

## PORTFOLIO 4.0.2 RELEASE NOTES

Welcome to Portfolio 4.0.2. This is the latest release of the Portfolio Asset Management System and features some exciting new improvements. This document describes those changes as well as the changes made in Portfolio 4.0.2 and Portfolio 4.0.1.

For information regarding the product in general, please refer to the 'Portfolio 4.0 User Guide'. For information on getting started with Portfolio, please refer to the 'Portfolio 4.0 Quick Start Guide'.

### **WHAT'S NEW IN PORTFOLIO 4.0.2**

1. Import and Export in Export HTML
2. New Macros in Export HTML
3. Macro Blocks in Export HTML for added flexibility
4. Windows System Upgrade

#### **1. Import and Export in Export HTML**

Export HTML now offers the ability to Export and Import HTML templates as text files. This allows both the ability to move templates easily from one catalog to another and to edit the templates using a text editor with HTML features.

##### **To export HTML Templates from Portfolio:**

1. Choose File>Export>HTML.
  2. Choose a template from the list and click the 'Edit...' button.
  3. In the Edit HTML dialog, click the 'Export...' button.
  4. Specify a name for the file to be exported. See below for information regarding the format.
- NOTE: Export only imports what

##### **To import HTML Template files into Portfolio:**

1. Choose File>Export>HTML.
2. Either:
  - a. Choose a template from the list and click the 'Edit...' button.-or-
  - b. Click the 'Add...' button to add a new template.

In the Edit HTML dialog, click the 'Import...' button.

Identify the file you want to import. See below for information regarding the format.

##### **Key format components of the HTML Template files:**

The exported files are simply text files split into three blocks, representing the Header, Item, and Footer blocks from the Edit HTML dialog. Each block is delineated by start and end tags. The two tags are simply:

```
<!--Port4-Header-->
```

and

```
<!--Port4-/Header-->
```

Where 'Header' is replaced by 'Item' and 'Footer' for the other two blocks. All of the text in between the open and close tags is simply imported into the appropriate block. The three blocks must be in the order they are displayed in Edit HTML: Header, Item, and Footer.

#### **2. New Macros in Export HTML**

Export HTML now supports additional macros so you can further customize the HTML Portfolio generates. The three new tags are:

- |                           |   |
|---------------------------|---|
| <code>%PageList%</code>   | This outputs a list of hyperlinked page numbers (up to 9) so users can jump between pages without having to use the Previous and Next links.    |
| <code>%TotalPages%</code> | This inserts the number of the maximum number of pages, based on the grid size in the template and the number of items selected in the gallery. |
| <code>%TotalItems%</code> | This inserts the number of items selected in the gallery.   |

### **3. Macro Blocks in Export HTML for added flexibility**

Export also allows for markers to delineate the beginning and end of 'macro blocks'. Macro blocks define the beginning and end of a section of HTML that surrounds a Portfolio macro. If the macro evaluates to an empty value, then none of the HTML text within the macro block is NOT generated. Macro blocks are defined using HTML comment tags in the following structure:

```
<!--Port4-%macro%> and <!--/Port4-%macro%-->
```

where the first comment opens the block and the second comment closes the block. As Portfolio processes the template, each time it encounters an open comment, it evaluates the macro defined within. If the value is empty, Portfolio skips past the following HTML code until the corresponding close comment is found (or the end of the section is reached). The most common use for the macro blocks is for the 'Previous' and 'Next' macros, so that additional information does not get generated. Take the following example:

```
<!--Port4-%prev%-->  
<A HREF = "%prev%">Previous Page</A>  
<!--/Port4-%prev%-->
```

When Portfolio processes this section, if it were on the first page, the %prev% macro would evaluate to empty. Therefore, Portfolio would not generate any text until the close comment is encountered.

Another example would be to add a field name in front of a field macro, but not display the field name if there was no value for the field:

```
<!--Port4-%filename%-->  
File Name: %filename% <BR>  
<!--/Port4-%filename%-->
```

A more elaborate possibility would use the macro of one field as a logic flag for determining whether to display a completely different piece of information:

```
<!--Port4-%HasSource%-->  
<A HREF = "%path%">%filename%</A>  
<!--/Port4-%HasSource%-->
```

The preceding example would insert a hyperlink to the source file, but only if there was a value in the field titled "HasSource".

Note that it is possible to nest macro blocks, but it may result in unanticipated results if the blocks are not properly nested or if the blocks are not properly terminated with a close comment, since Portfolio simply stops generating text until it encounters the appropriate close block.

### **4. Windows System Upgrade**

The Portfolio 4.02 for Windows installer runs a Microsoft installer named 'axdist.exe'. This installer makes sure the Windows system has current versions of several system DLLs. If the system is already current, the installer will not change anything. This update is required to run the Portfolio application (as well as many other applications). The DLLs that get updated in the Windows system directory are:

- WinInet.dll
- InLoader.dll
- URLMon.dll
- HLink.dll
- HLinkPrx.dll
- OLEAut32.dll
- STDOLE2.tlb

## **WHAT'S NEW IN PORTFOLIO 4.0.1**

1. Search and Sort Optimizations
2. Additional Field Indexing
3. Advanced Catalog Creation Control
4. Bug Fixes

### **1. Search and Sort Optimizations**

A number of searches now execute more quickly. In particular, 'contains' searches on indexed fields are dramatically faster. See items #2 and #3 for related information. Sorts also execute more quickly. Additionally, calculating the catalog's keywords (in Catalog Properties - Statistics) is much faster.

## **2. Additional Field Indexing**

Almost all standard fields in the Portfolio database have been indexed. This allows for both sorting on these fields and faster 'contains' and 'ends with' searches on these fields. Note that ONLY catalogs created by Portfolio 4.01 will have these fields indexed; pre-existing catalogs will remain as they were.

## **3. Advanced Catalog Creation Control**

A new tab has been added to the Preferences dialog, titled 'Advanced'. The two options available are described below.

NOTE: The options described here ONLY affect settings for newly created catalogs (they have no effect on pre-existing catalogs).

### **INDEX NODE SIZE:**

This option controls the size of the blocks that are written into the database. In general, increasing the node size to 4K or 8K will increase the performance of Finds and Sorts on indexed fields, but may decrease the speed of cataloging slightly.

**IMPORTANT:** Portfolio 4.0 is only capable of reading catalogs created with a 1K node size. For this reason, the default has been left set at 1K, even though 4K and 8K produce superior performance results. If you are working in an environment that contains both 4.0 users and 4.0.1 users, do not change the node size. If all users in your environment have upgraded to 4.0.1, it is recommended that you create new catalogs with the node size changed to 4K or 8K to achieve better performance. Additionally, if you are using the Portfolio Server 4.0.1, you can safely change the node size for served catalogs, even if some of the clients are still using 4.0.

### **LANGUAGE SELECTOR:**

This option sets what sort tables are used for a catalog. If you are about to create a catalog for a language other than English, this pop-up can be changed to another language so that the values will sort correctly in those languages.

## **4. Bug Fixes**

The following issues have been resolved in Portfolio 4.0.1:

- Portfolio now works correctly with QuickTime 3.0 and Windows NT 4.0.
- A problem that occurred with incorrect data being placed on the Clipboard in Windows NT 4.0 when copying from the Preview window has been resolved.
- The Macintosh version now properly extracts image information from JPEGs.
- Sorting in List view the Macintosh client no longer resets the view to the left-most columns.
- Resolved a conflict between the 'Network...' option in Macintosh Navigation Services and Portfolio.
- The Windows Server now properly displays full (12-digit) IP addresses.