# Extensis™

# Portfolio™ 6

## Using Portfolio Browser
### for Macintosh® and Windows®

# Contents

# Welcome to Portfolio Browser

Portfolio Browser is a free program designed to make it easy to browse, preview and search through large collections of images and other files that have been cataloged with Portfolio 6, the award-winning digital asset management program from Extensis. Portfolio Browser is generally distributed along with an image collection (usually on CD) to make finding and viewing images easier.

This User Guide provides a brief overview of how to get the most out of your copy of Portfolio Browser.

## What is Portfolio?

Extensis Portfolio is a program designed to help individuals and workgroups keep their files organized, find them quickly when needed, and then distribute them to others via e-mail, CD, disk and the Web – with as little effort as possible. The program is designed to work with thousands, or even hundreds of thousands of files at a time, allowing both individual and large workgroups to keep things organized.

The full version of Portfolio allows you to automatically copy and rename files that you download from your digital camera, categorize files using keywords and other custom information, create slideshows, and build web pages from your images. It also includes powerful file management tools that allow you to manage your files on disk — copying, moving and deleting files from within Portfolio's visual catalogs.

For more information about the full version of Portfolio 6, go to *www.extensis.com/portfolio/*.

## So, what's Portfolio Browser?

Portfolio Browser is the free read-only version of Portfolio. With the Portfolio Browser, you can't add or remove items from a Portfolio catalog, nor can you add or remove keywords or other "metadata" associated with the items in a catalog (such as description or copyright information).

However, you do have full access to Portfolio's preview and search features. Using Portfolio, it's easy to search through a catalog of images to find the ones you're looking for.

Here's what you can do with your copy of Portfolio Browser:

• View a catalog in a variety of different customized views, changing the fonts, background color, and borders used in the catalogs.

• View detailed information stored about each file.

• Email copies of cataloged files from within Portfolio Browser.

• Search catalogs for specific items.

• Preview items without having to launch the programs that created them. Portfolio can open and preview most image formats, as well as QuickTime movies, MP3 audio files, Microsoft PowerPoint files, and many other types of documents.

• Make copies of cataloged files.

• View presentation-style slideshows of cataloged images.

• Read Digimarc watermarks that are embedded in cataloged images.

When you use Portfolio Browser, many of the fetaures offered in the full version of Portfolio are visible — but most won't be operable. You won't be able to use any of the commands that ordinarily allow you to add or remove items from a Portfolio catalog, or change any of the information about these items that are stored in the Portfolio catalog.

## Opening catalogs with Portfolio Browser

There are several ways to open a catalog using the browser:

• Double-click a catalog file (it's the one with the .fdb filename extension) from the Finder or Windows Explorer. Portfolio Browser will launch automatically.

• Choose File > Open Catalog, then choose the catalog file you want in the Open dialog box.

| File | Edit | View | Catalog | Galle |
|------|------|------|---------|-------|
| **New Catalog...** | | | | ⌘N |
| **Open Catalog...** | | | | ⌘O |
| Connect to Servers... | | | | ⌥⌘O |
| Administer Servers... | | | | |
| Close | | | | ⌘W |
| Export | | | | ▶ |
| Import Field Values... | | | | |
| **Page Setup...** | | | | ⌥⌘P |
| Print... | | | | ⌘P |
| **Quit** | | | | ⌘Q |
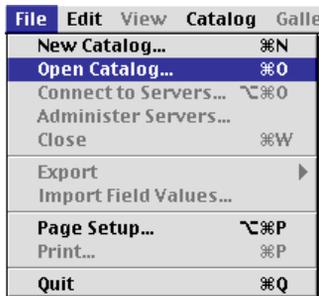
• Use the recently-opened catalogs list in Portfolio's File menu (Windows version only). Recently-opened catalogs appear in the File menu, directly under the Print command. You can choose any of the catalogs listed to open them, bypassing the standard Open command.

• If you have the Catalogs palette displayed (Window > Show Catalogs), you can click the Open button, use the Open command on the palette's fly-out menu, or select a recently-used catalog by name from the fly-out menu.

## Opening a password-protected catalog

If a catalog administrator has protected a catalog with a password, you'll be prompted to enter the password each time you try to open the catalog. Simply type in the password when prompted to access the catalog.

# Catalog viewing options

One of Portfolio Browser's strengths is its ability to display many different views of your files. You can view large or small thumbnails or simple text-based lists of your cataloged images. You can create views that display many file details, or just the basics. You can change the fonts, background colors, and other attributes of gallery windows to give your catalogs the look and feel you want.

This section shows you how to completely customize the Portfolio environment to view catalogs that are styled and tailored to your exact needs.

## Customizing the Portfolio environment

Portfolio offers an extremely flexible working environment, with many options for configuring and controlling the program's main components. Here's an explanation of each part of the main Portfolio window.

**The Toolbar**. Contains buttons for several of Portfolio's main functions, including Find, Get Info/Properties and E-mail. You can also use buttons on the toolbar to switch between Portfolio's three main views: Thumbnail, Record and List.

## The Portfolio Window

Many items in Portfolio can be displayed on floating palettes, as shown here. Use the Window menu to open the palettes, which can be docked together to save space on screen.

**QuickFind**. One of the Toolbar's most powerful features is the QuickFind field. You can search for items in a catalog based on information in any searchable field simply by typing a string of text in the QuickFind field and pressing Return.

**Status Bar**. In the Windows version of Portfolio, you can hide or show the gray Status Bar that runs along the bottom of gallery windows by activating or deactivating the Status Bar command in the View menu. On the Macintosh, there is no Status Bar displayed along the bottom edge of galleries, and no corresponding command in the View menu.

### Dockable palettes

Portfolio uses a system of dockable palettes to display and access information when you're working with Portfolio catalogs. Each of these palettes can be hidden or displayed by using the corresponding Show or Hide commands in the Window menu. The available palettes (and their corresponding functions) are:

**Catalogs**. Displays a list of all catalogs you currently have open, allowing you to easily switch between them. The palette also lets you specify which catalogs will be searched when performing a Find in multiple catalogs.

**Categories**. This palette allows you to find files based on hierarchical categories that may have been set up by the catalog administrator. Using Portfolio Browser, you can't edit or change categories.

**Galleries**. Displays a list of all the saved galleries within the currently-opened catalog. Galleries are windows containing specific records within your catalog.

**Master Keywords**. If keywords have been defined in a catalog using a master keywords list, you can retrieve keyworded items using the palette's Find command. (Even if there's no Master Keywords defined in the catalog, you can still search for keyworded items using the Find command and the QuickFind field.)
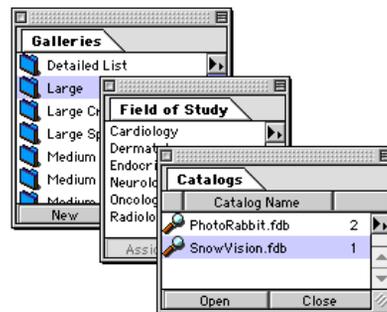


**Custom Fields**. If a Portfolio catalog contains any custom fields that contain pre-defined values (such a prices, item numbers or other information), these value lists can be opened as palettes from which you can find records that contain those values.

Any combination of these palettes can be docked together to form a single, tabbed palette by simply dropping one on top of the other, as illustrated here.
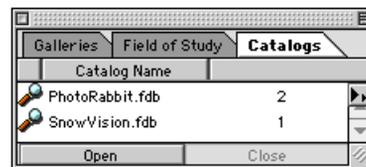
## Catalogs, Galleries and Views

In order to understand your options when customizing your view of Portfolio catalogs, it's important to understand the relationship between catalogs, galleries and views.

A *catalog* is the entire database containing all the items that have been cataloged using Portfolio. You can display all these items at once, or a subset of those items based on a search or selection. Portfolio can keep as many catalogs open as you like, limited only by your computer's memory. It can also search for content in more than one catalog at a time.

Each individual window in Portfolio is called a *gallery*. A gallery can display all of the items in your catalog — or a subset of them. Suppose you have 5,000 images in your catalog. Using

one of Portfolio's search tools, you locate all images tagged with the keyword "Ocean" and find 135 matching images. In this case, you have a catalog of 5,000 images, but a gallery of 135 images.

With Portfolio, you can open and display more than one gallery at a time. Each gallery is a separate window or view into your catalog of images. In Portfolio Browser, you cannot save a gallery, however.

Within each gallery window, you can also customize the *view*. A view is a combination of attributes — background color, fonts, font color, thumbnail size, grid spacing, and field data— that determine the style of a gallery window. All of these attributes can be changed using the Customize View command.



Two views of the same Portfolio catalog. Thumbnail size, border, font, background color and fields have been changed to create two galleries that provide different views of the same files

## Thumbnail, Record, and List Views

There are three main "types" of views available in Portfolio, each of which can be customized to create any number of unique custom views:

### Thumbnail view

Thumbnail view, the default view in Portfolio, displays your cataloged items in an adjustable grid of small thumbnail-sized previews, as shown in the figure in the left column of this page. Information about each cataloged item appears under each thumbnail.

You can switch to Thumbnail view by clicking the Thumbnail View button on the Toolbar or by pressing ⌘-T (Mac) or Control-T (Windows).

By default, only the filename for each item is shown in Thumbnail View, but you can choose to display the contents of *any* Portfolio fields

under the thumbnails. Using the Customize View command, you can also choose from four different sizes of thumbnails, and select the font, size and formatting used to display field data. See "Customizing Gallery Views" on page 7 for details on doing this customization.

### List view

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

When in List View, a panel appears at the bottom of the gallery displaying the thumbnail of the currently selected record, along with its associated keywords and description.

Switch to list view by clicking the List View button on the main Toolbar, or by pressing ⌘-L (Mac) or Ctrl-L (Win).
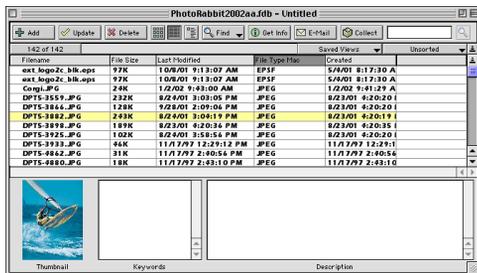


### Record view

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

The fonts, colors, thumbnail sizes, etc. of record views can also be customized, as outlined in the "Customizing Gallery Views" on the next page.

Switch to record view by clicking the Record View button on the main Toolbar, or by pressing ⌘-R (Mac) or Control-R (Win).
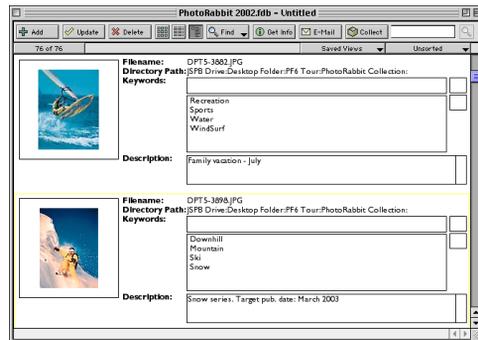


### Record view options

All three of Portfolio's main views— Thumbnail, Record and List — allow you to do some basic customization, tinkering with fonts, text sizes, and background colors, for example. But Record views have a few unique options, which you can access in View > Customize.

**Display as List.** By default, Record View displays just one record at a time. Turn this option on to view a scrolling list of Portfolio records, each record with its own set of field data displayed. This makes it easy to compare records and move from one item to the next when browsing records.

**Show field names.** Displays the name of each field used in a record view. This option is on by default, but turning it off makes record views more visually compact.

## Using Saved Views

The catalogs you open with Portfolio Browser may include saved views containing custom fonts, colors, borders and so on.

### To apply a saved view:

**1** Choose the view by name from the Saved Views menu, as shown here.
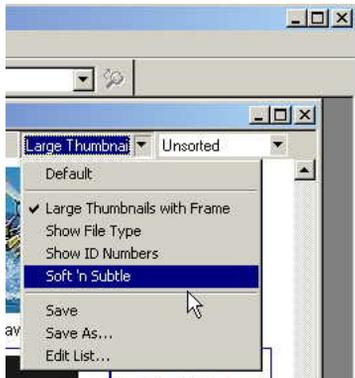


## Customizing Gallery Views

To customize thumbnail, list and record views, choose either View > Customize (⌘-D on Mac; Control-D on Windows) or Gallery > Customize View to open the Customize Gallery dialog box.

Switch between the Thumbnail, List and Record tabs to customize the three different types of views
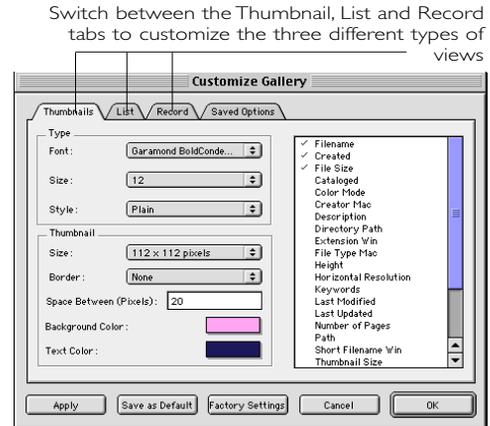


You can give each view in Portfolio a unique look by customizing the thumbnails, fonts, background colors, borders and spacing, as outlined below:

## Type

On Macintosh, use the font, size and style pop-up menus to apply formatting to all text fields displayed within the current gallery. On Windows, click the Font button, then use the Font, Font style, Size, and Effects lists in the standard Font dialog box to select the desired formatting. Don't choose the Font color in this dialog box; you set that using the Text Color drop-down menu in the Customize Gallery dialog box.

*You can choose only one font, size and style for all the field text displayed in any view.*

## Thumbnail size (available in Thumbnail and Record views only)

Choose from four different standard sizes, from 32 pixels by 32 pixels up to 256 pixels by 256 pixels. Note that Portfolio can't display thumbnails that are larger than the ones generated when files were cataloged.

## Border (available in Thumbnail and Record views only)

You can apply a graphic border, or frame, around each thumbnail to give your Portfolio catalog a unique look. To apply a border, choose one of the pre-defined borders from the Border menu.

## Background color

Use this control to select a background color for the current Portfolio gallery.

**Mac:** Click the Background color swatch to open the standard Mac color picker and select the color you want. Click OK.

**Windows:** Choose one of the pre-defined colors from the Background Color drop-down menu, or choose Other from the menu to use the standard Windows color picker to define a new color, then Click OK.

## Fields

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

Simply choose the field you want included in a view from the scrolling list of fields in the Customize Gallery dialog box.

### To show or hide fields:

In the Field list in the Customize Gallery dialog box, select the fields you want to show. A checkmark to the left of each field name indicates that a field is activated; click in the checkmark column to toggle fields on or off.

Put a checkmark next to the fields you want to display in the current view

Drag fields up or down in the list to change their order in the gallery

✓ Filename
✓ File Size
✓ Last Modified
✓ File Type Mac
✓ Volume
✓ Cataloged
✓ Color Mode
✓ Created
Creator Mac
Description
Directory Path
Extension Win
Height
Horizontal Resolution
Keywords
Last Updated
Number of Pages
Path
Short Filename Win
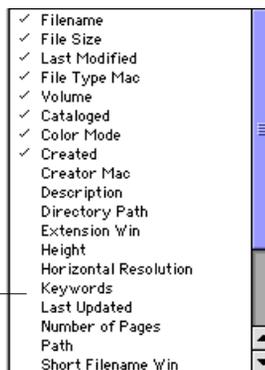
### To change the order of fields:

Drag the field names in the Field list into the order you want.

### Controlling the display of multi-line fields

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

For such fields, the number of lines to be displayed in record view is shown to the right of the field name in the Fields list in the Customize Gallery dialog box, as shown in the next illustration:
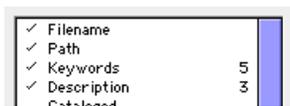
To change the number of lines displayed for each field:

**Macintosh:** For each field, click on the number to reveal a pop-up menu. Choose a number of lines to display, from 1 to 20.

**Windows:** For each field, click on the number to open the Set Number of Rows dialog box. Type the number of lines you'd like to display and click OK.

## Spacing (Thumbnail view only)

This setting controls the amount of grid spacing (in pixels) between thumbnails. The default is 5 pixels. You can use any number between 0 and 99 to create a tighter or looser grid.

## Setting a catalog to open at startup

You can select one or more Catalogs to open automatically each time you start Portfolio.

### To set up a Catalog to open on startup:

**1** With the catalog open, choose Catalog > Open on Startup.

— or —

**2** Open the Catalogs palette (Windows > Show Catalogs). Highlight the catalog in the list, then choose "Open Catalog on Startup" from the palette fly-out menu.

A checkmark appears beside the menu command indicating that this catalog will be opened automatically when Portfolio is

launched. By turning this setting on in various Portfolio catalogs, you can have multiple catalogs open automatically each time you launch Portfolio.
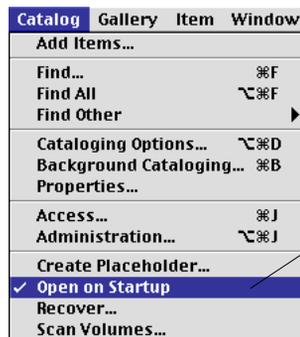


Toggle this command on (with check-mark visible) to set a catalog to open when you launch Portfolio

To stop a catalog form opening at startup, select the Open on Startup command again to remove the checkmark.

## Setting a catalog to stay open

Normally, a Portfolio catalog is automatically closed if you close all of its gallery windows. But you can force a catalog to stay open, even if all of its windows are closed. This allows you to search across multiple catalogs without needing to have any gallery windows open.

### To keep a catalog permanently open:

**1** Open the Catalogs palette (Windows > Show Catalogs).

**2** Highlight the desired catalog.

**3** From the Catalog palette fly-out menu, choose "Keep Open."

## Restoring Factory Settings

Click the Factory Settings button in the Customize Gallery dialog box at any time to revert the view settings to those that were originally set as defaults in Portfolio.

# Catalog Properties

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

• Get details such as the total number of items in your catalog, total number of keywords used, catalog size on disk, creation date, and so on.

• View and copy the path to the catalog file on disk.

• View all the keywords used in the Catalog, along with their frequency.



To do this, select the Statistics tab, then click the Calculate (Mac) or Calculate Now (Windows) button. Portfolio lists each keyword and indicates how many cataloged items have each keyword assigned.

• Save all the keywords used in a document to a text file. First click the Calculate button to generate the keywords list. Then click Export Keywords (Mac) or Save Keywords to File (Windows) to save the list as a text file.

# Working with Cataloged Files

Portfolio Browser puts many tools at your disposal that make it easy to view, organize and manage your work. This chapter will tell you how to use Portfolio to handle the following tasks:

• Preview images, audio and video clips and other documents

• Get detailed information about each file

• Edit original files (if they're available)

## Previewing & Editing Files

Portfolio can directly open most image, movie and sound files, allowing you to quickly preview cataloged items. This saves you from having to launch the programs that were used to create the items in order to view them.

*Some file types cannot be previewed. If Portfolio is unable to preview a file, a prompt appears asking if you want to view the file using the program that created it.*

**To preview an item:**

• Double-click a thumbnail in any gallery window.
•Double-click any item listed in a List View

• Select the item, then press ⌘-Option-I (Mac) or Ctrl-Alt-I (Windows)

• Double-click a thumbnail in an Item Properties window.

• Control-Click (Mac) or Right-click (Windows) a thumbnail, and choose the Preview Original command from the pop-up menu.

*By default, Portfolio previews a file when a thumbnail is double-clicked, but you can have it open the Item Properties window or edit the original file with a double-click instead by changing this behavior in the User Preferences dialog box. Choose Edit > Preferences and in the first pop-up menu set the result of a double-click to Show Preview or Show Properties or Edit Original.*
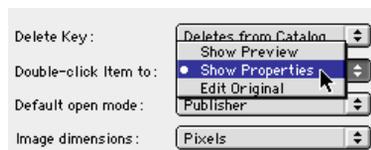


Unless items were cataloged using the Disk Previews option, Portfolio must be able to locate a file in order to preview it. If the original file that was cataloged cannot be found, Portfolio will prompt you to find the missing file. If the cataloged file was on a removable disk, such as a CD-ROM, Portfolio will prompt you to insert the missing disk.

### The Preview Window

The Preview window has buttons that allow you to zoom in, zoom out or fit the image to the size of the Preview window.

If you are previewing a multi-page document, such as a PowerPoint document or PDF file, the preview window has standard navigation buttons that allow you to move from page to page within the document.

## Previewing audio/video files

When you preview audio or video files, a standard QuickTime control bar appears in the Preview window, allowing you to play back the audio or video content. By default, playback begins automatically when you open a preview window.

If you *don't* want audio and video files to play back automatically when you preview them, choose Edit > Preferences and turn off the "Autoplay Movie and Sound files when Previewed" option in the General preferences panel.

## Getting information about your files

Portfolio stores very detailed information about every file that you catalog. This information includes data that Portfolio itself collects during cataloging, such as each file's creation date, file size, image dimensions, file type, and so on. It also includes information that may have been added to a Portfolio record, such as a description, keywords, or other data.

All of this information is available in the Get Info/Properties window. To open Item Properties, select a thumbnail and click the Get Info/Properties button on the toolbar, or press ⌘-I (Mac) or Alt-Enter (Windows). Switch between the General, Keywords, and Fields tabs to view the details for each file.
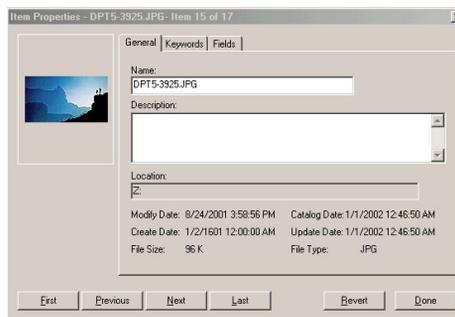


*Make Item Properties open by default when you double-click a thumbnail by going to Edit > Preferences and setting the "Double-click" item preference to "Show Properties" in the General panel.*

## Item Properties navigation buttons

The four navigation buttons at the bottom of the Item Properties window — First, Next, Previous, and Last — allow you to navigate from item to item in your catalog, so that you can get information about each item in succession. This makes it easy to access information about a series of items, without having to repeatedly open and close the Item Properties window.

Item Properties Navigation Buttons (WIndows)



Item Properties Navigation Buttons (Mac)

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

| To do this... | Press this shortcut.... |
|---|---|
| Move to next item | Windows: Control-⇨ <br> Mac: ⌘-⇨ |
| Move to previous item | Windows: Control-⇦ <br> Mac:⌘-⇦ |
| Toggle between General, Keywords and Fields tabs | Control-Tab |

*If you don't have any records selected in the current gallery window when you open Item Properties, the navigational buttons (and keyboard shortcuts) allow you to move among all the records in the gallery. If you do have certain thumbnails selected, the buttons and shortcuts allow you to navigate among the selected items only.*

# Editing and copying original files

You can jump directly from Portfolio into any other program in order to edit cataloged files — if the files are available.

**To edit a file:**

**1** In any Portfolio gallery, select the item you want to edit.

**2** Choose Item >Original > Edit, or just press ⌘-E (Mac) or Ctrl-E (Windows).

**3** Portfolio launches the program needed to edit the original file and opens the file in that program.

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

*If you frequently use Portfolio to edit original files, you might want to configure the program's preferences so that double-clicking a thumbnail opens the original for editing instead of previewing. Choose Edit > Preferences set the Double-click pop-up menu to Edit Original.*

**To copy a file:**

**1** In any Portfolio gallery, select the items you want to copy.

**2** Choose Item > Original > Copy.

**3** In the dialog box, choose a destination folder for the copied item(s), then click Choose (Mac) or OK (Windows).

**4** Portfolio copies the file(s) you selected to the folder you specified. The original files remain untouched.

# Printing your catalogs

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

Choosing the Print command from the File menu prints the contents of the active gallery window. To print thumbnails or a list of catalog items, select the items you want to include and place them into a gallery window. Select the appropriate gallery view (Thumbnail, List, Record). Customize the gallery view just the way you want it to appear, including sorting, manually reordering items, borders, background color, and so on. When the Gallery is set up just the way you want it, choose File > Print.

## Printing Options

In the Print dialog box, you'll find the following options:

**Header/Footer**: Fill in any text that you'd like to appear as a header or footer in the printed versions of your galleries.

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

**Page Numbering:** You can turn page numbering on or off, and set a starting number by typing a number in the Starting Page Number field (called "Number Pages From" on the Mac).

**Thumbnail Layout Grid**: Allows you to specify a layout grid size for printing. The default is 4x4 — a page with 16 image cells, 4 across and 4 down.



*Portfolio scales thumbnails to fit the grid you specify. With a smaller grid setting (such as 2x2) the thumbnails are likely to be stretched to fit, potentially causing pixelated images.*

**Print Using**: You can opt to have Portfolio print just the low-resolution thumbnails that you have stored in your catalog (by choosing Thumbnails in catalog) or full-resolution images (by choosing Actual images). This choice is available via a pop-up menu on the Mac, and as radio buttons on Windows.

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

## Printing Single Images

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

# Dragging cataloged images into other programs

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

Moving from Portfolio to these other applications is usually a simple drag-and-drop affair. Here are some of the ways that you can easily use Portfolio to work with images in other programs:

• Drag a thumbnail into a drag-and-drop savvy document (such as Word on the Macintosh) to place a copy of the image in that document.

• Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe Photoshop, Illustrator or Macromedia FreeHand to open the image with that program.

• Drag a thumbnail to the desktop or a folder window to move the original file to that location.

• Option-drag (Macintosh) or Control-drag (Windows) a thumbnail to the desktop or a folder window to copy the original file to the new location.
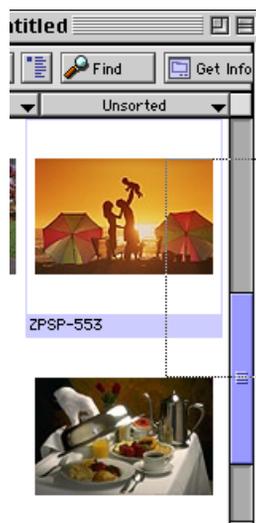


Place images in your documents by dragging thumbnails into any drag & drop aware program

• Drag a thumbnail into an e-mail message to send a copy of the image as an attachment.

• Drag a thumbnail into a QuarkXPress® document to place the image in an XPress layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box; otherwise, Portfolio will create its own new picture box for the image.

⚠️ *Dragging thumbnails from Portfolio into QuarkXPress requires the presence of QX-Drag & Drop, an XTension that must be installed in Quark's XTension folder. You can download QX-Drag & Drop from the Extensis website (www.extensis.com).*

# Finding Files with Portfolio

One of Portfolio's most important functions is to help you search for and retrieve your digital files when you need them. When you think about it, the whole point of cataloging, keywording and categorizing your images is so that ultimately you'll be able to find and use them as quickly as possible.

This section covers the various powerful tools available within Portfolio to perform lightning-fast searches that give you access to the files you need on demand. This will cover:

• Using the Toolbar's QuickFind field

• Performing advanced, multi-criteria searches

• Searching across multiple Portfolio catalogs

## QuickFind

The easiest and most accessible search tool in Portfolio 6 is the new QuickFind box, located on the right side of the Toolbar. QuickFind allows you to search for files based on the content of *any combination of fields*, without having to click a button, pull down a menu or open a Find dialog box. It's the fastest, easiest way to perform a file search.



QuickFind box in the Toolbar

**To perform a QuickFind search:**

**1** Click in the QuickFind box

**2** Type a word or phrase in the box and press Return.

By default, QuickFind searches the filename, description and keyword fields, using a "contains" search. (The creator of the catalog may have changed which fields are searched by QuickFind, however.)

**3** Matching items appear in the current Portfolio gallery.

*The text you've typed in the QuickFind box remains selected after you've pressed Return and performed a search. To do another QuickFind search, all you have to do is type another search word or phrase and press Return again.*

## Searching from palettes

The Master Keywords palette and any other custom field palettes available also provide an easy way to perform simple searches without having to open any dialog boxes.

To search from the Master Keywords Palette, locate the desired keyword on the palette, then click the Find button, or just double-click the keyword. All items with the selected keyword will be displayed in the active gallery window.

*On Windows, select any word on the Master Keywords palettte, then type the first letter of the keyword that you want to find to jump right to it. On Macintosh, type a letter in the text entry field of the palette to move the cursor to the entries starting with that letter.*

On any other palette created from a custom field, just double-click any value on the palette to find items in your catalog that contain that value (or select a value and click the Find button on the palette).

For super-fast keyword searches: Double-click a keyword on the palette

## Using the Find Command

For many Portfolio users, the simple multi-field search possible using the QuickFind box is all that is needed. However, Portfolio's sophisticated search engine can also perform complex searches using multiple criteria. Complex searches can be saved so that queries can be performed again with a minimum of effort.

Portfolio's Find command allows you to search *any* fields in any combination, with specific search parameters. Portfolio can display the results of the search in the current gallery window (completely replacing the previous contents, if any), or in a new gallery window.

There are three ways to access the Find window:

• Click the Find button  on the toolbar.

• Choose Catalog > Find.

• Press ⌘-F (Mac) or Ctrl-F (Windows).

### Finding all items

There are four ways to quickly find all the items in the current catalog:

• Choose Catalog > Find All.

• Open the Find window and click the "Find All" button.

• Open the Finds palette and click the Find All button.

• Press ⌘-Option-F (Mac) or Ctrl-Shift-F (Windows).

### Searching for specific items

**1** Open the Find window (using one of the three methods described above) and make sure you're on the Criteria tab.

**2** Select the criteria you want to use for the search by choosing a search field from the Field menu, as shown here.

See the table on pages 21-22 for a description of the attributes you can use in your search.

**3** Select a match option from the middle menu.
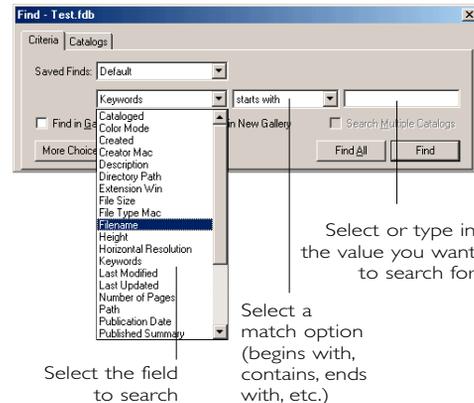


Select or type in the value you want to search for

Select a match option (begins with, contains, ends with, etc.)

Select the field to search

There are anywhere from 8 to 14 different options, depending on the field you're searching. You can look for perfect matches

(such as "equals" or "matches") or less rigid matches (such as "contains" or "does not end with").

**4** Select the other Find options.

The three checkboxes in the dialog box determine where Portfolio searches for your items and how it displays the results. The options are:

**Find in Gallery:** If you turn on this checkbox, Portfolio will search only the items that are in your current gallery, ignoring all other records in your catalog. This is useful for doing progressively narrower searches to zero in on a target file. If you want Portfolio to scan every item in your catalog for possible matches, make sure this option remains unchecked.

**Display Results in New Gallery:** Creates a new window (gallery) for the find results. If you don't turn this on, found items are displayed in the current gallery window, replacing the items that were there.

**Search Multiple Catalogs:** This option is dimmed out unless you have more than one catalog opened. If you do have two or more catalogs opened, you can turn this on to have Portfolio search all the opened catalogs for matching items. See "Searching Across Multiple Catalogs" later in this chapter for details.

**5** Click Find to start the search.

## Searching using multiple criteria (complex searches)

The Find window also allows you to perform more complex searches based on multiple criteria — matching file type, creation date *and* keyword, for example.

**To perform a complex search:**

**1** In the Find window, click the More Choices button to expand the window to include addition criteria.

You can expand the window to include up to five different lines of search criteria.
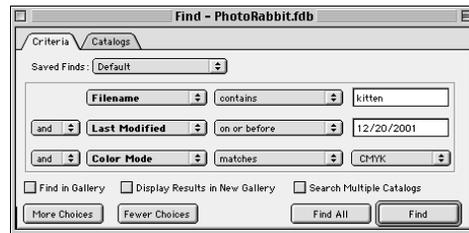


(After expanding the window, you can click the Fewer Choices button to shrink the window for simpler searches.)

**2** Configure the search criteria as described in Steps 2, 3 and 4 in "Searching for specific items" on the previous page.

**3** Set the "And/Or" menu for each search line as needed to refine your search.

**4** Click Find to start the search.

## Using Saved Finds

Creators of Portfolio catalogs can save search criteria for future use. If your catalogs contain saved finds, you can use them to quickly locate files.

Your saved finds appear in the Saved Finds pop-up menu in the Find window. Whenever you want to use a Saved Find, choose its name from the menu or select the Find from the pop-down menu using the Saved Finds button on the Toolbar, or double-click the saved find on the Finds palette.



Click on the black triangle to pull down the Saved Finds menu from the Toolbar
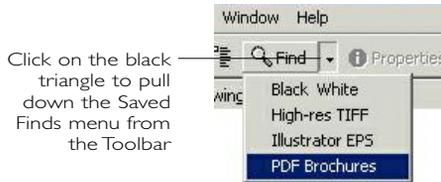
**To use a Saved Find:**

You can activate a Saved Find in several ways:

• Choose the Saved Find from the Saved Finds menu in the Find window.

• Choose the Saved Find from the pop-down menu on the Toolbar, as shown here.

• Open the Finds palette (Window > Show Finds) and double-click the name of a Saved Find on the palette.

• Select a Saved Find on the Finds palette, then either click the Find button, or choose Find from the palette's fly-out menu.

## Searching Across Multiple Catalogs

One of Portfolio's most powerful searching features is its ability to find items by searching multiple open catalogs.

*Portfolio can only search through open catalogs. If you want a search to span multiple catalogs, make sure the appropriate catalogs are open.*

**To search multiple catalogs:**

**1** Open all catalogs that you wish to include in the search.

Open catalogs will be displayed on the Catalogs palette and on the Catalogs tab of the Find window (Catalog > Find).

You do not need to include a catalog in a search just because it is open, but you cannot search through closed catalogs.

**2** On the Catalogs palette or in the Catalogs tab of the Find window, select the catalogs that you want to include in the search.

A magnifying-glass icon to the left of a catalog name indicates that the catalog will be included in the search. No icon indicates that the catalog will be excluded from the search.
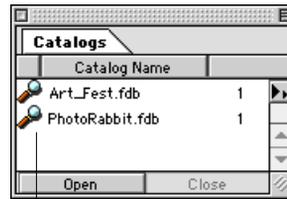


Magnifying-glass icon indicates that a catalog will be included in a multi-catalog search. Click the icon to clear it.

**3** In the Find window, enable the Search Multiple Catalogs checkbox in the Criteria panel.

**4** Configure the search parameters in the Find window (just as you would for a standard one-catalog search) and then click Find.

**5** The results of the multi-catalog search will be displayed in a new gallery window called Items Found. Because this gallery contains items from more than one catalog, it can't be customized or saved. The temporary Items Found gallery window *does* allow you to preview any of the found items, view properties and locate the original files.

## Finding Document Text

The Find Document Text command allows you to find words or phrases within the text of cataloged documents, as opposed to in the item's record, as with other Portfolio word searches.

⚠️ *Portfolio only indexes the text found in plain text files and PDF documents.*

**To find text in a cataloged document:**

**1** Choose Catalog > Find Other > Document Text.

**2** Enter the words or phrases that you wish to search for in the Words to Find box.

**3** Choose the desired search criteria from the pop-up menus. The various Find Options are identical to those in the standard Find dialog box.

**4** Click Find to start the search.

# Search Criteria Options
Available using the Find Command

| Search option... | Finds this... |
| --- | --- |
| Cataloged | The date and time that an item was first cataloged in Portfolio |
| Color Mode | Color modes: Unknown, Black & White, Grayscale, RGB, CMYK, YUV, Lab, and YCCK |
| Created | The date the original file was created |
| Extension Win | The item's three-character file extension |
| Description | The item's file description |
| File Size | The item's file size |
| Filename | The item's name |
| 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 dpi |
| Vertical Resolution | The item's vertical resolution, in dpi |
| Keywords | Any keywords assigned to the item(s) |
| Last Modified | The date the original file was last modified |
| Last Updated | The date the item was last updated in the catalog |
| Creator Mac | The four-character file creator code for the item (empty if cataloged on Windows) |
| File Type Mac | The four-character file type code for the item (empty if cataloged on Windows) |
| Zone Mac | AppleTalk Zone where item's file is located (empty if cataloged on Windows) |
| Path | The file path (location) for the item., including the filename |
| Short Filename Win | 16-bit DOS path and filename |

⚠️ *All fields are indexed for faster searching*

# Search Criteria Options (continued)
Available using the Find Command

| Search option... | Finds this... |
| --- | --- |
| Thumbnail Size | The item's thumbnail size, in pixels: 32 (icon), 64, 112, 256. (This field will be empty in catalogs converted from earlier versions of Portfolio) |
| Multipage Count | Items matching a particular page count |
| PlaceHolder | Items created as PlaceHolder Records |
| Watermarked | Items with the indicated watermark |
| WatermarkURL | Items with the indicated watermarkURL |
| Custom Fields | Any custom fields that have been created for the current catalog |
| Volume | The physical drive or disk on which the item resides |
| Directory Path | The full directory path for an item, not including the filename |

*All fields are indexed for faster searching*

## Sorting records

You can sort the contents of a Portfolio catalog by most fields — including any of the custom fields that may be present. Sorting items by filename, size, color mode, file type, or other criteria can make it easier to browse through and organize a collection of files.

*You can also sort items in your catalog into a custom order by simply dragging thumbnails into any position you want. Sorting via drag and drop isn't practical if you're trying to put a large number of files in a strict order, but it can be useful if you simply want to rearrange a smaller number of items into exactly the order you want.*

### Sorting a gallery

To sort files, use the Sort menu available in the upper right corner of the status bar that runs along the top of each gallery window (right under the main Toolbar). By default, this menu simply says "Unsorted." Choose any of the criteria in the menu to apply a sort order to the current gallery. (By default, galleries are always sorted by the order in which items were cataloged.)

After you've sorted a gallery using the Sort menu, the current sort field remains displayed in the menu, so you can see the sort order for any gallery window at a glance.

Sort menu

Unsorted

✓ Unsorted
Cataloged
Color Mode
Created
Creator Mac
Directory Path
Extension Win
File Size
File Type Mac
**Filename**
Height
Horizontal Resolution
Last Modified
Last Updated
Number of Pages
Photographer
Place Holder
Short Filename Win
Thumbnail Size
Vertical Resolution
Volume
Watermarked
Width
Zone Mac
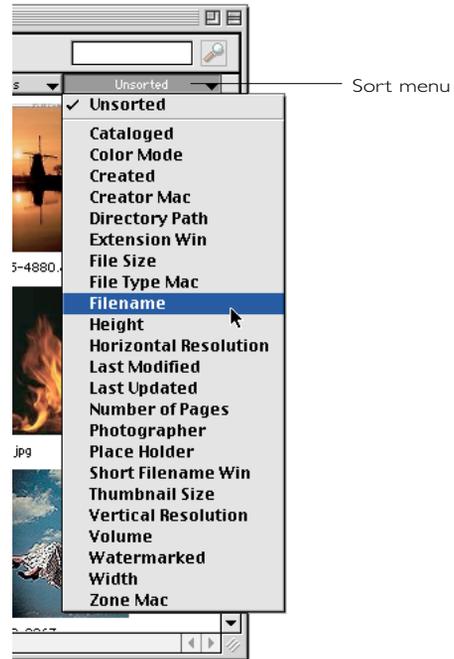
## Organizing with Galleries

Another useful tool for sorting, grouping and organizing files in Portfolio is to create multiple galleries — separate windows that allow you to display different groups of the items contained in your catalog. Each gallery can have its own style and sort order.

### Opening a New Gallery

By default, a Portfolio contains only one gallery — a single window displaying all your cataloged items. At any time, however, you can open additional galleries (windows) and select exactly which items you want displayed in them. For example, you may have a large catalog

containing 5,000 images, but would like one window that contains only the 20 images that you plan to use for a specific project. You can create a new gallery to view those 20 selected items.

*Creating multiple galleries has no effect on the number of items in your catalog; galleries are simply different windows into the same catalog.*

**To open a new gallery:**

**1** Choose Gallery > New, or press ⌘-G (Mac) or Ctrl-G (Windows).

Alternatively, if you have the Galleries palette displayed (Window > Show Galleries) you can click the New button, or choose New from the palette's fly-out menu. An empty "Untitled" gallery opens.

**2** Fill the gallery with the items you want to include in it. There are several ways to do this:

• Choose Catalog > Find All to show all your cataloged items in the new window.

• Drag thumbnails from another gallery into the new gallery.

• Use the Edit menu's Copy and Paste commands to copy and paste thumbnails from another gallery into the new gallery.

• Use the Edit menu's Cut and Paste commands to cut items from one gallery and move them into the new one. (Remember, cutting items from a gallery *doesn't* delete them from the catalog; it just removes them from the current window.)

• Perform a search for a selected set of records — such as those containing a particular keyword.

# E-mailing files

Portfolio Browser lets you e-mail images and other digital media files to other users from within a Portfolio catalog by connecting directly to your computer's e-mail program. This provides a convenient way to distribute images or send out proofs without having to manually launch your e-mail program and attach an image in order to send it.

**To e-mail a file from Portfolio:**

1 Select the item (or items) that you want to send from the current gallery window.

2 Click the E-mail button on the Toolbar.

Portfolio launches the default e-mail program on your system, creates a new e-mail message, and adds the file(s) you selected as an attachment.

3 Address the e-mail and fill in the subject and body text as usual.

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

*On a Macintosh, you can change the default e-mail program that is launched by Portfolio using the Internet control panel. Go to the E-mail tab in the control panel, and select a program from the Default E-mail Application pop-up menu at the bottom of the panel.*

# Slideshows

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

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

### To set up a Slideshow:

**1** Choose View > Slideshow Options.

**2** In the Slideshow Options dialog box, choose from Manual or Timed in the Control section. With a manual slideshow, you advance from image to image using the arrow keys, or the VCR-like onscreen slideshow controls. A timed show advances from slide to slide automatically. You can set a time delay of up to 99 seconds.

**3** Choose a display size. Actual Size displays the images at the actual size of the source file image. Full screen allows Portfolio to scale the image up to fit the display screen. In all cases, if the image is too large, it will be scaled down to fit.

**4** Set the other slideshow options.

Turn on the Continuous Loop checkbox if you're creating an auto-running slideshow and want it to loop continuously. If you want to display a field with the images in the slideshow — the filename, for example, or a caption saved in a custom field — turn on the Display Field checkbox and select the field from the pop-up menu. When you run the slideshow, the field text will appear along the bottom of the screen (in the font being used in the current gallery) under the images.

**5** Click OK when you've adjusted all the settings. You're ready to run your slideshow.

### To run a Slideshow:

1 Configure a gallery window with the items you would like to be displayed in the slideshow, and drag the items in the order in which you want them to be shown.

⚠️ *A slideshow can contain still images, 3D images, movies, and sounds. Anything that can be previewed in Portfolio can be displayed in the slideshow.*

2 Choose View > Slideshow, or press ⌘-; (Mac) or Ctrl-; (Windows).

**3** For manually run slide shows, click the arrows on the controller to move to the next or previous item. Alternatively, you can press the Page Up and Page Down keys to advance through a show. Click the first/last arrows to move to the beginning or the end of the show.

**4** Timed slideshows begin automatically, but you can stop and start the presentation and restart using the pause button on the mini-controller.

Copy
original

Other editing buttons on the
controller (such as rename)
are not active when using
Portfolio Browser
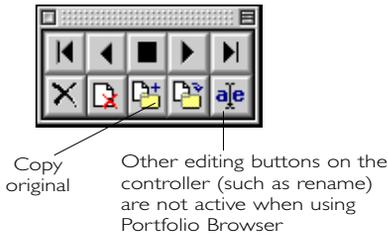
If the Slideshow is not on "Continuous Loop"
it will end when the last item has been
displayed.

**5** To stop the slideshow and return to the
gallery window, press the Stop button on the
controller, or just press Esc on your keyboard.

Pause ———  ——— Stop

*Keep in mind when using a timed delay that
images do not start loading until after the
delay period and it can take up to a few
seconds for larger images to load.*

# Using DigiMarc Watermarks

A Digimarc watermark is a special form of
embedded information that is invisibly
incorporated into an image file, generally
pertaining to copyright and licensed use of an
image. Digimarc watermarks can be detected,
displayed, and embedded directly by Portfolio.

Using the Read Digimarc ID command you can
have Portfolio examine a file for a Digimarc
watermark, then display information about the
watermark. When Portfolio displays the
Digimarc information you can click a button to

go directly to the Digimarc website to obtain
more information about the watermark's creator.

*Portfolio only detects watermarks in TIFF
and JPEG files that do not contain extra
channels.*

### Reading Digimarc watermark data

Reading a watermark is the process of extracting
and displaying the specific copyright, creator
and URL information contained in the
watermark. To read watermark data:

**1** Select the item(s) for which you want to
display watermark information.

**2** Choose Item > Read Digimarc ID.

If a single gallery item is selected when you use
the Read Digimarc ID command, Portfolio will
display the watermark information as well as
record it in the item record.

If more than one item is selected, Portfolio will
record the data in each item's record and display
a summary of the results that includes how
many source files were scanned and how many
items were found to have watermark data
embedded in them.

### Displaying the Digimarc Watermark URL:

Most watermarks include a URL linking to the
Digimarc web site, where more information
about the watermark's creator may be available.
To see this URL in Portfolio, customize your
gallery view so that the Watermark URL field is
one of the fields displayed. (See page 40 for
details about customizing views to include
specific fields.)

# Extensis™

## Extensis, Inc.

1800 SW First Avenue, Suite 500
Portland, OR 97201

Phone: (503) 274-2020
Fax: (503) 274-0530
E-mail: info@extensis.com
Internet: **http://www.extensis.com**

## Customer Service

Phone: 800-796-9798
E-mail: sales@extensis.com

## Technical Support

Web: http://www.extensis.com/support/
Phone: 503-274-7030
　　　　Monday–Friday
　　　　8am–5pm Pacific

## Extensis Europe

First Floor
Century House
The Lakes, Northampton NN4 7SJ
United Kingdom

Telephone: +44 (0)16 04 636300
Fax: +44 (0)16 04 636366
E-mail: info@extensis.co.uk