WEB CLIENT
USER GUIDE

Portfolio Server Web 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, and search for 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 applications, 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 have links to related topics.

Portfolio Web Client

The Portfolio Web Client gives a powerful front end for adding assets, editing metadata, searching, and downloading files.

The most common Web Client tasks include:

- **Uploading files**
- **Editing file information:** Add keywords and metadata.
- **Organizing assets using Galleries and Smart Galleries**
- **Organizing files and folders:** Add, move, and rename files and folders.
- **Finding assets**
- **Downloading files**
- **Batch Processing (converting) files**
- **Previewing items**
- Sharing assets with **Galleries** and **PDF Contact Sheets**

What's New

The Web Client provides a web-based connection to catalogs served by Portfolio Server. This makes it easy to deploy to users without requiring the installation of specialized asset management software on desktops. Users of the Portfolio Web Client can automate everyday media-processing tasks, as well as have access to the most popular Portfolio features:

- Rich search and download capabilities
- Upload files to AutoSync folders
- Organize files on disk
- Batch convert files
- Enter and embed metadata

This version of Portfolio Web Client includes these improvements:

- **Favorite organizers:** You can identify specific organizers as favorites; they will be displayed in a separate list at the top of the **Organizers** panel for quick access.
- **Improved Organizers panel:** The **Organizers** panel now devotes more space to displaying galleries and folders, and includes the **Favorites** organizer. See *Organizers* on page 21 for more information.
- **Improved handling of PostScript file formats:** Improvements in cataloging and conversion of PDF, EPS, and Adobe Illustrator files.
- **More metadata:** Portfolio now supports metadata defined in the IPTC Photo Metadata (Iptc4xmpExt) standard and PLUS (Picture Licensing Universal System) XMP namespaces.
- **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/***).
- **Better synchronization between Filtered Fields and Searching and Sorting:** The Field menu available for the Sort and Advanced Search functions will show the set of fields displayed in the Properties panel: either All Fields or the Filtered Field list. The last item on the Fields menu will show the other set of fields (if the menu currently lists the Filtered Fields, then the last menu item will be Show All Fields).
- **Customized login page:** A System Administrator can change the color scheme of the Web Client login page, and add a graphic that optionally links to another website.
- **Improved performance:** The Web Client intelligently updates catalogs as you use them, providing improved performance for users with access to many catalogs.

For more details on what's new in Portfolio Server, see the Server Admin help system or User Guide.

Previous Releases

These features were added in recent releases of Portfolio Web Client.

- **Field Chooser and Filtered Fields:** Use a single window to select and order the fields to be displayed in Grid view, List view, the Properties display in Preview mode, and in the Properties panel of the main window.
- **User menu:** The current user's name is shown as a menu that allows the user to log out or restore default view preferences.
- **Downloading and Batch Processing:** These functions have been differentiated better. Convert presets have been moved to the **Download** menu for easy access, while the **Batch Process** button allows you to use presets or custom settings to convert assets and download them or add them to the catalog.
- **Clickable URLs:** Custom URL fields that are displayed in the Grid view will open the target website when clicked.
- **Video and Audio:** More powerful support for video and audio. Play preview clips, add audio and video to slideshows, and download video and audio files to disk. NetMediaMAX users can also convert video and audio files to multiple formats.
- **Batch Find:** Use a list of identifying criteria (such as file names) to quickly find disparate items.
- **PDF Contact Sheet:** You can quickly create a PDF containing 1, 2, 4, 9, or 16 images per page.
- **Saved View state:** The settings you specify in Grid and List View are saved when you switch catalogs or exit the Web Client.
- **AutoSync improvements:** AutoSync is much faster, and gallery, folder, and catalog icons have been modified to better reflect their current AutoSync status.

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/***).

Getting Started

Portfolio Web Client 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 catalog or perform a search for a needed item using the Portfolio Web Client's powerful search engine.

Catalog: Files must be uploaded to the catalog so that Portfolio can find them, preview them and track them. See:
- ***Uploading Items to a Catalog*** on page 14.

Customize: Display items in your catalog the way that you want with galleries and view options. See:
- ***Main Window View Options*** on page 10.
- ***Creating, renaming, and deleting galleries*** on page 24.

Access: Preview, download and convert files from Portfolio Server. See:
- ***Previewing Items*** on page 12.
- ***Downloading Files*** on page 36.
- ***Batch Process*** on page 38.

Organize: Using the Portfolio Web Client you can group, organize and categorize your files by adding keywords, descriptions, and other custom data. See:
- ***Editing Item Properties*** on page 29.
- ***Keywords and Custom Fields*** on page 31.

Find: Type a word or phrase to locate any catalogued file and access it instantly. Search using a wide array of criteria automatically stored by Portfolio. See:
- ***Finding Files*** on page 16.
- ***QuickFind*** on page 16.
- ***Batch Find*** on page 16.
- ***Using the Find Tool*** on page 17.

Installing Portfolio

While the Portfolio Web Client requires no actual installation software, to use the Portfolio Web Client, you must connect with a compatible web browser that has Adobe Flash installed.

For more information about installing Adobe's Flash player see Adobe's download page (***http://www.adobe.com/go/getflashplayer/***).

In addition, your Portfolio administrator must give you access to catalogs on Portfolio Server. When you are granted membership in a catalog, that catalog becomes available to you through the Portfolio Web Client.

System Requirements

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.

Connecting to Portfolio Server

To connect to Portfolio Server, you must first have the following access information from your Portfolio Server Administrator:
- The Portfolio Server IP address or server name;
- The Portfolio Server's port number;
- Your user name;
- Your password.

To connect to Portfolio Server:
1. Open a supported web browser.
2. In the address field, enter the IP address or server name followed by a colon and the port number.

    The default port for connecting to Portfolio Server is 8090. For example:

    `http://192.168.0.1:8090`

    `http://servername:8090`
3. Select your preferred language from the drop-down menu.
4. Enter your user name and password and click **Login**.

NOTE
Portfolio Server Professional and Enterprise can be set up so that you can use your network login and password; check with your Portfolio Server Administrator to see if this has been set up for you.

The Web Client User Interface
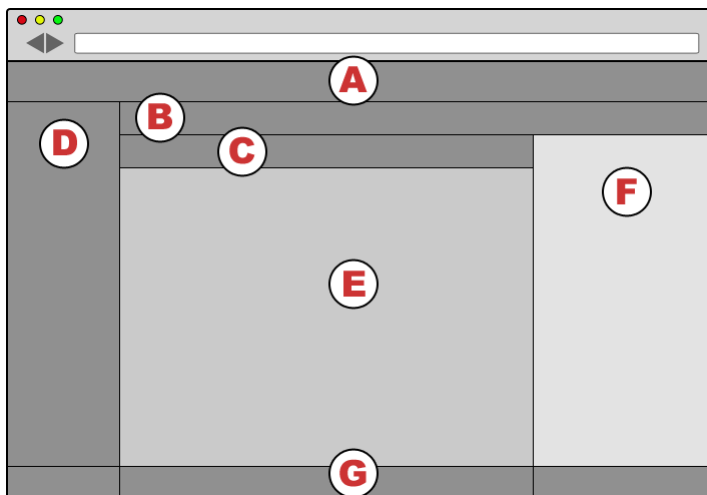
The major areas of the Web Client user interface are:

A	Main toolbar	**E**	Main window
B	View, Sort, and Find options	**F**	Properties panel
C	Item Proxies and the Field Chooser	**G**	Navigation toolbar
D	Organizers panel		

A. Main toolbar

The main toolbar is displayed across the top of the Portfolio Web Client interface. This toolbar gives you access to the major functions available within the Web Client, such as uploading, downloading, and converting files.

B. View, Sort, and Find

The main window of the Portfolio Web Client can display items in four different view modes: ▦ Small Thumbnail Grid, ▦ Large Thumbnail Grid, ▤ List, and ▢ Preview. Depending on your workflow, each view mode has its advantages.

You can sort the Grid and List views on any data field, in either ascending or descending order.

Use QuickFind to instantly search common item data fields, or switch to Advanced Find to search for items using a number of criteria.

See also: *Main Window View Options* (page 10); *QuickFind* (page 16); *Using the Find Tool* (page 17)

C. Item Proxies and the Field Chooser

Item proxies allow you to copy or move a pre-defined subset of displayed items: all items on all pages , all items on the current page , or the selected items on the current page Users can drag these proxies, rather than perform complex selections or navigate pages of items.

The **Field Chooser** allows you to choose data fields to display with each item in the Grid view, List view, the Properties display in Preview mode, and the Properties panel.

See also: *Using item proxies* (page 10); *The Field Chooser* (page 11)

D. Organizers panel

The **Organizers** panel at the left side of the window allows you to select one of the catalogs that are available to you, then displays the galleries and folders within that catalog.

To select a catalog, click the pop-up menu at the top of the panel.

Click a gallery or folder to display the items it contains in the main window.

Drag the separator between galleries and folders up or down to show more of one and fewer of the other.

Drag frequently-used organizers to the **Favorites** list to have them readily accessible.

See also: *Organizers* (page 21); *Favorites* (page 23)

E. Main window

The main window displays item thumbnails and data within your catalog. When you select a catalog, gallery, or folder in the **Organizers** panel, the main window displays the items within your selection.

You can refine how items are displayed using the main toolbar at the top and the navigation toolbar at the bottom. You can control:
- How many items are displayed per page;
- The sort order of items on the page;
- Whether to display a grid or list view of your items;
- The size of the thumbnail image in grid view.

The main window also displays the results of any QuickFind or other catalog search.

See also: *Main Window View Options* (page 10)

F. Properties panel

The **Properties** panel displays file system and metadata information for items selected in the main window. Many of the fields that are displayed can be edited directly.

When you select a single item, all of that item's catalog information and metadata is displayed in the **Properties** panel. Any metadata that you edit is applied only to the selected item.

When you select multiple items, the **Properties** panel displays the fields that are common to all selected items. Any changes you make in the displayed fields will be applied to *all* items in the selection.

You can hide the **Properties** panel using the double arrow icon at the right side of the main toolbar.

See also: *Item Properties and Metadata* (page 27)

G. Navigation toolbar

The Navigation toolbar at the bottom of the window allows you to further control how many items are displayed in the main window, the size of the thumbnails displayed, the ability to add and remove galleries, and much more.

See also: *Main Window View Options* (page 10)

Shortcut menus

When you have selected items in the main window, or an organizer in the **Organizer** panel, you can access common functions from a shortcut menu. Right-click one of the selected items to reveal a menu of functions you can perform.

Main Window View Options

⊞ Grid views

Each of the **Grid views** displays a thumbnail of each item and the item's file name. Thumbnails can be 112 x 112 or 256 x 256; you can change the size by clicking one of the icons ⊞ in the main toolbar.

To change the information displayed with each thumbnail, click **View Fields** at the top right of the main window.

If you display an URL field in Grid view, it becomes a hyperlink that, when clicked, opens a new browser window.

☰ List view

List view displays a scrollable list of files with a small thumbnail, flag status, and the file's path, name, and modification date.

To change the information displayed with each item, click **View Fields** at the top right of the main window.

☐ Preview mode

Preview mode allows you to view large previews of the files you select in **Grid** or **List** views. You can zoom in and out, download the file, view file metadata, preview other files from the selection, or play a slide show of the selected files.

You can enter **Preview** mode by clicking the **Preview mode** icon or by double-clicking an item in either **Grid** or **List** view.

If you select several items then double-click one of them, **Preview** mode will open with the thumbnails of the selected items in a row across the bottom of the window. You can click any item in this gallery to immediately preview it.

View Fields

You can choose the properties that you want to display for each item in **Grid view**, **List view**, the **Properties** display in **Preview** mode, and the **Properties** panel. Each view mode or panel can display a different set of fields.

To open the **Field Chooser**, click **View Fields** just above the main window.

For more information about using the **Field Chooser**, see *The Field Chooser* on page 11.

↻ Refresh

To update the current view (especially after adding or removing items from an organizer), click the **Refresh** button in the toolbar above the main window.

Selecting items

In **Grid** and **List** views, select a single item by clicking it once. You can select a range of items by clicking the first, holding down the *SHIFT* key, then clicking the last item in the range. You can select scattered items by holding down the *COMMAND* key (Mac) or *CTRL* key (Windows) and clicking each item.

Using item proxies

You can use item proxies for copying a subset of items in the main window to a folder or gallery.

- Drag the **Found Items** proxy ◁▭ to copy all the items on all pages in the main window.
- Drag the **Displayed Items** proxy ◁▭ to copy all the items on the current page in the main window.
- Drag the **Selected Items** proxy ◁▭ to copy only the selected items on the current page.

When you drag a proxy, the left end will include a green dot to indicate that you can copy the items to the container your mouse pointer is over, or a red X to indicate that you can't copy them here.

The number on the proxy graphic indicates how many assets are represented by the proxy.

Previews

Previews are automatically generated by the Portfolio Server as they are needed. The maximum preview image size or audio/video clip duration can be specified for each catalog by the Portfolio Administrator in the Portfolio Server Admin application.

Some file types do not support thumbnail or preview images; for these types of files, the file icon is shown instead.

Navigation buttons

At the bottom of the main window, the navigation buttons allow you to control the number of items displayed per page in the main window, as well move between pages.

The **Items per page** drop-down menu allows you to change the number of items displayed on each "page" of Grid view or List view: 20, 50 or 100 items per page.

The paging controls allow you to switch between multiple pages in the main window: **First page**, **Back one page**, **Forward one page** and **Last page**. Additionally, you can enter a specific page number to jump directly to that page.

The Field Chooser

You can choose which fields in that catalog to display for items in **Grid view**, **List view**, the **Properties** display in **Preview** mode, and the **Properties** panel.

Grid view and List view:

Click **View Fields** below the **QuickFind** tool to open the **Field Chooser**.

Preview mode:

Click the icon to show the **Properties** display, then click the **View Fields** button to open the **Field Chooser**.

Properties panel:

Choose **Edit Filtered Fields** from the drop-down menu at the top of the **Properties** panel.

NOTE: The list of **Filtered Fields** is also used as the default list of fields in the **Sort by** menu.

Choosing fields

The **Field Chooser** shows a list of all fields in the catalog on the left, and fields displayed in the current view on the right.
- To add a field to the current view, drag it from the list on the left to the list on the right.
- To change the order that fields are displayed in, drag a field up or down in the list on the right.
- To remove a field from the current view, drag it out of the list on the right.
- To narrow down the list of fields on the left, type a partial field name in the **Search** box at the top of the dialog.

Click the **OK** button to save your changes.

Setting options for multiple views

At the top right of the **Field Chooser** is the **Fields for View** drop-down menu.

From this menu, you can choose a different view, then select fields to display for that view.

When you click **OK** in the dialog, changes you have made for each view are saved.

Previewing Items

In **Grid** or **List** view, you can select one or more items and view them in **Preview** mode. To view items in **Preview** mode:
- Double-click an item;
- Select several items and double-click one of them;
- Select items and click the **Preview mode** icon.

You can preview all items in a folder or gallery by clicking on the organizer, then clicking the **Preview mode** icon.

Preview mode controls

When you enter Preview mode, the main window shows just the large image preview. Move your mouse to temporarily reveal the Preview controls; they will fade out when you stop moving the mouse. You can use the mouse our keyboard shortcuts to access these features.

A	Close	Exits **Preview** mode and returns to your previous view. Shortcut: *ESC*	**F**	Zoom	Zooms the image preview in or out. (You can't zoom a video or audio preview clip.) When zoomed, you can click in the image and drag to pan the image. Shortcuts: **+** (zoom in), **–** (zoom out), *0* (100% or fill the window)
B	Filename	The name of the file.	**G**	Preview	The asset preview: an image or playable media clip.
C	Flag	Flags the picture for inclusion in the **Flagged Items** gallery. Shortcut: *B*	**H**	Properties	The **Properties** display. Click the **View Fields** button to choose the fields that are displayed here.
D	Download	Downloads the original file.	**I**	Filmstrip	Shows thumbnails of the images available in **Preview** mode. Click an image to preview it. (The Filmstrip is only displayed when you have multiple items selected when entering the **Preview** mode.)
E	Show/Hide Properties	Show or hide the **Properties** display.	**J**	Navigator	Navigate through thumbnails, or start/stop a slideshow of the images. Shortcuts: *HOME* (first image), *LEFT ARROW* (previous), *SPACEBAR* (play/pause slideshow), *RIGHT ARROW* (next), *END* (last image)

Cataloging Files

There are a number of ways to add items to a catalog.

- You can upload items to the Portfolio Server directly from the Portfolio Web Client. This requires an AutoSync folder, which can be created by your Portfolio Administrator when the catalog is created, or later using the Portfolio Desktop Client.
- You can add files to a "watch folder" on a computer on your network. You can create watch folders using the Portfolio Desktop Client. (The Portfolio Server needs to have access to the watch folder in order to catalog files in it.)
- You can catalog files using the Portfolio Desktop Client.

Uploading Items to a Catalog

You must be assigned permission to upload files to Portfolio Server using the Web Client. When you upload an item with the Web Client, the file is uploaded to the selected folder and cataloged by Portfolio Server.

To upload items with the Portfolio Web client:

1. Select the folder where you would like to upload files.
2. Click **Upload** on the toolbar.
3. Browse to the file or files to upload.
4. Click **Select** (Mac) or **Open** (Windows) to upload the selected files.

   File upload status is displayed at the bottom of the main window in the **Navigation** toolbar. For a more detailed report of file upload status, see *Jobs* on page 40.

NOTE

While uploading audio or video files, Portfolio Server will create a preview clip. The preview may not be available immediately; when a clip is available to play, the file's icon will show a small "movie camera" indicator. You can then double-click the file to open it in **Preview** mode and play the preview clip.

Deleting Items from a Catalog

There are three ways to delete items while in a catalog, and it is important to recognize the distinction between each of them. These include:

- Deleting original files from disk;
- Deleting items from a catalog;
- Deleting items from a gallery.

The key difference in each of these options is the source of the item selection within a catalog, gallery, or folder.

 The **Delete** button is located at the bottom left of the main window, and only appears when an item is selected.

Deleting using the shortcut menu

Besides using the **Delete** button, you can right-click on a selected item, gallery, catalog, or folder and choose **Delete Selection** (for items) or **Delete Contents** (for a container). **Delete Contents** will remove the items from a container but leave the container in place.

Deleting original files from disk

When you delete an original file from disk, all catalog references to the file are removed. Exercise care when using this option to ensure that files are not accidentally deleted.

To delete original files from disk:

1. Select the folder that contains the file or files that you want to delete.
2. In the main window, select the files that you want to delete from disk.
3. Click the **Delete** button in the lower left corner of the main window.
4. Click **Delete from Disk**.

Deleting items from a catalog

Deleting items from a catalog only removes the entry from the catalog, and does not affect the original file.

> **NOTE**
> If you delete a file entry from a catalog, and the file exists in an AutoSync folder or other watched folder, it will be re-added to the catalog by Portfolio Server. To avoid this, you should move the file to an unwatched folder, then delete it from the catalog.

To delete an item from a catalog:
1. Select the folder or gallery that contains the files that you want to delete.
2. In the main window, select the files that you want to delete from the catalog.
3. Click the **Delete** button in the lower left corner of the main window.
4. Click **Delete from Catalog**.

Deleting items from a gallery

Deleting items from a gallery does not remove the items from the catalog, and does not affect the original file.

To delete an item from a gallery:
1. Select the gallery that contains the file or files that you want to remove.
2. In the main window, select the files that you want to delete from the gallery.
3. Click the **Delete** button in the lower left corner of the main window.
4. Click **Delete from Gallery**.

Access Levels

There are four access levels that determine what each user can do with assets in a catalog. Access levels are assigned by the Portfolio Administrator for each user of a catalog.

This means that while you may have the Publisher access level for one catalog, you may only have Reader access level for another.

Check with your Portfolio Administrator for your access level details.

NOTE: You can access catalogs using either the Web Client or Desktop Client.

Catalog Administrator: This level allows access to all functionality available. Catalog Administrators have access to advanced operations in the Portfolio Desktop Client, like editing custom fields, metadata mappings, and AutoSync folder settings.

Catalog Administrator access should not to be confused with the Portfolio Server Administrator, who has access to all server settings.

Publisher: Publishers are able to upload and delete items from a catalog as well as update all metadata for files in a the catalog. Publishers can also create galleries.

Editor: Editors are able to modify metadata, such as entering keywords and custom field values.

Reader: Readers may only view items in the catalog. They cannot add or remove items or edit metadata.

Your Portfolio Administrator may also give you specific access to other features of the Portfolio Web Client. These include the ability to:
- **Access and Process Originals:** This allows you to download original files. If you have this permission and **Use Convert Presets**, you can also use the **Batch Process** feature.
- **Embed Metadata:** Allows you to edit metadata that can be embedded in a file. Embeddable metadata is indicated with the icon.
- **Make PDF:** When this setting is enabled, you can generate a PDF contact sheet.
- **Manage Convert Presets:** When enabled, you are able to use the **Edit Convert Presets** feature and save presets from the **Batch Process** dialog.
- **Manage Public Galleries:** When this setting is enabled, you can create, update, and delete public galleries.
- **Run MediaScripts:** Allows users to run custom scripts that can utilize any of the MediaEngine's capabilities for converting and delivering images, audio, or video.
  This feature is only available to users of the NetMediaMAX module.
- **Use Convert Presets:** This allows you to use custom conversion presets created by others. If you have this permission and **Access and Process Originals**, you can also use the **Batch Process** feature.

Finding Files

There are several ways to search for files with the Portfolio Web client.

QuickFind allows you to quickly search a few common catalog fields.

Find can be customized to search your catalog for up to five criteria using any type of data tracked by Portfolio Server. You can refine your search with the Find dialog, then update the displayed results.

Batch Find lets you search a single field for a list of values. You can easily list a group of items that have unique identifiers (such as file names or part numbers).

QuickFind

The easiest and most accessible search tool in the Portfolio Web Client is QuickFind. Located in the Toolbar at the top of the main window, QuickFind searches on three fields: Filename, Description, and Keywords.

QuickFind only searches on items in the selected **Organizer** panel. Selecting a catalog searches the entire catalog, but selecting a gallery only searches the items in that specific gallery.

To perform a QuickFind search:
1. Select an organizer in the **Organizers** panel.
2. Type a word or phrase in the **QuickFind** field and press *ENTER*.
3. Matching items are displayed in the main window.

To clear the main window of the QuickFind search results, click the **Clear Results** button ⊗ at the right end of the **QuickFind** field.

Batch Find

Batch Find takes a list of values and lists each Portfolio asset where the specified field contains one of these values.

Example:

You have a Portfolio catalog that contains a custom field for Part Number. You need to find all the assets that refer to several different part numbers. Using **Batch Find**, you can enter the list of part numbers and search the Part Number field. Portfolio quickly finds all the assets related to those part numbers.

Batch Find is available for Text and Number fields (including fields that can contain multiple values, such as Keywords).

Using Batch Find

To perform a Batch Find:
1. Click the triangle to the left of the **QuickFind** field to open the **Advanced Find** window.
2. Click the **Batch Find** tab.
3. Choose the field you want to search from the drop-down menu.
4. Enter your search criteria, one item per line, in the field next to the drop-down menu.
   TIP: You can paste text that has one search item per line into this field.
5. Click the **Search** button.

The Web Client will display the items that match your search criteria. If some items in your list were not found, these will be reported as an error.

A single entry in your list may match more than one Portfolio record. In the example above, your Portfolio catalog may have multiple photos of some parts; searching for such a part number would return all the photos related to that part.

What Next?

What do you need to do with the results of your search? You will probably want to work with them as a group, so it is a good idea to add them to a gallery, either an existing gallery that you need these records in, or a new gallery devoted to them. (You can also add them to the Flagged Items organizer.)

By adding the search results to a gallery, you avoid the risk of clearing the results list, and can use the QuickFind or Advanced Find features to locate other items in your catalog.

See *Creating, renaming, and deleting galleries* on page 24 for information on creating a gallery.

See *Working with Flagged Items* on page 22 for information on the Flagged Items organizer.

To add all the found records to a gallery, you can drag the Found Items proxy to the desired gallery.

See *Using item proxies* on page 10 for more information about item proxies.

You can also use the Batch Process command, edit item metadata, and perform any other actions you would normally do with catalog items.

Using the Find Tool

Find can be used to locate files by searching data in any field in the catalog. The Find tool is considerably more flexible and powerful than the QuickFind tool. Where QuickFind searches on three parameters for files, the Find tool searches on up to five parameters.

A	Sort field	Select the field to sort the main window view.	**H**	Search operator	How to search for the value.
B	Sort order	Click to sort the view in ascending or descending order.	**I**	Search term	Enter a value to match in the search field.
C	Show/Hide	Click to show or hide the Find controls	**J**	Remove criterion	Click to remove the search criterion
D	QuickFind field		**K**	Add criterion	Click to add another search criterion
E	Find tab	Shows the Find options.	**L**	Boolean	Determines how criteria are used in searches: **and** means both must match, **or** means either must match
F	Batch Find tab	Shows the Batch Find options.	**M**	Save as Smart Gallery	Click to create a Smart Gallery based on these search criteria
G	Search field	Choose a field to search on.	**N**	Search button	Click to start the search with the specified criteria.

Search results can also be converted into Find Criteria for Smart Galleries on the fly. For more information on Smart Galleries, see *Galleries* on page 23.

The **Find** tool only searches the item selected in the **Organizer** panel.

To search for items with the Find Tool:
1. Select an organizer in the **Organizers** panel.
2. Click **Find** at the left end of the **QuickFind** field.
3. Select a field to search from the drop-down menu.
4. Select a search operator from the second drop-down menu.
5. Enter a search term into the text box.

   Depending on the field type and the search operator you select, a search term may not be required. For example, if you search using the `exists` search operator, a search term is not required since you only want to locate files that have any data in the selected field.
6. If more detailed search parameters are required, click to the right of the first parameter to open an additional parameter. Repeat the above steps to add more search parameters, up to a maximum of five parameters.
7. When you are ready to start your search, click the **Search** button or press the *ENTER* key.

If you tend to search your catalog using these search parameters frequently, click **Save as Smart Gallery** to save your search criteria. Every time you open a smart gallery, Portfolio automatically searches the catalog for files based on these search parameters.

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 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).

Clearing Search Results

After searching, there are different ways to clear the search results, whether you used QuickFind or the Find feature.

By default, clearing the search results displays the first page of available items in the catalog, gallery or folder that is currently selected in the **Organizer** panel.

To clear QuickFind results from the main window:
- Select a different organizer in the **Organizers** panel.
- Click **Clear Results** in the right end of the **QuickFind** field.

To clear Advanced Find results from the main window:
- Select a different organizer in the **Organizers** panel.
- Click **Hide Find Tools** at the left end of the **QuickFind** field.

Organizers

Organizers help you manage your digital assets and use them in your daily workflows. There are several kinds of organizers:
- Catalogs are created by your Portfolio Administrator and are the main grouping of digital assets. You can be assigned to multiple catalogs but can only work in one at a time.
- Folders are folders on disk where assets are stored or cataloged. Folders are usually used for either or both of two functions: organizing assets on disk, and adding assets to a catalog.
- Galleries are different ways you can organize assets within a catalog. You may have a gallery with all photos of dogs, and another with cats; each gallery may include photos of dogs and cats together.
- Built-in organizers give you a quick way to see certain important groups of asset: the entire catalog, items that you have flagged, or the last group of items you cataloged.

The Organizers panel

Use the Organizers panel to:
- Change catalogs
- Work with built-in organizers and favorites
- Work with galleries
- Work with folders

Changing catalogs

The Portfolio Web Client works with one catalog at a time. To change catalogs, click the pop-up menu at the top of the **Organizers** panel and choose a new catalog.

The menu lists only the catalogs that you have access to; if you don't see the catalogs that you expect, ask your Portfolio Administrator for access.

Built-in organizers and favorites

The Portfolio Web Client displays three built-in organizers for your convenience.

The **All Items** organizer displays all items in the catalog. You can do anything with these items, but this is especially convenient for finding items that you want to include in other galleries.

The **Flagged Items** organizer displays items that you have flagged. For more information, see Working with Flagged Items.

The **Last Cataloged** organizer displays the items that you have cataloged (using your current computer and browser) over the past 24 hours.

Favorites are organizers that you use frequently. They are displayed immediately below the built-in organizers to make them readily accessible.

To add an organizer as a favorite, drag it into the **Favorites** list or right-click on it and choose **Add to Favorites** from the shortcut menu.

You can work with items in the built-in organizers and favorites just as you can in any gallery or folder.

Galleries

You can add galleries, delete galleries, change gallery properties, and make a gallery a favorite.

To add a gallery, click the button at the bottom of the **Organizers** panel and choose **New Gallery** from the pop-up menu.

To delete a gallery, select it in the **Galleries** or **Favorites** list and click the button at the bottom of the **Organizers** panel.

To edit a gallery, click it once to select it, then right-click it and choose **Edit Gallery** from the shortcut menu.

For more information on creating and editing galleries, see *Creating, renaming, and deleting galleries* on page 24.

For details on adding items, see *Adding items to a gallery* on page 24.

For more about removing items from a gallery, see *Deleting items from a gallery* on page 24.

Folders

The Portfolio Web Client identifies two kinds of folders: AutoSync folders and subfolders. Both kinds of folders exist on a disk that is accessible to the Portfolio Server.

AutoSync folders are folders that Portfolio Server knows about and can catalog files from. They can be created by the Portfolio Administrator when he creates a catalog, or by other users from within the Portfolio Desktop Client.

Subfolders are folders inside of AutoSync folders. In general, all folders inside an AutoSync folder are accessible to the Web Client as subfolders, whether they are created using the Web Client, Desktop Client, or directly using the operating system. (Folders that have special permissions or restrictions applied, and operating system folders, may not be accessible as subfolders of AutoSync folders.)

To create a subfolder, select an AutoSync folder, click the ⊞▾ button and choose **New Subfolder**.

To delete a subfolder and all its contents, select it and click the ⊟ button.

For details on managing files and folders from within Portfolio Web Client, see *Managing Files* on page 34.

Working with Flagged Items

The Flagged Items organizer is a special organizer that shows the items you have flagged during your current browser session. (This means that, if you log out from Portfolio then log back in without quitting your browser session, the flagged items will be retained.)

You can flag items in a variety of ways:
- Click the flag icon at the top right of the item thumbnail in Grid View
- Click the checkbox in the Flagged column for an item in List View
- Click the flag icon on a thumbnail in the filmstrip in Preview mode
- Click the flag icon on an image in Preview mode
- Drag an Item Proxy to the Flagged Items organizer

You can work with items in the Flagged Items organizer just as you would any other organizer, keeping in mind that once you exit the Web Client and quit your browser, the flags will be cleared from those items.

The Flagged Items organizer is unique for each user in each catalog; if you and a coworker are logged in to the same catalog, you can each flag whatever items you desire without affecting the other user's Flagged Items.

Flagging with an Item Proxy

The fastest way to flag a group of items is to drag an item proxy to the Flagged Items gallery. Drag the Found Items proxy ◀🔍 to flag all items in the current view, drag the Displayed Items proxy ◀⊞ to flag all the items on the current page, or select items on the page and drag the Selected Items proxy ◀▢ to flag all the selected items.

See *Using item proxies* on page 10 for more information about item proxies.

Favorites

Favorites are organizers that you use frequently. Once you identify an organizer as a favorite, it is added to the **Favorites** list at the top of the **Organizers** panel.
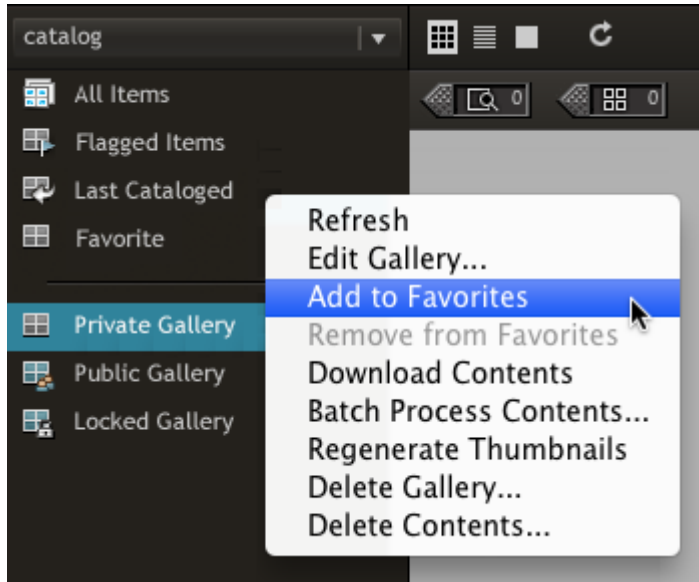

To add an organizer as a favorite, select it, right-click on it, then choose **Add to Favorites** from the shortcut menu.

You can also drag an organizer into the **Favorites** list.

To remove a favorite, select it, right-click on it, and choose **Remove from Favorites**.

An organizer in the **Favorites** list behaves just as it does anywhere else. When you click on it, Portfolio Web Client displays all the items in that organizer. If you delete the organizer, it is deleted from the catalog, not just from the **Favorites** list.

The **Favorites** list is saved with your catalog, so if you use Portfolio Web Client on another computer, your favorites will display there as well.

Galleries

A gallery can display any subset of the items in your catalog.

A gallery is a good way to organize and view only certain items in your catalog. For example, 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.

Public, private, and read-only settings

By default, galleries are private: only the user that creates a gallery can access or modify it. Galleries can be made *public* so that they are available to all users of a catalog. If you choose to make your gallery public, you can restrict changes to that gallery by making it *read-only* to other users.

To find out how to change the gallery access level, see **Making a Gallery Public or Private** on page 25.

Smart galleries

When you open a smart gallery, Portfolio automatically searches the Portfolio catalog and selects the appropriate files to display. Smart galleries can be configured to search and select files for any metadata stored in your catalog. For more information about creating and using smart galleries, see **Creating a Smart Gallery** on page 25.

Creating, renaming, and deleting galleries

To create a new gallery in a catalog:

1. Click the **Add** button ![+▾] at the bottom of the **Organizers** panel and choose **New Gallery** from the menu.
2. Enter a gallery name.
3. Select privacy settings for the gallery:
   - **Public** galleries are available to all members of the catalog. **Read Only** means others can only view your gallery, not change it.
   - **Private** galleries are only available to you.
4. Click the **Save** button.

The new gallery is displayed in the **Organizers** panel.

To rename a gallery:

Double-click the gallery name in the **Organizers** then enter the new name.

To delete a gallery:

1. Select the gallery in the **Organizers** panel.
2. Click the **Delete** button ![—] button at the bottom of the **Organizers** panel.
3. Click **OK**.

Adding items to a gallery

You can add items to galleries for which you have the appropriate permission and access level to modify. See your Portfolio Administrator for access level details.

NOTE: You cannot add items to a Read-Only gallery that you do not own.

To add items to a gallery:

1. Select an organizer in the **Organizers** panel.
2. Select one or more thumbnails in the main window.
3. Drag item thumbnails from the main window onto the gallery icon in the **Organizers** panel.

You can also add items to a gallery by dragging an item proxy to the gallery. Drag the **Found Items** proxy ![icon] to add all items on all pages in the main window, drag the **Displayed Items** proxy ![icon] to add all items on the current page, or drag the **Selected Items** proxy ![icon] to add the selected items on the current page.

Deleting items from a gallery

When you delete items from a gallery, they are removed only from the current gallery, not from the catalog. If you have created a gallery of a set of images and find that it contains a few images that you don't want to display with the others, just delete the ones that you don't want in the gallery.

To delete items from a gallery (without removing them from the catalog):

1. From the **Organizers** panel, select the gallery. (If you are not the gallery's owner, then make sure that the gallery is not marked Read Only.)
2. In the main window, select one or more items to remove from the gallery.

   To select a range of files, click the first file in the range, then hold down the *SHIFT* key and click the last file.

   To select multiple scattered files, hold down the *COMMAND* key (Mac) or *CTRL* key (Windows) and click each file.

3. Click the **Delete** button ![—] at the lower left corner of the main window.
4. Click **Delete from Gallery** to remove the items from the gallery but leave them in the catalog, or **Delete from Disk** to remove them from the gallery, the catalog, and to permanently delete the items from disk.

NOTE

Items cannot be removed from a Smart Gallery, except by choosing **Delete from Disk.** This is because Smart Galleries display search results. Each time you open a smart gallery, the results can be different because item metadata may have changed in your catalog.

Sorting a gallery

- To sort files in a gallery, choose a sort field from the **Sort By** drop-down menu in the toolbar.

  By default the fields available in the drop-down menu are limited to a basic set of fields: **Directory Path**, **File Size**, **Filename**, **Item ID**, and **Modified**.
- To show all available fields in the drop-down menu, choose **Show All** from the **Sort By** menu.
- To restore the basic set of fields, choose **Show Only Basic Sort Fields** from the **Sort By** menu. (This is the last item in the list.)

You can change the sort order by clicking the **Ascending** ▲ or **Descending** ▼ icon to the right of the **Sort By** menu.

You can change the default fields shown and the order they are listed in by changing the **Filtered Fields** available in the **Properties** panel. See *Choosing Properties to View* on page 27 for more information.

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.

When you create a gallery, you can choose to make it public or private. You can choose to make a public gallery Read Only so that other catalog members can view but not change your gallery.

To change the privacy settings of a gallery:
1. In the **Organizers** panel, double-click the name of the gallery.
2. Select privacy settings for the gallery:
   - **Public** galleries are available to all members of the catalog.
   - **Private** galleries are only available to you.
   - The **Read Only** option restricts the ability for other users to change your public gallery. You are still able to modify the contents of the gallery.
3. Click **Save**.

Creating a Smart Gallery

A Smart Gallery is a saved Find Tool setting. When you open a Smart Gallery, the Find is performed again and the results are displayed in the Main window.

As new items are added to the catalog that fit your search parameters, they will be found by the Smart Gallery.

To create a new Smart Gallery:
1. At the lower left of the **Organizers** panel, click the **Add** button ➕▾ and choose **New Smart Gallery** from the menu. This displays the **Find** tool.
2. Enter search parameters. For more information, see *Using the Find Tool* on page 17.
3. Click **Save as Smart Gallery**.
4. Enter a Smart Gallery name in the text box.
5. Select privacy settings for the smart gallery:
   - **Public** smart galleries are available to all members of the catalog.
   - **Private** smart galleries are only available to you.
   - The **Read Only** option restricts the ability for other users to change your public smart gallery search settings.
6. Click **Save**.

The new smart gallery is displayed in the **Organizers** panel.

Folders

Folders in Portfolio Web Client represent folders on disk that are have been added to a catalog in Portfolio Server. Ideally, these folders are always accessible to the Portfolio Server, but in some cases (such as mounted optical discs) they may be available temporarily or intermittently.

There are two types of folders in Portfolio: *AutoSync folders* (also called *Watch folders*), and *subfolders*.

AutoSync folders can be created in two different ways: by the Portfolio Administrator when he creates a catalog, or by a catalog administrator using the Portfolio Desktop Client.

AutoSync folders are "watched" by Portfolio Server for changes in their content, and the catalog is updated to reflect those changes.

In the Web Client, AutoSync folders have this icon: ⊞

Subfolders are folders inside an AutoSync folder (or inside another subfolder).

Using the Web Client, you can create and delete subfolders or move them between AutoSync folders.

Subfolders have this icon: 📁

Using folders

People tend to use a folder or folder hierarchy with Portfolio for two different reasons: to organize their asset files outside of Portfolio, and to add assets to Portfolio.

These two uses do not conflict; in fact, many users do both.

The key use of AutoSync folders and subfolders within the Portfolio Web Client is as a way for users to add files to their catalog, even when they do not have network access to the Portfolio Server or any of the AutoSync folders. Because you are using a web browser, the Web Client uses Internet technologies to transfer selected assets to the AutoSync folder, at which point the Portfolio Server will "see" the new assets and add them to your catalog.

To expose the subfolders within a Watch folder, click the ▷ next to the AutoSync folder icon.

Adding files to a folder

You can quickly add files to your catalog by copying them to one of your catalog's AutoSync folders or subfolders.

To add files to a folder:
1.   Select the folder you want to add files to.
2.   Click the **Upload** button on the toolbar.
3.   Select the files to upload and click **Open** (Windows) or **Select** (Mac).

Syncing an AutoSync folder

AutoSync folders are watched for changes and synchronized on a schedule. By default, folders are watched continuously and changes are synchronized immediately; these settings can be changed when you create or edit an AutoSync folder in the Desktop Client.

If you need to synchronize an AutoSync folder without waiting for its schedule, select the folder and click ↻ in the toolbar.

Creating a subfolder

To create a subfolder:
1.   Select an AutoSync folder ⊞ or a subfolder 📁.
2.   Click the ⊞▾ button at the bottom of the **Organizers** panel.
3.   Choose **New subfolder** from the pop-up menu.
4.   Enter a name for the subfolder and click **Save**.

Deleting a subfolder

To delete a subfolder, select it and click the ➖ button at the bottom of the **Organizers** panel.

Moving a subfolder

You can move a subfolder within its AutoSync folder's hierarchy; just drag it to the desired location.

Organizer Icon Reference

▦ Private Gallery	✳ Private Smart Gallery
▦ Public Gallery	✳ Public Smart Gallery
▦ Public, Read-only Gallery	✳ Public, Read-only Smart Gallery
▦ Last Cataloged Gallery	▦ Flagged Items Gallery

Item Properties and Metadata

Portfolio stores very detailed information about every file that you catalog. This information includes data that is collected during the cataloging process, such as each file's type, creation date, size, image dimensions, and other properties. It also includes metadata information included in files or that you may add to a Portfolio item, such as a description or keywords.

All of this information can be displayed in the **Properties** panel on the right side of the Web Client window.
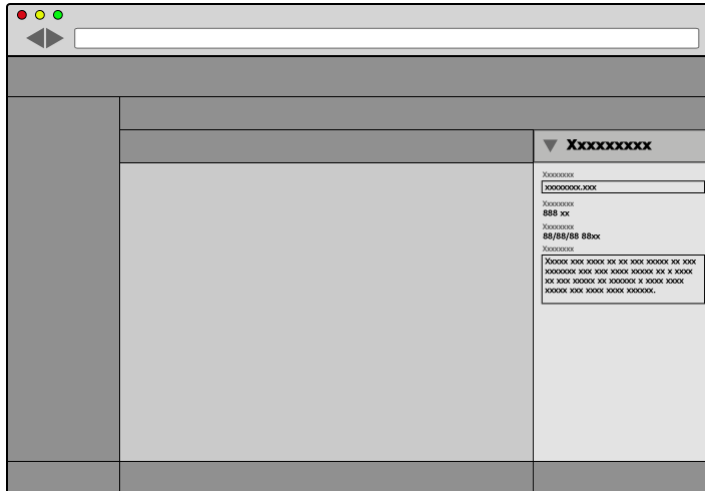
If the **Properties** panel is not visible, show it by clicking the ⏯ button at the top right of the window. If you want to hide the **Properties** panel, click the ⏯ button at the top right.

All data entry tasks such as populating keywords or metadata fields are done in the **Properties** panel.

Choosing Properties to View

By default, the **Properties** panel displays all of the properties for a selected item.

The Properties panel is organized into groups of fields in several categories, such as **Basic**, **File Info**, and **Movie**.

To view the fields in a category, click the ▶ next to the category name.

To hide the fields in a category, click ▼ next to its name.

Filtering the list of fields

You may find that you regularly access certain properties, and rarely or never use others.

Instead of displaying all available fields, you can specify a set of fields that you want to display, and the order they are listed in.

To filter the list of fields in the Properties panel:
1. Open the **Properties** panel if it isn't already displayed.
2. Choose **Edit Filtered Fields** from the drop-down menu at the top of the **Properties** panel.
3. Drag field names from the list of **All Fields** on the left into the list on the right.
   To remove a field name from the list of **Filtered Fields**, drag it off the list.
   You can reorder the list of **Filtered Fields** by dragging the field names up or down in the list.
4. Click **OK** to save the list of **Filtered Fields**.

You can switch between displaying **All Fields** and **Filtered Fields** using the drop-down menu at the top of the **Properties** panel.

NOTE: The **Filtered Fields** list is also used as the default list of fields displayed on the **Sort by** menu.

Understanding Field Types

Information is stored in Portfolio catalogs in multiple fields. Field types vary depending upon the type of data that they can store. It's important to understand the different field types so that you can better add and edit item properties with the Portfolio Web Client.

Date/Time

A Date/Time field allows you to enter date and/or time values into your items. The Catalog Administrator can elect to have Time values not displayed. Date/Time fields can include multiple values, and 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 the Catalog Administrator, the time will still be noted by Portfolio when a search is generated. For example: Searching for "5/20/09" will not find an item which contains "5/20/09 3:00 PM" because the request is interpreted as "5/20/09 12:00:00."

Decimal

In a Decimal field, you can enter numeric values with a precision up to 8 decimal places. Decimal fields can include multiple values, and be configured as a predefined list.

Number

Number fields can include one or multiple values, and can be configured as a predefined list.

Text

The Text field is designed for single line text values. The data in a Text Field can be from 1 to 249 characters long, can include multiple values, and be configured as a predefined list. Fields cannot contain multi-lined text; for multi-line text, use a Text Block field.

Text Block

Text Blocks are multi-lined fields that can be any length up to 32,767 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. The **Description** field is an example of a Text Block field.

Editing Item Properties

You can edit metadata and properties for items in a catalog using the Portfolio Web Client.

When you edit an item property, Portfolio updates the item's record in the catalog. For file types that support the embedding of metadata, Portfolio Server also embeds the changed properties into the original file. Fields that support the embedding of metadata are designated by the ⊠ icon.

Portfolio Server supports the embedding of metadata directly into many image and video file formats, as well as other files that have XMP metadata. Portfolio Server supports other types of metadata; see the Extensis website at *http://www.extensis.com/downloads/documents/supported-file-formats-camera-models/* for the latest supported formats..

NOTE: Portfolio Server does not read from or write to XMP sidecar files.

To edit a property for a single item:
1. Select an item in the main window.
2. In the **Properties** panel, locate the information that you want to update.
   Fields are grouped together by category. To display properties within a category, click the disclosure triangle to the left of the category name.
3. Edit the field's value. How you edit a field depends on its type:
   Single value field (such as Photoshop Label): Type the new text and press *ENTER*.
   Text Block (such as Description): Edit the text and click the **Submit** button below the field.
   Multi-valued field (such as Keywords): Click the **[+]** button below the field to open the **Add Property Values** dialog. See the note about the **Add Property Values** dialog below.

To edit properties for multiple items:
1. Select several items in the main window.
2. In the **Properties** panel, locate the field that you want to update.
3. Edit field values. How you edit a field depends on its type:
   Single value field (Such as Photoshop Label): Type the new text into the field.
   Text Block (such as Description): Edit the text then choose either the **Append** or **Replace** option below the field.
   Multi-valued field (such as Keywords): Click the **Add Values** link to open the **Add Property Values** dialog. See the note below.
   As you edit a field, a checked box indicates that it contains changed information that has not been submitted.
4. Edit additional fields as necessary using the instructions above.
5. When you have completed your edits, click the **Submit** button below the **Properties** panel.

THE ADD PROPERTY VALUES DIALOG
When you edit a multi-value field, such as Keywords, you use the **Add Property Values** dialog. This dialog lets you enter or select multiple values to add to the item all at once. If the field has pre-defined values (such as a Master Keyword list), you choose the values from a drop-down menu in the dialog; otherwise, you type them into a field.

Add Property Values:
Multi-value Field

Add Value | enter a value here | | + |

add [+]
multiple
values
then
[Update]

−

Cancel   Update
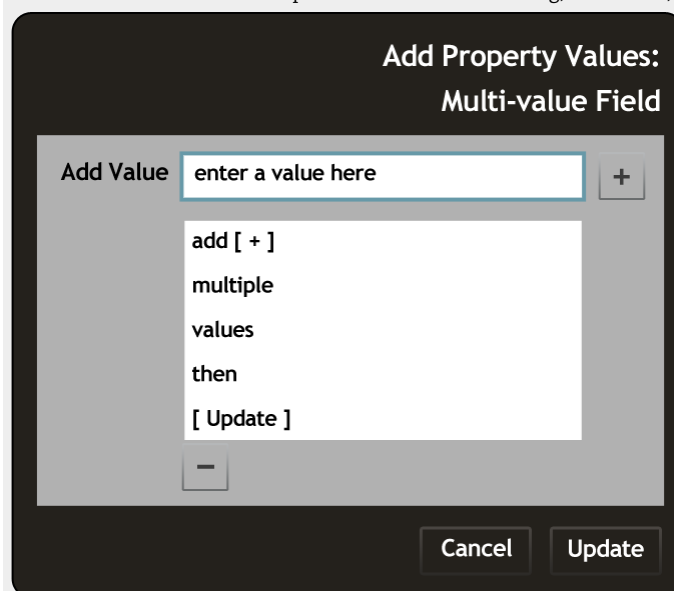
Checking on the status of your update

When you edit multiple items at once, your changes are submitted as a "job" to Portfolio Server. To check on the status of a job, click **Show Jobs** in the main toolbar.

In addition, status updates of your job are listed in the navigation bar at the bottom of the main window.

Keywords and Custom Fields

Keywords

Keywords are descriptive words and phrases that you can assign to assets to make organizing and locating them easier.

Suppose you are cataloging an image of a tropical beach at sunset. You might assign it keywords such as *sand*, *beach*, *ocean*, *sunset*, *tropical*, and *vacation*. Using these terms would make it easier to group the image with related images, and also make it easier to locate this specific file.

In Portfolio, there's no limit to the number of different keywords that you can assign to an item.

Your Catalog Administrator can configure a Master Keyword list to help maintain keyword consistency. This can also help you keep from typing keywords over and over.

When to use

Keywords are best used to describe the contents of a file (such as elements of an image, feelings or actions invoked or depicted in a photo, or topics discussed in a word processing document).

Custom fields

Custom fields allow you to store just about any type of information you want—a date, a number, some 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.

There are six types of custom fields, all of which can be edited in the **Properties** panel of the Portfolio Web Client.
- **Date/Time:** Enter a date or a date with 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 hyperlink that, when clicked, will open a new browser window or tab.

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.

For more information about entering custom field data, see ***Editing Item Properties*** on page 29.

Custom fields can be added to a catalog by a Catalog Administrator using the Portfolio Desktop Client.

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.

When to use

Custom fields are best used to show properties of a file, such as image resolution or page count. They are also useful in tracking a file or document in a workflow.

Adding Keywords

Keywords can come from three different sources: metadata embedded within the file which is read in when the file is cataloged, **Cataloging Options** specified for a watched folder in the Portfolio Desktop Client, and keywords added manually using the **Properties** panel of the Portfolio Web Client.

When you add keywords to an item, you use the **Add Property Values** dialog. This dialog lets you enter or select multiple values (in this case, keywords) to add to the item all at once. If your catalog has a Master Keyword list, you will select keywords from a drop-down menu in the dialog; otherwise, you type them into a field.
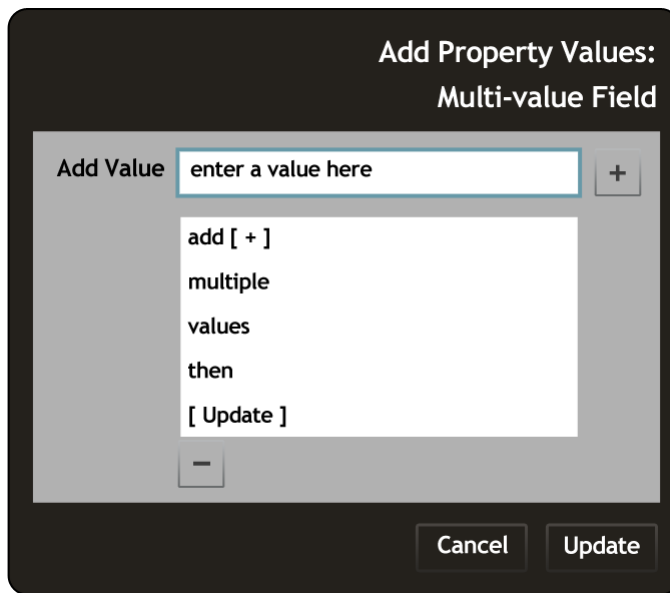
The method to add keywords varies depending on whether you have a single item or multiple items selected.

To add keywords to a single item:
1. Select an item in the main window.
2. Click the **Add** button [+] below the **Keywords** field in the **Properties** panel.
   This opens the **Add Property Values** dialog.
3. Enter the new keyword in the **Add Value** field or select one from the drop-down menu.
4. Click the [+] button to copy the keyword to the list of values to be added to the item.
5. Continue choosing keywords.
   If you have added one to the list by mistake, select it and click the [−] button below the list.
6. When you have finished choosing keywords, click the **Update** button.

To add keywords to multiple items:
1. Select one or more items in the main window.
2. Click the **Add Values** link below the **Keywords** field in the **Properties** panel.
   This opens the **Add Property Values** dialog.
3. Enter the keyword or select it from the drop-down menu.
4. Click the button [+] to copy the keyword to the list of values to be added to the item.
5. Continue choosing keywords.
   If you have added one to the list by mistake, select it and click the [−] button below the list.
6. When you have finished choosing keywords, click the **Update** button.
7. Click the **Submit** button below the **Properties** panel.

Click **Show Jobs** in the toolbar to check on the status of your update.

Removing Keywords

To remove keywords from a single item:
1. Select an item in the main window.
2. In the **Properties** panel, locate the **Keywords** field.
3. Select one or more keywords in the list and click the − button below the field.

To remove keywords from multiple items:
1. Select items in the main window.
2. In the **Properties** panel, locate the **Keywords** field.
3. Click the **Remove Values** link below the **Keywords** field.
   This opens the **Remove Property Values** dialog.
4. Enter the keyword that you want to remove.
   If your Administrator has defined a Master Keyword List, select a keyword from the drop-down list.
5. Click the + button to copy the keyword to the list of keywords to be removed from the items.
6. Continue choosing keywords to remove.
   If you have added one to the list by mistake, select it and click the − button below the list.
7. When you have finished choosing keywords to remove, click the **Update** button.
8. Click the **Submit** button below the **Properties** panel.

Click **Show Jobs** in the toolbar to check on the status of your update.

To remove all keywords from multiple items:
1. Select items in the main window.
2. Click the **Remove Values** link below the **Keywords** field in the **Properties** panel.
3. Click the **Remove All Values** button.
4. Click the **Submit** button below the **Properties** panel.

Click the **Show Jobs** link in the toolbar to check on the status of your update.

Replacing Keywords

If you have a keyword that you want to change from one keyword to another, the Portfolio Web Client can search through multiple items for a keyword and replace it with a new one.

For example, if you want to consistently use the keyword `automobile` to designate sedans, station wagons, and so forth, you can use the **Replace Keywords** command to update any misused keywords.

Replace Keywords is only available when updating more than one item.

To replace keywords:
1. Select items in the main window.
2. Click the **Replace Values** link below the **Keywords** field in the **Properties** panel.
   This opens the **Replace Property Value** dialog.
3. Enter the keyword to replace in the **Replace Value** text box.
   If your Administrator has defined a Master Keyword List, select a keyword from the drop-down list.
4. Enter the new keyword in the **With Value** text box, or select it from the drop-down list.
5. Click the **Update** button.
6. Click the **Submit** button below the **Properties** panel.

Click **Show Jobs** in the toolbar to check on the status of your update.

Managing Files

The Portfolio Web Client can be used to move files from one folder location to another on disk, download files, convert files to another type and much more.

NOTE

Using these features may require a certain access level or custom permissions. Check with your Portfolio Administrator to determine your access level.

Creating a Subfolder

To help you organize files within folders that are watched by Portfolio Server, you are able to create subfolders with the Portfolio Web Client. This is the same as creating a new folder with Windows Explorer or Macintosh Finder.

To create a new subfolder:
1. In the **Organizer** panel, select a top-level folder or subfolder .
2. At the lower left corner of the **Organizer** panel, click the **Add** button and choose **New Subfolder**.
3. Enter a folder name and click **Save**.

To move a subfolder in the **Organizers** panel, drag it to a new location within the same top-level watched folder.

NOTE: You can create additional top-level "watch" folders using the Portfolio Desktop Client.

Moving and Deleting Files

You can move and delete your original files from within the Portfolio Web Client.

To move a file:
1. Select an organizer in the **Organizers** panel.
2. Select one or more items in the Main window.
3. Drag the selected files to a new folder. The target folder must exist in the same catalog as the current location.

To delete a file:
1. Select a folder in the **Organizers** panel.
2. Select one or more thumbnails in the Main window.

   To select a range of files, click the first file in the range, then hold down the *SHIFT* key and click the last file.

   To select multiple scattered files, hold down the *COMMAND* key (Mac) or *CTRL* key (Windows) and click each file.

3. Click the **Delete** button at the lower left corner of the main window.
4. Click **Delete from Disk** to delete the original file from disk, or click **Delete from Catalog** to remove the file from the catalog.

Applying or Removing a Custom Preview

You may choose to replace an item's preview image with something different. For example, a PDF document's thumbnail and preview are generated from the first page in the document, but you may wish to provide a different image.

To apply a different image as a preview, select the item, then right-click the item and choose **Apply Custom Preview** from the shortcut menu. You can then choose a supported image file for the new preview image.

To regenerate the original preview image, select the item, right-click it and choose **Regenerate Thumbnail**.

Automation and the Web Client

The Portfolio Web Client includes a number of automation features that can help speed your workflow. See:

- ***Creating a Smart Gallery*** on page 25 for an easy way to automatically locate files.
- ***Downloading Files*** on page 36 for information about using a Convert preset for downloading files.
- ***Batch Process*** on page 38 for ideas about running a preset to edit originals.
- ***Convert Presets*** on page 36 for details about creating and using Convert Presets.

The Automate Command

Portfolio Server implementations that include NetMediaMAX have access to advanced automation scripts. The Portfolio Server Administrator can make scripts available for use in the Portfolio Web client. The functionality of the scripts can vary considerably. Consult your Portfolio Server Administrator for details about available scripts.

To run scripts with the Portfolio Web Client:
1. Select some files in the catalog.
2. Click the **Automate** drop-down menu in the toolbar.
3. Select a script from the list.

As the script runs, progress is displayed in the **Navigation** toolbar at the bottom of the main window. For more detailed status, and for any script results, see the **Show Jobs** dialog.

Working with Originals

The Portfolio Web Client can be used to collect files in your catalog for download, as well as converting files from one format to another. All media processing and `.ZIP` file compression is handled by Portfolio Server.

The **Download** menu allows you to download original files, run Convert Presets and download the resulting converted files, or create Convert Presets.

The **Batch Process** command allows you to create, run, or modify Convert Presets, rename files, and download or catalog the resulting files.

> ***NOTE***
> Depending upon your access level, you may not be able to download files or perform a Batch Process. See your Portfolio Administrator for access level details.

Downloading Files

The **Download** menu allows you to download original files, run Convert Presets, or create new Convert Presets.

If Convert Presets are available, they will appear on the **Download** menu below **Download Originals**.

To run a Convert Preset, select one or more items in an organizer, then choose the preset from the **Download** menu.

To download original files, select the items in an organizer, then choose **Download Originals** from the **Download** menu.

When Portfolio Server has prepared your selection for download, you will be prompted to download now or later.
- If you have selected multiple files to download or convert, Portfolio Server will compress them into a `.ZIP` archive.
- If you have selected a single file, Portfolio will download the file without compression.

If you click **OK** to download now, you will be prompted to provide a name and location for the download.

If you click **Cancel**, you can download your file or `.ZIP` archive later from the Jobs dialog.

Convert Presets

A Convert Preset is a group of settings, such as file type and resolution, that you can save if you frequently convert files using those settings. For example, you may frequently create JPG files that are 320x240 pixels in size for use on a web page. By saving a preset with these values, you can convert and download files with one click.

Convert Presets can be used to download files using one click, or as part of a Batch Process operation, where you can also choose to rename files or add them to your catalog.

There are two ways to create presets: Choose **Edit Convert Presets** from the **Download** menu, or click **Batch Process** on the main toolbar.

NOTE: In the **Batch Process** dialog, all preset options are in the **Convert** section.

To create a new preset:
1. Modify the conversion settings (see below).
2. Click the ⊕ button next to the **Presets** drop-down menu.
3. Enter a name for the preset and click the **Save** button.
4. Click **OK** to close the **Convert Presets** dialog or **Cancel** to close the **Batch Process** dialog.

The new preset will be available from the **Download** menu and in the **Batch Process** dialog.

Conversion settings

- Choose a file format for the conversion from the **Format** drop-down menu.
  When you choose a format, the format options change. For example, for the TIFF format, Compression Type and Byte Order options are available; for JPEG, only the Quality parameter can be changed.
  Users of the NetMediaMAX Solution Pack have several additional formats available for conversion.
- Choose a color mode for the converted files: RGB, CMYK, or Grayscale.
- Check **Change Resolution** to specify a new resolution for the converted files.
- Check **Resize** to resize the converted files.
  Percent: The percent value is based on the original image, where 100% is the size of the original. The output file is scaled the same percentage in both dimensions and retains the aspect ratio of the original.
  Fit Within: Enter a height and width for converted files to be resized to fit. For original files whose aspect ratio (ratio of width to height) is *lower* than the output aspect ratio, the converted file will be resized so that the shorter side is the same dimension as the target dimension, otherwise the longer side will be sized to fit the output dimension. The resulting output will be the same as the specified size in one dimension, and the same or smaller in the other, retaining the aspect ratio of the original. No portion of the image will be lost.
  Expand/Crop: Enter a height and width for converted files to be sized to. Output files will have the specified dimensions; if the aspect ratio of the original file is lower than the output aspect ratio, the converted file will fit the output width but be cropped at the top and bottom. If the original's aspect ratio is higher than the output target, the converted file will be resized to fit the output height but will be cropped from the left and right.
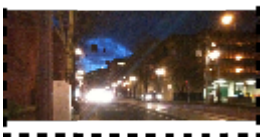
Resize examples

Here is how three images of different dimensions would be resized using the **Fit Within** and **Expand/Crop** options. All images are resized to fit a 1280x720 image size.

Original	Fit to 1280x720	Expand/Crop to 1280x720
320x240	1080x720	1280x720
1920x817	1280x545	1280x720
1307x1961	480x720	1280x720

Modifying and deleting presets

If you need to tweak a preset:
1. Choose **Edit Convert Presets** from the **Download** menu, or click **Batch Process**.
2. Choose the preset from the **Presets** drop-down menu.
3. Make changes to the settings.
4. Click the **Update** button.
5. Click **OK** (**Edit Presets**) or **Cancel** (**Batch Process**) to close the dialog.

To delete a preset:
1. Choose **Edit Convert Presets** from the **Download** menu, or click **Batch Process**.
2. Choose the preset from the **Presets** drop-down menu.
3. Click the ⁻ button.
4. Click **OK** (**Edit Presets**) or **Cancel** (**Batch Process**) to close the dialog.

Batch Process

The Batch Process command allows you to perform transformations on multiple files, then either download the results or add them to the catalog, optionally replacing the originals.

To process a group of files, select a gallery or folder in the **Organizers** panel or select items in the main window, then click **Batch Process** in the main toolbar. This will open the **Batch Process** dialog.

NOTE: Batch Process is always performed on a selection; the dialog displays the number of items you've selected for processing.

The **Batch Process** dialog is separated into three sections: **Convert**, **Rename**, and **Destination**.

The **Convert** and **Rename** sections are optional; the **Destination** section must have a selection made before a Batch Process operation can proceed.

Once you have specified settings for the Batch Process command, click the **Batch Process** button to proceed. Progress will be displayed in the Navigation toolbar at the bottom of the main window. For more specific information on the process, click on **Show Jobs** in the toolbar.

Conversion settings

To convert files from the original format to a new format, check the box labeled **Convert**, then choose conversion settings.

You can choose a Convert Preset from the **Presets** drop-down menu, or apply custom settings.

See *Convert Presets* on page 36 for information on conversion settings and creating your own presets.

Renaming options

To rename files, check the box labeled **Rename**, then set options for the new file names.

File names are constructed in three sections: a front, middle, and end. Choose an option for each section from a drop-down menu. Options for the three sections are **None**, **Filename**, **Text**, and **Number From**.
- **None** means that section is not used in the new filename.
- **Filename** uses the original filename as part of the new filename.
- **Text** allows you to add specific text (up to 31 characters) to the new filename.
- **Number From** allows you to add a number the new filename, starting at a specified value and incrementing for each new filename.
  To use a certain number of digits, include leading zeroes in your starting value.

For example, setting the three sections to **[None]**, **[Text: Portfolio-]**, and **[Number From: 001]** will result in filenames such as `Portfolio-001.jpg`, `Portfolio-002.jpg`, and so on.

Destination options

The destination indicates where the converted, renamed files should be saved.
- **Download the new files:** The files will be downloaded to your computer (or saved as a job for you to download later).
- **Place the new files in the same folder as the original files:** Each converted, renamed file will be saved where its original counterpart is. If the new file's name conflicts with an existing file, the new file's name will be modified automatically.
  Check **Add the new images to the catalog** to have the new files added to the catalog, leaving the originals in place also.
- **Replace the original files with the new files:** Each original file will be deleted from disk, the new file will be saved to the same location, and the original catalog record will be modified and associated with the new file.

PDF Contact Sheets

A Portfolio Contact Sheet is similar to its photographic counterpart in that it contains small versions of your images. For the Portfolio Contact Sheet, you can choose the number of images to appear on a page, add header and footer information, and determine which catalog fields are printed with each image.

To create a contact sheet, choose a container in the **Organizer** panel, or choose items in the main window, then choose a preset option from the **Make PDF** menu.

Portfolio Server will generate the PDF, then you can download it or add it to the **Jobs** panel to download later.

Printing Fields

The fields that are included with each image in the contact sheet are the same fields that are displayed in the current view.

If you are using ▦ **Grid view** and create a contact sheet, the fields displayed in the grid will be added to the contact sheet in the order listed. If you switch to ☰ **List view**, the fields in the list will be used for the contact sheet.

To change the fields that are displayed in your current view, click **View Fields** below the **QuickFind** tool. See *The Field Chooser* on page 11 for details.

NOTE: Contact sheets have limited space for text associated with images, so not all fields displayed in your view may appear in the contact sheet.

Contact Sheet Settings

To specify settings for the PDF presets, choose **Customize PDF** from the **Make PDF** menu. This opens the Make PDF dialog.

Change the **Page Size**, **Grid** (items per page), **Header**, and **Footer** options as necessary, then click Make PDF.

All settings except the items per page will be used for each PDF preset in the future, until you change them again using **Customize PDF**.

Jobs

The **Jobs** dialog displays the status of all server tasks for your user account, including **Upload**, **Download**, **Batch Process**, and **Automate** commands.

Click **Show Jobs** on the main toolbar to open the **Jobs** dialog. (The **Show Jobs** link will show a badge indicating the number of jobs that have been processed since the last time you opened the **Jobs** dialog.)

As the server processes a command, an entry for the command is added to the **Jobs** dialog. The entry includes a timestamp and the job status.

When a job is complete, you can click the **Download** button to download the processed files.

Completed jobs are listed in the **Jobs** dialog for 24 hours, unless you clear them prior to that time.

NOTE
If a some items in a job cannot be processed, when the job completes the **Jobs** dialog will show "# of # items was not processed." Click this entry to reveal more information about the problem. Give this information to your Portfolio Server Administrator for troubleshooting purposes.

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.

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