 23, 2011 can be represented as 110623. This helps keep the files sorted in order in the Macintosh Finder, Windows Explorer as well as within Portfolio.

Catalog Administration

Default Field Values

Default values can be specified for fields in a catalog. This ensures that there are always values entered into any custom fields where you might always want to have a value.

When new files are cataloged, values may be entered through the cataloging options dialog, yet if settings are not chosen, the default values are automatically recorded for the item.

For example, if you have a Portfolio catalog for all of your work in progress, you might have a custom field called Project Status. You would set up the default field value for this custom field to "Draft" ensuring that all newly cataloged items have this setting, and that it is only changed to "Final" when you change this value later.

Default values can also be overwritten with any extracted or manually-assigned value. Manually-assigned values include those assigned by Cataloging Options, or those applied by an AutoSync watch folder.

To define default values for fields:
1. Choose **Catalog > Administration**.
2. Enter the administration password and click **OK**.
3. In the **Catalog Administration** dialog, click the **Default Values** tab. All of the custom fields for the catalog are listed on this tab.
4. Locate the custom field for which you want to set a default value. Check the box to the left of the field name.
   If there is already a default value set, click **Edit**, otherwise the **Edit** dialog automatically opens.
5. The **Edit** dialog varies by the type of custom field that you are editing. For multi-value fields, you can add one or more default values, single-value fields only accept one default value. Enter the appropriate default value and click **OK**.
6. Add any additional default values as necessary.
7. Click **OK** when you are finished adding default values.

Setting catalog startup options

As a catalog administrator, you also have control over a number of actions that occur when a catalog is opened.

The following options are available on the **Startup** tab of the **Catalog Administration** dialog (choose **Catalog > Administration**).

Open the Find Dialog: Turn this option on if you want Portfolio's Find command to automatically be activated at startup, allowing you to immediately begin a complex search. This can be useful if you know the first action that you typically perform in Portfolio involves using the search criteria controls in the **Find** dialog.

Open Master Keywords Palette: Opens the **Master Keywords Palette** on startup, saving users from having to open it manually.

Run a Slideshow: Puts Portfolio into full-screen Slideshow mode on startup, presenting a slideshow (using whatever Slideshow options you've designated) on the All Items gallery of your catalog. This can be useful if you're using Portfolio to give kiosk-style presentations and want to launch immediately into the presentation when someone opens a catalog. For details about using the Slideshow feature, see *Slideshows* on page 69.

Display a Splashscreen: You can add your own splashscreen to a Portfolio catalog so that this screen appears (for a duration of four seconds) each time a catalog is opened. When you launch Portfolio, the custom splashscreen appears immediately after the standard Portfolio splashscreen. See *Adding a Custom Splashscreen* on page 78 for more information.

Adding a Custom Splashscreen

You can add your own splashscreen to a Portfolio catalog so that this screen appears (for a duration of four seconds) each time a catalog is opened. When you launch Portfolio, the custom splashscreen appears immediately after the standard Portfolio splashscreen.

> **NOTE**
> Large splashscreens add to catalog size and can take a long time to load. It's good practice to size your splashscreen so that it is no larger than necessary.

To add a custom splashscreen:
1. Choose **Catalog > Administration** to open the **Catalog Administration** dialog.
2. From the **Startup** tab, enable the **Display a Splashscreen** option.
3. Click **Choose File** (Mac) or **Open** (Windows).
4. Navigate to a JPEG image to use as a splashscreen and click **Open**.
5. Click **OK**.

The selected image will appear in the **Custom Splashscreen** section of the dialog and will be used as a splashscreen the next time you open the catalog.

To remove a custom splashscreen:
1. Choose **Catalog > Administration** to open the **Catalog Administration** dialog.
2. On the **Startup** tab, click **Clear**.
3. Click **OK**.

Importing and Exporting Data

Portfolio includes some powerful tools for importing data into a catalog or exporting it out for use in other applications.

Using the **Import Field Values** command, you can bring data from an another database into Portfolio by matching fields from the database with specific fields in Portfolio. Conversely, you can export values from any Portfolio field into a text file for use with a database or spreadsheet.

Importing Field Values

To set up a database file for import into a Portfolio catalog, it should be exported from your database application as a plain text file, with tab-delimited fields and a carriage return between each item.

The first item in the text file should contain the database field headers. (This first item will be used to match your database fields with fields in your Portfolio catalog and will not be imported as an item.)

> ***WARNING***
> Text files to be imported should always be saved in Unicode format (UTF-16). If you are not sure about the formatting, open the file in a text editor (Notepad, TextEdit, Wordpad, etc) and save the file in Unicode UTF-16 format.

Portfolio should be pre-configured with any required custom fields prior to initiating the import. Otherwise, data targeted for custom fields will not be imported.

To import field values:
1. Make sure you've set up any custom fields in your catalog needed to store the data you're about to import. For information about creating custom fields, see ***Custom Fields*** on page 56.
2. Make sure the data you're trying to import is a plain text file, formatted as described above with a tab separating each field value and a return separating each item.
3. Choose **File > Import Field Values** and locate the text file to be imported.
   In the Import Field Values dialog, the field headers from the text file appear along the left column, under the heading Import File Fields.
4. Match each field header in the text file with the appropriate Portfolio catalog field name listed in the right-hand column. Move the file fields and Portfolio fields up and down the list to reorder their relative position. Click between the two columns to activate the Import menu. This allows you to select the appropriate import operator—Key, Import, or Skip— for each field. The operators work as follows:
   - **Skip Field (X)** indicates that the field in the text file will not be imported into the catalog.
   - **Assign to this field (->)** indicates that the field in the text file will be imported into the catalog field indicated to the right of the arrow.
   - **Key on this field (=)**) defines the key relationship. The selected field in the imported data will be searched for matching values in the corresponding field in the Portfolio catalog. Only one Key relationship can be designated for the import.
5. When you have finished setting up the import fields, you can save the settings for future use. To do so, choose **Save As** from the **Saved Sets** drop-down menu.
6. When you are ready to import the database, click **Import**.

Portfolio examines the field value data in the second item in the text file (the first item with actual data, since the first item holds the field headers) for appropriate data types by comparing each value in the item with the paired Portfolio field type specified at the start of the import. If a value does not match, a warning is presented, allowing you to cancel the import.

If all item types match, Portfolio imports the data. As the import progresses, data in any field which does not match the paired Portfolio field type, is skipped.

Replace Multi-valued Field Data

When this box in the Import Field Values dialog is checked, values imported into a multi-valued field overwrite the values in the Portfolio item. When unchecked, the values being imported are added to the end of the list in the Portfolio item.

Technical notes about importing text files

Because the import text file is delimited by tabs between fields and carriage returns between items, make sure your data does not contain either of these characters within a field, as it will cause unexpected results on Importing.

Portfolio follows the ASCII standard by recognizing ASCII 11 as the Vertical Tab character. This character should be used to denote a line break within a field (such as in a text block like the Description field). Portfolio also recognizes ASCII 29 as the Group Separator character. This character should be used to delimit values within a multi-valued field (such as the Keywords field). If

you are exporting multi-line or multi-valued data from other databases, make sure to use these characters. Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

Exporting data to a text file

You can export your Portfolio catalog data to a text file, specifying which fields to export and which fields to skip. Only data for the selected items in the active Gallery is exported.

To export catalog fields as text:
1. In any Gallery, select the items for which you want to export text data.
2. Choose **File > Export Field Values**.
3. Click in the left-most column of the Catalog Fields list to enable or disable items from export. A check mark indicates that the field will be exported.
4. Click **Export**.
5. Enter a name for the file and indicate the storage location, then click **OK**. Portfolio exports a tab-delimited text file containing information from each item that you selected. In the file, each field within an item is delimited by a tab, and each item is delimited with a carriage return.

Technical notes about exporting text files

Because the exported text file is delimited by tabs between fields and carriage returns between items, Portfolio cannot use either of these characters within a field, as it will result in an improperly formatted file.

Therefore, Portfolio follows the ASCII standard by using ASCII 11 as the Vertical Tab character. This character will be used to denote a line break within a field (such as in a text block like the Description field). Portfolio also uses ASCII 29 as the Group Separator character. This character will be used to delimit values within a multi-valued field (such as the Keywords field). Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

Recovering damaged catalogs

Should you ever have trouble opening a Portfolio catalog and suspect that it may have been damaged, you may be able to recover it using the **Recover** command.

Another time to run the **Recover** command is when you experience crashes when sorting or searching on a particular field.

To recover a catalog:
1. Using the Portfolio Server Admin interface, take the catalog offline.
2. Make a local copy of the catalog's FDB file.
3. Using the Portfolio Desktop Client locally on the computer, choose **Catalog > Recover**.
4. In the **Open** dialog, locate the catalog you want to recover, then click **Open**.
5. Type a new name for the recovered catalog, select where you want to save it, then click **Save**. A progress window is displayed as Portfolio checks the catalog and attempts to repair the damage.
6. When the completed status report is displayed, click **OK**.
7. To test the recovered catalog, put it into Portfolio Server's default catalog location.
8. Using the Portfolio Server Admin interface, serve the recovered catalog.

Administering Served Catalogs

When opening a catalog in Administrator mode from the Portfolio Desktop Client, that catalog cannot be accessed by any other user.

On the Portfolio Server, where catalogs are shared with other users simultaneously, this means that others will not be able to access the catalog while you are using it in Administration mode. When you open a catalog as the Administrator, all other users are locked out.

If other users have the catalog open when you change to Administrator mode, they will be logged off immediately. To prevent this from happening, use options in the Server Administration dialog to give users a time period in which to log themselves off (by closing the catalog), or give them a time period after which they will be logged off.

To prevent users from being logged off inadvertently, a served catalog cannot be opened in Administrator mode. To switch to Administrator mode, choose **Catalog > Access Level**.

While you open a catalog in Administrator mode, it does not appear on the Connect to Servers dialog for others users, even though the catalog is still being served. To release the catalog for other users, either close it or change to a different access mode (Publisher, Editor, Reader).

For additional information on setting up catalogs on a Portfolio Server, see the Portfolio Administration Guide.

Scripting the Desktop Client

Portfolio offers extensive scripting support via AppleScript on OS X and via scripting languages such as Visual Basic, Visual C++, JavaScript or any other scripting language that can be used to access OLE Automation on Windows.

The **Scripts** menu appears in Portfolio only when valid scripts of the types described above are placed in a folder named `Scripts` located in the same folder as the Portfolio application. Scripts and applications located in the `Scripts` folder are added to the **Scripts** menu and are available as regular menu commands.

Macintosh script files in the `Scripts` folder must be AppleScript files. Windows script files must be compiled EXE or CMD files to be included on the **Scripts** menu.

NOTES
- The **Scripts** menu is only for use automating the Portfolio Desktop Client and has nothing to do with MediaScript™ files. With the purchase of Portfolio NetMediaMAX, MediaScript files can be used to automate file conversion and other processes with Portfolio Server using the Web Client and/or Portfolio Server API.
- Due to the varied and complex nature of custom programming, Extensis cannot provide technical support or assistance with custom scripting with the Desktop Client. If you need assistance in this area, contact an Extensis sales or customer service representative about services and system integrator offerings.

Custom Catalog Types

The server administrator can use the Portfolio Desktop Client to create custom catalog types that can be used as the starting point for new catalogs. Custom catalog types can include custom fields and metadata mappings.

The process is described in detail in the Portfolio Server Administration Guide and help system. Here is a summary of the process:
1. Create a new empty catalog in the Portfolio Server Admin application.
2. Open the catalog in the Desktop Client as the catalog administrator.
3. Customize the catalog.
4. Choose **File > Save Catalog Type**.
5. Move the saved catalog type files to the Portfolio Server.

User Preferences

Double-click Preferences

You can choose what happens when you double click on an item in a gallery catalog. You can choose a default setting to show the Item Properties, edit the original file, or display the Screen Preview image.

To change double-click preferences:
1. Choose**Portfolio > Preferences** (Mac) or **Edit > Preferences** (Windows).
2. On the General tab of the Preferences dialog, choose the appropriate setting from the **Double-clicking an Item** drop-down menu.

Customizing the Toolbar

To customize the buttons on the toolbar:
1. Choose **View >Customize Toolbar**.
2. On OS X, click and drag button icons directly on to or off from the toolbar.

   On Windows, select the desired button icons from the list and click **Add** and **Remove**.
3. Click **Done** (Mac) or **Close** (Windows).

Preferences Dialog

To open the Portfolio Preferences dialog:
- On Windows, choose **Edit > Preferences**.
- On OS X, choose **Portfolio > Preferences**.

Preferences dialog - General tab

These options primarily relate to how Portfolio displays thumbnails, shows previews of cataloged items and the current Username.

Show Open Dialog at Startup

Check this box to have Portfolio show the Open dialog when you start the application.

Image Dimensions

Select the unit of measure for displaying image dimensions. This applies to displays in the gallery and preview windows.

Double-click Item to

This option allows you to define how Portfolio behaves when you double-click a thumbnail.

You can tell Portfolio to:
- Open the Item Properties dialog for the item.
- Open a preview of the item.
- Open the original item for editing (using the file's "parent" application).

Autoplay Movie and Sound Files When Previewed

When selected, QuickTime compatible movie and sound files are played automatically in preview windows; you don't need to click the Play button.

Display Multipage Icon on Thumbnail

When selected, a small multiple-page icon is added to the lower left-hand corner of PDF, Photoshop, PowerPoint, and TIFF files that contain more than one page.

Display Partially-Cataloged Icon on Thumbnails

When enabled, Portfolio displays a small icon at the bottom of the thumbnail each item that is partially cataloged. This icon is removed when the item is fully cataloged.

Preferences dialog - Cataloging tab

Do not prompt for Cataloging Options

You can keep the **Cataloging Options** window hidden at any time by enabling the **Do not prompt for Cataloging Options** option in the **Cataloging** tab of the Preferences dialog.

The three options in the **But still do the following as configured** section let you determine which cataloging options will be performed and which will be ignored when the **Cataloging Options** dialog is configured to remain hidden.

You can disable these options as a precaution against moving or renaming files unintentionally when cataloging. Leaving the **Rename Items** option disabled, for example, means that Portfolio won't rename files as you catalog them unless you specifically show the **Cataloging Options** dialog to confirm the renaming scheme.

Glossary

-A-

access level

A hierarchical rank that determines what features and functionality will be available to a user when working with a specific catalog. A user can have a different access level for each catalog he is a member of.

Active Directory

A directory service for Windows networks. Usually abbreviated AD.

administrator

A person responsible for specific aspects of a computer hardware or software system. See also server administrator; catalog administrator.

ALT key

A modifier key on Windows keyboards. When used in conjunction with the mouse or other keys, provides a shortcut to or enhances a function or action.

API

Application Programming Interface. Portfolio Server provides an API for developers to create custom solutions for accessing Portfolio catalogs.

AppleScript

A scripting language for OS X that allows automating and exchanging data between applications. The Portfolio Desktop Client can be automated with AppleScript® on OS X. See also Visual Basic.

asset

A photo, image, document, audio, video, or other file that contributes to or produces value for an organization.

assistant

A utility that breaks a complex task into several simpler steps. The Portfolio Desktop Client includes the NetPublish Assistant and Create Webpages Assistant.

automate

To cause a system to perform a sequence of tasks without intervention. Portfolio Web Client can automate finding files using a Smart Gallery, automate conversion and download using a Convert preset, and with NetMediaMAX, can run advanced automation scripts.

AutoSync

A system for automatically cataloging files and for keeping cataloged items up-to-date. With appropriate settings, AutoSync can also delete item records for missing originals, ensuring a catalog is "in sync" with the items in a watch folder.

AutoSync folder

A folder on your network that has been designated as a location where users can place files to be added to a Portfolio Server catalog. Portfolio checks AutoSync folders at specified intervals, adds new files and updates existing ones found there, scans the files, extracts and updates pertinent metadata and creates and updates path locations, thumbnails and preview files. See also watch folder.

-B-

batch convert

To change one or more aspects of multiple items in one operation. The Batch Convert feature of the Portfolio Web Client allows you to change the file type, resolution, color mode, and size.

batch process

The execution of a series of processes or jobs without manual intervention. Portfolio uses batch processes to catalog items, perform conversions, and prepare items for download.

bit depth

The number of bits used to represent the color of a single pixel. An 8-bit image uses one byte per pixel, allowing for 256 colors. A 24-bit image uses three bytes per pixel, typically one each for red, green, and blue components, providing a palette of over 16 million colors.

-C-

Camera Raw

A file format, usually specific to a model or series of device, that contains minimally processed data. The purpose of a raw image is to preserve image data obtained directly from the device sensor and the metadata identifying the conditions of the image's capture.

catalog

(n.) A collection of related digital assets. (v.) The process of adding digital assets to a catalog. Portfolio organizes your images, graphics, digital photos, documents, and other files in a database file called a catalog. A catalog stores thumbnail images of your files, embedded metadata, any custom information you require, as well as pointers to your files on disk. A catalog does not store copies of your original files. See also asset; file; metadata; thumbnail.

catalog administrator

An access level that defines what a user can do with assets in a catalog. Catalog administrators can configure all catalog-specific settings.

cataloging options preset

A saved group of settings that you can utilize to have multiple actions applied to items when they are cataloged using the Portfolio Desktop Client.

category

A virtual grouping of items that you define within the Portfolio Desktop Client. Categories can be nested to give a hierarchical organization to assets in a catalog.

certificate authority

An entity (such as VeriSign) that issues a digital certificate that certifies the ownership of a public key by the named subject of the certificate. You can use a custom certificate in Portfolio Server to allow using an encrypted connection with between Portfolio Server and the Web Client. See also SSL.

child

An immediate descendant or subordinate in a hierarchy. A file or folder contained within a folder is a child of that folder.

client application

Software that runs on a non-server system (computer, tablet, smartphone) and connects to and works through a server. Portfolio includes a desktop client application as well as a browser-based web client.

clip

A segment of audio or video. Portfolio Server creates clips from audio and video media that you catalog. The server administrator set the specifications for clips when he creates a catalog.

Command key

A modifier key on the Macintosh keyboard. Used with the mouse or other keys, provides a shortcut to or enhances a function or action. Especially well-known when used with various symbol keys to provide easy access to common menu items, such as Command-P to print or Command-C to copy.

compression

A method of encoding digital information (as a file or a stream) to reduce the total number of bits used, thus reducing file size and/or transmission time. Many image, video, and audio formats utilize compression. See also ZIP.

contact sheet

(1) Portfolio Web Client: A PDF that contains small representations of images or documents in a catalog, along with some information about each item. (2) Portfolio Desktop Client: One or more pages of small, similar-sized images representing the content of a gallery. In traditional photography, a contact sheet, contact print, or proof sheet is made by laying a series of negatives directly on photographic paper, exposing the paper through the negatives, then processing the paper. Since the negatives were in direct contact with the paper, the images are the same size as the negatives. This gives the photographer an idea of the final image as well as the differences between negatives.

Control/Ctrl key

A modifier key on the computer keyboard. When used in conjunction with the mouse or other keys, acts as a shortcut to or enhances a function or action.

convert

Change a file from one format to another.

crop

Trim an image to fit specific dimensions, usually eliminating some content of the original image.

custom field

A user-defined field in a Portfolio catalog, used to identify non-standard properties of a file. Typically used to include information specific to a workflow or business model, such as a customer code or order ID.

–D–

database

A structured set of data that can be accessed in various ways. A Portfolio catalog is a database with specific fields and relationships designed to simplify identifying and linking digital assets.

DBA Tool

Database Administrator Tool. A Windows-based tool that provides advanced access and administration functionality for SQL databases used by Portfolio catalogs.

directory

(1) A network data resource, with entries for people, departments, teams, printers, and other similar resources in an organization. (2) Common term for a disk organizing structure that contains files and other directories. Usually called a folder based on its visual representation in graphical user interfaces.

directory service

The software that stores, organizes, and provides ways to access a directory. On Windows-based servers, Active Directory is the most common directory service; on OS X servers, Open Directory is common. Both are an implementation of LDAP.

directory service mapping

The association between directory service groups and user accounts and Portfolio user accounts.

DNG

Digital Negative. A container file format invented by Adobe to hold a raw image file as well as XMP metadata, preview image, and other information.

document

A computer file that represents the results of a person or group's thinking. In typical use, "document" refers to a file that consists mainly of text content, but it is also appropriate to use the term to refer to photographs, drawings, videos, and sound files. (The term "document" has a long history and its use to refer to digital content is itself the subject of much philosophical debate.)

Domain User account

Under Windows, a network-based user account. Such an account can have access to network resources as soon as it is logged in. Compare local system account.

download

Transfer a file from a remote computer or server to a local computer. Compare upload.

drag and drop

Use the computer mouse to visually move ("drag") and release ("drop") content to a new location. Drag and drop can be used for either moving or copying data, depending on the context.

DSN

Data Source Name. Information that describes a connection to a data source. Portfolio Server uses a data source name to identify a catalog in a SQL database.

–E–

editor

An access level that defines what a user can do with assets in a catalog. Editors can modify item metadata but cannot add or remove catalog items.

embed

To include one object completely within another. Typically refers to a self-contained document that includes all component elements such as graphics and fonts. Can also refer to metadata added to a file.

EPS

    Encapsulated PostScript. A self-contained graphic file consisting of PostScript commands that describe an image or drawing, and can be placed within another PostScript document.

EXIF

    Exchangeable Image File format. A standard that specifies the formats for images, sound, and metadata used by digital cameras. EXIF data also typically includes information about the device capturing an image, such as model and serial number. Portfolio can import EXIF tags and embed them in exported files.

extension

    The last characters of a filename, beginning with the final period, indicating the format of the file. Examples are .DOC (a Microsoft Word document), .JPG (a JPEG-compressed image), and .INDD (an Adobe InDesign document).

extract

    To identify and isolate. Portfolio extracts metadata from a file and inserts each piece of metadata in a field in the item's catalog entry.

–F–

FDB

    The native catalog/database format used by Portfolio Server. FDB is also the file extension used by the catalog file.

field

    A single part of a database record. Fields generally have data types associated with them, such as numeric, date, or text.

file

    A collection of object code or data stored on a computer disk under a single identifying name.

filter

    A piece of software that processes data for use in another application or process. In the Portfolio Web Client, you can filter the list of fields displayed in the Properties panel and for sort and search operations, so that the list only shows fields you are interested in.

Filtered Fields

    A subset of catalog fields that can be displayed in the Properties panel of the Portfolio Web Client. Filtered Fields can also be used for making selections in searches and displaying information. Each user of the Portfolio Web Client can select the fields that are most relevant for his or her purposes.

firewall

    Software in a computer system or network that controls access. Firewalls are commonly used to block systems outside the firewalled system or network from accessing resources inside the firewall.

flag

    (v.) To mark an item for attention. (n.) A symbol used to mark an item for attention.

Flagged Items

    A built-in organizer in the Portfolio Web Client. It displays all items that have been flagged in the catalog.

folder

    A container used to organize files and other folders on a disk.

folder hierarchy

    An arrangement of folders, one within another, that usually represents a system organizing files.

–G–

gallery

    A collection of a specific set of items within a catalog. A gallery does not contain actual items, but merely lists specified items, so that adding items to or removing items from a gallery does not change the catalog itself.

GPS

    Global Positioning System. Cameras equipped with GPS units or other geo-location systems can embed GPS metadata in images. Portfolio imports this metadata.

-I-

IP address

Internet Protocol address. A numeric addressing system used to uniquely identify a computer or other device on a network. The IP address usually consists of four values in the range 0–255 separated by periods, such as 192.168.0.10. The IP address can be assigned statically so that it never changes (useful for printers and other devices on a network), or dynamically, so that it may be different for a specific device at different times (such as a laptop that disconnects from the network periodically).

IPTC

International Press Telecommunications Council. The first worldwide standard system for adding metadata to digital files. While IPTC metadata has been superseded by XMP, many systems and devices still include it. Portfolio can read and embed IPTC metadata.

item

An entry in a Portfolio catalog. An item can reference an image, a video, a document, or any other file asset, along with its metadata.

item proxy

A stand-in for a disparate group of items. In the Portfolio Web Client, there are several item proxies. These proxies are icons that allow you to view or manipulate a group of items that might otherwise be difficult to deal with. The available proxies are for Found Items (that references all items resulting from the current search or organizer selection), Displayed Items (all items displayed on the current page of the main window), and Selected Items (the selected items on the current page).

-J-

job

A task performed by the Portfolio Server as a result of a command issued by a user. Jobs include upload, download, batch process, and automation tasks.

JPEG/JPG

(1) A compression standard developed by the Joint Photographic Experts Group, used for color and grayscale images. JPEG is referred to as a "lossy" compression, because it allows data to be discarded (lost) to achieve higher compression. (2) A bitmapped file format, typically used for photographs, that implements this compression.

-K-

keyword

A word or phrase assigned to an item to describe it, link it to other similar items, and make it easier to locate using search tools. See also Master Keyword List.

-L-

LDAP

Lightweight Directory Access Protocol. A method for reading and editing network user directories.

local system account

A Windows account for a user specific to a single system. Such an account is not automatically granted access to network resources. Compare Domain User account.

-M-

mapping

Association of one set of data with another. When importing files into Portfolio, certain metadata content can be imported into specific fields; which metadata is stored where is determined by the metadata mapping.

Master Keyword List

> A list of keywords that has been defined by the catalog administrator. Instead of manually entering keywords, users can choose from the Master Keyword List of pre-approved keywords, helping to ensure consistency in keywords across a catalog. See also keyword.

media

> (1) A file, usually of a time-dependent nature (such as an audio or video file). (2) Physical component of a computer storage system where data is actually stored, such as a DVD disc.

Media Engine

> A hardware/software combination that Portfolio Server calls on to process many types of files. For lightweight conversion requirements, Portfolio Server includes an internal Media Engine; for large-scale processing, Portfolio Server can offload requests to one or more other systems running a Media Engine.

MediaScript

> A sequence of commands and actions to be performed by the Portfolio Server on one or more catalog items. Scripts can be run on an arbitrary selection of items at any time.

member

> A person with a Portfolio account that is allowed to access a catalog.

metadata

> "Data about data." Metadata is information about the content of a file, such as a document's author or word count, or the location or photographer of a photo, or keywords used to describe a file's content. Metadata is an important tool in categorizing, identifying, and locating assets.

multi-threaded

> Computer code that is written so that multiple pieces of code can be run simultaneously on separate processors or cores. Multi-threading allows a program to operate faster and more efficiently. Portfolio Server is multi-threaded and so can split a single high-overhead task among multiple processors or even systems (using NetMediaMAX).

–N–

namespace

> A container for a set of names, where the names are unique within the container but may be duplicated in other namespaces. A name in a namespace usually also includes a namespace identifier to differentiate it from the same name in another namespace. Common namespaces in Portfolio Server are those used by various metadata-labeling agencies, such as IPTC.

NetMediaMAX

> An add-on to Portfolio Server that includes additional Media Engine licenses and advanced format conversions and scripting.

NetPublish

> An add-on to Portfolio Server that allows you to publish the contents of a gallery or catalog to a website.

–O–

ODBC

> Open Database Connectivity. This software acts as a middleman between an operating system and a database, making it much easier for any application to access a database. Portfolio Server Enterprise Edition uses ODBC to connect to Microsoft SQL Server, Oracle, and MySQL databases.

Office document

> A spreadsheet, word processing document, or presentation written in a format native to a Microsoft Office application (Excel®, Word, or PowerPoint®). Portfolio can catalog Office documents and extract metadata from them.

offline

> A Portfolio catalog that has been made unavailable to users (for instance, when it is being backed up). Compare online.

online

> A Portfolio catalog that is accessible to users. Compare offline.

Open Directory

> A directory service that runs on OS X servers. Also known as "Apple Open Directory."

organizer

A grouping of catalog items displayed within the Portfolio Web Client. Some organizers represent real collections of items, such as a folder on disk or a Portfolio catalog, and others, such as galleries, represent a subset of items from another source.

original

The source file for a catalog item. Original files are not stored in the catalog.

–P–

page

A subset of items in an organizer or search results. In the Portfolio Web Client, the main window displays a fixed number of catalog items. If the selected organizer (or search results) includes more items than can be displayed in the main window, they are displayed on multiple pages.

palette

A window that floats on top of other windows and provides quick access to a specific set of features or functions. The Portfolio Desktop Client offers palettes for organizing items in Categories, using Master Keywords, applying cataloging option presets, and entering data in custom fields, among others.

parent folder

The folder containing a specified file or folder.

path

Text describing the location of a file or folder on disk.

PDF

Portable Document Format. A file format typically used for distributing print-quality versions of a document electronically. PDF files are based on PostScript and can include embedded fonts as well as various levels of protection.

placeholder

A record in a Portfolio catalog that is reserved for a file that will be added at a later date.

port

A number used as an address by a server to determine which application should receive incoming data. Portfolio Server uses a variety of ports to communicate between components.

Portfolio Express

A desktop application for OS X and Windows that provides access to Portfolio catalogs and assets. Portfolio Express uses few system resources and can run in the background and be activated with a hot key. It provides the ability to search a catalog, view thumbnails, drag images into other applications, and locate original files.

PostScript

A page description language developed by Adobe as a device-independent way to describe the layout of text and graphics on a page. PostScript is also the basis behind Adobe Illustrator and PDF documents, among others.

preset

A saved group of conversion settings that you can access quickly to perform the same conversion on files over and over. Portfolio Web Client allows you to create and use presets for converting and downloading files.

preview

(v.) To display an image or document before committing changes or printing. (n.) A low-resolution or reduced dimension copy of an image, or static image of a document page or video frame, used to visually identify the original file.

private gallery

A gallery that is only visible to its owner and not to other catalog members. Compare public gallery.

property

An attribute of or metadata assigned to an item, such as a graphic's pixel dimensions, a PDF's page count, or a photograph's copyright notice. You can view, assign, and edit hundreds of item properties in the Portfolio Web Client.

public gallery

A gallery that is visible to all members of a catalog. Compare private gallery.

publisher

An access level that defines what a user can do with assets in a catalog. Publishers can create galleries and add items to and delete items from a catalog.

-Q-

query

(n.) A request for information from a database. (v.) To request information from a database.

QuickFind

A tool that quickly searches through specific fields for a string of text. QuickFind behavior can be modified by editing the quickfind.xml file on the Portfolio Server.

QuickTime

A multimedia application from Apple that can play and convert between many video and audio formats. Portfolio Server uses QuickTime for some media transcoding.

-R-

reader

An access level that defines what a user can do with assets in a catalog. Readers can only view items in the catalog.

read-only

(1) A public gallery that cannot be modified by anyone except its owner. (2) Access that allows a user to look at, but not change or replace, an item. Can refer to a location on disk (a file, a folder, or even the entire disk can be read-only), or to a record or field in a database.

regenerate thumbnail

Cause Portfolio Server to re-create an item's thumbnail from the original file. This may be desirable if either the catalog thumbnail or the original file were modified.

resolution

(1) The pixel dimensions of an image or device: an HDTV has a resolution of 1920×1080 pixels. (2) The pixel density (typically dots-per-inch or pixels-per-inch) of an image or device: A laser printer may have a resolution of 600 dots per inch.

root

(1) The first or top-most directory in a hierarchy. (2) A user with full administrative privileges in a system.

root certificate

An unsigned public key certificate or a self-signed certificate that identifies the Root Certificate Authority.

-S-

scalability

The ability of a system to easily handle a growing amount of work or to be enlarged ("scaled") to accommodate growth.

scratchpad gallery

A temporary gallery typically used for separating items for a specific task or workflow. A scratchpad gallery can be saved as a normal gallery.

screen preview

A screen preview is a low-resolution image that Portfolio automatically creates of a file when it is cataloged. Due to their small size, screen preview files often open much more quickly than the original full-resolution files.

served catalog

A catalog that is online and available to users.

server

(1) A computer system dedicated to delivering files or services to users or to other computer systems, such as a file server or print server. (2) A software package that provides a service to users or other computer systems, such as Portfolio Server or Universal Type Server.

Server Admin

The browser-based application used to create and remove Portfolio Server catalogs and users and set catalog membership.

server administrator

The person responsible for using the Server Admin app to manage catalogs and users.

share

A file container (folder or volume) that is made available to network users, usually appearing as a volume.

sidecar

A file that contains metadata for another file whose format does not allow embedded metadata. Typically, the sidecar will have the same name as the original file with an extension that indicates its nature (such as .XMP for an XMP sidecar file). Like a motorcycle with a sidecar, the metadata sidecar file "travels" with the original file.

Smart Gallery

A gallery that displays items that match a set of rules. The contents of a Smart Gallery can change if its rules change, if new items are added to the catalog that match its rules, or if items in the catalog are changed so that they match (or no longer match) its rules.

SQL

Structured Query Language. Pronounced "sequel." SQL is the most common programming language for manipulating databases.

SQL Connect

A component of the Portfolio Server Enterprise Edition that allows you to use a SQL database for catalogs, instead of Portfolio's built-in database.

SSL

Secure Sockets Layer. A cryptographic protocol that provides communications security over the Internet. SSL uses a keyed message authentication code for message reliability.

sync/synch/synchronize

The process of propagating changes made to a previously-cataloged file into the Portfolio catalog. For example, if you use Adobe Bridge to add keywords to a group of InDesign files that have already been cataloged, syncing the files with the catalog will ensure that the new keywords get added to the catalog items.

–T–

template

A pre-developed design or layout used to make new elements sharing a common design, pattern, or style. NetPublish provides templates for various types of websites you may want to use to provide access to catalog contents. Portfolio Desktop Client allows you to save a catalog layout (available fields, metadata mapping, Master Keywords List, etc.) as a new catalog type or template.

thumbnail

A visual representation of a cataloged item, reduced in size, resolution, and/or duration compared to the original.

TIFF

Tagged Image File Format. A graphic file format often used for high-quality images. TIFF files can contain bitmap graphics, vector paths, multiple layers, and multiple pages.

transcode

Convert a video or audio file from one format to another.

–U–

upload

Transfer a file from a local computer to a remote computer or server. Compare download.

URL

Uniform (or Universal) Resource Locator. A text string that references an Internet resource, such as a file or web page. Portfolio catalog items can include URL fields which, when displayed in the Grid view of the Portfolio Web Client, become clickable links to an asset-related web resource.

user

An individual who has an account on the Portfolio Server that enables him to access catalogs and assets.

user account

The login credentials (username and password) and other information related to a user that is stored in the Portfolio system.

–V–

Visual Basic

A programming language and development environment for Microsoft Windows. Visual Basic® (abbreviated VB) can be used to automate the Portfolio Desktop Client on Windows. See also AppleScript.

volume

A disk partition. A volume is often represented to the user with a disk icon, but in reality, a disk might be partitioned into multiple volumes. (It is usually forgivable to use these terms interchangeably.) Portfolio records the volume name where an item's original file is stored.

–W–

watch folder

An AutoSync folder. You specify watch folders using the Portfolio Desktop Client, but you can use them in the Web Client as well.

watermark

(n.) A recognizable image or pattern applied to an original image. The watermark provides a means to indicate copyright or ownership, as well as deterring unauthorized use of an image. (v.) To apply a watermark image to an original image. Portfolio can add a watermark image to downloaded images.

web application

A robust application that runs in a web browser and so can be easily used on multiple platforms. A web application doesn't have to reside on the Internet.

web server

(1) Software for delivering content on the World Wide Web, or for delivering web-style content on a local intranet. Examples are Microsoft's Internet Information Services (IIS) or the Apache HTTP Server (Apache). (2) A hardware system devoted to serving web content.

Work folder

A location that Portfolio Server uses to temporarily store files used or created during a Web Client session. Though temporary, a Work folder may require a lot of disk space, so should be located on a volume where space is not at a premium.

workflow

The series of steps or processes that a piece of work passes through from inception to completion.

–X–

XMP

Extensible Metadata Platform. XMP includes a large selection of fields and can be extended with custom metadata as necessary.

–Z–

ZIP

(adj.) A file format used for data compression and archiving. (v.) The act of compressing one or more files into a ZIP-format archive. Portfolio delivers downloaded files in ZIP archives. See also compression.

Contacting Extensis

Extensis

1800 SW First Avenue, Suite 500
Portland, OR 97201
Toll Free: (800) 796-9798
Phone: (503) 274-2020
Fax: (503) 274-0530
Web: *http://www.extensis.com*

Extensis Europe

Suite 18, Newton House
Kings Park Road, Moulton Park
Northampton NN3 6LG, United Kingdom
Phone: +44 (0)1604 654 270
Fax: +44 (0)1604 654 268
Email: *info@extensis.co.uk*

Customer Service

Phone: (800) 796-9798
Web: *http://www.extensis.com/customerservice/*

Celartem, Inc.

Phone: +81 3 5574 7236
Email: *sales_ap@celartem.com*
Web: *http://en.celartem.com*

Corporate Sales

Phone: (503) 274-4492 (North America)
Email: *NA_sales@extensis.com* (North America)
Web: *http://www.extensis.com/store/corporate-buying/* (all regions)

Technical Support

Technical Support is available directly through the Extensis website or by telephone.
- **Phone:** Please call (503) 274-7030 in North America, or +44 (0) 1604 654 270 in Europe.
- **Web:** Visit *http://www.extensis.com/support/*.

When contacting technical support, please have the following information available:
- Your product name and serial numbers;
- Your computer configuration, including operating system, memory, and hard drive configuration;
- Your question, or a description of the difficulty you're experiencing: what specifically occurs and when;
- Any error numbers or messages that display and other information you think may be relevant;
- Your phone number if you want to have a representative call you.

Answers to frequently asked questions, troubleshooting tips, and more can also be found at the Extensis support page (*http://www.extensis.com/support/*).

Priority Support

If you have a current Annual Service Agreement, you are entitled to priority support.

If you are in North or South America, the Caribbean, or Asia (except India & Japan):
- **Phone:** 1-800-935-6453 (Office Hours: 7:00 AM–5:00 PM Mon–Fri Pacific Time; outside of those hours, leave a message for a return call)
- **Email:** *p1support@extensis.com*

If you are in Europe, Africa, the Middle East, India or Australasia:
- **Extensis Europe:** +44 1604 654270 (09:00–17:30 GMT, Mon–Fri)
- **Extensis Aus/NZ:** +61 3 9376 3079 (09:00–17:30 EST, Mon–Fri)
- **Out of hours pager:** +44 7699 715931
- **Email:** *EuroASASupport@extensis.com*

If you are evaluating a demo copy of the product, please contact your sales representative for assistance.

Index