



PORTFOLIO™

User Guide

Version 4.0 for Macintosh® and Windows®

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Introducing Portfolio

Welcome to Extensis™ Portfolio™! Portfolio is an easy-to-use and efficient cataloging tool that allows you to organize all your creative work into on-line libraries that can be browsed. Whether your creative content is created on Macintosh or Windows, shared over a network, or accessed from remote locations using TCP/IP, Portfolio will forever change the way you view, organize, manage, select, share and use digital content.

Portfolio allows you to build visual catalogs from digital media including images, sounds, movies, and documents automatically, with detailed reference information and thumbnail images. You can catalog any media regardless of application, then effortlessly retrieve them by visually searching or by searching using keywords or other criteria. You can view your media files as thumbnails, as a list, or as individual records, and customize the views to suit your needs.

Portfolio also lets you stay in sync with other users by sharing your catalogs over networks and across platforms. You can import databases of information into your catalog, and even export catalogs or specified items as Web pages.

System and Software Requirements

To install and use Portfolio, you will need the following:

Macintosh:

- Apple® Power Macintosh® or PowerPC compatibles
- Mac OS® System 7.5.3 or later (System 7.5.5 or higher recommended)
- 6M application RAM, minimum
- 20M free hard disk space
- Open Transport 1.1 or higher only if you will be connecting to catalogs being served by Portfolio Server software

Note: If you commonly work with large files or large catalogs, you may need to increase the amount of RAM allocated to Portfolio.

Windows:

- 486/33MHz or faster PC (Pentium 133MHz or faster recommended)
- Microsoft® Windows 95®, Windows 98® or Windows NT® 4.0
- 6M application RAM, minimum
- 20M free hard disk space
- TCP/IP Services only if you will be connecting to catalogs being served by Portfolio Server software

Tip

Portfolio 4.0 for Macintosh uses the Appearance Manager and the Contextual Menu Extension to display extended keyboard shortcuts and context menus. These extensions are part of MacOS 8.0 and above and are available on the Extensis CD.

Note

Installation instructions and system requirements for the Portfolio Server application are given on page 153.

Installation

You can find instructions for quick and easy installation on the CD-ROM that is included with your product or, if you downloaded an Extensis product installer from our web site, running the installer will place an informational Read Me on your hard drive.

Registration

It is important to register your copy of Portfolio so we can provide you with the best possible service. Registered users of Portfolio are eligible for technical support, information regarding new versions and products, discounts and special offers on new products.

Your registration number is located on the back cover of this manual. You will need to enter that number to personalize your copy of Portfolio. If you choose not to personalize your copy, Portfolio will run in a demonstration mode that allows you to use the product for 30 days. You can purchase additional registration numbers in the US at 1-800-796-9798 or 1-503-274-2020. In Europe call 31 (0) 30 247 50 50.

Tip

Extensis Customer Service contact information for the US and Europe is shown on *page 2*.

Technical Support

For questions regarding Portfolio, please first refer to this manual, which describes the features and basic operations. We invite you to visit our Portfolio page on the Extensis website (www.extensis.com) for frequently asked questions and troubleshooting tips.

If you have a question which is not addressed in this manual or on the Extensis website, Technical Support is available by phone at (503) 274-7030, Monday through Friday, 8:00 a.m. to 5:00 p.m. Pacific time. When calling for technical support, please be at your computer and have the following information available: your Portfolio registration number, your computer configuration, and your question or a description of the difficulty you're experiencing—what specifically occurs and when. Take note of any displayed error numbers or messages and any other information you think may be relevant.

Tip

We can also be reached by:

Fax: (503) 274-0530

E-mail: support@extensis.com

Internet:
<http://www.extensis.com/support>

What is Portfolio?

Portfolio is a digital image cataloging application. Using Portfolio you can take images—including graphics, presentations, movies, sounds and other digital media files, even documents—that you or members of your workgroup create and put them into common catalogs. You can then view, edit, copy, and retrieve items from the catalog and transfer them to other documents, regardless of file format, location, platform, or applications that created the files.

It's quick and easy to view and retrieve images in Portfolio catalogs because the catalog stores only thumbnail images of the file (along with whatever additional information you require), rather than the full document or image. Portfolio creates pointers to the original files, so the originals are always available for copying to applications, previewing, editing, etc., while allowing the catalog itself to be fast and efficient.

There is no limit to the number of items a single catalog can contain (bearing in mind that the more items in a catalog, the more memory and time are required for common operations). To each item in a catalog, you can add:

- An unlimited number of keywords that will help you easily search for and select catalog items.
- A description (up to 32,000 characters long) that lets you store important or useful information about the file.
- Unlimited custom fields, including special field types such as Date/Time, Strings with multiple values and predefined lists, URLs, and more.

In a workgroup setting, you can allow all users full access to all catalog functions, or you can designate catalog administrators to create, maintain, and control access to catalogs for the entire workgroup. With Portfolio installed on their computers, members of your workgroup can simultaneously search, view, and use items from catalogs whose source files are located on one or many network servers, shared volumes, CD-ROMs or removable drives. Users can access the Portfolio Server remotely using TCP/IP, and you can even create Web pages of cataloged items.

What's New in Portfolio 4.0?

Portfolio version 4.0 is a major upgrade to this popular cataloging program, adding a number of exciting new features and enhancements. Minor enhancements are too numerous to mention, but the major new features and enhancements are listed below.

New to Portfolio in version 4.0 are:

- **Record View**—A vertically scrolling list of records that allows you to focus on individual catalog items by allowing the full text of all fields to be displayed along with the thumbnail.
- **Slideshow**—Allows you to display catalogs as self-running or manually controlled slide shows for review and/or presentation.
- **URL fields**—Allows you to build hyperlinks inside Portfolio records, so you can go to a location on the Internet right from the record.
- **Export to HTML**—Gives you the ability to export catalog items as Web pages, complete with JPEG thumbnails.
- **Search and Replace**—Allows you to change field values using powerful search and replace technology.
- **Borders**—Gives you the ability to add borders to thumbnail representations in Thumbnail and Record view.
- **Scripting**—Gives you the ability (using AppleScript on the Macintosh or Visual Basic on Windows) to automate tasks inside Portfolio or between Portfolio and other applications, including using Watch folders for automated cataloging.
- **Importing**—Adds the ability to map database data to Portfolio fields, including custom fields.
- **Client/Server Option**—Offers a dedicated Portfolio Server for improved performance, and to allow more users to connect simultaneously. Clients access Portfolio served catalogs using the standard Portfolio application. *Note: Portfolio Server is a separate product.*

Tip

Macintosh users: With Portfolio 4.0 you can now extract thumbnails and/or text from non-Macintosh files. See list on page 162.

Windows users: Portfolio now allows you to extract data from files. See list on page 162.

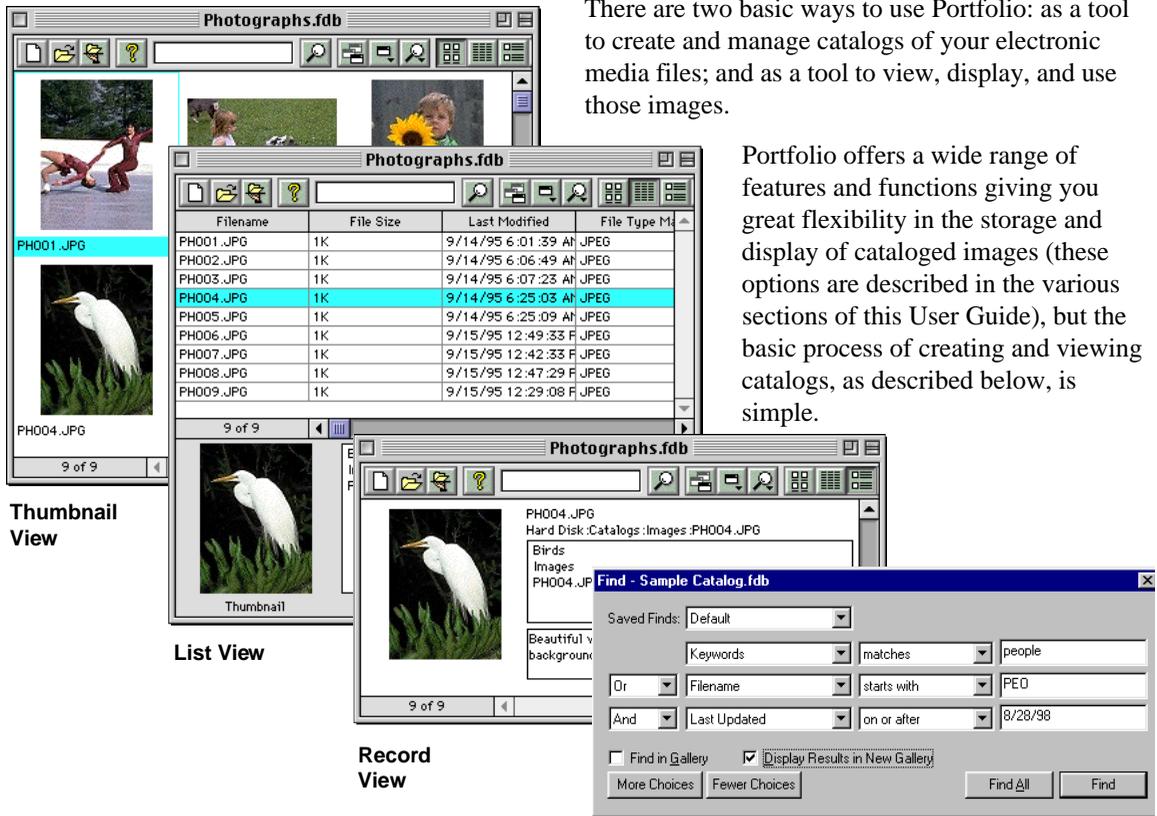
Enhancements include:

- **Translators**—Supports additional formats and improved importing. Adds the ability to view information about source files, such as the size and resolution of an image.
- **Splash Screen**—Lets you specify a custom splash screen to be presented when the catalog is opened.
- **Cataloging Options**—Reorganized and more powerful, making catalog options easier to understand and use.

Getting Started with Portfolio

There are two basic ways to use Portfolio: as a tool to create and manage catalogs of your electronic media files; and as a tool to view, display, and use those images.

Portfolio offers a wide range of features and functions giving you great flexibility in the storage and display of cataloged images (these options are described in the various sections of this User Guide), but the basic process of creating and viewing catalogs, as described below, is simple.



Simple to Complex Searching

Cataloging Steps Summarized

1. Open Portfolio, create a new catalog, then drag and drop images or folders of images into the open Gallery window.
2. When prompted for Cataloging Options, select the desired options, or simply accept common default options.
3. After Portfolio has finished adding the new images to the catalog, you can view the items in different ways using commands from the View menu, add information about the items using commands from the Item menu, or change catalog parameters using commands from the Catalog menu.
4. You can add keywords, descriptions, and custom fields, then search on these entries, or search using a number of other criteria.
5. If your catalog is shared over a network or on a Portfolio Server, you can access and use catalog images at the same time as other users.

Portfolio Basics

When you create a new Portfolio catalog or add items to an existing catalog, Portfolio gathers information about the item and creates a record for it in the Portfolio database. If the source file being cataloged includes a thumbnail and/or icon, the thumbnail and/or icon can be added to the item's record.

Portfolio does not import the item itself, but creates a link to the file that contains the cataloged item. This allows you to view, search, and retrieve cataloged items quickly, and to view and search for items even when the original file is not available (such as on a hard disk, CD, or network volume that is not mounted). The only time you need to access the original file is when you want to Preview the image, Edit the image, or copy it to another application.

If a cataloged item is moved to another location, renamed, or if other information about the original file changes, you will want to make Portfolio aware of the change by "updating" the record.

You view cataloged items in a window called the "Gallery." Portfolio provides several different Gallery views, and each of these views can be customized to meet your needs. You can add additional information to item records such as keywords, description, and Custom Fields, and then search for cataloged items using keywords, or use Portfolio's powerful Find function to locate items using any of the information fields assigned to them.

If your catalogs are being used in a workgroup and/or network environment, you can use Portfolio's Access Level options (*page 133*) to limit access to the different cataloging functions.

See pages 11 through 18 for a General Overview of Portfolio's major functions and features.

The Sample Catalog

If you have not yet cataloged your own files, or if you'd like to work with file types that you may not yet have (such as 3D images, movies, and sounds), you can use the Portfolio Sample Catalog. The Sample Catalog is located on the Extensis CD.

Note: You can copy the Sample Catalog to your hard drive and work with it there if you prefer.

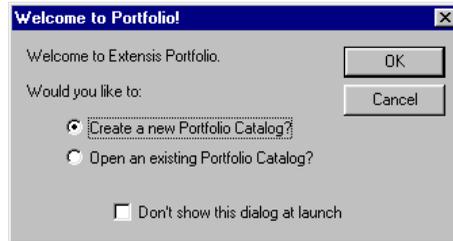
General Overview

To create and view a catalog:

1. Open the Portfolio application by double-clicking its icon. When the Welcome dialog appears, choose “Create a new Portfolio catalog,” then click “OK.”

Tip

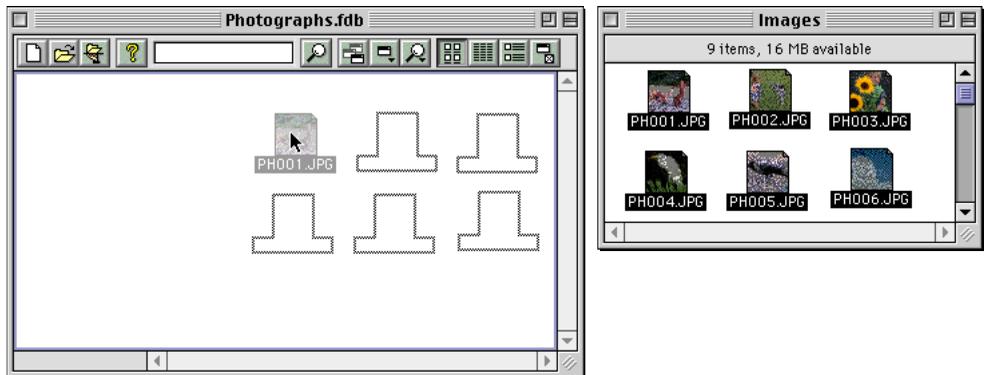
If you'd like to learn about Portfolio but don't want to create a catalog yet, you can use the Sample Catalog located on the Extensis CD. You can read through steps 1 through 5 and examine the examples, or go straight to “Gallery Views” (step 6) on page 13.



2. Choose a name and location for your new catalog.

Portfolio creates a blank catalog, then opens the catalog and displays the Gallery window.

3. Drag and drop selected files or folders into the open Gallery window.



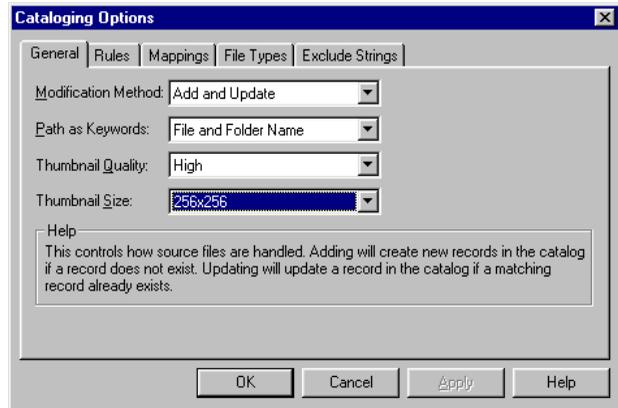
You can also add items to a catalog by choosing “Add Items” from the Catalog menu.

When you add items to a catalog, the Cataloging Options dialog is displayed, allowing you to choose a variety of options for the cataloged files. You can keep the Cataloging Options dialog from opening automatically by selecting the appropriate option under Edit > Preferences. *See page 61.*

Tip

If you have a catalog that you use frequently, you can specify it as the Default catalog and have Portfolio automatically open this catalog when you start Portfolio. Open the desired catalog, then choose “Set Default Catalog” from the File menu.

4. Select the desired settings from the Cataloging Options dialog—or simply allow Portfolio to use the typical default settings—then click “OK.”



The Cataloging Options dialog allows you to determine what information will be cataloged with the image, how the thumbnails will be created, and whether the records should be updated. You can access and set these options at any time by choosing Catalog > Cataloging Options (or press **Command+J** (Mac OS) or **Ctrl+J** (Windows)).

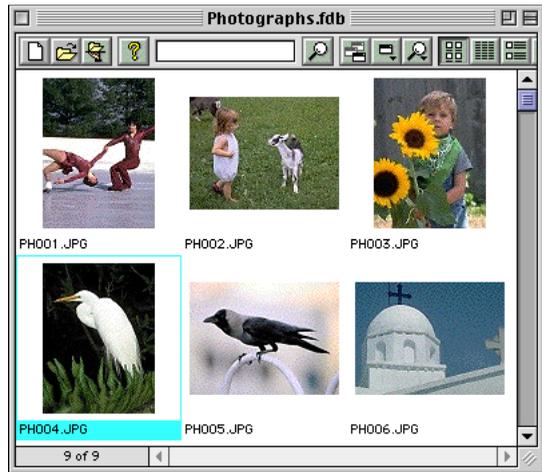
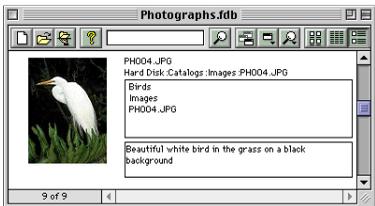
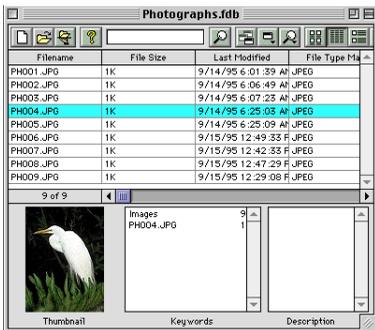
Since Portfolio creates catalogs using the image thumbnails rather than by importing the entire image, updating is required when any of the images have been relocated; updating allows Portfolio to update the pointers to the image files.

Note: Even if an image has been moved and the link to it lost, you can continue to view and work with the image in the catalog. It is a simple matter to update links to images using the Update Items option from the Catalog menu.

5. Portfolio will begin cataloging the items, keeping you posted in its progress.

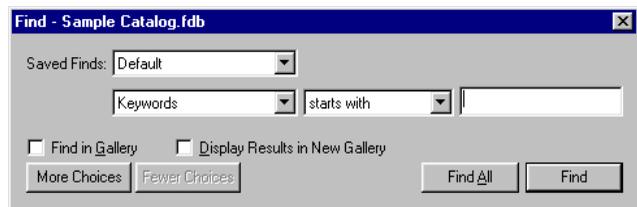


6. **Gallery Views:** When cataloging is complete, the catalog items will be displayed in the Gallery window, using whatever view was last displayed.



Portfolio provides three different catalog views: Thumbnail view, List view, and Record view. You can change views at any time by selecting a new view from the View menu, or by clicking the appropriate icon    on the Toolbar, or by using keyboard shortcuts: **Command+T, L, or R** (Mac OS) or **Ctrl+T, L, or R** (Windows).

7. **Find:** You can search for items in the catalog using a number of different options.



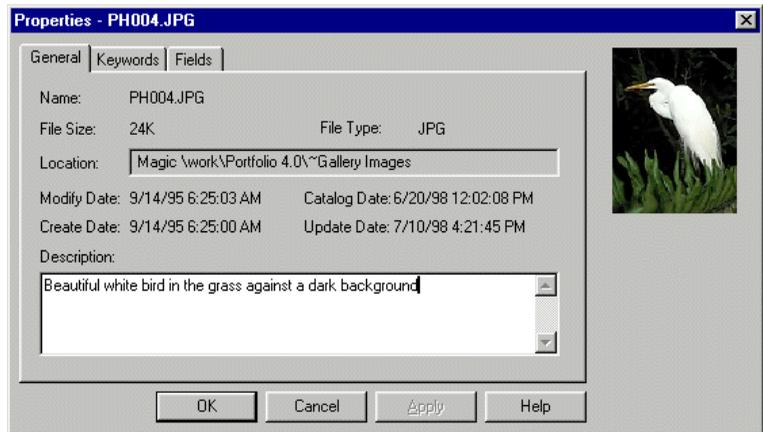
Tip

To eliminate having to recreate detailed Find parameters, save commonly searched-for parameters as a Saved Find (page 39).

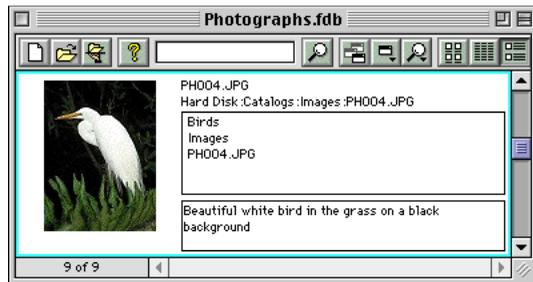
To do so, choose “Find” from the Catalog menu, or press **Command+F** (Mac OS) or **Ctrl+F** (Windows), or click the Find  icon on the button bar, or enter a keyword to search for in the search field in the button bar.

You can use multiple search parameters at one time, display the found items in a new Gallery window, then search those Gallery items using different search parameters to narrow the search even more.

8. Keywords and Descriptions: You can add additional information to the items in the catalog, such as keywords, descriptions, and Custom Fields.



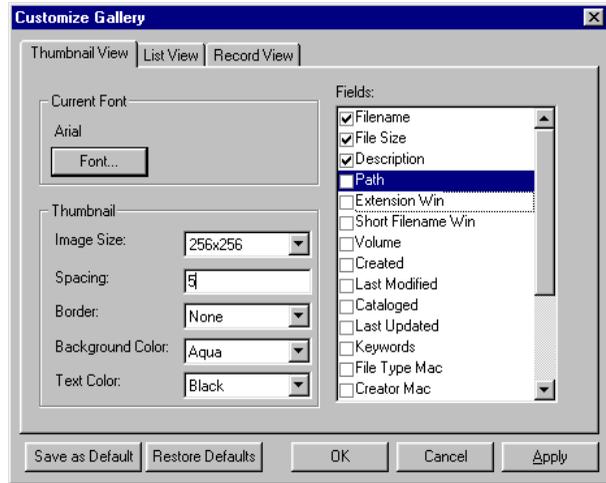
To do so, choose “Item Properties” from the Item menu. You can also edit the fields, if any, that were included with the item when it was cataloged. Use Item > Edit Keywords to assign keywords to multiple items at the same time.



When you close the Properties dialog, the changes are applied and can be viewed along with the item thumbnail in any Gallery view that has the keywords, descriptions, or Custom Fields displayed (this is set in View > Customize).

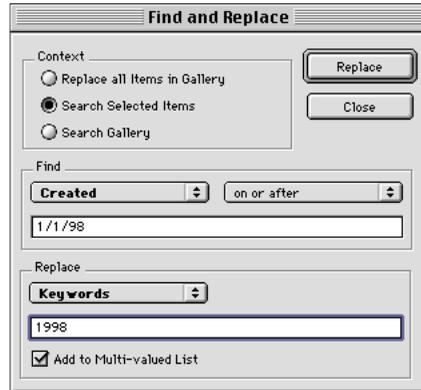
Note: You can import keywords into catalog records using Import > Field Values... from the File menu. And you can add consistency to your keywords by creating a Master Keywords list that users can choose from when assigning keywords to catalog items. Master Keywords can only be added and edited when in Administrator mode.

9. Customize Layouts: You can customize the layout of the different Gallery views.



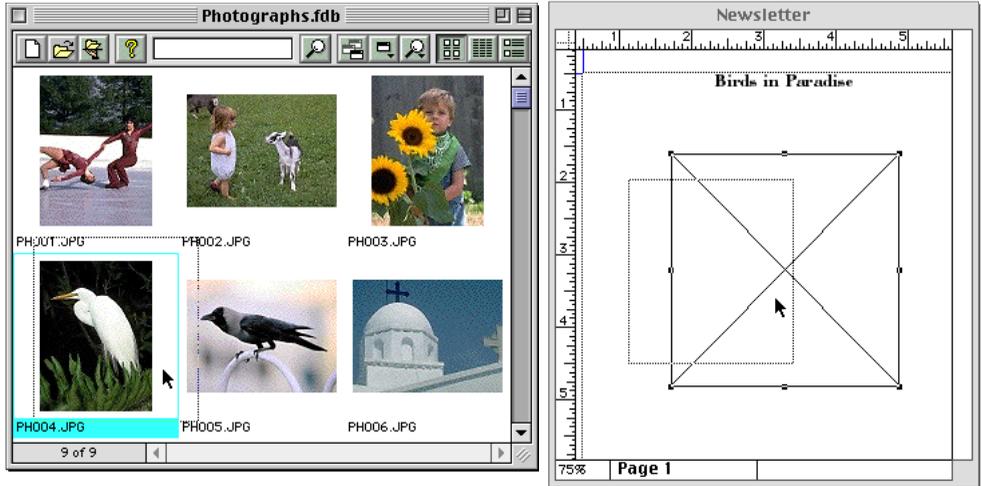
Customizing views allows you to include just the information you want to see, and determine how that information is presented. You can change the font size and style of text, add different background colors and custom borders to the thumbnails, and more. To customize a Gallery view, choose View > Customize, or press **Command+D** (Mac OS) or **Ctrl+D** (Windows).

10. Replace: You can add and replace keywords, descriptions, and Custom Field data for multiple items using the Replace function.



This allows you to select a number of items and replace key information for them all at once. Choose “Replace” from the Catalog menu, or press **Command+Option+R** (Mac OS) or **Ctrl+Shift+R** (Windows).

11. **Using Catalog Items:** You can work with catalog items in a number of different ways, such as previewing the original image, copying the image to a document, editing the image (in the parent application), rotating the thumbnail if appropriate, relocating the original image, and more.

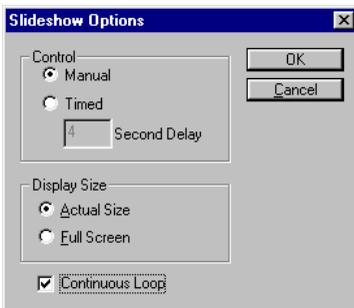


Tip for Macintosh QuarkXPress Users

To drag and drop catalog items to QuarkXPress documents you will need to install QX-Drag&Drop, a free XTension from Extensis that is included on the Extensis CD. See page 42.

To use a catalog image in a document: If the application allows drag and drop, simply drag the image to the open document window and drop it there. If the application does not allow drag and drop, open the item Preview window. Macintosh: Choose “Select All” [**Command+A**]. Windows: The item is selected automatically. Copy the image to the Clipboard [**Command+V** (Mac OS) or **Ctrl+V** (Windows)], then Paste it into the document [**Command+V** (Mac OS) or **Ctrl+V** (Windows)].

To access other item options, choose them from the Item menu.



11. **Slideshow:** You can view catalog images at their original size using the Slideshow feature.

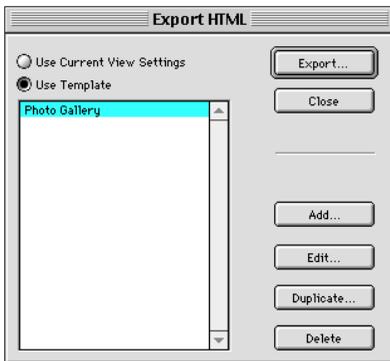
The Slideshow displays only the images in the active Gallery window, so you can limit the Slideshow to just the items you wish to show by creating a new Gallery and adding the desired images to it.

You initiate the Slideshow and access Slideshow options from the Catalog menu. You can also start your Slideshow using the Slideshow keyboard shortcut: **Command+S** (Mac OS) or **Ctrl+S** (Windows).

12. Multiple Catalogs/Multiple Galleries: You can organize and view your catalogs in whatever way works best for you, including opening multiple Catalogs and creating multiple Galleries.

For example, you might want to create different catalogs for different types of items, or you might want to put all your items in one catalog, and create different Galleries to display them. Or you might want to locate (using keywords or the “Find” command) items meeting specific criteria and display them in a new Gallery—you can even save Galleries for future viewing of only those items.

For information on the differences between Catalogs and Galleries, see *page 27*. For information on multiple Catalogs, see *page 46*; for multiple Galleries, see *page 43*.



13. Importing and Exporting:

You can import field values, such as keywords and data from other databases, and you can convert entire Cumulus catalogs (Macintosh) to Portfolio.

Export options include the ability to: export catalogs as text files for input into a database; export “pnot” data (Macintosh); and export an entire catalog or selected items as HTML Web pages (*see page 121*).

14. Multiple Drives/Image Networking

Portfolio catalogs can contain images on multiple hard disks, network servers, CD-ROM drives, removable drives, etc., whether or not these drives are mounted. When you want to work with the original image of an item located on an unmounted drive, you will be prompted to insert or mount it.

15. Multiple Users/Catalog Networking: Using standard system filesharing, you can share Portfolio Catalogs between users. For even greater multi-user capability, use Portfolio Server software.

In a network environment, a shared catalog can be on a network file server or on any user’s Macintosh or PC, as long as the Macintosh or PC is properly networked.

For better performance when sharing catalogs, and to allow more simultaneous users, Portfolio Server software is recommended. You create and access Portfolio Server catalogs using the standard Portfolio 4.0 application.



15. Catalog Security/Access Levels:



Portfolio gives you control over who can make changes to catalog information using four levels of access: Administrator, Publisher, Editor, and Reader. You can change catalog access level by choosing “Access” from the Catalog menu, or press **Command+Option+B** (Mac OS) or **Ctrl+Shift+B** (Windows).

For more information on catalog access levels, see *page 133*.

Converting a Portfolio 3.0 Catalog

To access the rich new features added to Portfolio 4.0, catalogs created in Portfolio 3.0 must be converted to version 4 catalogs. Portfolio 4.0 can open Portfolio 3.0 catalogs without conversion, in a limited browsing mode.

Opening a version 3.0 catalog with Portfolio version 4.0 in Administrator mode allows the catalog to be converted.

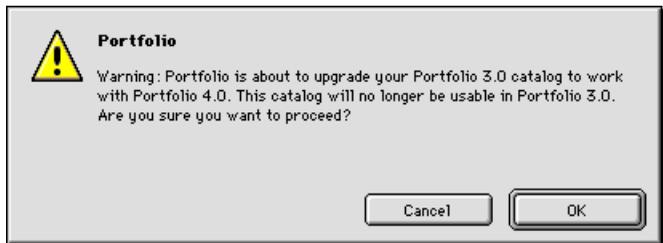
To convert a Portfolio 3.0 Catalog:

1. **Set the default access mode (Edit > Preferences) to “Administrator.”**

This will automatically open the catalog in Administrator mode. If the catalog requires a password for Administrator level access, you will be prompted to provide it. If you open the catalog in any other mode, the catalog will automatically be opened in a limited browsing mode.

Windows only: If you have just one catalog to convert, you can select Administrator mode from the Open dialog. This opens the current catalog in Administrator mode without changing the default access mode setting.

2. **Open the catalog to be updated.**



You will be asked to confirm the conversion.

3. **Click “OK.”**

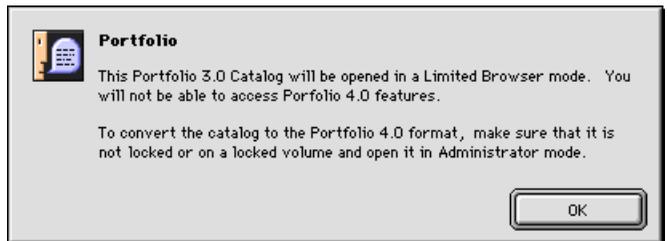
The catalog is converted and all options (Catalog options, saved Galleries, etc., are preserved.)

Choose “Cancel” to open the catalog in limited browsing mode, leaving it set as a version 3.0 catalog.

To open a Portfolio 3.0 Catalog without converting it:

- **Open the catalog in any mode *except* Administrator mode.**

You will be informed that the catalog will be opened in a limited browsing mode.



— *or* —

- **Open the catalog in Administrator mode and click “Cancel” when asked to confirm the conversion.**

The catalog will be automatically be opened in a limited browsing mode.

When the catalog is closed it will still be a Portfolio version 3.0 catalog.

Converting a Fetch 1.2/1.5 Catalog (Macintosh)

Due to the rich new features added to Portfolio 4.0, earlier catalogs, such as those created in Fetch, cannot be opened directly. To convert the catalog Portfolio will create a new version 4.0 catalog containing the records from the Fetch catalog.

To convert a Fetch 1.2 or Fetch 1.5 Catalog:

- 1. Open Portfolio 4.0.**
- 2. Open the catalog to be converted.**

You will be asked to confirm the conversion.

- 3. Click “OK.”**
- 4. Enter a name and location for the new catalog.**

The records will be converted and added to the new catalog. The original Fetch catalog is left untouched.

If errors occurred during the conversion process, a log file will be generated. This log file will be given the same name as the catalog with the extension “.log” added. The log file is a text file that lists the record number of each record which could not be converted. You can use this list to scroll the catalog (from the Fetch application) to view the records that did not convert.

You can skip records that are causing errors by pressing the Option key after specifying the name of the new catalog. This displays a dialog allowing you to indicate a record number from which to start the conversion. Choosing a record number beyond the set of problem records causes Portfolio to skip the troublesome records and start cataloging with the indicated records.

Converting Cumulus Catalogs (Macintosh)

To import an existing Cumulus catalog you will need to export the catalog database in Cumulus, then import those records into Portfolio.

To convert a Cumulus Catalog:

In Cumulus:

- 1. Select the records you want to convert to Portfolio, or choose “Select All” from the Edit menu to select the entire catalog.**
- 2. Choose File > Export Record...**
- 3. Specify a file name and location where you want to save the Export file.**

In Portfolio:

- 4. Either open an existing Portfolio 4.0 catalog, or create a new Portfolio catalog.**

The import process can import records into either a new or existing catalog.

- 5. Select Publisher access level or higher (Catalog > Access > Publisher).**
- 6. Choose File > Import > Cumulus Database...**
- 7. From the Open file dialog, locate and select the Export file you saved in step 3, then click “Open.”**
- 8. Portfolio will display a progress bar while it converts the records into its own format. Note that the original source files do not have to be available during the conversion process.**

Fields from the Cumulus database are imported as indicated in the table on the following page.

Cumulus	↔	Portfolio
Record name	↔	Filename
Notes	↔	Description
Categories	↔	Keywords
File Size	↔	File Size
File	↔	Path
Program	↔	Creator Mac
Type	↔	File Type Mac
Vertical Resolution	↔	Vertical Resolution
Horizontal Resolution	↔	Horizontal Resolution
Height	↔	Height
Width	↔	Width
Created	↔	Created
Modified	↔	Last Modified
Cataloged	↔	Cataloged
Modified (2)	↔	Last Updated
File	↔	Volume

Cumulus Fields not Imported into Portfolio:

- Color Mode (Cumulus' color modes do not match the color modes used by Portfolio)
- Status
- User Name

Additional Notes:

1. The Portfolio field Zone Mac is populated if the path points to a different AppleTalk zone.
2. The Portfolio field Extension Win is generated based on the filename (the same way Portfolio generates it when cataloging).
3. The thumbnail is imported at whatever size it was saved in Cumulus.
4. The Portfolio fields "Thumbnail Size" and "Color Mode" are left blank. To populate this information, the Portfolio records need to be updated with the Regenerate Thumbnail option enabled. This will also reset the thumbnail to a standard Portfolio size, which could result in space savings in the catalog. See *page 81* for additional information on Updating records.

Viewing and Searching Catalogs

This chapter describes how to open Portfolio catalogs, how to view catalog items, and how to search for, select, preview, and use those items in a variety of ways. You'll also learn some techniques for getting the most from Portfolio.



This chapter assumes that you have an existing catalog with which to work. If you do not, you can use the Sample Catalog located on the Extensis CD. For information on creating a catalog, refer to “Creating and Managing Catalogs” on *page 76*.

Opening Catalogs

You can open a Portfolio catalog in a number of ways, and you can have multiple catalogs open at the same time. If you need to access a shared catalog on the Portfolio Server, see *page 24*.

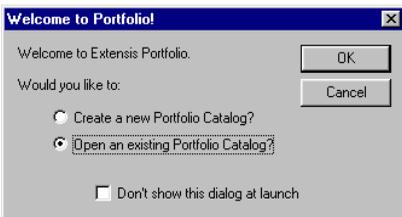
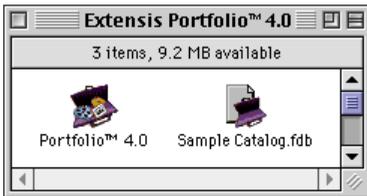
To open a Portfolio catalog:

- **Drag and drop a catalog icon onto the Portfolio application icon.**
— *or* —
- **Double-click a catalog icon.**
— *or* —
- **Double-click the Portfolio icon. When prompted to open a new or existing catalog, click “Open an existing Portfolio catalog,” then locate the catalog.**

To open Portfolio without a catalog, click “Cancel.”

— *or* —

- **With Portfolio already open, click the Open Catalog icon  on the Toolbar, or choose “Open...” from the File menu, or press Command+O (Mac OS) or Ctrl+O (Windows).**



Tip

If you have a catalog that you use frequently, you can specify it as the Default catalog and have this catalog opened automatically whenever you start Portfolio. Open the catalog that you wish to use as the default, then choose File > Set Default Catalog.

The catalog opens to the Gallery window. From the Toolbar you can access most of the major functions and options in Portfolio. You can change views, open new Catalogs, open additional Gallery windows, search the catalog, and more.

Note: If you open a protected catalog, you must enter the appropriate access password to view and modify catalog items. If the catalog won't open, another user may have it open in Administrator mode or with the Portfolio browser. See “Catalog Access Levels” on page 133.

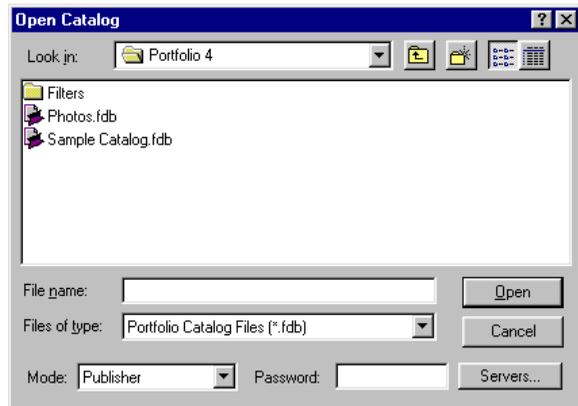
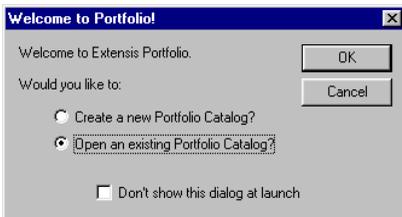
Connecting to a Server

If the catalog you want to open is on a Portfolio Server, you will need to connect to the Server and then select the appropriate catalog. When accessing a served catalog, the Portfolio 4.0 application software is referred to as the “client.”

Note: The Portfolio Server is special software that allows you to share catalogs with more simultaneous users than is possible using standard system networking. If you need to access a catalog that has been shared using conventional networking, simply access the catalog the same way you access other network files. See your System Administrator for help.

To Open a catalog on a Portfolio Server:

1. **Double-click the Portfolio icon and click “Open existing catalog.”**
 - 1a. **Click the “Connect to Server” button (Mac OS) or the “Servers...” button (Windows).**



The “Connect to Servers” dialog will be displayed.

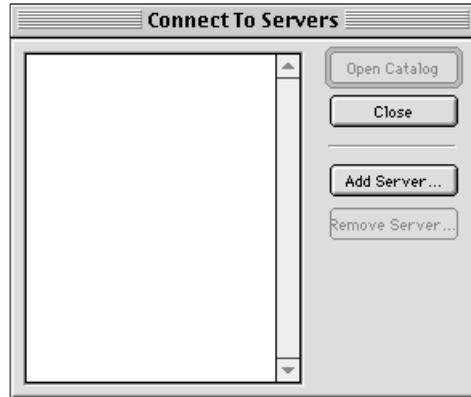
— or —

1. **With Portfolio open, choose “Connect to Server...” from the File menu, or click the “Servers”  button on the Toolbar, or press Command+Option+O (Mac OS) or Ctrl+Shift+O (Windows).**

The “Connect to Servers” dialog will be displayed.

2. Click “Add Server...”

The “Add Server” dialog will be displayed.

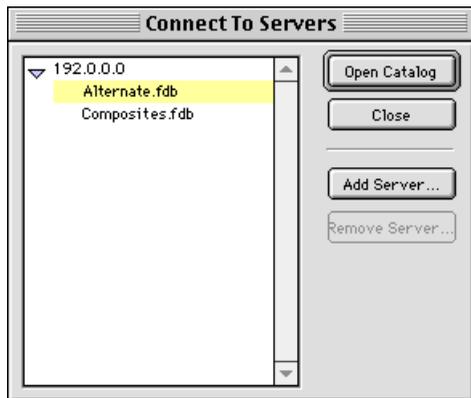


3. Enter the Name or IP address of the server you want to connect to.



Portfolio will connect to the Server and display a list of catalogs available on the Server.

4. Select the desired catalog from the list, then click “Open Catalog,” or double-click the selected catalog to open it.



Note

You cannot access an item's source file (such as Previewing it or dragging and dropping it into another application) from a served Portfolio catalog unless you have access to that source file using standard system networking.

If you do not have access to an item's source file and you attempt to perform a Portfolio function that requires it, Portfolio will ask you to locate the source file. Contact your Server Administrator about getting access to the original image.

Notes on accessing Served Catalogs from Portfolio (client):

- Windows clients must have TCP services active to access the Server. For Macintosh clients, the machine must be using Open Transport TCP; classic networking is not supported when accessing catalogs on the Portfolio Server.
- Clients cannot access a served catalog in Administrator mode. To gain Administrator access to a catalog the catalog must be closed from the Portfolio Server application and opened in the Portfolio 4.0 application (either on the server machine or via filesharing).
- The client application will attempt to open the catalog in the mode set in the user's Preferences. If the preference is set to Administrator, the client application will automatically attempt to connect to the catalog in Publisher mode.

Note: The user will be asked to enter a password if the catalog requires it.

- For more information on installing and using the client, refer to the other sections of this Portfolio User Guide.

Viewing Catalog Items in the Gallery

Tip

To hide the Toolbar, deselect “Show Toolbars” (Mac OS) or “Toolbar” (Windows) from the View menu.

When items are cataloged in Portfolio, a record is created for each one, and information about the item is stored in this record. Item information can include keywords, descriptions, and custom fields that you create, as well as the item thumbnail, source file name, creator, creation date, source file location, and other information gathered automatically when the item is cataloged. A *Catalog* is therefore a collection of records that provides information about the items contained in it.

When you view catalog items in Portfolio you are actually viewing the information contained in each item’s record, such as the item thumbnail, description, and keywords. Your window to these records is called the *Gallery*. The Gallery is the main window in Portfolio, and a Gallery window is opened automatically each time you open a catalog. There are three different Gallery views, allowing you to display and view catalog records in a variety of ways.

A Toolbar at the top of the Gallery window gives you quick and



easy access to

some of the more commonly used functions and options in Portfolio. *To learn more about the Toolbar, see page 32.*

You can specify which catalog items you want to view in the Gallery by using the Find  function (*page 34*). You can view all the catalog items at once, or locate items matching specified criteria.

You can easily switch between Gallery views using buttons on the Toolbar. The three Gallery views are: Thumbnail view , List view , and Record view .

Each view can be customized  to show as much or as little information as you require. You can even customize the way that thumbnails are displayed—changing the display size, adding background colors, and even thumbnail borders. *See page 65.*

You can create multiple Galleries  to display as many or as few cataloged items as you wish, drag and drop items between Galleries, and save Galleries by name for viewing at any time. This allows you to have a large number of items in a catalog, yet be able to limit the view to a small number of specific items.

There are a number of other things you can do with cataloged items in the Gallery window. These procedures are summarized on *page 30*, and described in detail throughout this User Guide.

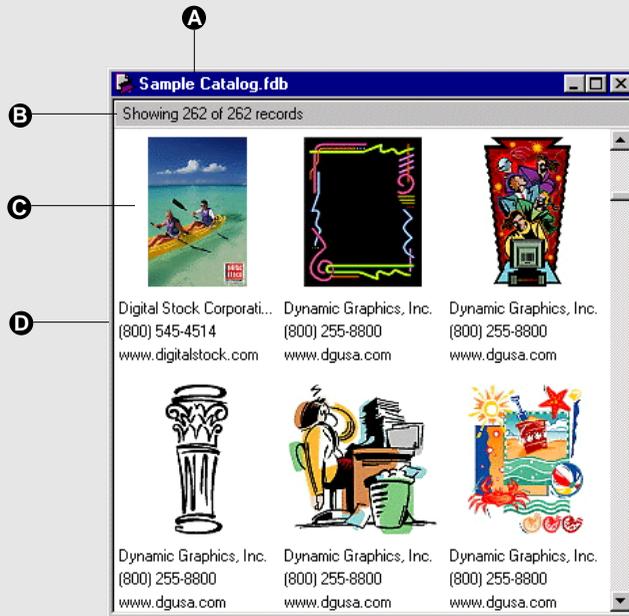
Tip

Saved Galleries do not change even when items are added to the catalog. This feature allows you to create snapshots of specific catalog items in specific views, and easily access them at any time. You must have Publisher or higher level access to save Galleries.

Gallery—Thumbnail View

Thumbnail view displays catalog items as thumbnails, with item information displayed below the thumbnail. The Toolbar is shown at the top of the Gallery window (Mac OS) or Portfolio window (Windows).

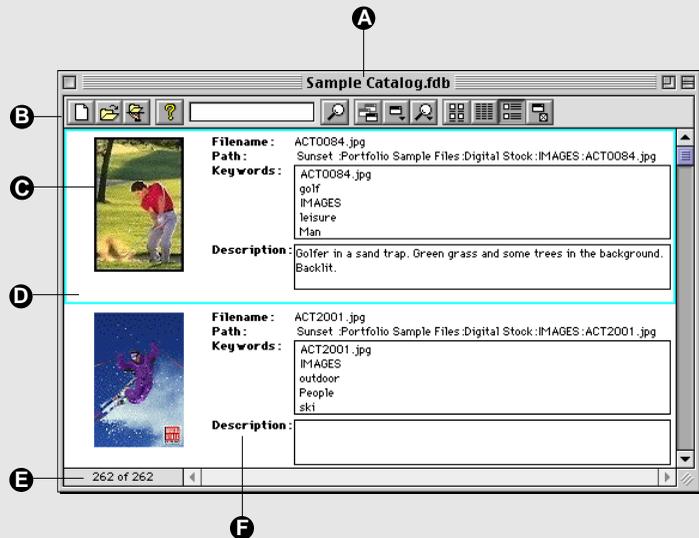
- A** Catalog Name: If more than one Gallery window is opened in a particular catalog, a number (representing the order in which the Gallery was opened) is appended to the catalog name [name.fdb -1 (Mac OS) or name.fdb:1 (Windows)].
- B** Number of Items: Shows how many items are displayed in the current Gallery window out of how many total items in the Catalog.
- C** Thumbnail: Displays a thumbnail of each item selected for display in the Gallery. You can change the size of the displayed thumbnail from the Customize dialog (ClickCustomize ).
- D** Item Fields: Lists information about the item. You determine what fields are displayed here by selecting them in the Thumbnails tab of the View > Customize dialog.



Gallery—Record View

Record view gives you the ability to see more information about a catalog item than you can easily see in any other view. You can scroll the Record list to see additional items.

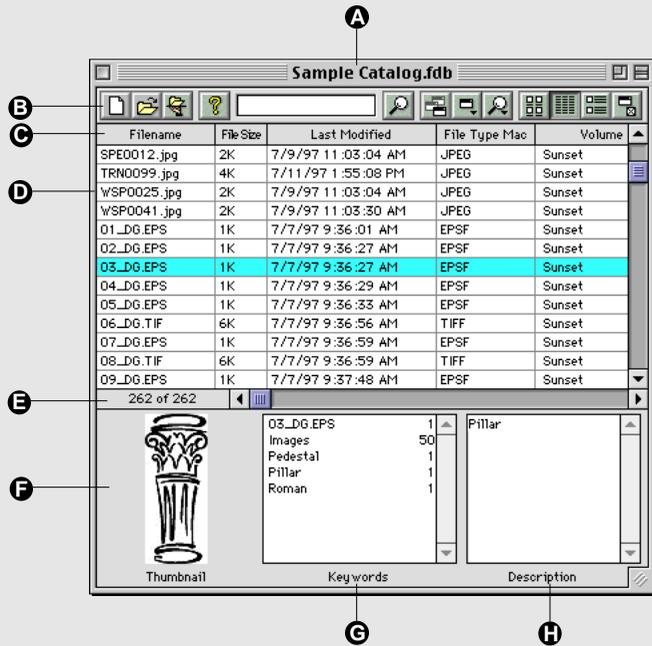
- A** Catalog Name
- B** Toolbar: Gives quick and easy access to major catalog commands.
- C** Thumbnail: Displays a thumbnail view of the selected catalog item.
- D** Record with Information Fields: Lists information about the item. You determine what information is displayed here by selecting it in the Record tab of the View >Customize dialog.
- E** Number of Items: Shows how many items are displayed in the current Gallery window out of how many total items in the Catalog.
- F** Field Name: Specify show or hide Field Names from the Record tab of the View >Customize dialog.



Gallery—List View

List view displays catalog items as a list, allowing you to search quickly by name and/or location. You can specify what information will appear in the columns; thumbnail, keywords, and description for the selected item are always displayed at the bottom of the window.

- A** Catalog Name: If more than one Gallery window is opened in a particular catalog, a number (representing the order in which the Gallery was opened) is appended to the catalog name [name.fdb -1 (Mac OS) or name.fdb:1 (Windows)].
- B** Toolbar: Gives quick and easy access to major catalog commands.
- C** Column Names: Click the name to sort the list by Indexed fields. Drag a column divider to widen or narrow a column.
- D** Item List: Displays columns of information as specified in View > Customize.
- E** Number of Items: Shows how many items are displayed in the current Gallery window out of how many total items in the Catalog.
- F** Thumbnail: Displays a thumbnail of the currently selected item.
- G** Keywords: Displays keywords for the selected item, and indicates how many other items in the catalog have the same keyword assigned. Double-click a keyword to locate all the items with that keyword and display them in the current Gallery window.
- H** Description: Displays description text for the selected item.



Working with Items in the Gallery window

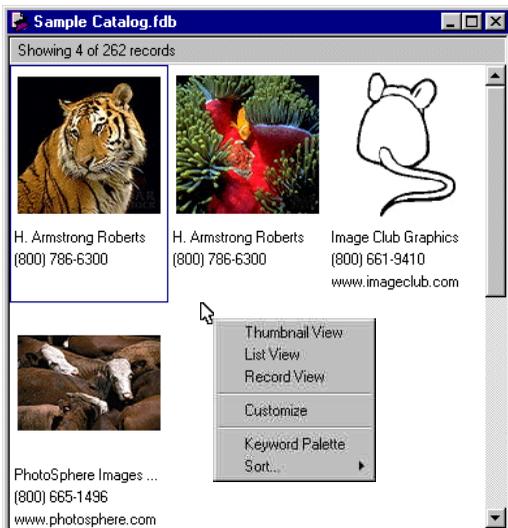
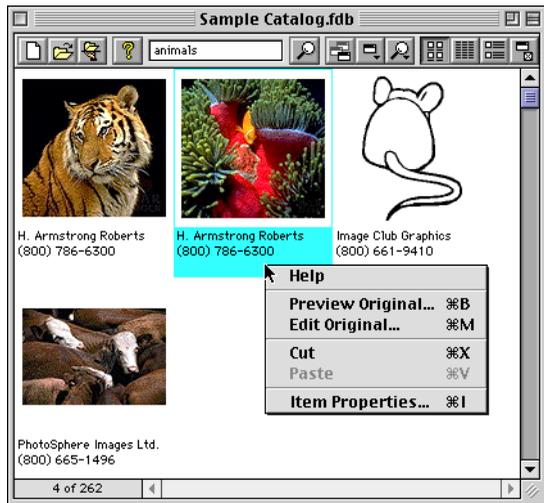
To do this...	Follow this procedure...
Sort the items in a Gallery window	Click a column heading (List View) or choose one of the “by” commands from the View menu. The default is the order in which the items were added to the catalog; catalogs can only be sorted on indexed fields. (See page 38.) Galleries revert to the order cataloged after each search.
Reorder items in a Gallery window	Drag the item(s) and drop where you want them to appear. Galleries revert to the order cataloged after each search.
Select items	Click the item row (List view) or thumbnail (Thumbnail view). To add another item to the selection, press Command (Mac OS) or Shift (Windows) while clicking the item. To select a contiguous range of items, press Shift (Mac OS) or Ctrl (Windows) while clicking on the first and last item.
Preview an item	Double-click the item’s thumbnail. Or select the item, then select “Preview Original...” from the Item menu.
Display an item’s properties	Select the item, then choose “Item Properties...” from the Item menu. Or press Command+I (Mac OS) or Alt+Enter (Windows).
Edit an item’s source file	Select the item, then choose “Edit Original” from the Item menu.
Edit an item’s keyword list	Select the item, then choose “Item Properties...” from the Item menu and edit the keywords in the Keywords tab.
Edit multiple items’keyword list	Select the items, then choose “Edit Keywords...” from the Item menu.
Add items to a Catalog*	From the Finder [Explorer], select the item(s) to be added, then drag and drop them into an open Gallery window in the desired catalog. Or choose “Add Items” from the Catalog menu (see page 79).
Copy items to another Gallery in the same Catalog	Drag the item thumbnail(s) (or rows) and drop in the other Gallery window. Or use the standard system copy and paste functions to copy items from one Gallery to another.
Copy items to a Gallery in a different Catalog*	Drag the item thumbnail(s) (or rows) and drop in the other Catalog. The item is copied to the catalog unless it already exists. Or use the standard system copy and paste functions to copy items to another catalog.
Move items to another Gallery	Select the item(s) to be moved, then use the standard system Cut and Paste functions [Command+X and Command+V (Mac OS) or Ctrl+X and Ctrl+V (Windows)] to cut to cut cataloged items from one Gallery and paste them in another. If the Gallery belongs to another Catalog, the items are copied to the Catalog.
Delete items from a Gallery	Select the item(s) to be deleted, then press the Delete key. Or use the standard system Cut function [Command+X (Mac OS) or Control+X (Windows)] to remove the item(s). This deletes items from the Gallery without deleting them from the Catalog.
Delete items from a Catalog*	Select the item(s) to be deleted, then choose “Delete Items” from the Catalog menu. From the Delete Items dialog, choose “Delete from Catalog.” Or select the item(s) and press Option+Delete (Mac OS) or Ctrl+Backspace (Windows).
Copy items to another application	Drag and drop the selected items into an open document in the receiving application. The application must be drag and drop aware. For more information see page 42.

* Requires Publisher or higher level access to the open catalog.

Contextual Menus

Portfolio displays menu commands on contextual menus for three separate features: Items (individual records), Gallery windows, and item Previews. A contextual menu is a menu that pops up when you press a key while clicking the mouse (Mac OS, if the Contextual Menu Extension is enabled) or Right-click the mouse (Windows), in the appropriate area of a window.

Item contextual menu: To access the contextual menu for an item, select the item, then **Control-click** (Mac OS) or **Right-click** (Windows).



Gallery contextual menu: To access the contextual menu for a Gallery, **Control-click** (Mac OS) or **Right-click** (Windows) anywhere in the unused area of a Gallery window (Mac OS: You can even click in the scroll bars and Toolbar)—but be sure that you do not accidentally select a cataloged item or a button when you click.

Preview contextual menu: To access the contextual menu for an item when the Preview window is active, **Control-click** (Mac OS) or **Right-click** (Windows) anywhere in the Preview window.

The Toolbar

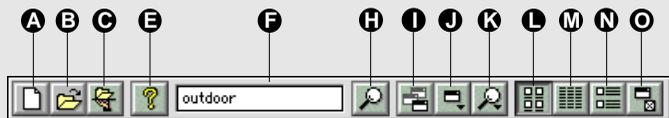
The Toolbar at the top of the Gallery window (Mac OS) or Portfolio application window (Windows) allows you to easily access many of Portfolio's commonly used features, including QuickFind, a fast way to find items in the catalog without opening the Find window. As you place the mouse over each button, the button Tool Tip is displayed, indicating the button's function.

Windows only: The Toolbar is a tear-off menu, and the last ten QuickFinds are listed on the QuickFind drop-down menu.

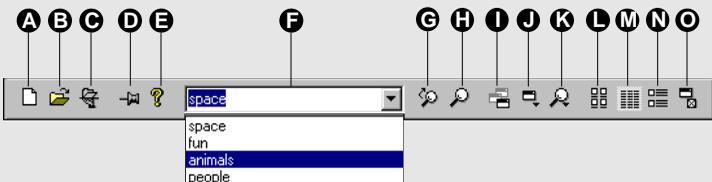
The Toolbar

- A** New Catalog: Click to open a new catalog.
- B** Open: Click to locate and open an existing catalog.
- C** Connect to Server: Click to select a Portfolio Server.
- D** Always on Top: (Windows only) Click to keep the Portfolio application window frontmost, even when another application is active.
- E** Help: Click to open the Portfolio online Help index.
- F** QuickFind Text Box: Type a keyword to match in a search. (Windows only: Choose a previously entered word from the pop-up list.) Press Return or Enter to initiate the search. QuickFind uses the "starts with" search criteria and searches only keywords; the results are displayed in the current Gallery. You can choose to open a new Gallery for QuickFind results from the Edit > Preferences dialog.
- G** QuickFind - Find Now: (Windows only) Click to perform a search using the word displayed in the QuickFind text box (see (F)).
- H** Find: Click to open the Find window.
- I** New Gallery: Click to create a new Gallery window for the active catalog.
- J** Saved Galleries Pop-up: Allows you to choose from a list of saved Galleries for the active catalog.
- K** Saved Finds Pop-up: Allows you to choose from a list of saved finds for the active catalog.

Macintosh Toolbar



Windows Toolbar



- L** Thumbnail View: Click to change to Thumbnail view.
- M** List View: Click to change to List view.
- N** Record View: Click to change to Record view.
- O** Customize Gallery: Click to open the Customize Gallery dialog, allowing you to change the type and the look of information displayed in any Gallery view.

Searching the Catalog Using Keywords

Tip

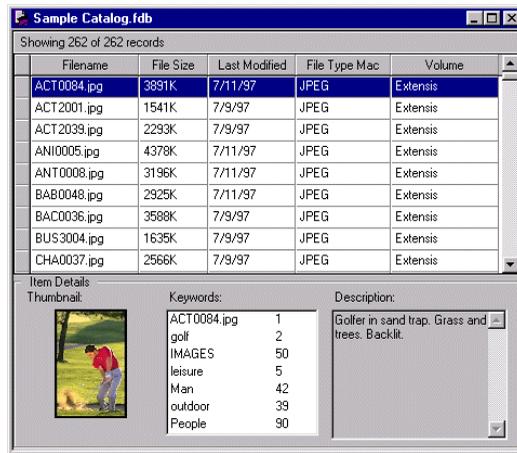
In a network environment, a catalog administrator (using catalog access levels), can control who is allowed to edit item keyword lists for each catalog. In addition, a catalog can include a preset list of Master Keywords. Master Keywords can help maintain consistent keywords among the items in a catalog, or across catalogs; see “Catalog Administration,” page 99, for information on maintaining the list of Master Keywords.

Tip

To find all the items with a particular keyword when you aren't sure what the keyword is (and no Master Keywords list exists), choose Catalog > Catalog Properties. Select the Statistics tab, then click the “Calculate” button. This builds a list of all keywords in the catalog. *Note: This can be slow in catalogs with a large number of records.* Look through the keywords listed, then double-click on a word that looks like it might fit your search. This locates all the items matching that keyword and displays them in the current Gallery window.

A *keyword* is a word or phrase that you associate with a particular item, and a good keyword list can be a valuable tool for finding the material you need in a catalog. Each catalog item can have an unlimited number of keywords associated with it.

Item keywords are available for display in every Gallery view (see “Customizing Gallery Views,” page 65) so that you can easily see which keywords are assigned to an item, and have easy access to other items with the same keyword.



The number to the right of the keyword indicates how many other items in the catalog have that keyword assigned. From the List and Record View you can have Portfolio locate and display all the items with a particular keyword by double-clicking the desired keyword in the Keywords list. All items with the selected keyword will be displayed in the active Gallery window.

You can also search for keywords using the QuickFind field on the Toolbar at the top of the Gallery (Mac OS) or Portfolio (Windows) window (see page 36).

Searching from the Master Keywords List

If you create a list of Master Keywords for your catalog (page 136) you can find multiple items with specific keyword(s) assigned to them using the Master Keywords Palette.

To open the palette, choose View > Master Keywords Palette or press **Command+K** (Mac OS) or choose View > Keywords or press **Ctrl+K** (Windows). Locate the desired keyword on the list, then click “Find” or double-click the keyword. All items with the selected keyword will be displayed in the active Gallery window.



Searching the Catalog Using Find Options

You can search for catalog items by examining the items in any of the Gallery views, or you can speed your search using Portfolio's Find function. You can search any field, including Custom fields (*page 35*) and keywords. Creating and adding keywords is discussed in detail on *pages 99 through 106*.

You will probably find that you will use different search strategies at different times. For example:

- If your catalog is small or you're looking for ideas, you might start by looking through everything the catalog contains.
- If your catalog is very large or you have a general idea of what you're looking for, you might want to look only at items related to a particular subject or concept, or of a particular file type.
- If you're in the final stages of a job, you probably know exactly what items you need.

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.

To open the Find window:



- **Click the Find button on the toolbar.**
— or —
- **Choose “Find” from the Catalog menu.**
— or —
- **Press Command+F (Mac OS) or Ctrl+F (Windows).**

Catalog	
Find...	Ctrl+F
Find All	Ctrl+'
Replace...	Ctrl+Shift+R
Add Items...	Ctrl+E
Update Items	Ctrl+U
Delete Items...	
Cataloging Options...	Ctrl+J
Catalog Properties...	Ctrl+Shift+J
Missing Files...	Ctrl+Shift+M
Administration...	Ctrl+H
Slideshow...	Ctrl+S
Slideshow Options...	Ctrl+Shift+S
Access...	Ctrl+Shift+B

To display the entire contents of a catalog:

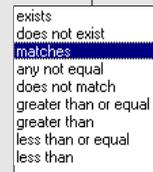
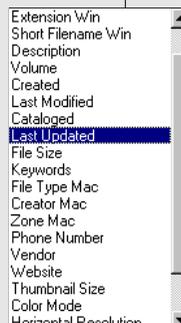
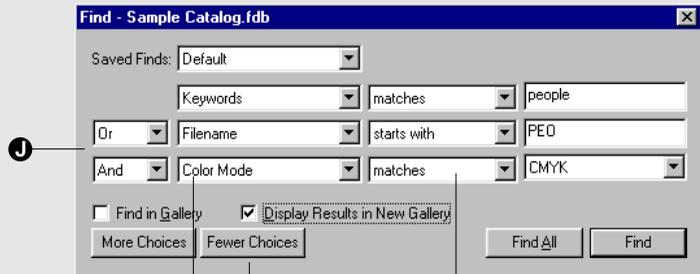
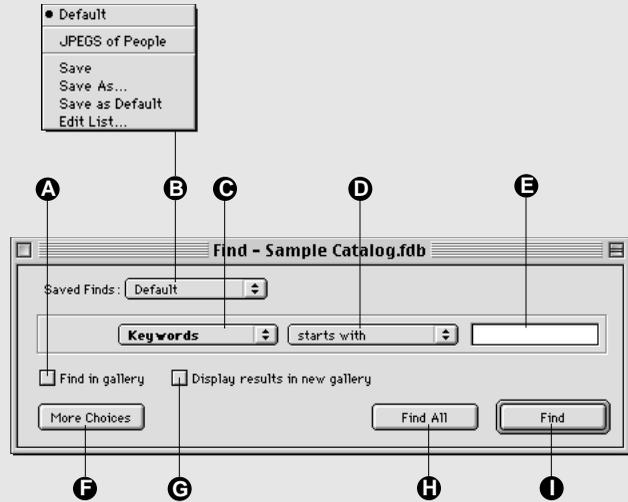
- **Choose “Find All” from the Catalog menu.**
— or —
- **Open the Find window and click the “Find All” button.**
— or —
- **Press Command+' (Mac OS) or Ctrl+' (Windows).**

The Find Window

Enter a single search description for a simple search, or choose "More Choices" to perform a complex search. To display the found items in a new Gallery window, rather than replacing the contents of the window with the found items, click "Display results in new gallery."

- A** Find in gallery: Searches the items in the current Gallery only. Allows you to perform multiple searches to narrow the field.
- B** Saved Finds Pop-up: Specify and select search criteria for later use. See "Saving Finds" on page 39.
- C** Search Field: Select the search criteria.
- D** Search Options: Select an option to focus the search criteria.
- E** Search Word or Phrase: Type a value to search for.
- F** More Choices: Click "More Choices..." to display the expanded window. Up to five criteria fields can be used.
- G** New Gallery: Click to display found items in a new Gallery window.
- H** Find All: Click to find and display all items in the Catalog.
- I** Find: Click to start the search.
- J** And/Or: Select "and" to narrow the search; "or" to broaden it.
- K** Fewer Choices: Click here to eliminate search criteria line by line and reduce the Find window.

*Notes: 1) Find searches both fields (Title and URL) of a URL Custom Field.
2) Portfolio searches for values in the Height and Width fields in pixels; convert other units of measure to pixels prior to entering values in these fields.*



To find specific items in a catalog:



1. Open the Find window.

Portfolio opens the Find window and displays the default saved Find.

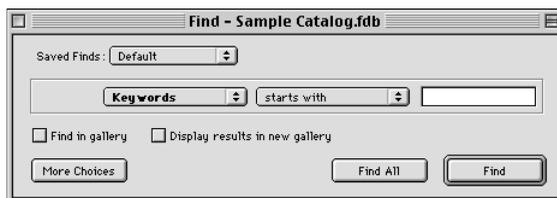
2. Use the Find window to describe what you are looking for, then click “Find.”

Portfolio lets you search for various attributes of an item, including filename, keyword, file size and so on. See the table on *page 37* for a description of the attributes you can use in your search.

Tip

Since Portfolio stores all the information about an item (including its thumbnail) you do not need to mount volumes referenced in the catalog in order to search for and view them.

When you attempt to Preview or work with the original item in any way (such as dragging and dropping it into another application), Portfolio will prompt you to mount the volume where the original item is stored, if it is not already mounted.



Found items are displayed in the Gallery window, replacing the items there. You can elect to have the found items displayed in a new Gallery window by clicking “Display results in new gallery” option before you initiate the Find.

Using QuickFind

You can quickly locate catalog items by keyword using the QuickFind field on the Toolbar.

To find items in a catalog using QuickFind:

1. Type in the keyword that you want to search for in the QuickFind text box located on the Toolbar at the top of the window.

Windows: You can select previously searched for items by selecting the word or phrase from the QuickFind combo box.

2. Press Return or Enter.

This initiates the search. Find searches both fields (Title and URL) of a URL Custom Field.

QuickFind uses the “starts with” search criteria and searches only keywords; the results are displayed in the current Gallery unless you indicate otherwise in Edit > Preferences.



Search Criteria Options

This option...	Finds...
Cataloged*	The date 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 item 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
Width	The item's width, in pixels
Horizontal Resolution	The item's horizontal resolution, in dpi
Vertical Resolution	The item's vertical resolution, in dpi
Keywords*	Any keywords assigned to items
Last Modified	The date of the item's last modification
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
Short Filename Win	16-bit DOS path and filename
Thumbnail Size	The item's thumbnail size: none (never empty in Portfolio version 4 catalogs; empty when version 3 catalogs are converted to version 4, until thumbnails are regenerated by updating the items), 32 (icon), 112, 256
Volume*	The physical drive or disk on which the item resides
<i>Custom Fields</i>	Any custom fields that have been created for the current catalog

*These fields are indexed for faster searching. For more information on indexed fields, see [page 38](#).

Streamlining Searches

Portfolio has several options that can help you search through a catalog quickly and effectively. For example, you can:

- Select the most efficient searches for Portfolio to carry out.
- Name and save frequently used searches (to save yourself from having to re-enter the criteria each time).
- Customize the default search displayed when you open the Find dialog.

Indexed Fields

Indexed fields are fields that are included in a special Portfolio look-up table, to speed searching. While indexing speeds searching, it adds to the overall size of a catalog, so not all fields are indexed. Fields that are indexed are indicated by an asterisk (*) in the table on *page 37*.

Indexed fields appear in bold in the search criteria pop-up menu (item (C) on *page 35*). Custom fields can be indexed, if you select this option when the field is created (*see pages 140 through 146*). When you search on indexed fields, choose “matches” or “starts with” from the modifier pop-up menu for the fastest searches.

Other types of searches may be somewhat slower because Portfolio must examine every entry in the catalog:

- Searching is slower when there is a large number of items that match your search criteria.
- Searching using “contains” or “ends with” is slower when the catalog is large.
- You can only search on single-value indexed fields.

You can also sort the Gallery window on any indexed field (such as Catalog order, File Name, File Type, Creation date, Custom Fields that are indexed, etc.) *See page 41*.

Date/Time Fields

Times are always assumed when searching fields of the type “Date/Time,” even if a time is not entered, and when the “Display Time” option for the field is disabled. That is, if a time value was entered into the field (either by extraction from the source file when the item was cataloged or by entering a time in the field) and then hidden by turning off “Display Time,” the time will still be noted by Portfolio when a search is requested. For example: Searching for “5/20/98” will not find a record which contains “5/20/98 3:00 pm” because the request is interpreted as “5/20/98 12:00:00.” This is true even if the time is not being displayed.

Tip

Saving Finds requires Publisher or higher level access to the open catalog. See *page 133*.

Saving Finds

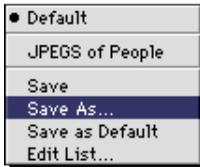
If you routinely need to locate particular types of items in a catalog, you can name and save a Find that will retrieve those items.

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

To Save a Find:

1. **Set up your search in the Find window.**
2. **Choose “Save As...” from the Saved Finds pop-up menu.**
3. **Type a name for the new definition in the “Find Name” dialog box that appears.**
4. **Click “OK” to return to the Find window.**

Portfolio stores the search definition you just created in the catalog.

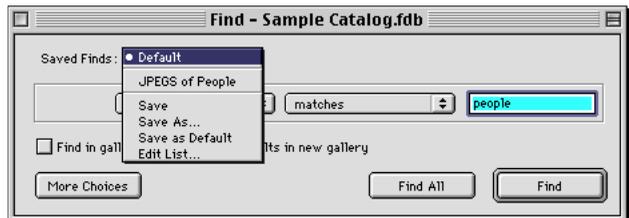


The Default Find

Each time you open the Find window (or choose “Default” from the Saved Finds pop-up menu) Portfolio populates the search fields and pop-ups with the attributes specified in the Default Saved Find. You can edit the Default Find so that it will retrieve the items you use most often.

To change the Default Find:

1. **Open the Find window and set up the search fields as you want them to be by default.**



2. **Choose “Save as Default” from the Saved Finds pop-up.**
You can change the Default Find as often as you want.

Editing Saved Finds

You can change the search parameters of your Saved Finds, rename them, duplicate, or delete them. You cannot rename or delete the Default Find.

To change the attributes of a Saved Find:

1. Choose the Find you want to change from the Saved Finds pop-up menu.
2. Modify the search criteria and choose “Save” from the Saved Finds pop-up menu.

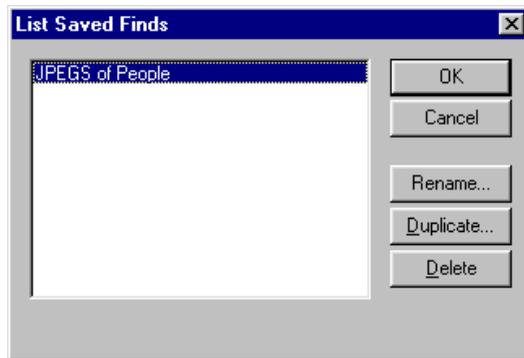
The new search criteria are applied to the Saved Find.

To Rename, Duplicate, or Delete a Saved Find:

1. Choose “Edit List...” from the Saved Finds pop-up menu in the Find window.

The “Saved Finds” dialog box appears.

2. From the list, select the Saved Find that you want to edit.



3. Click the appropriate button to Rename, Duplicate or Delete the Find.
4. Click “OK” to return to the Find window.

The changes are made to the Saved Find.

Sorting and Reordering Gallery Items

You can sort on any indexed field (*page 38*) in the catalog such as File Name, including Custom fields that you have elected to index. You use the “View by” options from the View menu to quickly sort items in the active Gallery.

To Sort the active Gallery:

1. Choose a sort “by” option from the View menu.
— or —
 1. Choose “by Other...” from the View menu, or press **Command+Option+D** (Mac OS) or **Ctrl+Shift+D** (Windows).The View by Other dialog box is displayed.
2. From the list, choose the type of sort, and choose “Ascending” or “Descending” order.



Tip

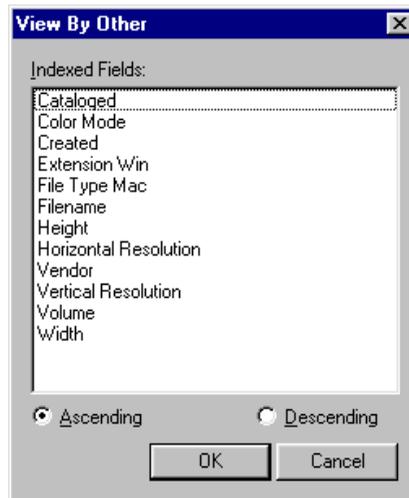
To sort indexed items in List View, click in the title bar of the indexed field column. An arrow will appear next to the name, indicating ascending or descending order.

Mac OS: Click for ascending order; Option+ click for descending order.

Windows: Click to toggle sort order.

Tip

To maintain the new order, save the items in a Saved Gallery (see *page 48*).



3. Click “OK” to sort the list and return to the Gallery window.

To manually Reorder items in the active Gallery:

1. Select the item thumbnail(s) that you wish to relocate, then drag them to the new location.

Note: Changes to the Gallery view, such as adding items to the Gallery, may undo these changes (see sidebar Tip).

Dragging and Dropping Catalog Items into Other Applications

Mac OS: On the Macintosh, you can drag items from Gallery windows into any application that supports drag and drop. Extensis provides drag and drop support for QuarkXPress with the “Extensis QX-Drag&Drop” XTension located on the Extensis CD. Run the Extensis QX-Drag&Drop Installer to add this XTension to the QuarkXPress XTensions folder.

Windows: On Windows PCs, you can drag and drop items from Gallery windows into any application that supports OLE drag-and-drop. Check your application’s documentation for information on OLE drag-and-drop support.

To place one or more Catalog items into a Drag and Drop aware application:

- 1. In the Catalog Gallery window, select the item(s) you wish to place into a drag-and-drop capable document.**
- 2. Drag and drop the item(s) into an open document in the receiving application.**

If the receiving application can accept the item’s file type, the item will be placed in the application.

— *or* —

- 1. Double-click the item to open the Item Preview window (page 52).**
- 2. Mac OS: Use the crosshair cursor to select an area to copy, or choose “Select All” from the Edit menu (Command+A) to select the entire image.**
Windows: The item is automatically selected.
- 3. Choose “Copy” from the Edit menu, or press Command+C (Mac OS) or Ctrl+C (Windows).**
- 4. Open a document in the receiving application, then choose “Paste” from the Edit menu, or press Command+V (Mac OS) or Ctrl+V (Windows).**

Note: You should not use the “Copy” command (which places items on the clipboard) to place items in other documents, unless you do so from the Item Preview window (shown on page 53) as indicated above. When you use the Copy command from a Gallery window, Portfolio expects you to be copying item records between Galleries (within or between Catalogs).

Tip

Creating new Galleries, then finding, rearranging, and deleting the items in them, and moving and copying items between Galleries, gives you great flexibility in displaying your cataloged items. You can save any number of Gallery Views (see page 48), so that you don't have to re-create Galleries of items that you view frequently. To save Galleries you must have Publisher or higher level access to the catalog.

Opening a New Gallery

As you work with your catalog you may want to create additional Galleries to display the items in it. You can add, rearrange, and delete items from Galleries without affecting the items stored in the catalog.

Note: You can have items from a “Find” request displayed in a new Gallery by clicking the “Display results in new Gallery” checkbox on the Find dialog (page 36).

To move and copy items between Galleries, and to delete items from them, see *below and page 45*. To copy or move items between Catalogs, see *page 46*.

To open a New Gallery window:

1. Choose **Window > New Gallery**, or click the **New Gallery** button  on the **Toolbar**, or press **Command+G (Mac OS)** or **Ctrl+G (Windows)**.

An empty Gallery will open in Thumbnail view.

Moving and Copying Items Between Galleries in the Same Catalog

When you move or copy items between Galleries in the same catalog, nothing about the individual item records in the database changes—you are merely creating different ways to isolate and view cataloged items.

To copy items to another Catalog, see *page 46*. For information on creating new catalogs or adding items to catalogs, see *pages 76 and 78*.

To Copy items between Galleries in the same Catalog:

1. **Open a Saved Gallery, or create a new Gallery** [choose **Window > New Gallery**, or click the **New Gallery** button  on the **Toolbar**, or press **Command+G (Mac OS)** or **Ctrl+G (Windows)**].
2. **From the originating Gallery, select the item(s) that you want to copy. To select all the items in the Gallery, choose “Select All” from the Edit menu, or press Command+A (Mac OS) or Control+A (Windows).**

3. Drag and drop the items into the target Gallery window.

— *or* —

3. With the items in the originating Gallery selected, choose “Copy” from the Edit menu [or press Command+C (Mac OS) or Ctrl+C (Windows)].
 - 3a. Activate the receiving Gallery window by clicking it, then choose “Paste” from the Edit menu [Command+V (Mac OS) or Ctrl+V (Windows)].

The items will be copied to the new Gallery.

To Move items from one Gallery to another:

1. Open a Saved Gallery, or create a new Gallery [choose Window > New Gallery, or click the New Gallery button  on the Toolbar, or press Command+G (Mac OS) or Ctrl+G (Windows)].
2. In the originating Gallery, select the items that you want to move. To select all the items in the Gallery, choose “Select All” from the Edit menu, or press Command+A (Mac OS) or Control+A (Windows).
3. Choose “Cut” from the Edit menu [Command+X (Mac OS) or Ctrl+X (Windows)].
4. Activate the receiving Gallery window by clicking it, then choose “Paste” from the Edit menu [Command+V (Mac OS) or Ctrl+V (Windows)].

The items will be removed from the originating Gallery and added to the receiving Gallery.

Note: Even if you do not Paste the items into another Gallery, they are not deleted from the Catalog (see page 45).

Tip

When you delete items from a Gallery, you can verify that the images have not been removed from the catalog by examining the numbers in the lower-left corner (Mac OS) or upper-right corner (Windows) of the Gallery window. Only the number representing how many items are currently being displayed will have changed; the number representing the total number of items in the catalog remains the same.

Deleting Items from a Gallery

When items are deleted from a Gallery, they are merely deleted from the current view, not from the catalog. This allows you to create Galleries that display just the images you want to see. For example, you can use the Delete from Gallery feature after you've searched for a set of images and found that it contains a few images that you don't want to display with the others— simply delete the ones you don't want in the Gallery.

For information on deleting items from a catalog, see *page 47*.

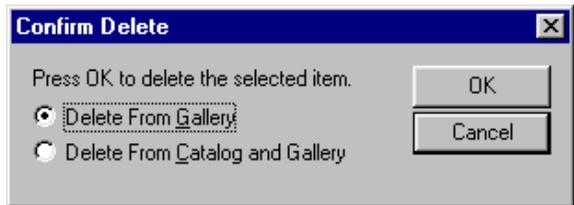
To Delete items from a Gallery:

1. **From the Gallery window, select the item(s) that you want to delete.**
2. **Press the Delete (Mac OS) or Backspace (Windows) key, or choose “Cut” from the Edit menu, or press Command+X (Mac OS) or Ctrl+X (Windows).**

The selected item(s) will be deleted from the Gallery window, but not from the catalog.

— *or* —

2. **Choose “Delete Items” from the Catalog menu.**
 - 2a. **Choose “Delete from Gallery,” then click “OK.”**



The selected item(s) will be deleted from the Gallery window, but not from the catalog.

Moving and Copying Items Between Catalogs

When you copy items between catalogs, you are actually copying the item record (all of the information associated with the item, including the thumbnail, the link to the original file, and any Custom field data—if those Custom fields have been defined in the receiving catalog).

To Copy items between Catalogs:

1. **If you have not created Custom fields, proceed to step 2.**

If you have created Custom fields in the originating catalog, open the destination catalog and add those Custom fields to it.

If you do not recreate the Custom fields in the destination catalog, Custom field information will be lost when the records are copied.

2. **In the Gallery window of the originating catalog, select the item(s) that you wish to copy.**
3. **Drag and drop the items into an open Gallery window in the receiving catalog.**

— *or* —

3. **Choose “Copy” from the Edit menu [or press Command+C (Mac OS) or Ctrl+C (Windows)].**

- 3a. **Activate the receiving Gallery window by clicking it, then choose Edit > Paste [Command+V (Mac OS) or Ctrl+V (Windows)].**

The items and all information in the records will be copied to the new Gallery.

To Move items from one Catalog to another: To move items from one catalog to another you will need to add them to the destination catalog and then delete them from the originating catalog. You could do this by making a copy of the catalog and deleting the appropriate items from each, or by copying the items to the destination catalog and then deleting them from the originating one (using this method you would have to recreate any Custom fields in the destination catalog—see above). Or you could create a new catalog and add the desired items to it, then delete the appropriate items from the old catalog (using this method you would have to re-enter any information that had been manually added to the record after it had been cataloged).

Tip

When moving and deleting catalog items, remember that you are working with references to image files, not the actual image source files. Deleting catalog items deletes the reference from the catalog, it does not delete the item file. If you accidentally delete items from a catalog, you can restore them by re-adding them to the catalog (you may have to re-enter keywords or other custom information). See *page 78*.

You can use Portfolio to delete an item's source file, see *page 58*.

Tip

If you have deleted an item's source file (and you did not do so using Portfolio's Delete Original command), you will probably also want to delete the item record from the catalog. You can do this using the Delete Items command discussed here, but if a number of items are involved it may be easier to use the Missing Items command (see page 85).



Tip

To avoid being warned each time you delete items, deselect this option in Edit > Preferences.

Deleting Items from a Catalog

Since item records contain so much information that might be difficult to replace if an item is accidentally deleted, Portfolio provides some protection from accidentally deleting items from catalogs. First, you must have Publisher or higher level access to the catalog (see page 132) to delete items. Second, you will be given an opportunity to verify that you really want to delete an item before the item is deleted (this notification can be disabled in Edit > Preferences).

To Delete items from a Catalog:

1. From a Gallery window, select the item(s) that you want to delete.
2. Choose “Delete Items” from the Catalog menu.
3. Choose “Delete from Catalog,” then click “OK.”



The selected item(s) will be deleted from the Catalog.

— or —

2. Press Option+Delete (Mac OS) or Ctrl+ Backspace (Windows).

You will be asked to verify the deletion.



3. Click “OK.”

The selected item(s) will be deleted from the Catalog.

Tip

Saving Galleries requires Publisher or higher level access to the open catalog. See *page 133*.

Saving Gallery Windows

Once a Gallery window contains the items you want, you can save the window for future use. For example, you may want to create a Gallery of items to show to prospective clients. (You can even present your Gallery as a Slideshow—see *page 74*.)

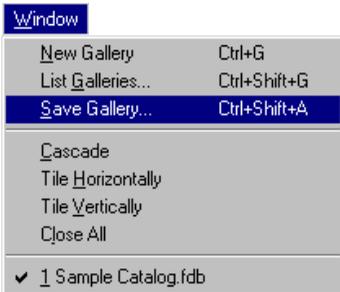
Saved Galleries are static. That is, they are not updated when you display the Gallery and then modify it in any way—such as adding, rearranging, or deleting items. The Gallery must be re-saved in order to preserve changes.

Deleted Items in Saved Galleries

If items in a Saved Gallery window are deleted from the Catalog, the items will still be displayed when the Saved Gallery is opened. The thumbnail will be indicated as “Item Deleted.” To eliminate the missing items from the Gallery, choose Refresh from the View menu [**Command+Option+U** (Mac OS) or **Ctrl+Shift+U** (Windows)] then resave the Gallery.

To Save a Gallery:

- 1. Make sure the Gallery window contains all the items you want (to also customize the view, see *page 65*).**
You can use Find to change the contents of the current Gallery window, or to create a new window (see *page 35*), or you can copy or drag and drop items from other catalogs, other Galleries, or even add new items.
- 2. Sort or manually reorder the Gallery items exactly as you want them to appear.**
- 3. Choose “Save Gallery...” from the Window menu, or press Command+Option+A (Mac OS) or Ctrl+Shift+A (Windows).**



The “Save Gallery” dialog box appears.

4. Type a name for the Gallery window and click “OK.”

The Gallery window is saved for later use.

Note: The name you specify for the Gallery does not appear at the top of the Gallery window. Instead, each Gallery for a catalog is numbered in the order in which it was created, and that number appears in the window’s title bar with the Catalog name.

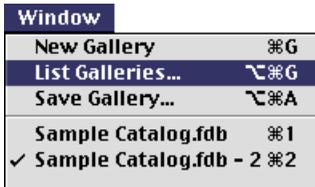
To Open a saved Gallery:



1. Choose the desired Gallery from the Saved Galleries pop-up menu in the toolbar.



— or —



1. Choose “List Galleries...” from the Window menu [Command+Option+G (Mac OS) or Ctrl+Shift+G (Windows)].

The “Saved Galleries” dialog box appears.

2. From the list, select the Gallery you want to open, then click “Open,” or double-click a name on the list.

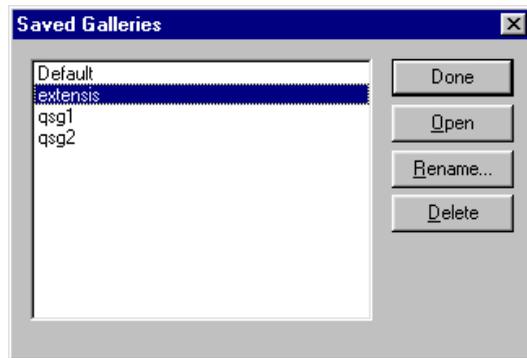
The Gallery window you selected opens.

To Edit a Saved Gallery:

1. **Choose List Galleries... from the Window menu, or press Command+Option+G (Mac OS) or Ctrl+Shift+G (Windows).**

The “Saved Galleries” dialog box appears.

2. **Select the Gallery you want to edit.**



3. **Click “Rename...” to rename the selected Gallery, or click “Delete” to remove the Saved Gallery from the catalog.**
4. **Click “Done” to close the Saved Galleries dialog box.**

Tip

If you have a catalog with many items in it, saving a Default Gallery with just a few records (or none) will allow the catalog to open more quickly. You can save other Galleries with your selected items, and open those after the catalog is open.

Default Galleries

You can set up your catalog so that a specific gallery is displayed when the catalog is initially opened. This is known as the Default Gallery.

If you do not specify a Default Gallery of items, each time the catalog is opened it will automatically create a Gallery in Thumbnail view and display all of the items in the catalog.

To create a Default Gallery:

- 1. Make sure the Gallery window contains all the items you want (to also customize the view, see *page 65*).**

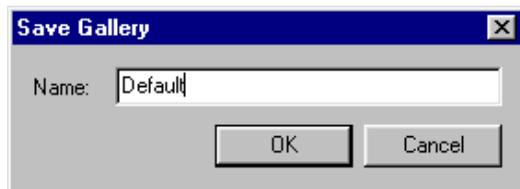
You can use Find to change the contents of the current Gallery window, or to create a new window (see *page 35*), or you can copy or drag and drop items from other catalogs, other Galleries, or even add new items.

You can also open a Saved Gallery that you created earlier and make it the Default Gallery.

- 2. Choose “Save Gallery...” from the Window menu, or press Command+Option+A (Mac OS) Ctrl+Shift+A (Windows).**

The “Save Gallery” dialog box appears.

- 3. Type “Default” in the Save Gallery dialog box, then click “OK.”**



The saved Gallery becomes the Default Gallery.

Previewing Catalog Items

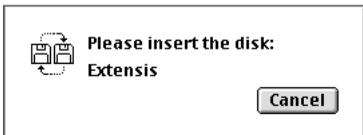
When you want to look more closely at any image or play sound or movie items, you can open a Preview window for an item in Portfolio. This saves you from having to launch the application that the item's source file was created in.

The Preview window lets you display and manipulate an item in various ways depending on the item's type (image, sound or movie), as described on *pages 53 through 55*.

Note: Some file types cannot be previewed. If Portfolio is unable to preview a file type, you are prompted to view the file in the application that created it. See "Working with an Item's Source File" later in this chapter for details.

To Preview an item:

- **Double-click its thumbnail in the Gallery window.**
— *or* —
- **Select the item, then press Command+B (Mac OS) or Ctrl+B (Windows).**
— *or* —
- **Select the item, then choose "Preview Original..." from the Item menu.**



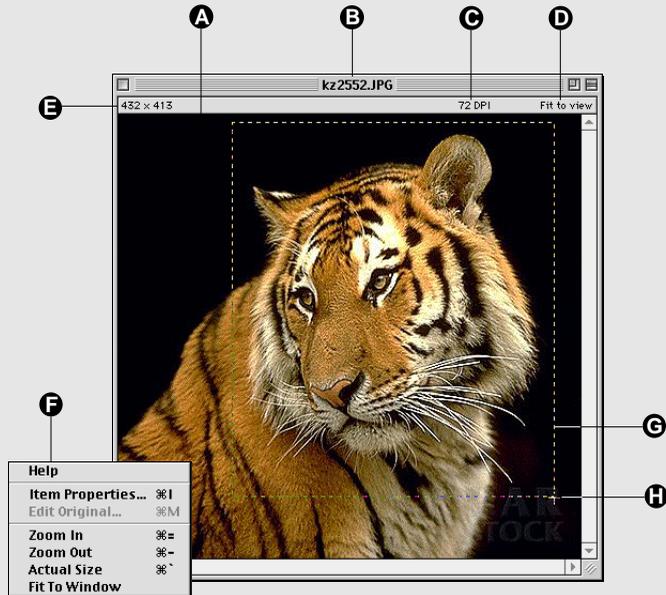
Before displaying an item in the Preview window, Portfolio must be able to locate the item's source file—that is, the original file from which the catalog entry was made. If the source file cannot be found (because the disk is not mounted or the file has been moved or renamed), Portfolio will prompt you to insert the missing disk. If the file is no longer on the requested disk, click "Cancel" and Portfolio will allow you to manually locate the missing file.

Portfolio takes advantage of Apple's QuickTime 3.0 capabilities for previewing many multimedia formats, if QuickTime 3.0 is installed. QuickTime 3.0 installers for both Mac OS and Windows are available on the Extensis CD.

Item Preview—Still Images (Pictures)

A still image initially appears in a Preview window at actual size (100% magnification) or scaled to fit a window appropriate to your screen size, depending on your preferences settings.

- A** Original Image: Scaled to 100% or to Fit to Screen.
- B** File Name: Displays the file name of the original image file.
- C** Image resolution: Displays image resolution in dpi. (Not available for all file types.)
- D** Current Magnification: Displays current magnification. Use the Zoom tools and key commands from the View menu to examine the image.
- E** Image size (not available for all file types): Size is displayed in measurement type indicated in Edit > Preferences. Options are: inches, centimeters, millimeters, pixels.
- F** Contextual Menu: Control+click (Mac OS) Right-click (Windows) in the Preview windows to access this pop-up.
- G** Partial image selection area (Mac OS): Select an area of the image to examine or copy.
- H** Preview window cursor (Mac OS): Crosshair cursor helps you select an area.



To...

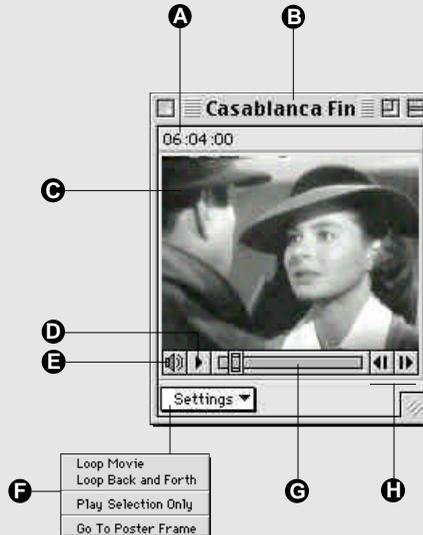
Procedure

Select a portion of the image	(Mac OS only) Drag a box around the area.
Select the whole image	Windows: Entire image is automatically selected. Mac OS: Choose Edit > Select All (Command+A).
Increase both magnification and window size	Choose Item > Zoom In [Command+"+" (Mac OS) or Ctrl+"+" (Windows)]
Decrease both magnification and window size	Choose Item > Zoom Out [Command+"-" (Mac OS) or Ctrl+"-" (Windows)]
Return image to actual size (100%) and adjust window size to fit	Choose Item > Actual Size [Command+' (Mac OS) or Alt+' (Windows)].
Edit the image's source file	Select the item, then choose Item > Edit Original...
Create a copy of the image file	Choose "Copy Original..." from the Item menu.
Copy the image to the Clipboard	Select an area to copy, or choose Edit > Select All (Command-A [Ctrl+A]), then choose Edit > Copy (Command-C [Ctrl+C]).
View the item's properties	Choose Item > Item Properties... [Command+I (Mac OS) or Alt+Enter (Windows)]

Item Preview—Movies

A movie item appears in the Preview window at its actual size with a standard QuickTime control bar that lets you start, stop, and step through the movie; select frames; and control the volume. You cannot resize a movie preview.

- A** Duration: Displays movie duration.
- B** File Name: Movie file name.
- C** Movie window: Displays the movie.
- D** Play/Stop button: Press to start or stop the movie.
- E** Volume control (if movie has sound): Increase or decrease volume.
- F** Options menu: Select Looping and playback options.
- G** Control bar: Shows movie progression. Drag to start movie at specified location.
- H** Step buttons: Allows you to step through the movie frame by frame.



To...

Procedure

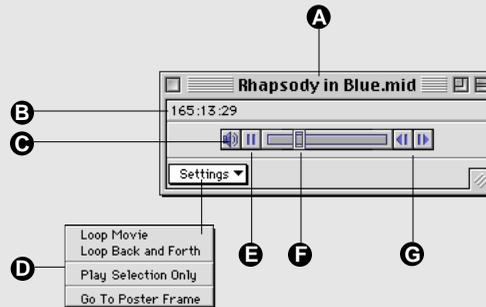
Select part of the movie	Press Shift and drag the control bar (selected frames appear highlighted).
Play or pause the movie	Click the play button or press the spacebar. You can also double-click the movie to play and click it to pause.
Step forward or backward one frame	Click the forward or backward step button.
Increase or decrease volume	Click the volume control and adjust the slider.
Edit the movie's source file	Choose "Edit Original" from the Item menu.
Create a copy of the movie file	Choose "Copy Original..." from the Item menu.
View the movie's properties	Choose "Item Properties..." from the Item menu.

Item Preview—Sounds

A sound item in the Preview window appears and works much the same as a movie item, except that there is no visual component. The control bar lets you start, stop and step through a sound item; select part of the sound item; and control the volume.

- A** File Name: Sound file name.
- B** Duration: Displays sound duration.
- C** Volume control: Increase or decrease volume.
- D** Options menu: Select Looping and playback options.
- E** Play/Stop: Press to start or stop the movie.
- F** Control bar: Shows sound progression. Drag to start sound at specified location.
- G** Step buttons: Allows you to step through the sound frame by frame.

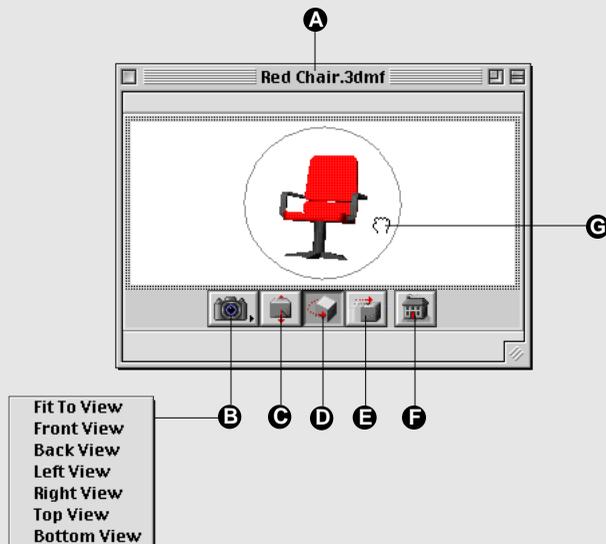
All of the procedures in the table on *page 54* apply to both movies and sounds.



Item Preview—QuickDraw 3D Images (Mac OS)

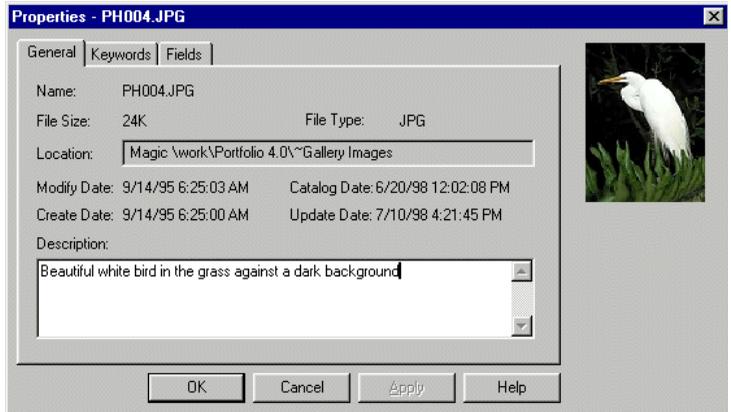
A QuickDraw 3D image is a three-dimensional drawing that can be cataloged with Portfolio.

- A** File Name: 3D image file name.
- B** Views pop-up menu: Click to select a particular view from the pop-up menu.
- C** Magnification: Click to enlarge (magnify) or reduce the image in the window.
- D** Rotate: Click to spin the model in 3D space.
- E** Move: Click to move the object around inside the window.
- F** Home: Click to return the object to its original view.
- G** Grabber: Click in the window and drag to rotate the item in real time. The cursor will change to the grabber hand and a rotation circle will outline the image.



Viewing Item Properties

You can view all the information available about an individual item from the Item Properties dialog. This view is helpful when you want additional information, but don't want to include it in any of the Gallery views. You can also edit the item's keywords, description, and Custom Fields from the Item Properties dialog. For additional information on the three tabs of the Item Properties dialog, see *page 56*.



To view Item Properties:

- Select the item, then choose “Item Properties...” from the Item menu.
- *or* —
- Select the item, then press Command+I (Mac OS) or Alt+Enter (Windows).

You can have up to ten “Item Properties” dialog boxes open at one time.

Item	
Item Properties...	⌘ I
Edit Keywords...	⌘ Y
Preview Original...	⌘ B
Edit Original...	⌘ M
Rotate Thumbnail ▶	
Copy Original...	⌘ C
Move Original...	⌘ Y
Delete Original...	⌘ X
Find Original	⌘ F
Rename Original...	⌘ N
Zoom In	⌘ =
Zoom Out	⌘ -
Actual Size	⌘ ~
Fit To Window	

Working with an Item's Source File

Once you have identified a catalog item you want, you can work with it from within the open catalog. For example, you can:

- Switch to another program to edit the source file (the original file to which the catalog entry points).
- Move, Copy, Delete, Find, or Rename the source file.
- Find out more information about the item.
- Print thumbnails or the item itself.

To Edit an item's source file:

1. **Select the item in the Gallery window, or open a Preview window for the item.**
2. **Choose “Edit Original...” from the Item menu [Command+M (Mac OS) or Ctrl+M (Windows)].**

Portfolio remembers the name and location of the application last used to edit the source file for any item of the same type and creator. If necessary (such as the first time you attempt to edit a file of a particular type) you will be prompted to choose an application and to specify where the application is located.

Portfolio launches the application, and opens the source file for editing.

3. **Make the changes you want, save the file, and quit the application.**

After quitting the editing application, you are returned to Portfolio.

Tip

To change the application that will be used to edit the item's source file, hold down the **Option** (Mac OS) or **Shift** (Windows) key while choosing Edit Original... from the Item menu. Locate the application that you want to open the item with. The selected application becomes the one that Portfolio associates with the file until you change it.

To Copy a source file:

1. In the Gallery window, select the item(s) whose source file you want to copy.
2. Choose Item > Copy Original... [Command+Option+C (Mac OS) or Ctrl+Shift+C (Windows)].
3. In the file directory dialog box, locate and select the folder you want the original file copied to.
4. Click the “Select” button at the bottom of the directory dialog box.

Portfolio copies the source file into the folder you specified.

Note: You can also copy source files by dragging items from Gallery windows onto the desktop or into folders.

To Move a source file:

1. In the Gallery window, select the item(s) whose source file you want to move.
2. Choose Choose Item > Move Original... [Command+Option+Y (Mac OS) or Ctrl+Shift+Y (Windows)].
3. In the file directory dialog box, locate and select the folder you want the original file moved to.
4. Click the “Select” button at the bottom of the directory dialog box.

Portfolio moves the source file into the folder you specified.

Note: “Move Original...” moves the source file from its current location to the one you specify. If the source file is locked, “Move Original...” does not move the file, but makes a copy of it in the new location.

Portfolio automatically updates the catalog after you move a file.

Important

In a multi-user setting, be careful about moving or deleting source files unless you are sure that your entire workgroup wants the files moved or deleted.

Warning!

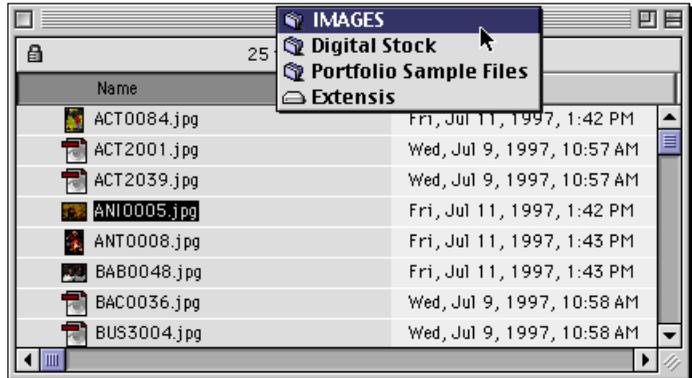
Be very careful when using the “Delete Original” command to delete source files. Once you confirm the deletion the files are deleted immediately and cannot be recovered.

To Delete a source file:

1. Select the item in the Gallery window.
2. Choose Item > Delete Original... [Command+Option+X (Mac OS) or Ctrl+Shift+X (Windows)].
3. Click “Cancel” if you change your mind or “OK” to confirm that you want to delete the file.

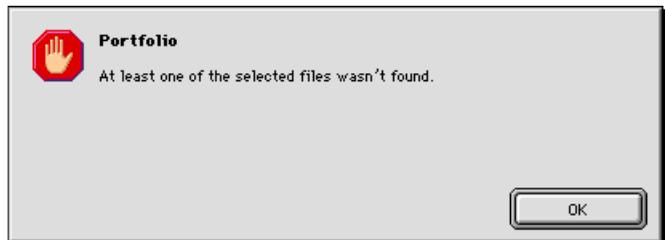
To Find a source file:

1. In the Gallery window, select the item(s) whose source file you want to find.
2. Choose **Choose Item > Find Original...** [Command+Option+F (Mac OS) or Ctrl+Shift+F (Windows)].



The source file will be located and highlighted. Mac OS: If you select more than one item, Portfolio will open a window for each folder containing found items, and highlight all the found source files.

If any of the requested source files cannot be found, Portfolio will locate the files that it can, and present a dialog indicating that one or more source files could not be found.



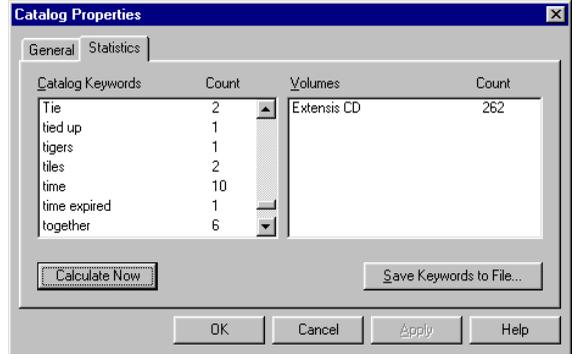
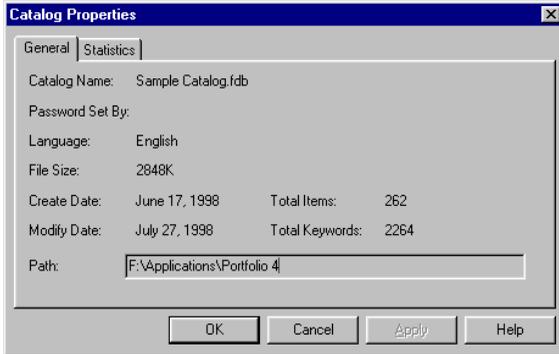
To Rename a source file:

1. Select the item in the Gallery window.
2. Choose **Item > Rename Original...** [Command+Option+N (Mac OS) or Ctrl+Shift+N (Windows)].
3. Click “Cancel” if you change your mind or “OK” to confirm that you want to rename the file.



Viewing Catalog Properties

You can view general information and statistics about any catalog from the Catalog Properties dialog. Statistics include Keywords used in the catalog and volumes linked to catalog items. You can also export the keywords list from this dialog (see page 101). For additional information on Catalog Properties, see page 60.

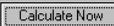


To view Catalog Properties:

- Choose **Catalog > Catalog Properties...**
- or —
- Press **Command+Option+J (Mac OS) or Ctrl+Shift+J (Windows)**.

The Catalog Properties for the active catalog will be displayed. To view information for another catalog, open it and make it the active window. You can have up to ten “Catalog Properties” dialog boxes open at one time.

Catalog	
Find...	⌘F
Find All	⌘*
Replace...	⌘R
Add Items...	⌘E
Update Items	⌘U
Delete Items...	
Cataloging Options...	⌘J
Catalog Properties...	⌘Option+J
Missing Files...	⌘M
Administration...	⌘H
Slideshow	⌘S
Slideshow Options...	⌘Shift+S
Access...	⌘B

To view all the Keywords in the Catalog: Open the Catalog Properties dialog (Catalog > Catalog Properties), select the “Statistics tab, then click the  to be able to speak with your customer service and have not “Calculate” (Mac OS) or “Calculate Now” (Windows) button. Portfolio will list each keyword and indicate how many cataloged items have each keyword assigned. Calculating the number of keyworded items may take some time to complete.

Setting Preferences

You can customize Portfolio to suit your working style and work more productively by setting preferences using the “Preferences...” command in the Edit menu. Refer to the table at the top of *page 62* for descriptions of each User Preference.

Where Preferences are Stored

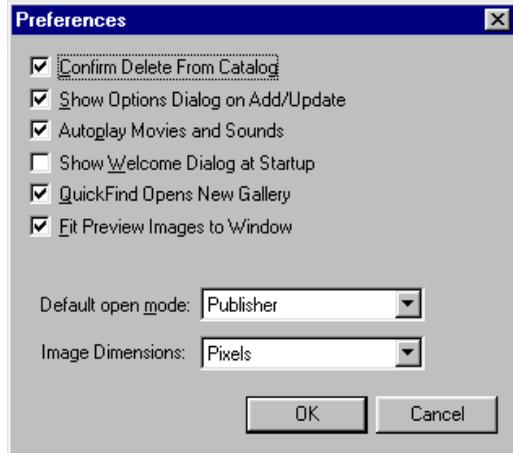
There are two types of Preferences in Portfolio, user preferences and catalog preferences. User preferences are “user based” and are stored on the user’s machine. These settings apply to all catalogs opened on that machine. Catalog preferences are “catalog based” and are stored in the catalog. Catalog preferences apply to just one catalog, and are shared by all users of the catalog. The table below shows each Preference setting and where it is stored.

For more information on preferences and settings, refer to the section of the User Guide dealing with the listed topic.

These settings	Accessed in this location	Are stored in
View Defaults	View > Customize: Save Defaults	User's system
Default Catalog	File > Save as Default	User's system
Editing Application List	Item > Edit Original	User's system
File Types List	Catalog > Cataloging Options:File Types tab	User's system
User Preferences	Edit > Preferences	User's system; Catalog
Default Gallery	Windows > Save Gallery	Catalog
Default Find	Catalog >Find	Catalog

To set or change User Preferences:

1. Choose “Preferences...” from the Edit menu, or press **Command-Option-E (Mac OS)** or **Ctrl+Shift+E (Windows)**.



The “User Preferences” dialog box is displayed.

2. **Select the desired options.**
3. **Click “OK.”**

Preference	Result
Confirm Delete from Catalog	When selected, the “Confirm Delete” dialog box appears when you delete an item from the catalog.
Show Options Dialog on Add/Update	When selected, the Cataloging Options dialog box appears when you add items to or update items in a catalog.
Autoplay Movies and Sounds	When selected, movie and sound files are played automatically in Preview windows; you don’t need to click the Play button.
QuickFind Opens New Gallery	When selected, QuickFind (<i>page 36</i>) will display found items in a new Gallery window.
Display Welcome Screen	When selected, a dialog box prompting you to create a new catalog or open an existing one appears when you launch Portfolio.
Fit Preview Images to Window	When selected, images are automatically scaled to fit Preview windows. When unchecked, images appear at 100% and scroll bars appear in the window to allow you to view the entire image.
Default Open Mode	Select the access level with which Portfolio will open the catalog: Reader, Editor, Publisher, or Administrator (<i>see pages 132–133</i>).
Image Dimensions	Select the unit of measure for displaying image dimensions. Applies to displays in the Gallery and Preview windows.

Printing Catalog Items

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 to a client, for example, or to evaluate items for possible use in a document.

Choosing “Print...” from the File menu prints the contents of the active 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, background colors, and the like.

When the Gallery is set up, select “Print.” To print a single full-size image, print from a Preview window.

- If the active window is a Preview window, you see a standard “Print” dialog box that contains no special options for Portfolio.
- If the active window is a Gallery window, the print dialog box includes the options described in the table on *page 64*.

8.4.3

Printer: **PrintMaster 5MP** Destination: **Printer**

Portfolio™ 4.0

Header

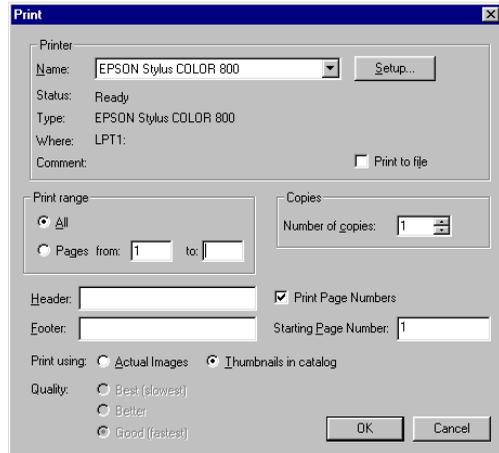
Footer

Number Pages
Number pages from:

Print Using: Actual Images Thumbnails in catalog

Quality: Best (slowest)
 Better
 Good (fastest)

Save Settings **Cancel** **Print**



Technical Notes

“Print Using Actual Images” with Quality set to “Best” 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. It’s a good idea to run the “Missing Items” command before printing actual images.

Thumbnails rotated in the catalog are printed with their original orientation when using “Print Using Actual Images.”

Gallery Window Printing Options

Print Option		Result
Header		Prints a text header centered at the top of the page.
Footer		Prints a text footer centered at the bottom of the page.
Number Pages		Page numbers on each printed page. Enter a starting page number in the “Number Pages From” text box if you want the start page numbering at a number other than “1”.
Print Using...	Actual Images	Prints thumbnails using the original source files if available. This option generally yields a higher-quality output, but can be time intensive because Portfolio must open and process each item’s source file when creating its thumbnail. Thumbnails in the catalog are substituted for any actual images that are not found.
	Thumbnails in Catalog	Always prints from the thumbnail images available in the catalog.
Quality	Best	Provides the highest-quality output but the slowest print times.
	Better	Provides medium-quality output at moderate print times.
	Good	Provides the lowest-quality output but the fastest print times.

Customizing Gallery Views

You can change the layout of any Catalog Gallery view. This allows you to display precisely the information you want to see, including the information in any custom fields that you have created.

To customize Gallery views:

1. Choose “Customize...” from the View menu, or press Command+D (Mac OS) or Ctrl+D (Windows), or click the Customize  button on the Toolbar.

The Customize Gallery dialog (*page 67*) will open to the tab associated with the current Gallery view.

2. Select the options you want.

The view options are described in the table on *page 66*.

3. If you are going to modify any of the other Gallery views, click “Apply” to apply the selections to the Gallery window without closing the Customize Gallery dialog box.
4. When you have finished selecting options, click “OK” to apply the changes and close the dialog box.

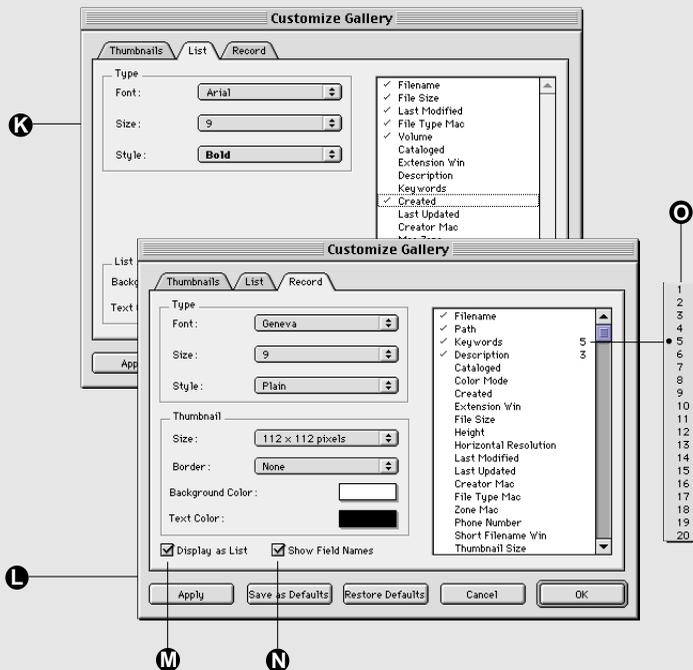
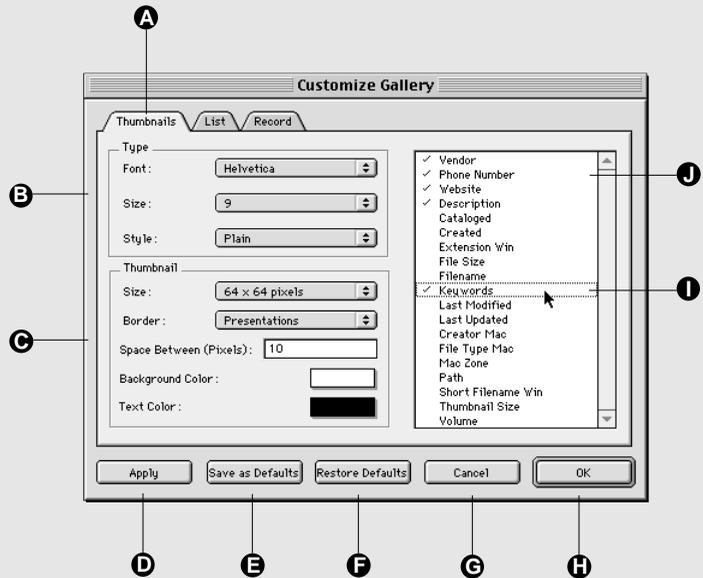
Note: Click “Save Defaults” to save the current settings as the default layout for each Gallery view. The layout will then be used for all new Gallery windows displayed in each view.

Option	Choices	Description
Type	Font	Sets the display font for the view.
	Size	Sets the font size for the view.
	Style	Sets the font style for the view.
Thumbnail	Size	Sets the size of thumbnails in Thumbnail and Record view.
	Borders	Sets the type of border (or none) for thumbnails.
	Space Between	Sets the number of pixels between thumbnails in Thumbnail view.
	Text Color	Sets the color of text in Thumbnail, List, and Record view.
	Background Color	Sets the window background color on which the records are displayed.
List	Text Color	Sets the window background color in List view.
	Background Color	Sets the color of the text in List view.
Fields List		<p>A scrolling list of all available fields in the catalog. Select a field name to have it displayed in the current view. Drag field names to rearrange list order, representing the order in which the fields will be displayed.</p> <p>In Thumbnail view, the Filename field is selected by default. In List view, the Filename, File Size, Last Modified, Volume and File Type fields are selected by default. In Record view, the Filename field is selected by default. In List view, the Filename, Path, Keywords, and Description fields are selected by default.</p> <p>In Record view, the number of lines in the display for Description, Keyword, and Custom Fields of type "String" that have "Display Multi-line" enabled or are Multi-valued fields can be edited (item (O) on <i>page 67</i>). Click the number displayed to the right of these fields to access a pop-up menu (Mac OS) or click in this area to open an edit dialog (Windows).</p>
Display as List		Record view only. Sets window to display records as a continuous list.
Show Field Names		Record view only. Sets window to display Field Names in front of information fields. Field Names are displayed in bold.

Customize Gallery Views—Thumbnail, List, Record

You can customize each of the three Gallery views (Thumbnail, List, and Record) using the following options.

- A** Thumbnails tab: Selections apply to Gallery window Thumbnail view.
- B** Type: Select how the text will be displayed in the window. Options include Font Type, Size, and Style.
- C** Thumbnail: Select Thumbnail Size, Background Color, Text Color, and Space Between image thumbnails (in pixels). From the Border pop-up menu create and select thumbnail Borders.
- D** Apply: Click to apply the selections on the selected tab to the Gallery view without closing the dialog.
- E** Save as Defaults: Click to save the settings on all tabs as the Default settings for that Gallery view.
- F** Restore Defaults: Click to revert settings to the factory set defaults.
- G** Cancel: Click to close the dialog box without making any changes.
- H** OK: Click to accept the changes and close the dialog box.
- I** Information Fields Item: Click an item to select it for viewing (checkmark indicates selected for viewing). Drag items up or down the list to position them in relation to other fields selected for viewing.
- J** Information Fields: Displays the full list of information fields that can be added to the Gallery view.
- K** List tab: Similar selections as Thumbnails tab but without thumbnail options. Adds List Background and Text Color. Selections apply to Gallery window List view.
- L** Record tab: Similar selections as Thumbnails tab, except that records are listed in a scrolling vertical window.
- M** Display as List: Allows you to show records as a continuous list.
- N** Show Field Names: Allows you to add Field Names to the information fields. Field Names are shown in bold.
- O** Fields List pop-up menu (Mac OS) or Edit Dialog (Windows): Allows you to specify the number of lines to be used for displayed information in Keywords, Description, and Custom Fields that allow multiple lines (see page 143).



Adding Borders to Thumbnails

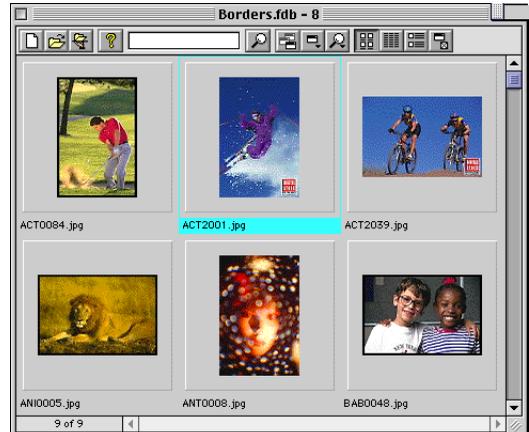
Tip

You can create stunning borders almost effortlessly with Extensis PhotoTools, an exciting collection of Photoshop plug-ins that allows you to create custom bevels, drop shadows, embosses, glows, and more! A Demo version of PhotoTools is available on the Extensis CD.

You can highlight your catalog thumbnails by displaying them in the Gallery window with Thumbnail Borders. Portfolio provides a few sample borders for you to use, and you can create unlimited effects using your own border designs.

Any bitmapped image (PICT, BMP) can be used—all you need to do is create your border design, copy it to the system clipboard, paste it into the Edit Borders dialog, then select it in the Thumbnail or Record tab of the Customize Gallery dialog.

All thumbnails in the Gallery window will be displayed with the selected border. Using the Save Galleries feature (*page 48*) you can set up special Galleries of items with borders, and others without, or specify different borders for different Galleries.

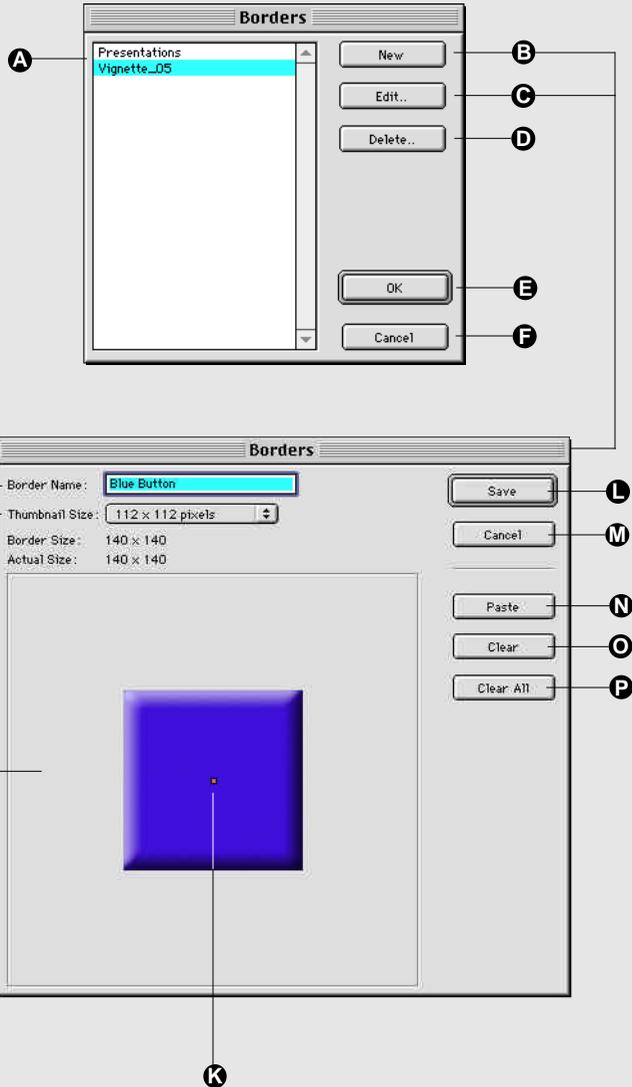


When adding borders, you specify which thumbnail size you want your border to apply to. The Border Box that Portfolio provides for each thumbnail size is 25% larger than the thumbnail, so your borders should be 25% larger than the thumbnail size you intend to use them with (*see sidebar table on page 71*). If your border is larger than the Border Box, it will be scaled down to the proper size. If it is too small it will be hidden by the thumbnail; it may be visible if the item displays as an icon.

Edit Thumbnail Borders

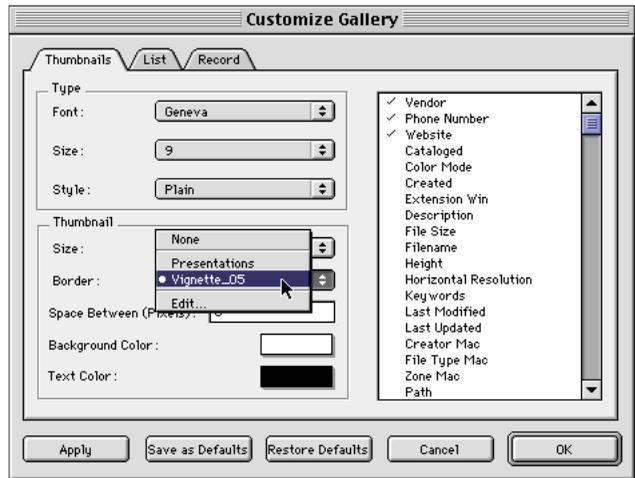
The Borders dialogs allow you to add thumbnail borders to the catalog, and change the options of currently installed borders. Before a border can be displayed you must select it from the Borders List in the Customize Galleries dialog (View >Customize: Thumbnail tab or Record tab).

- A** Borders List: Displays a list of Borders available in the catalog.
- B** New: Opens the Edit Borders dialog to create and name a new border.
- C** Edit: Opens the Edit Borders dialog allowing you to edit the currently selected border (**A**).
- D** Delete: Deletes the currently selected border.
- E** OK: Close the dialog box and save any new or modified Borders.
- F** Cancel: Close the dialog box without saving any changes.
- G** Border Name: Displays name of border being edited. Enter name for new border here.
- H** Thumbnail Size: Select size of thumbnail border is being created for.
- I** Dimensions: Displays border size and actual size.
- J** Border Box: Represents the area allowed for the border. Box size changes based on the selected thumbnail size (see table on page 71). The border that you paste is displayed here.
- K** Transparency Pixel: Sets the color map for the transparency (see page 71).
- L** Save: Close the dialog and save the Border box(es).
- M** Cancel: Close the dialog box without making any changes.
- N** Paste: Copy the border to the system clipboard, then click this button to paste it into the Border box (**J**).
- O** Clear: Clears the Border box for the currently selected thumbnail size.
- P** Clear All: Clears all Border boxes.



To select a thumbnail border:

- 1. Choose View > Customize, or press Command+D (Mac OS) or Ctrl+D (Windows), or click the Customize  button.**
- 2. Click the Thumbnails tab or Record tab to select it.**
Borders are not available in List view.
- 3. Choose the desired thumbnail Border from the Border pop-up menu.**



- 4. Click “OK” to close the dialog and apply the border to the items in the active Gallery.**

To add a thumbnail border to the catalog:

1. From your image editing application, copy your border to the system clipboard.
2. From Portfolio, choose View > Customize, or press Command+D (Mac OS) or Ctrl+D (Windows), or click the Customize  button.
3. Click the Thumbnails tab or Record tab to select it.

Borders are not available in List view.

4. Choose “Edit” from the Border pop-up menu.

The Edit Borders dialog will be displayed.

5. Click “New,” then enter a name for the border.

6. Select the thumbnail size to which you wish to add the border.

7. Paste the border—it will be pasted into the selected size Border Box. When you have finished in the Edit Borders dialog, click “Save.”

You can paste the same or a different border for each thumbnail size.

8. When you have finished in the Customize dialog, click “OK.”

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

How Borders Work / Border Transparency

Border images are displayed behind the thumbnails. This means that thumbnails and icons will always be displayed in their entirety, at whatever size and orientation they are, “overlapping” the border image.

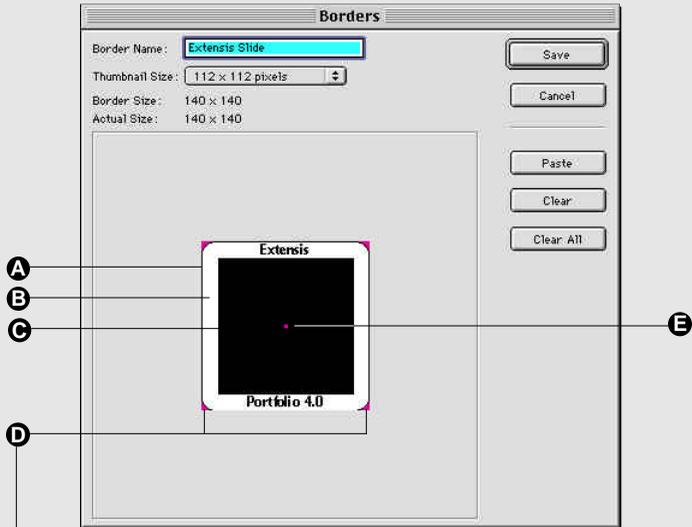
Portfolio looks at the center pixel of the selected border image and sets that as the designated transparency color. This allows you to create borders that behave like a transparency mask, allowing the background to show through certain areas of the border design (*see the Slide Border example on page 72*). Wherever the transparency color appears in the border image, the background is allowed to show through. So you can designate areas of the border image as transparent by coloring them the same color as the center pixels of the border image.

Portfolio always sets a transparency color using the center pixel of the border image, whether you intend to create transparency in your border or not. For example: Suppose you have a border image that is a white box with a black border, and your Gallery background color is blue. Portfolio will set the transparency color to white because the center pixel of the border image is white. If the thumbnails completely cover the white area of the border

Border Transparency

The center pixel of the Border image (E) sets the transparency (mask) color. Everywhere on the Border image that that color appears becomes a masked area, allowing the Gallery background to show through.

- A Border Box Outside Edge: The outside edge defines the largest area that the border will occupy. In this example, the border image is 140 x 140 pixels.
- B Border outer box: In this Border image we created two boxes. Notice, in the Gallery example, how the thumbnails overlay the Border. Compare the Border image and its effect on the thumbnails to get an idea of what you need to do to create the border effect you want.
- C Border inside box: This is the inside box of our image. Notice the effect on the thumbnails in the Gallery view below.
- D Masked areas: In this example, all four corners of the Border image were painted the same color as the center pixels. This allows the gray background in the Gallery to show through at the corners of the Border, creating a "slide" effect.
- E Transparency Pixels: Portfolio always sets the color of the center pixel as the transparency color. By creating a 4 x 4 pixel box and coloring it pink, then coloring the four corners with the same pink color, we created a mask along the corners that allows the background to show through.

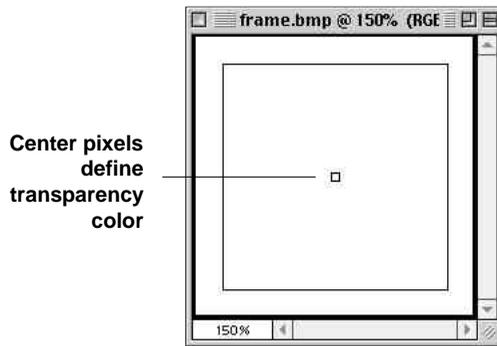


image, you will not see the blue background. If the thumbnails do not completely cover the white area of the border design, some blue will show through. This may or may not be what you want. To eliminate potential problems and ensure that you can change backgrounds without being concerned about transparency, it's good practice to add a color in the center of your border image (using a 4 x 4 pixel square works well) that does not appear anywhere else in the border image.

To set the transparency color of a Border image:

1. **Choose a color that is not used anywhere in the Border design.**

This will be your designated transparency color.



2. **Color a 4 x 4 pixel area in the center of the image with the transparency color you selected in step 1.**

You could color a larger area with the transparency (mask) color, but a 4 x 4 pixel area is large enough to see, yet small enough to be completely covered by the item thumbnail or icon.

3. **Using the transparency color, color in the areas that you want to mask.**

Everywhere on the Border image that the transparency color appears will become transparent, allowing the Gallery background to show through.

Note: Thumbnails (and icons) cannot be made transparent. Thumbnails and icons are displayed on top of the Border image and will cover the Border design in that area whether the Border is transparent or not.

4. **Copy and paste the Border image into the Border Edit dialog as outlined on page 71.**

Slideshows

The Portfolio Slideshow feature lets you create slide shows from your catalog images (not thumbnails) that can run automatically—with the images being advanced in specified intervals—or that can be manually advanced.

Tip

You can close the Slideshow controller and use the following keyboard shortcuts to run your Slideshow. This allows you to run the show with nothing on the screen but the images.

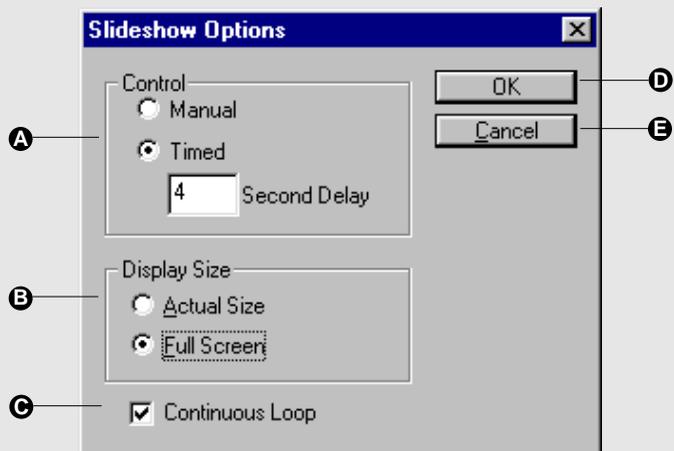
Quit Slideshow	Esc
Previous Item	Page Up
Next Item	Page Down
Last Item	End
First Item	Home

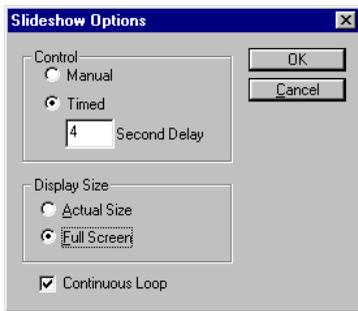
Portfolio uses the images in the active Gallery for the slide show. The screen is blanked and the images are displayed against the background color of the current Gallery view. You can elect to show images at their actual image size, or to have them scaled up to fit as much of the display screen as possible. (If an item is too big for the screen, it is automatically scaled down.) When running a Slideshow, if an image is encountered that cannot be found or displayed, the item is skipped.

You can also have the slide show run automatically (Catalog > Administration... > Startup tab) when Portfolio is launched; in this case the last-saved Slideshow Options are used.

Slideshow Options

- A** Control: Select Manual, for manually run slide shows, or Timed, for auto-running slide shows. You can enter a delay from zero to 99 seconds.
- B** 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.
- C** Continuous Loop: Allows you to set auto-running slide shows to loop continuously.
- D** OK: Close the dialog box and save the changes.
- E** Cancel: Close the dialog box without making any changes.





To set up a Slideshow:

1. Choose Slideshow Options... from the Catalog menu or press Command+Option+S (Mac OS) or Ctrl+Shift+S (Windows).
2. Select the desired settings, then click “OK.”

To run a Slideshow:

1. Configure a Gallery window with the items you would like to be displayed in the slide show, and arrange the items in the order in which you want them to be shown.

You can show still images, 3D images, movies, and sounds. Anything that can be previewed in Portfolio can be displayed in the slide show.

2. Choose Slideshow from the Catalog menu, or press Command+S (Mac OS) or Ctrl+S (Windows).
3. For manually run slide shows, click the arrows on the controller to move to the next  or previous  item. Click the first/last arrows to move to the beginning  or the end  of the show.
4. Slideshows begin automatically, but you can stop and start the presentation (perhaps to elaborate or answer questions) and restart using the pause button  on the mini-controller.

If the Slideshow is not on “Continuous Loop” it will end when the last item has been displayed.

5. To stop the slideshow and return to the Gallery window, press the Stop  button.

Note: When using a timed delay, images do not start loading until after the delay period. This means that (depending upon system parameters) with a delay of 4 seconds, a small image might show up in 4 to 4-1/2 seconds, while a large image might take longer.

Controller
Manual Mode



Mini-controller
Timed Mode



Hiding the controller: You can hide the controller in both automatic and manual mode by clicking it’s Close Box, then use the keyboard commands to run the Slideshow.

Creating and Managing Catalogs

Tip

Most of the procedures in this chapter require Editor or higher level access to the open catalog (see page 133).

Important

When a new catalog is created, Portfolio also creates a supporting file with a ".adm" extension; this file is placed in the same folder as the catalog. The ".adm" file is used to control file access in a multi-user environment. If you delete the file Portfolio will recreate it. Deleting the file in a multi-user environment can cause unexpected problems for catalog users.



This chapter describes how to create and modify Portfolio catalogs, including: adding items to a catalog; selecting cataloging options; adding information to items such as keywords, descriptions and custom fields; updating cataloged items; and creating and using Master Keyword lists. Also covered are catalog Access Levels and networking without a Server.

For information on managing a Portfolio Catalog Server see "Server Administration" starting on page 153. For information on using Portfolio to find and retrieve cataloged items, see "Viewing and Searching Catalogs," starting on page 23.

Creating a New Catalog

To catalog items in Portfolio you "add" them to an open catalog—Portfolio then handles the cataloging automatically. You can add items to a new catalog or to an existing one. New catalogs created in Portfolio are initially empty.

This section shows you how to create a new, empty catalog; to add items to the catalog, see "Adding Catalog Items" on page 78.

Note: You'll notice that the Portfolio catalogs you create are automatically given a ".fdb" filename extension, even on the Macintosh. This is to ensure cross-platform access to your catalogs. Macintosh users who do not work in a cross-platform environment can delete the ".fdb" extension in the Save dialog when the file is named and saved.

To create a New catalog:

1. **Open the Portfolio application by double-clicking its icon. When the Welcome dialog appears, select "Create a New Portfolio catalog," then click "OK."**



To prevent the Welcome dialog from being displayed each time you open a catalog, deselect this option in Edit > Preferences.

— or —

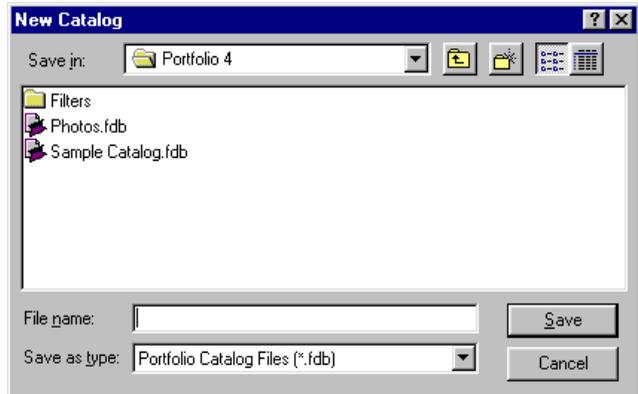
1. **Click "Cancel" at the Welcome dialog. When Portfolio opens, select "New..." from the File menu, or click the "New Catalog" button  on the button bar, or press Command+N (Mac OS) or Ctrl+N (Windows).**

Tip

Portfolio automatically opens new catalogs in Administrator mode. Administrator mode gives you the necessary permissions for modifying catalog structure.

You cannot share a catalog when it is in Administrator mode. Before sharing the catalog, switch to Publishing mode or lower (Catalog > Access). (See page 132.)

2. Specify a name and location for the new catalog, then click “Save.”



Portfolio creates the catalog and opens a blank Gallery window.

3. Add items to the catalog as described in “Adding Catalog Items” on page 78.

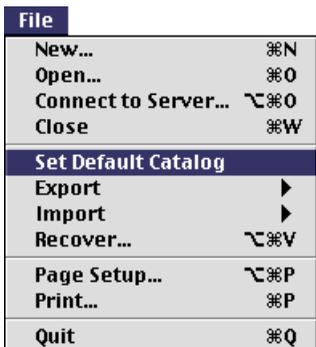
Specifying a Default Catalog

You can specify a Default Catalog that will be opened automatically each time you start Portfolio.

To specify a Default catalog:

1. Open or create the catalog that you want to use as the Default.
2. Select “Set Default Catalog” from the File menu.

A checkmark appears beside the menu command indicating that a Default Catalog has been assigned. To deselect the catalog, select “Set Default Catalog” again, or specify another catalog as the default.

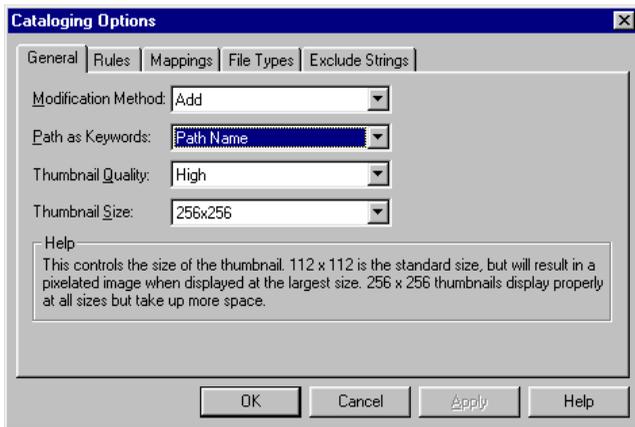


Adding Items to the Catalog

You can easily add items (including whole folders and volumes of items) to a catalog from within Portfolio, or by dragging and dropping them into an open Gallery window.

If you add items to a catalog from disks or network volumes, you can dismount the drives or volumes and continue to use the catalog—viewing, searching, and organizing cataloged items—without re-mounting the source file volumes. The only time you need to access the source file is when copying the item to another application, when printing from the original, or when using the source file functions available in Portfolio such as previewing, editing, copying, renaming, or deleting a source file. And even then, Portfolio automatically prompts you to insert the necessary volume.

When you add items to a catalog, Portfolio displays the Cataloging Options dialog so that you can select or change cataloging options before cataloging begins. (*See page 86.*)



Portfolio provides default Cataloging Options that will serve most needs, so you can quickly catalog items without spending time learning about these options. (To select the default options, click “OK” on the Cataloging Options dialog.) You can bypass this dialog altogether by disabling this option in Portfolio’s Edit > Preferences dialog. With “Show Cataloging Options” disabled, Portfolio automatically applies the default cataloging options (or the last-saved options if any were specified in Catalog > Cataloging Options) each time you add items to the catalog.

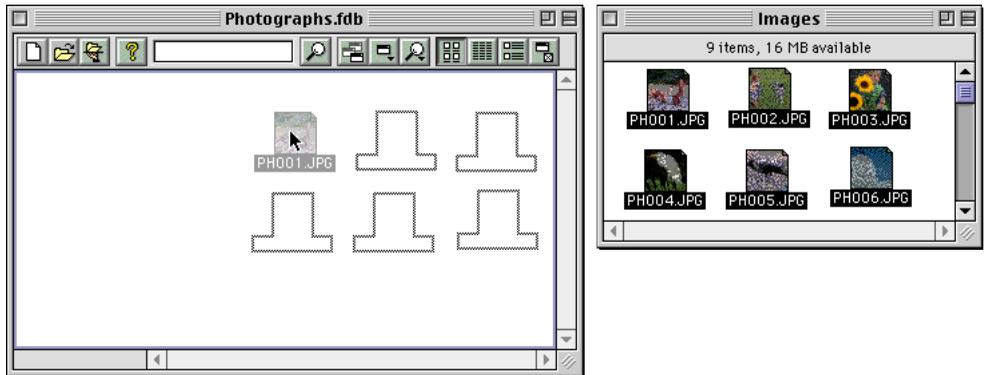
When the Cataloging Options have been set, Portfolio begins cataloging the items and displays a progress window so you can track its progress.

Note: Since Portfolio works with thumbnails and references to item source files rather than the actual file content, if you move or rename files and then wish to access the source file contents, (such as when copying items to a document in another application, Previewing the item, or editing the source file) you will need to “update” the catalog records. See “Updating Cataloged Items” starting on page 81.

To Add items to an open catalog:

Note: You must have a catalog open, either a new, empty catalog or an existing catalog, before you can add items. See page 76.

1. **Drag and drop selected files, folders, or volumes into the open Gallery window.**

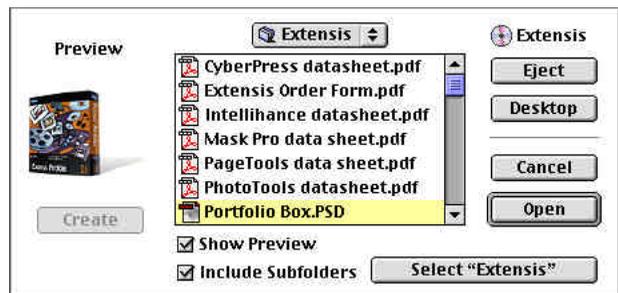


— or —

1. **Choose “Add Items...” from the Catalog menu, then locate the files, folders, or volumes of items that you want to add to the catalog.**

Tip

You can select multiple files from the Open dialog by pressing **Shift** (Macintosh) or **Ctrl** (Windows) as you select additional items. **Mac OS:** You must have Navigation Services enabled. **Windows:** System limitations prohibit selecting more than approximately 40 individual files at the same time (more files can be selected if are in folders).



To add...

Follow this procedure...

A single file

Locate and select the file you want to add to the catalog, then click “Open.”

All files in a folder or a volume

Locate and select the folder or volume you want to add. Click the select Folder button.

All files and subfolders within a folder or volume

Locate and select the folder or volume that you want to add, check the “Include Subfolders” option. Click the select Folder button.

Tip

Portfolio's default Cataloging Options settings are adequate for cataloging under most circumstances. You can change these options at any time either when the dialog box is displayed during an add or update, or by choosing Catalog > Cataloging Options....

Tip

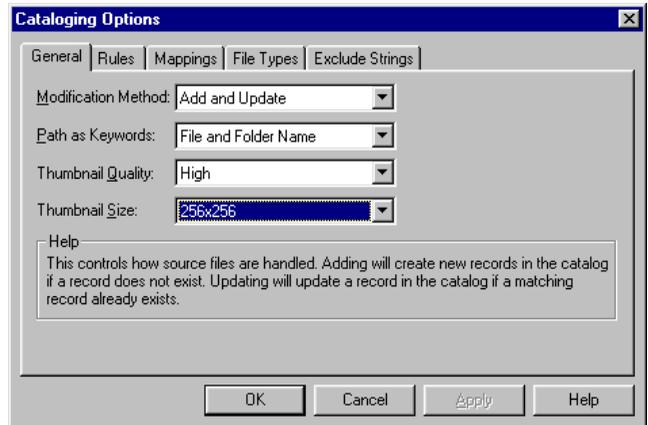
You can elect to have Portfolio automatically apply the default Cataloging Options when adding or updating. To do so, deselect the "Show Cataloging Options on Add/Update" option in Edit > Preferences.

Tip

Macintosh: Once the first process has started you can drag additional files, folders, or volumes to a Portfolio Gallery to initiate more cataloging processes while the first completes. Portfolio allows up to three cataloging processes to be active simultaneously.

The Cataloging Options dialog will be displayed, allowing you to choose a variety of options for the cataloged files.

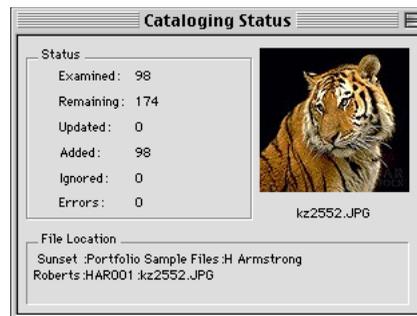
5. From the Cataloging Options dialog, select either "Add" or "Add & Update" from the Modify Method option of the General tab. You can review or change the other options, or simply allow Portfolio to use the default options presented.



Cataloging Options are discussed on page 86.

6. Click "OK."

Portfolio scans the volume(s) containing the source files, examines each file before adding it to the catalog, extracts the data as specified in Cataloging Options, and displays the "Cataloging Status" dialog to keep you posted on its progress.



When cataloging is complete, the items just added to the catalog will be displayed in the Gallery window.

Tip

When you work with item source files from within Portfolio (such as moving, renaming, or deleting them), Portfolio is aware of source file changes. This allows Portfolio to update those records automatically, reducing or eliminating the amount of manual updating that you need to do. See “Working with Item Source Files” starting on *page 57*.

Tip

You can add and update items at the same time by dragging and dropping source file folders into an open catalog, then selecting “Add & Update” from the Cataloging Options dialog. If Portfolio finds a catalog item with the same name as any of the source files, the existing record is updated. If Portfolio doesn’t find a catalog item for a particular source file name, a new record is created.

Updating Cataloged Items

When information associated with an item’s source file changes, you will want to “update” the catalog to reflect the changed information. You can update items individually, or update whole folders and volumes at the same time. You can even have Portfolio track changes and update automatically (see sidebar Tip).

The process of updating changes the pointers to each item’s source file (if these have changed). Updating can also be used to regenerate item thumbnails (such as when the source file has been edited); to read in any new or modified information such as file modification date; and to update any keywords, descriptions, custom field data, etc. that is embedded in the file. You can control which types of fields are updated using the options in the Cataloging Options dialog that is displayed when you update items. You can also set default cataloging options (Catalog > Cataloging Options).

You will want to update cataloged items when you:

- Move, rename, or delete files, folders, or volumes that have been cataloged.
- Edit source file(s) and want the catalog records to reflect those changes.
- Want to change the thumbnail size displayed in the catalog.

Two Ways to Update

There are two ways to initiate an update:

1. Using the “Add Items...” command (or by dragging and dropping files into an open catalog). Using this method you provide Portfolio with the path to the source files (you tell Portfolio where to find them.) Portfolio will scan the files and update the information. *For example:* If you know which files, folders, or volumes contain source files that need to be updated and you have easy access to those files, or if you have a large number of items to update, you can drag and drop them into the catalog’s open Gallery window, or alternately select Catalog > Add Items, then locate the files or folders using the system folder hierarchy.
2. Using the “Update Items...” command. When you update using this method you are asking Portfolio to locate the source files. Portfolio will attempt to locate the files using the pathname in the catalog. If the files are found, the records will be updated. If the files are not found, you will be asked to locate them. *For example:* If you don’t know which links have changed, or you

have just a few items to update and you don't have easy access to the source files (such as when they are spread across a number of folders or volumes), you would select those items in the Gallery window, then choose Catalog > Update Items to initiate the update.

After you initiate the update, Portfolio displays the Cataloging Options dialog so that you can select or change options before updating begins. Portfolio provides default Cataloging Options that will serve most needs, so you can quickly update without spending time learning about these options. (To select the default options, click "OK" on the Cataloging Options dialog.) You can bypass this dialog altogether by disabling this option in Portfolio's Edit > Preferences dialog. With "Show Cataloging Options" disabled, Portfolio automatically applies the default cataloging options (or the last-saved options if any were specified in Catalog > Cataloging Options) each time you add or update catalog items.

To Update using the Drag and Drop/Add Items method:

1. **Open the catalog that you want to update.**
2. **Locate the files, folders, or volumes to be updated, then drag and drop them into the open Gallery window.**

— or —

2. **Choose "Add Items..." from the Catalog menu, or press Command+E (Mac OS) or Ctrl+E (Windows), then locate the files, folders, or volumes that you want to have updated.**

Refer to the chart on *page 79* for instructions on specifying folders, sub-folders and volumes.

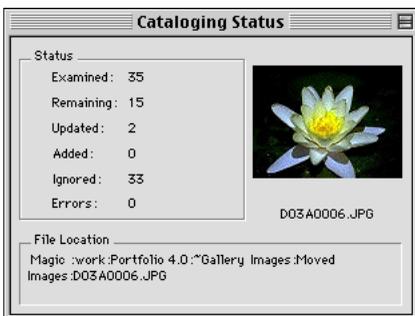
The Cataloging Options dialog will be displayed, allowing you to choose a variety of options for updating the files.

3. **From the Cataloging Options dialog, select "Update," "Add & Update," or "Update Unconditionally" from the Modify Method option of the General tab.**

Cataloging Options are discussed on *page 86*.

4. **You can review or change the other options, or simply allow Portfolio to use the default options presented. Click "OK."**

Portfolio scans the volume(s) containing the source files and updates item records based on the Cataloging Options settings.



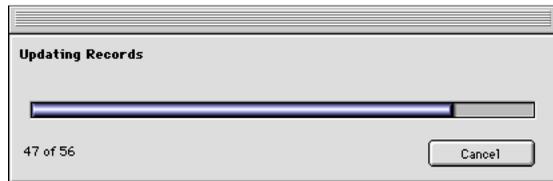
To Update using the Update Items method:

1. Open the catalog that you want to update.
2. In the Gallery window, select the items that you want updated. To update all the items, choose Edit > Select All [Command+A (Mac OS) Ctrl+A (Windows)].
3. Choose Catalog > Update Items... [Command+U (Mac OS) Ctrl+U (Windows)].
4. Review or change Cataloging Options (to change Modification method see sidebar Tip), or simply allow Portfolio to use the options presented, then click “OK.”

Portfolio searches for each item’s source file using the pathname stored in the item record.

Tip

The Update Items command (Catalog >Update Items...) automatically defaults to the “Update” Modification Method. You can set it to “Update Unconditionally” from the Cataloging Options dialog.

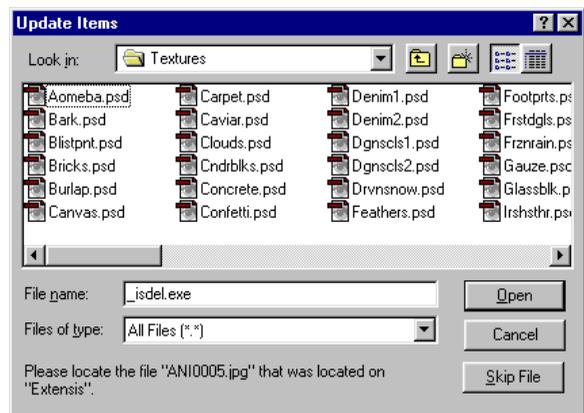


If the source file is found, the record is updated based on the Cataloging Options settings.

If the source file cannot be found, you are prompted to locate it. If you select a new file for the selected item, the record is updated with information from the new file, based on the Cataloging Options settings.

Tip

Portfolio automatically updates all selected items located in the same folder (after you locate the first file, others in the same folder will be updated automatically).



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

Updating to Regenerate Thumbnails

You can elect to regenerate thumbnails when you update catalog items by choosing this option in the Cataloging Options dialog (Catalog > Cataloging Options: Rules tab). Regenerating during an update offers the same options: by extracting the thumbnail from the source file or by building a thumbnail. See *page 90* for more information on generated and extracted thumbnails.

Tip

You can edit and update your images and media files right from the catalog—without ever having to search for the source files: Use the Edit Original command (Item > Edit Original) to open the item for editing. Modify and save the file as usual, then return to Portfolio and choose “Update Items.” Because the source file has not moved, Portfolio will update the record without asking you to locate it.

You may want to regenerate the thumbnail for an item when you have edited the file and the thumbnail has changed. In this case, choose Regenerate Thumbnails from the Rules tab, then choose “Update Items.” The Cataloging Options dialog opens with the default update method “Update” selected. Update checks the modification date; since this has changed, the item will be updated.

You might also want to regenerate thumbnails in order to switch between using a 112 x 112 pixel thumbnails and the larger 256 x 256 pixel thumbnails. In this case, choose Regenerate Thumbnails from the Rules tab, then select “Update Items.” This will open the Cataloging Options dialog where you can switch the update type to Update Unconditionally; Update Unconditionally does not check to see if modification date has changed. A standard Update would check for a modification date change and skip the update because the source file has not been modified.

Note: When you change Modify Method setting during an update, it only changes the modification method for that session. That is, if “Add” was set as the Modify Method previously, it will still be set to “Add” after the “Update Items” command is executed.

Identifying Missing Files

Portfolio's Missing Files command locates cataloged items whose source file has been moved, renamed, or deleted, and the catalog link has not been updated to reflect this change.

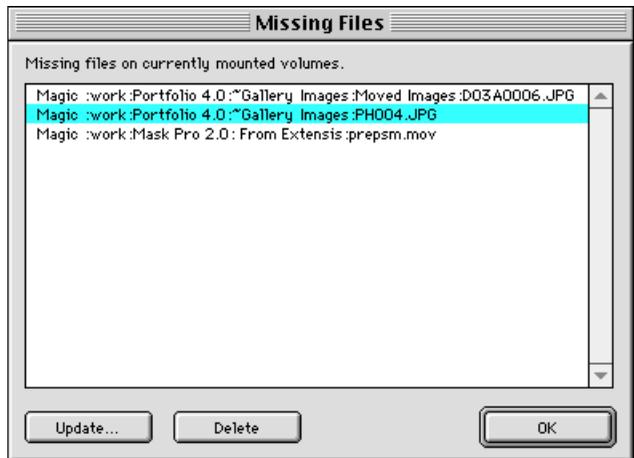
Note: Portfolio searches for missing files on mounted volumes only. If a volume containing cataloged item source files is not mounted, Portfolio will not report on those files.

To check for Missing Files:

1. Choose “Missing Files...” from the Catalog menu (or press **Command+Option+M** (Mac OS) or **Ctrl+Shift+M** (Windows)).

Portfolio compares each item's pathname as stored in the catalog record against all mounted volumes to see if the source file can be found at that location. The results are reported in the Missing Files dialog.

2. If Missing Files were located, select each item, then click either the Update or the Delete button at the bottom of the dialog to update the catalog.



Tip

You can select and update or delete multiple items on the list. Pressing **Shift** while choosing items from the list to select contiguously. Press **Command** (Mac OS) or **Control** (Windows) to select non-contiguously.

Update: Initiates a catalog Update (*see page 81*). Allows you to manually locate the missing source file.

Delete: Deletes the item from the catalog (*see page 47*). Allows you remove items from the catalog if the source file cannot be located.

Tip

The important Cataloging Options when updating are: Thumbnail Quality, Thumbnail Size, Updating options on the Rules tab, and Mappings tab options. Other Cataloging Options settings have no effect on the updating process.

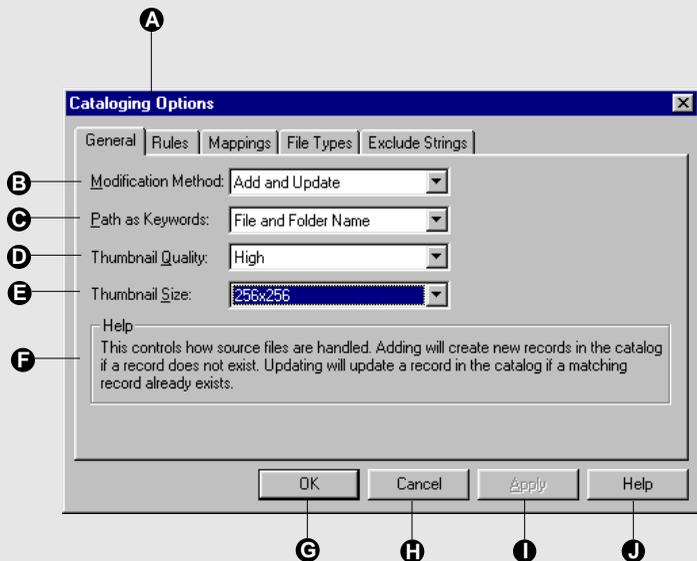
Cataloging Options

Unless you indicate otherwise in Edit > Preferences, Portfolio displays the “Cataloging Options” dialog box whenever you drag and drop files or folders into an open catalog. Whether or not the Cataloging Options dialog is displayed, the current Cataloging Options settings are checked any time that you add items to a catalog or update the items in a catalog.

Refer to the Cataloging Options dialog boxes and Options lists on pages 86 through 98 for descriptions of the available options.

Cataloging Options—General tab

- A** General tab
- B** Modify Method: Controls how source file information affects the catalog. “Add” creates new records for items, if a record does not exist. Update updates the item record, if a matching record exists.
- C** Path as Keywords: Determines whether or not the source file path name will be included as keywords, and if so, how much of the path name is used.
- D** Thumbnail Quality: Sets thumbnail compression. A higher quality thumbnail uses less compression, but takes up more space in the catalog.
- E** Thumbnail Size: Controls thumbnail size. 112x112 takes up less space in the catalog, but may appear pixelated when displayed at 256x256.
- F** Help: Displays information about an option when the mouse is placed over it.
- G** OK: Closes the dialog and accept the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.
- H** Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.
- I** Apply (Windows): Apply changes.
- J** Help (Windows): Access online help.



Cataloging Options—General

Option	Choices	Description
Modification Method*	Add	Adds a record to the catalog for each item being added, if a record does not currently exist. Ignores items if a catalog record already exists for the item.
	Update	Updates items only if there have been changes. Ignores changes in pathname if a copy of the source file exists at the previously cataloged location.
	Add & Update	Adds items if a record does not already exist, and updates records if the items exist but have changed.
	Add Unconditionally	Adds a record for the item even if a record already exists.
	Update Uncond.	Updates records even if the item source file exists in the previously cataloged location. Allows you to copy source files to a new location and have the catalog updated to the new location.
Path as Keywords	None	Filenames and pathnames are not added to the keyword list.
	File Name	Adds the item's filename to the keyword list.
	File & Folder Name	Adds the item's filename and immediate folder name to the keyword list.
	Path Name	Adds the item's filename and all of its folder names, but ignores the volume name.
	Path and Volume	Adds the item's full path, including volume name.
Thumbnail Quality	High	Creates a high resolution thumbnail using minimum compression
	Medium	Creates a medium resolution thumbnail using medium compression.
	Low	Creates a low resolution thumbnail using a higher level of compression.
Thumbnail Size	112x112	Generates a 112 x 112 pixel Thumbnail.
	256x256	Generates a 256 x 256 pixel Thumbnail.

* A flow diagram of Modification Method logic is given in *Appendix D, page 164*.

Tip

Flow diagrams of Modification Method logic are given in *Appendix D, pages 164 and 165*.

Modification Method

When you add items to the catalog, or update existing items (using either the Add Items/Drag and Drop method or the Update Items method as described on *pages 81 and 82*), you can select from the following options:

- Add
- Add Unconditionally
- Add & Update
- Update
- Update Unconditionally

Which method you select will depend on what you are trying to accomplish. If you are *only* adding items, choose “Add” or “Add Unconditionally.” If you are *only* updating items, choose “Update” or “Update Unconditionally.” If you know that you are both adding and updating, or if you want Portfolio to intelligently add or update as necessary, select “Add & Update.” “Add & Update” provides the most flexibility, and is a good choice if you want to automate the process as much as possible (in this case you might also want to prevent the Cataloging Options dialog from being displayed each time items are added or updated—you can disable this option in Edit > Preferences).

Add: Adds item files to the catalog as new records if Portfolio determines that the files do not already exist in the catalog. If a matching record already exists, the file is skipped.

Add Unconditionally: Adds files to the catalog as new records, regardless of whether a record for the file already exists in the catalog.

Add & Update: Performs both the Add process and the Update process. Portfolio adds a new record to the catalog if it determines that the file does not exist in the catalog. If a matching record is found, Portfolio updates the record.

Update: Updates existing records in the catalog if Portfolio determines that the files match existing records. If no matching record is found in the catalog, the file is skipped.

Update Unconditionally: Updates existing records in the catalog looking only at the filename and ignoring record criteria used in the normal Update logic. Specifically, Portfolio does not examine file dates and paths when determining whether the file matches an existing record. *See also page 89.*

More About Update Unconditionally

Update Unconditionally determines a source file match based only on filename only, not pathname. This can be useful when updating the catalog record from a copy of the source file.

Update Unconditionally is also useful when you want to update the catalog record but the file has not changed, such as to change catalog thumbnail size. (In this case, if you select Update rather than Update Unconditionally nothing will happen, since the file has not changed).

Note: Exercise caution when using Update Unconditionally. This is a powerful and useful tool, but it has the potential to effect unwanted changes: When you catalog two files by the same name located in different directories, Portfolio differentiates between the two records using their different pathnames. When you Update Unconditionally, Portfolio discards the pathname in its record search and updates the first record with the selected filename that it comes to. For example, assume that C:\Artwork\Box.jpg and C:\Photos\Box.jpg are both cataloged in the same catalog. You select Update Unconditionally in order to enlarge the catalog thumbnail for C:\Photos\Box.jpg. Portfolio searches the catalog records for "Box.jpg" and finds the record for C:\Artwork\Box.jpg, which it updates. This replaces the thumbnail in the record for C:\Artwork\Box.jpg with the thumbnail for C:\Photos\Box.jpg.

Cataloging Options—Rules tab

A Rules tab

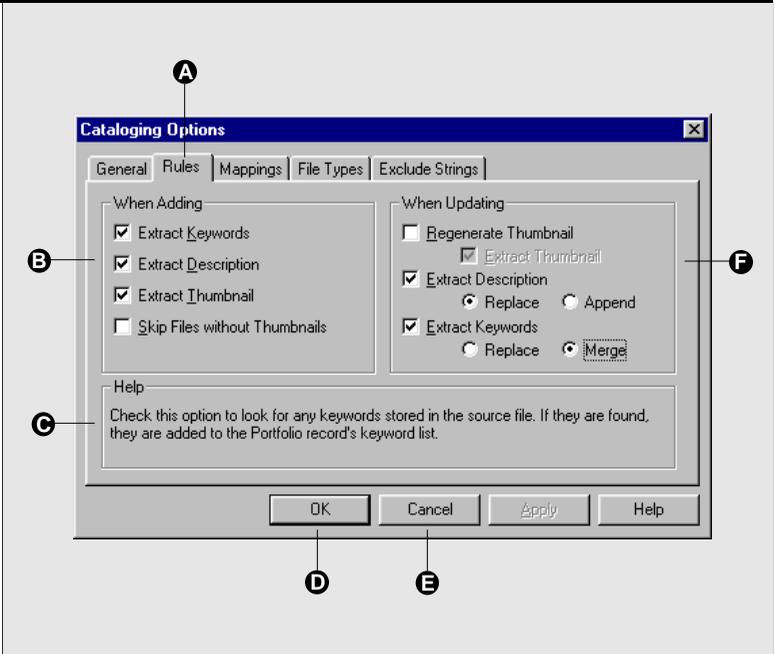
B When Adding: Controls which, if any, embedded information is extracted when items are added to the catalog.

C Help: Displays information about an option when the mouse is placed over it.

D Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.

E OK: Closes the dialog and accept the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.

F When Updating: Controls which, if any, embedded information is extracted when items are updated. Also indicates how the extracted information should be handled. Also controls whether Thumbnails are regenerated.



Thumbnails: Extracted vs Generated

An Extracted Thumbnail is one that already exists in the source file. If “Extract Thumbnail” is enabled (Catalog > Cataloging Options > Rules tab), Portfolio will look for and extract Thumbnails from various file types, such as:

- Photoshop files
- EPS files
- Adobe Illustrator files
- Any Macintosh file with a thumbnail in the "pnot" resource

If the source file does not contain a thumbnail, Portfolio will attempt to generate one.

A Generated Thumbnail is one that is created by Portfolio by reading the source file with an appropriate translator. If “Extract Thumbnail” is disabled, Portfolio will always attempt to generate a thumbnail, even if a thumbnail exists in the source file. Depending on the type of embedded thumbnail, Portfolio may be able to render a better thumbnail than that supplied in the source file.

Note: Extracting thumbnails is faster than generating them.

For information on Thumbnail size, see page 91.

Cataloging Options—Rules (Data Extraction)

Option	Choices	Description
When Adding	Extract Keywords	Looks for and extracts any keywords saved with the source file.
	Extract Description	Looks for and extracts any description saved with the source file.
	Extract Thumbnail	Looks for and extracts any preview image saved with the source file. Note: If you are adding QuickTime movies, we recommend that you do not use this option. You will get a larger thumbnail for the movie if you let Portfolio create it, rather than having it extracted.
	Skip Files without Thumbnails	Does not catalog the file if a thumbnail cannot be extracted or generated.
When Updating	Regenerate	If disabled (not checked), the Thumbnail in the catalog record will not be changed. If enabled (checked), the thumbnail will be updated if the source file has changed, or if Update Unconditionally is selected.
	Thumbnail	Extract Thumbnail: Controls whether Portfolio looks for an embedded Thumbnail or creates its own. This option is ignored if Regenerate is disabled.
	Extract Description	Replace: Replaces the existing description with the new one.
		Append: Adds the new description to the end of the old one.
Extract Keywords	Replace: Replaces existing keywords with the new ones.	
	Append: Adds the new keywords to the existing keywords.	

Thumbnail Size

Portfolio allows you to store thumbnails at either of two different sizes: 112 x 112 pixels, or 256 x 256 pixels.

The advantage in having the larger size thumbnails is as you might expect—improved resolution when viewed at the larger size. The disadvantage is that the larger thumbnails occupy about four times as much catalog space (typically 20K vs 5K).

Thumbnails that are embedded in the source file typically range in size from 80 x 80 pixels to 128 x 128 pixels. Portfolio will scale these extracted thumbnails to the closest size, typically 112 x 112 pixels. So if you elect to save thumbnails at 256 x 256, you will probably want to also disable extracting thumbnails and allow Portfolio to generate the larger thumbnails.

Mappings

Portfolio Mappings give you the ability to extract text data that is embedded in source files fields other than the standard Description and Keywords fields.

Typically, software that allows you to add information to a file (Photoshop's File Info is a good example) assigns a numeric ID, or Tag, to each field of embedded data. Using Portfolio's Mappings feature you can map this field ID to a Custom Field in your catalog, and have Portfolio read the source file data into the Custom Field.

Portfolio provides currently known Tag Codes for popular formats (Photoshop, IPTC, TIFF). These are displayed in the Mappings tab (Catalog > Mappings), and listed in *Appendix C (page 163)*. But you are not limited to the pre-installed codes—you can add Tag codes from any software that supports this convention, and also add new codes as they become available.

To use Mapping, you must create a Custom Field (Catalog > Administration > Custom Fields tab) for each tagged field that you want to extract from item source files. If the ID Code for the source file Tag is already listed in the Mappings table, all you need to do is Edit the entry and add the Custom Field name that you want to map it to. If the necessary code is not listed in the table, you can Add it to the list and then map it to your Custom Field.

To Enable or Disable an existing Mapping:

Note: Mappings must be created before they can be used. Refer to the following pages for instructions on creating catalog Mappings.

Tip

Macintosh: To quickly enable or disable mappings, click and drag in the checkmark column. This also works in the Action column.



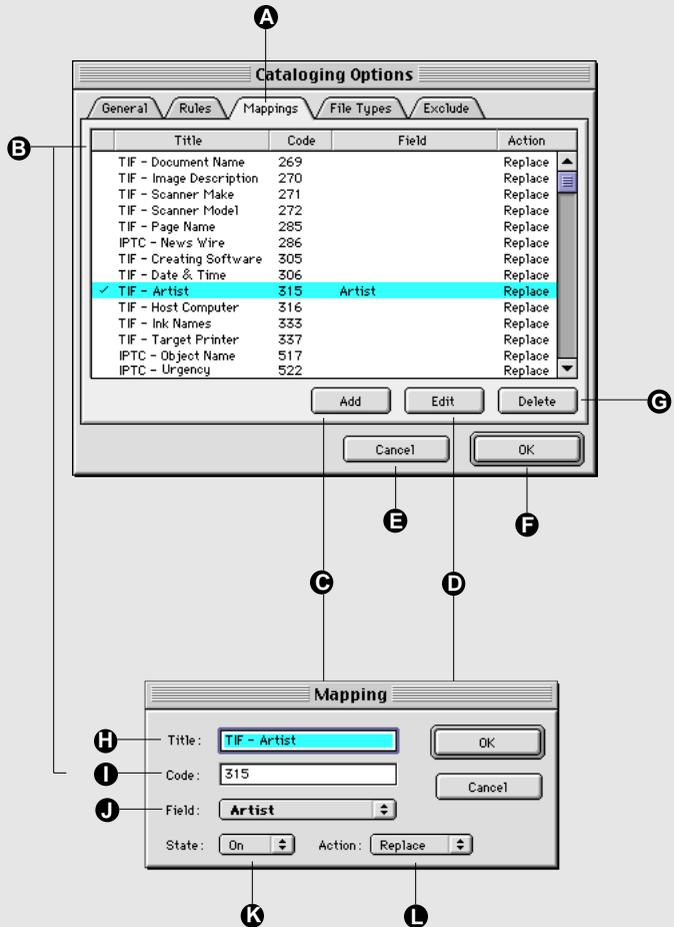
1. From the Mappings list (Catalog > Cataloging Options: Mappings), select the Mapping that you want to enable.
2. Click the “Edit” button or double-click the selection to open the Edit dialog or (Macintosh only) click in the first column of the Mapping that you want to change.
3. From the Edit dialog, select “On” from the “State” pop-up menu, then click “OK.”

A check indicates that the Mapping is enabled: Portfolio will extract data from the source file field and place it in the indicated catalog Custom Field. No check indicates that the Mapping will be ignored.

4. Click “OK” to close the Cataloging Options dialog and save the settings.

Cataloging Options—Mappings tab (Macintosh)

- A Mappings tab
- B List Headers: On/Off, Title, Code, Field, Action (see item descriptions (H) through (L)).
- C Add: Opens the Mapping dialog to add a mapping.
- D Edit: Opens the Mapping dialog to edit the selected mapping.
- E Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.
- F OK: Closes the dialog and accept the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.
- G Delete: Deletes the selected mapping.
- H Title: Enter a title for the mapping.
- I Code: Enter the IDcode for the source file field to be mapped.
- J Field: Select an existing Portfolio catalog Custom Field from the pop-up.
- K State: On enables the mapping; Off disables it. You can also enable and disable mappings from the checkmark column in the Mappings tab.
- L Action: Replace replaces any existing data in the catalog Custom Field with the data from the source file field. Append adds data from the source file field to any existing data in the catalog Custom Field.

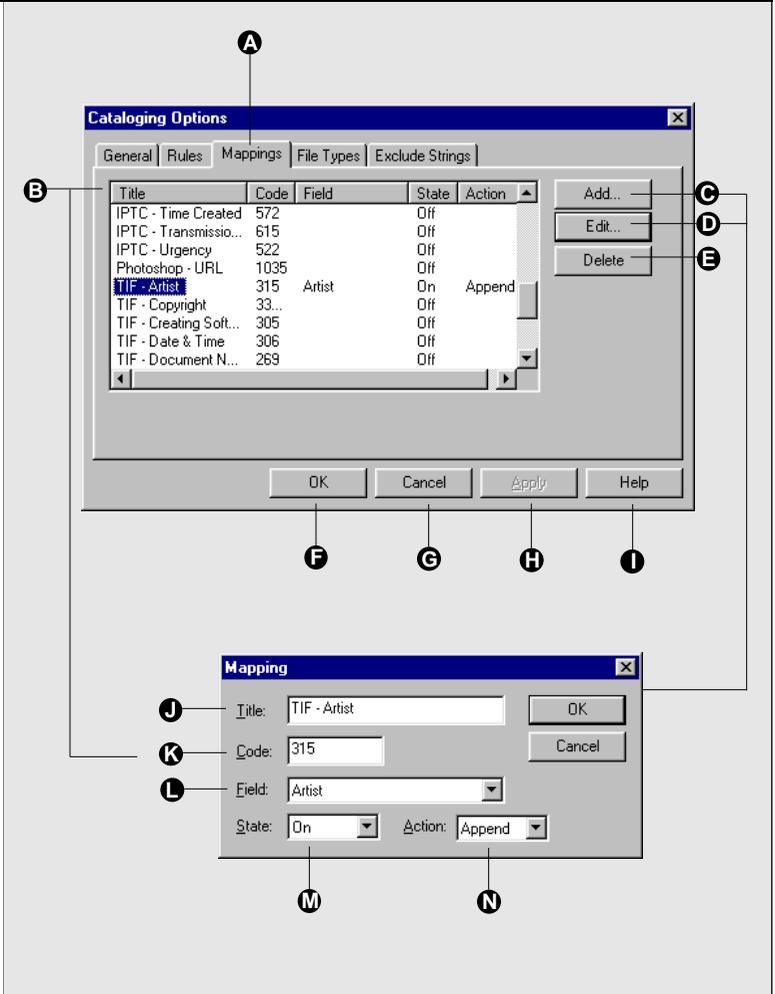


Notes about Mappings:

1. Mappings (that are enabled) are used during both Add and Update operations.
2. You cannot map to keywords or descriptions.
3. Some tags are automatically mapped to Keywords or Description. These tag codes cannot also be used to map to a Custom Field.
4. You cannot map one tag code to multiple Custom Fields.

Cataloging Options—Mappings tab (Windows)

- A Mappings tab
- B List Headers: On/Off, Title, Code, Field, Action (see item descriptions (J) through (N)).
- C Add: Opens the Mapping dialog to add a mapping.
- D Edit: Opens the Mapping dialog to edit the selected mapping.
- E Delete: Deletes the selected mapping.
- F OK: Closes the dialog and accept the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.
- G Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.
- H Apply (Windows): Apply changes.
- I Help (Windows): Access online Help.
- J Title: Enter a title for the mapping.
- K Code: Enter the IDcode for the source file field to be mapped.
- L Field: Select an existing Portfolio catalog Custom Field from the pop-up.
- M State: On enables the mapping; Off disables it.
- N Action: Append adds data from the source file field to any existing data in the catalog Custom Field. Replace replaces any existing data in the catalog Custom Field with the data from the source file field.



To Map an existing Tag Code to a Custom Field:

1. Create a Custom Field (Catalog > Administration > Custom Fields) for each source file tagged field that you want to extract.
2. Select Catalog > Cataloging Options (Command-J [Ctrl+J]). Click the Mappings tab to select it.
3. Select the first source file Tag Title/Code that you want to map, the click “Edit.”

The “Mapping” dialog will be displayed, showing the selected Tag and its ID Code.

Tip

Since you cannot export a tagged data field without a Custom Field to map it to, the Mappings tab will be blank until you have created at least one Custom Field.



- 4. Assign a catalog Custom Field to the Tag by selecting it from the Field pop-up menu.**
- 5. Set the State to On or Off.**

On instructs Portfolio to import the data from the Tag. Off instructs Portfolio to ignore the Tag.
- 6. Select the appropriate Action from the Action pop-up.**

Replace replaces any existing data in the specified Custom Field with the data from the source file field. Append adds data from the source file field to any existing data in the catalog Custom Field. If the field is a Multi-valued field, Append adds a new value to the list.
- 7. Click “OK” to accept the settings and return to the Mappings tab.**
- 8. Repeat steps 3 through 6 for all the tagged fields that you wish to import.**

To Add a Tag ID Code to the Mappings list:

- 1. Create a Custom Field (Catalog > Administration > Custom Fields) for each source file tagged field that you want to map.**
- 2. Select Catalog > Cataloging Options... [Command+J (Mac OS) or Ctrl+J (Windows)].**
- 3. Click the Mappings tab to select it, then click “Add.”**
- 4. Enter the Tag ID Code, and enter a Title for the Tag.**

Data is extracted using the ID Code. The tag Title is informational—you can name the tag anything you like.
- 5. Assign a catalog Custom Field to the Tag by selecting it from the Field pop-up menu.**
- 6. Set the State to On or Off, and select the appropriate Action from the Action pop-up.**
- 7. Click “OK” to accept the settings and return to the Mappings tab.**
- 8. Repeat steps 3 through 7 for all the tagged fields that you want to map.**

Excluding Files from being Cataloged

Using Portfolio Cataloging Options, you can tell Portfolio to skip files of a certain File Type or Name.

Exclude by Type: You can exclude files of a specific File Type from a catalog by deselecting or deleting that file type from the File Types list of the Cataloging Options File Types tab (*below*).

Exclude by Name: You can exclude files with a specific File Name by creating an “exclusions” list that specifies an explicit set of file names or patterns. File name exclusions are specified in the Cataloging Options Exclude tab (*page 98*).

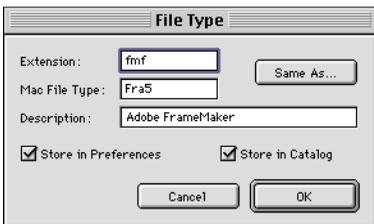
File Types

Portfolio recognizes and catalogs all file types, regardless of whether the file type appears on the File Types list or not. You only need to add file types to the list if you want to exclude a type that does not appear on the list, or if you will be excluding some types and including other types that do not appear on the list.

The File Types tab is described on *page 97*. The default File Types list is shown in *Appendix B, page 162*.

Tip

To catalog all File Types, select “Catalog All Types” from the File Types tab of the Cataloging Options dialog (Catalog > Cataloging Options).

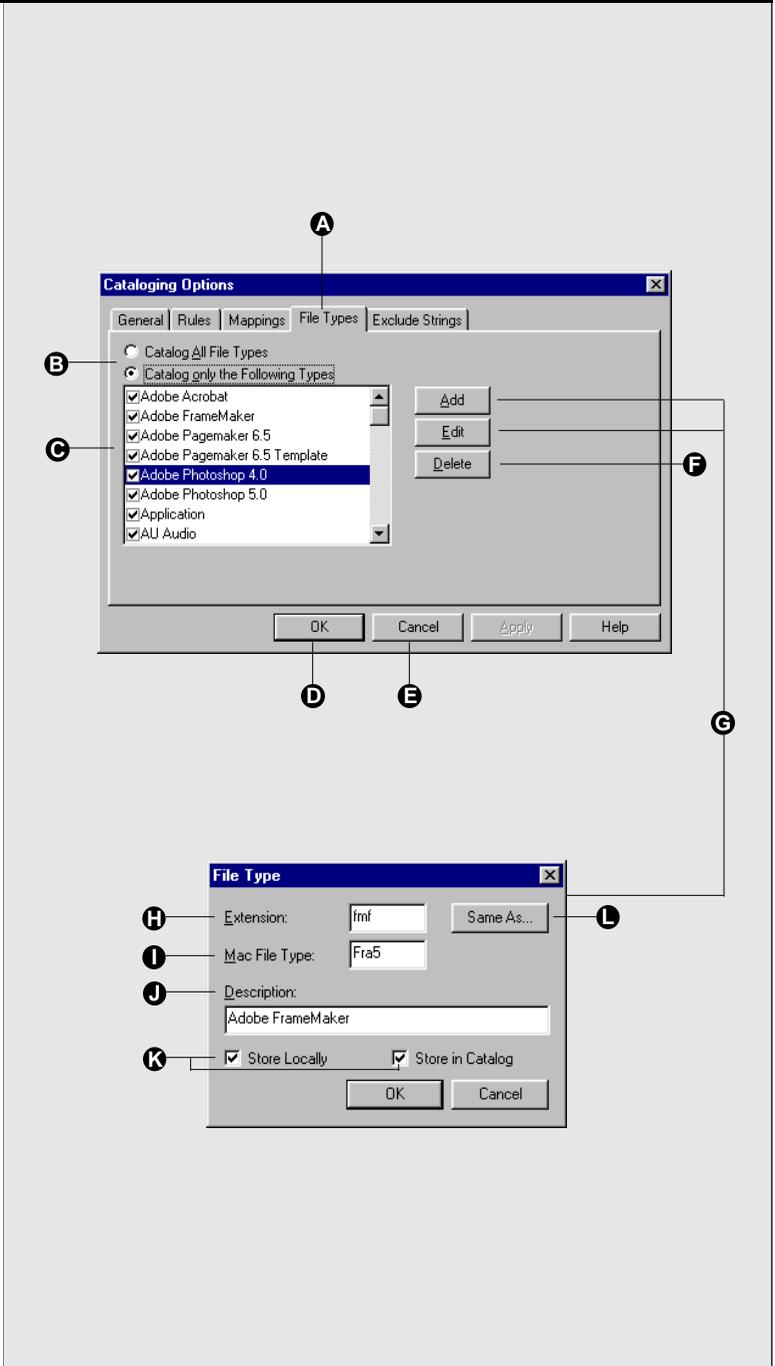


To add a File Type:

1. Choose Catalog > Cataloging Options [or press Command+J (Mac OS) or Ctrl+J (Windows)].
2. Click the File Types tab to select it.
3. Click “Add.”
3. Enter the file type information, or click “Same As...” and locate a file of the same type. Portfolio will copy the parameters of this file type into the fields.
4. Click “OK” to add this file type to the list.

Cataloging Options—File Types tab

- A** File Types tab
- B** Catalog All / Catalog Following Types: Determines which file types Portfolio will recognize.
- All Types: All File Types will be cataloged, even if the File Type does not appear on the list.
- Following Types: Recognizes only those File Types that are enabled (checked) in the File Types list.
- C** File Types list: Displays a list of all File Types recognized by Portfolio. Enable the “Catalog Following Types” option and uncheck a file type to prevent Portfolio from recognizing it.
- D** Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.
- E** OK: Closes the dialog and accept the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.
- F** Delete: Deletes the selected File Type from the list.
- G** Add/Edit: Opens the File Type modification dialog. Click Add to add a File Type to the list. Select a file type and click Edit to modify a File Type entry.
- H** Extension: Enter the 3-letter File Type extension.
- I** Mac File Type: For Macintosh files, enter the File Type.
- J** Description: Enter a description for the File Type.
- K** Storage Preference: Select “Store in Preferences” to save the File Types list on the user’s machine so that it is available for all catalogs opened on that machine. Select “Store in Catalog” to store the list in the catalog, making it available for all users who open the catalog.
- L** Same As: Click to locate a file with the desired File Type. Portfolio will populate the File Type fields with information from the selected file.



The default File Types list is shown in *Appendix B, page 162*.

Tip

A common use of exclusions is to exclude CMYK plate files from a catalog, allowing only the composite file to be cataloged. To do this, create four exclusions: Ends with .C, Ends with .M, Ends with .Y, and Ends with .K. If the plate files are saved with these extensions (which they usually are), Portfolio will skip these files, even if they are placed in the same folder as the composite. This allows you to drop a whole folder of CMYK files into an open Gallery to catalog them, without manually selecting just the composite images.

Exclude

Using the Cataloging Options Exclude tab you can exclude files with a specific File Name by creating an “exclusions” list that specifies an explicit set of file names or patterns.

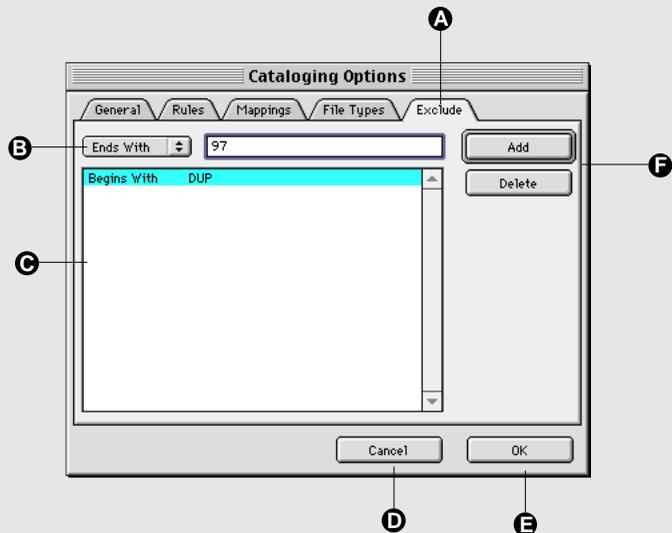
To add a File Name to the exclusions list:

1. Choose **Catalog > Cataloging Options** [or press **Command+J** (Mac OS) or **Ctrl+J** (Windows)].
2. Click the **Exclude** tab to select it.
3. Select the file name search parameter from the pop-up menu: **Begins with**, **Contains**, or **Ends with**.
4. Enter the filename or partial name that you want to exclude from cataloging. Letter case (uppercase/lower-case) is ignored.
5. Click **“Add.”**

Portfolio searches each pathname and each segment of the path for text strings matching any of the parameters you enter. For example: If you enter “Begins with: DUP” and “Ends with: 97” Portfolio will exclude “Duplicate_PH050,” “Report_97,” and “C:\Duplicates\Image.jpg”

Cataloging Options—Exclude tab

- A Exclude tab
- B File Name and Name Options Pop-up menu: Select “Begins with,” “Contains,” or “Ends with,” then enter the name or partial name that you wish to exclude from cataloging.
- C Exclude list: Lists all of the names and partial names that will be excluded from cataloging. Excludes files matching any of the listed parameters (acts like an “or” function).
- D Cancel: Close the dialog without changing any settings.
- E OK: Close the dialog and accept the settings.
- F Editing controls: Allows you to Add or Delete file names from the Exclude list.



Keywords

Tip

For information about searching using keywords, see *page 33*.

Each item in a catalog has certain information associated with it, such as filename, file type, volume, and so on. Each item can also have one or more keywords associated with it. A keyword is a word or phrase that you associate with a particular item, and a good keyword list can be a valuable tool for finding the material you need in a catalog.

Keywords can be extracted from the item's source file and/or added to item records manually. An unlimited number of keywords can be assigned to each item. In a network environment, using catalog access level permissions (*page 133*) a catalog Administrator can control who is allowed to edit item keywords.

A catalog can also include a preset list of keywords called the Master Keywords List. Master Keywords can only be created with Administrator access. Users select keywords from the Master Keyword list, which helps maintain consistent keywording among items in a catalog or across multiple catalogs. See "Catalog Administration," (*page 136*) for information on creating and maintaining a Master Keywords list.

Adding Keywords by Extracting Them from Source Files

If you have selected the "Extract Keywords" option (Catalog > Cataloging Options: Rules) for Adding and/or Updating, Portfolio examines all source files for keywords created in their native applications when you add and/or update items in a catalog. As items are cataloged or updated, extracted keywords are added to the item's keyword list according to the settings in the Rules tab (*page 90*).

Note

You must have Editor level access or higher to modify keywords. See *page 133*.

Viewing Item Keywords

You can view the keywords associated with a selected item in the following locations:

- In the Gallery window List view (View > List)
- In the Gallery window Record view (View > Record), if keywords have been included in the view (View > Customize).
- In the Keywords tab of the Item Properties dialog (Item > Item Properties: Keywords)
- In the Edit Keywords dialog (Item > Edit Keywords)

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

Tip

If you double-click a keyword in the Gallery window List view (or in Record view, if keywords are displayed), all the items with that keyword are located and displayed in the Gallery (replacing the items previously displayed in that Gallery).

Viewing Keywords for the Selected Item

- A** Keywords for the selected item as displayed in the Item Properties dialog (Item >Item Properties: Keywords).
- B** Keywords for the selected item(s) as displayed in the Edit Keywords dialog (Item > Edit Keywords).
- C** Keywords for the selected item as displayed in the Gallery List view (View >List).

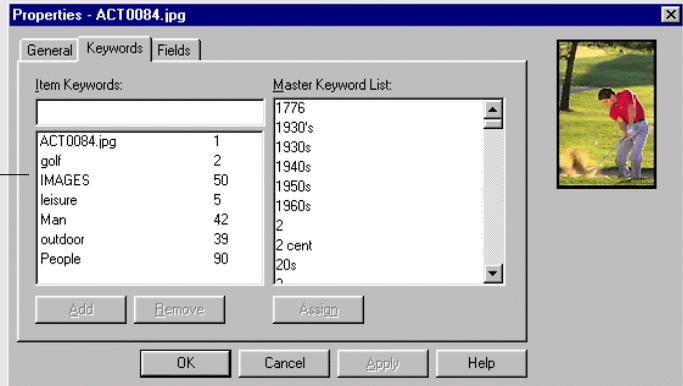
For information on adding keywords to the selected item, see *page 103*.

For information on viewing keywords for the entire catalog, see *page 99*.

For information on extracting keywords from an item's source file, see *page 99*.

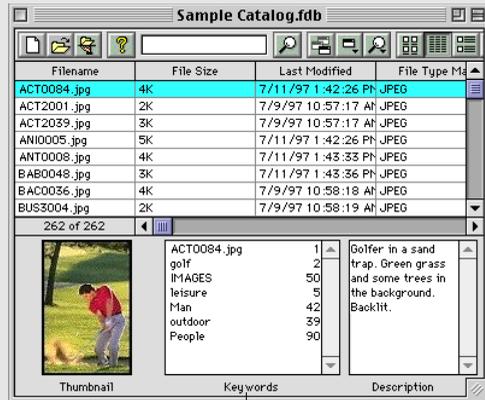
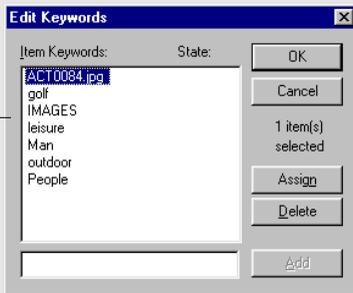
For information on creating a Master Keywords list, see *page 136*.

Item Properties



Gallery Window

Edit Keywords



To display the keywords for an item:

1. Select the item, then choose **Item Properties...** from the **Item** menu, or press **Command+I** (Mac OS) or **Alt+Enter** (Windows).
2. In the **Item Properties** dialog, click the **Keywords** tab.

The item's keywords appear in a list box on the left.
Master Keywords appear on the right.
3. Click **“OK”** when you are finished viewing the keywords.

To display the keywords for an entire catalog:

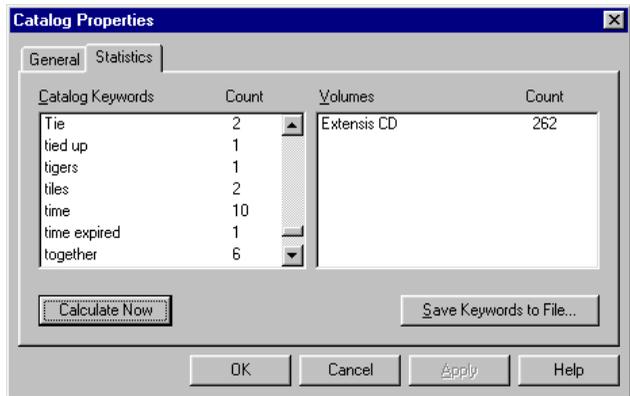
1. Choose **Catalog Properties...** from the **Catalog** menu, or press **Command+Option+J** (Macintosh) or **Ctrl+Shift+J** (Windows).

The “Catalog Properties” dialog is displayed.

2. Click the **Statistics** tab to select it.
3. Click “**Calculate...**”

Tip

You can export a catalog’s keywords to a text file by clicking “Export Keywords...” on the Statistics tab of the Catalog Properties dialog (Catalog > Catalog Properties: Statistics). This is useful if you want to import those keywords into a catalog’s Master Keywords list.



The keywords for all items in the catalog, and the number of occurrences of each keyword, are displayed in the list box on the left. The more items in the catalog, the longer this process will take.

Adding, Assigning, and Deleting Keywords

You can manually enter and assign keywords to the items in the catalog, and you can edit an item’s keyword list whether keywords were added manually or extracted from the item’s source file. With the exception of the Master Keywords List, you cannot add keywords to the catalog without assigning them to at least one item.

To add and assign keywords to items you must first select the items in the Gallery window. Once the items are selected you can assign keywords in the following ways:

- **Single items:** From the Item Properties dialog (Item > Item Properties), from the Edit Keywords dialog (Item > Edit Keywords), or from the Master Keywords Palette (View > Master Keywords Palette). *See page 103.*
- **Multiple items:** From the Edit Keywords dialog, or from the Master Keywords Palette. *See page 105.*

Adding and Assigning Keywords to Selected Items

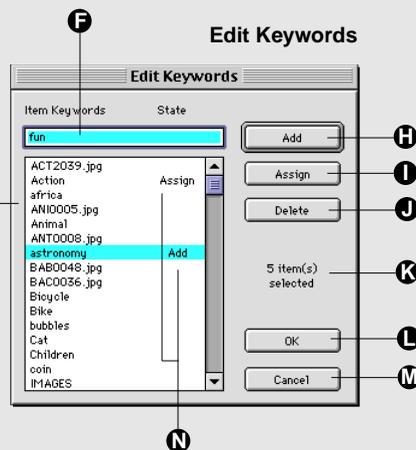
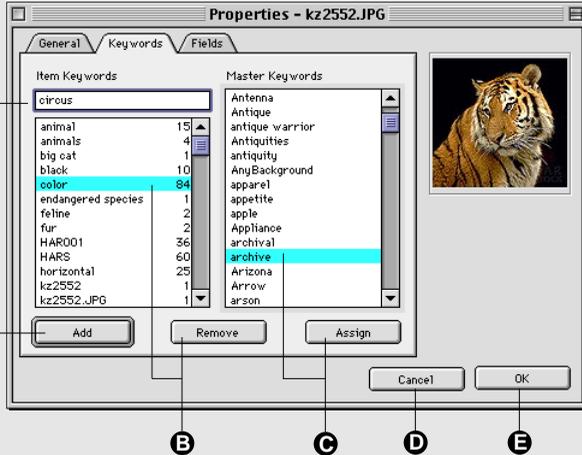
From the Item Properties dialog you can work with a single selected item:

- A Add:** Enter a keyword, then click Add to add it to the selected item's keyword list (this assigns the keyword to the selected item).
- B Remove:** Select a keyword assigned to the selected item, then click Remove to remove it from the item's keyword list.
- C Assign:** Select an item from the Master Keywords list, then select Assign to assign the keyword to the item.
- D Cancel:** Closes the dialog without applying any changes.
- E OK:** Closes the dialog and applies the keyword changes to the item record.

From the Edit Keywords dialog you can work with multiple selected items:

- F Keyword field:** Enter keywords to assign to the selected items.
- G Keywords list:** Shows all keywords assigned to at least one of the selected items.
- H Add:** Adds text in the Keyword field (F) as a new keyword to all the selected items.
- I Assign:** Adds the selected keyword (which is assigned to one or more of the selected items) to the rest of the selected items (see page 105).
- J Delete:** Deletes the selected keyword from all selected items.
- K Selected Items:** Shows how many catalog items are currently selected.
- L OK:** Closes the dialog and applies the keyword changes (indicated in the State column (N)) to the selected items.
- M Cancel:** Closes the dialog without applying any keyword changes.
- N State:** Displays the action that will be taken with keywords during this editing session. Options are: Add (H), Assign (I), or Delete (J). The actions indicated by the status of the State field are not applied to the selected items until the dialog is closed by clicking "OK."

Item Properties

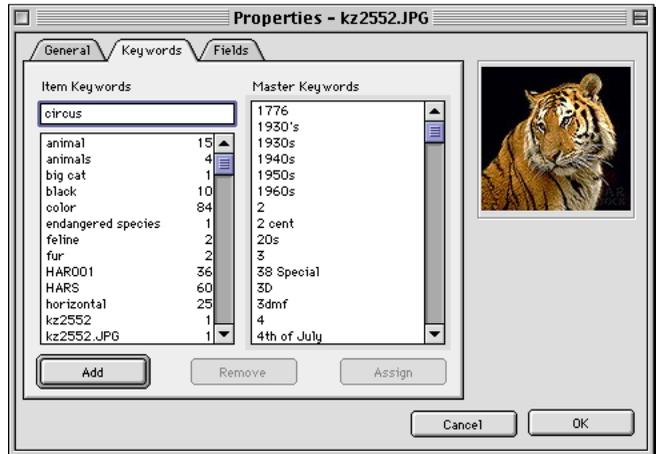


To Add keywords to a single item:

1. Select the item that you want to add keywords to, then choose **Item Properties...** from the **Item** menu (or press **Command+I** (Mac OS) or **Alt+Enter** (Windows)).

The "Item Properties" dialog is displayed.

2. Click the **Keywords** tab to select it.

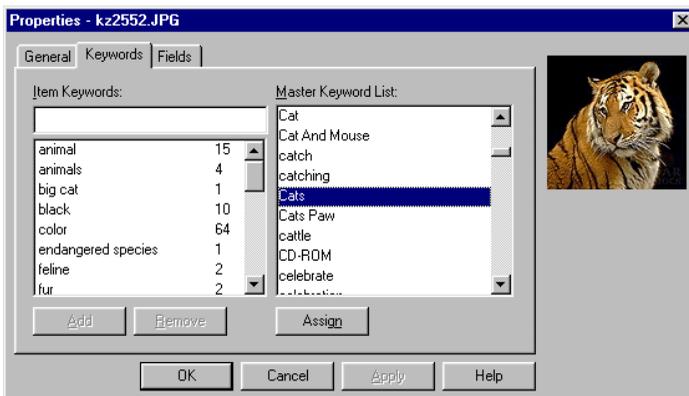


3. Type a keyword in the text box, then click "Add."

Note: If the catalog administrator has restricted keyword additions to only those in the Master Keyword list, Portfolio checks your additions against the list and notifies you of any "illegal" keywords.

— or —

3. If you have a **Master Keywords** list, select a keyword from the **Master Keywords** list, then click "Assign," or double-click the **Master Keyword**.



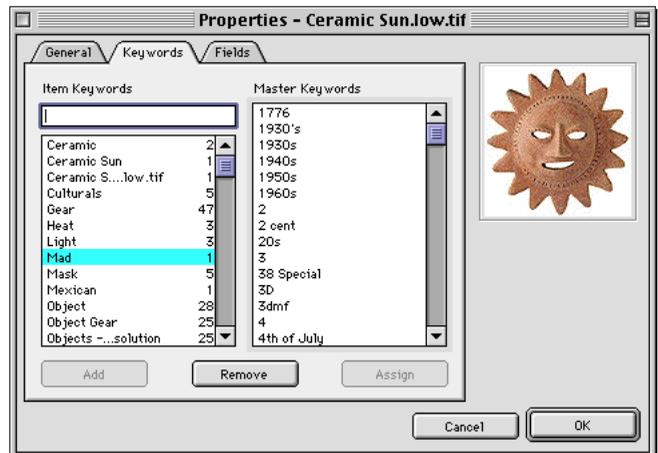
4. When you are finished adding keywords, click “OK” to close the dialog and assign the keywords to the item.

To Remove a keyword from an item:

1. Select the item that you want to add keywords to, then choose **Item > Item Properties** [or press **Command+I** Mac OS or **Alt+Enter** (Windows)].

The “Item Properties” dialog is displayed.

2. Click the **Keywords** tab to select it.
3. From the item’s keyword list, select the keyword that you want to remove.
4. Click “Remove.”



5. When you have finished selecting all the keywords that you want to remove from the selected item, click “OK.” This closes the dialog and removes the keyword(s).

The keywords are not actually removed from the item until you click “OK.” If you accidentally remove the wrong keywords, you can click “Cancel” to close the dialog without applying the changes.

When you delete a keyword it appears in the text entry box. This is handy if you decide you want to add it back—you can do so easily by clicking the “Add” button.

To Add a keyword and assign it to multiple items:

1. In the Gallery window, select the items that you want to add keywords to.
2. Choose **Item > Edit Keywords...** [or press **Command-Y (Macintosh)** or **Ctrl+Y (Windows)**].

The Edit Keywords dialog opens.

All the keywords assigned to at least one of the selected items will be displayed in the keywords list.

3. Type a keyword in the text box, then click **“Add.”**

The “State” of the keyword is changed to “Add,” indicating that it will be added to the catalog and assigned to the selected items.

Note: You do not need to click “Assign” after you add a keyword—“Add” implies “Assign” (that is, all keywords with either Add or Assign in the State field will be assigned to all selected items in the active Gallery when the dialog is closed. “Add” just tells you it’s a new keyword).

4. When you have finished adding keywords, click **“OK”** to close the dialog and assign the keyword to the selected items.

If you close the dialog by clicking “Cancel,” all changes are discarded.



To take a keyword that is already assigned to one item and assign it to other items:

1. In the Gallery window, select both the item that has the keyword you want to assign, and the items that you want to assign the keyword to.
2. Choose **Item > Edit Keywords...** [or press **Command+Y (Mac OS)** or **Ctrl+Y (Windows)**].

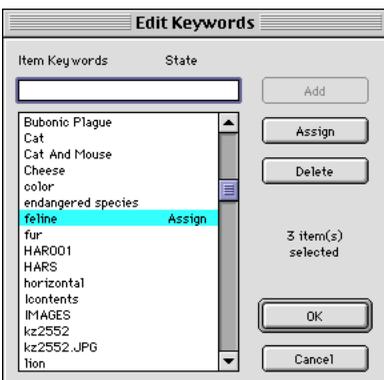
The Edit Keywords dialog opens.

All the keywords assigned to the selected items will be displayed in the keywords list.

3. Locate the keyword that you want to assign to the selected items.
4. Click **“Assign.”**

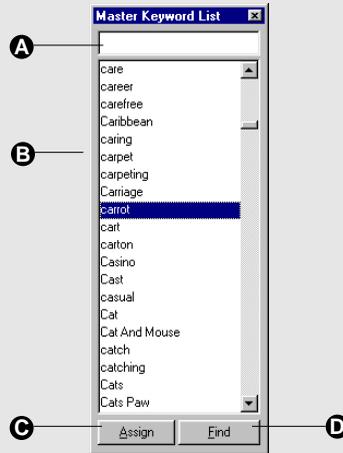
The “state” of the keyword is changed to “Assign.”

5. When you have finished assigning keywords, click **“OK”** to close the dialog and assign the keyword(s) to the selected items.



Assign Keywords from the Master Keywords Palette

- A Find:** Enter a keyword or partial keyword, then click the Find button to move to the location on the list of the closest matching keyword. Handy for quickly moving around a long list.
- B List of Keywords:** Select a Keyword from the list, then click Assign to assign the keyword to the selected items. You can also double-click a keyword or drag it to a Gallery to assign it to the selected items.
- C Assign:** Select a Master Keyword from the list, then click Assign to assign the keyword to the selected items.
- D Find:** Select a Master Keyword from the list, then click Find to locate all the items with that keyword assigned, and display them in the Gallery window.



Tip

To jump to a particular part of the list, start typing the keyword in the edit box. The list will jump to the first word beginning with the text that you entered.

Tip

You can drag multiple keywords from the Master Keywords list and drop them on the thumbnail of any one of the selected items to assign them to all the selected items at once.

Tip

Keep the Master Keywords Palette open while you are working with multiple catalogs. As you click in different Catalog Gallery windows, the Master Keywords Palette is immediately updated with the keywords for that catalog.

To assign keywords to items using the Master Keyword list:

- 1. In the Gallery window, select the items that you want to assign Master Keywords to.**
- 2. Choose Master Keywords Palette from the View menu, (or press Command+K (Macintosh) or Ctrl+K (Windows)).**

The Master Keywords Palette will be displayed, showing all the Master Keywords in the catalog.

- 3. On the Master Keywords List, locate and select the keyword(s) that you want to assign to all the selected items. [Press Command-click (Mac OS) or Ctrl-click (Windows) to select keywords non-contiguously.]**
- 4. Click “Assign.”**

The keywords are assigned to all the selected items immediately.

To find all items to which a keyword is assigned:

- 1. Open the Master Keywords Palette [View > Master Keywords Palette, or press Command+K (Mac OS) or Ctrl+K (Windows)].**
- 2. Select the keyword that you want to change, then click “Find,” or double-click the word.**
- 3. In the Gallery window, all the items with that keyword will be displayed.**

Item Descriptions

In addition to adding keywords to any item, you can add a description up to 32,000 characters long. You can use the description field to keep track of any information about the source file that you might find useful or important, but information that you probably won't use to locate catalog items. You might want to use the Description field for photo captions, small amounts of marketing copy, or miscellaneous notes.

If the original application provides a way for you to enter and save descriptive text with the source file, Portfolio can often extract this information automatically as it catalogs the item. Otherwise, you can add or edit a description after cataloging. In a network environment, a catalog administrator can control who edits descriptions (see *page 133*.)

Adding Descriptions by Extracting Them from Source Files

If you have selected the “Extract Descriptions” option (Catalog > Cataloging Options: Rules) for Adding and/or Updating, Portfolio examines all source files for descriptions created in their native applications when you add and/or update items in a catalog. As items are cataloged or updated, extracted descriptions are added to the catalog according to the settings in the Rules tab (*page 90*).

Entering and Editing Item Descriptions

You can manually enter item descriptions into a catalog, and you can edit existing descriptions whether they were added manually or extracted from an item's source file.

To enter or edit a description manually:

- 1. Select the item to which you want to add a description, then choose “Item Properties...” from the Item menu.**

The “Item Properties” dialog box appears with the General tab selected.

- 2. Type a description in the Description text box, then click “OK.”**

The description is added to the item.

Note: If the Description text box is disabled, it indicates that you do not have permission to edit descriptions for items in the open catalog (requires Editor mode or higher). If you are working in a network environment, check with your catalog administrator.

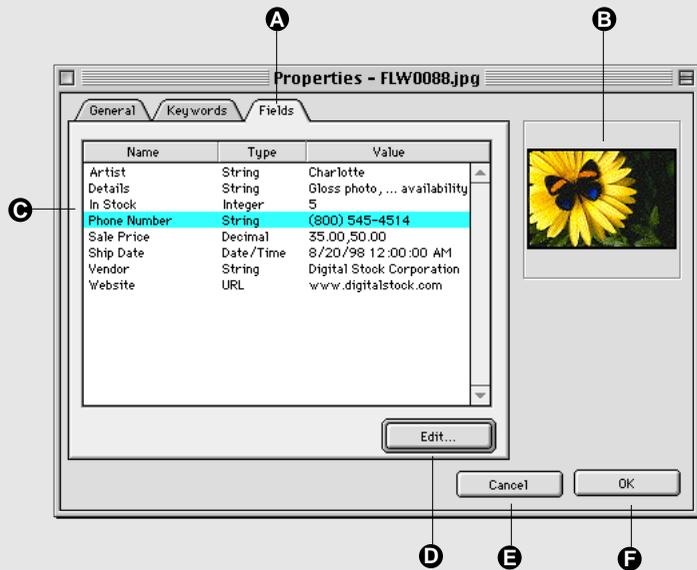
Adding Data to Custom Fields

If custom fields have been defined for a catalog, you can change their value (or contents). For example, you can add photographers' names to a custom "Photographer" field in a catalog of photographic images. Some custom fields even allow more than one entry, and others allow you to select from a predefined list of items so that consistency is maintained from record to record, and/or between catalogs. See *page 140* for information on creating special Custom Fields.

Note: You must have Editor level access or above to a catalog in order to change its Custom Field values. Creating new Custom Fields requires Administrator level access. See page 133.

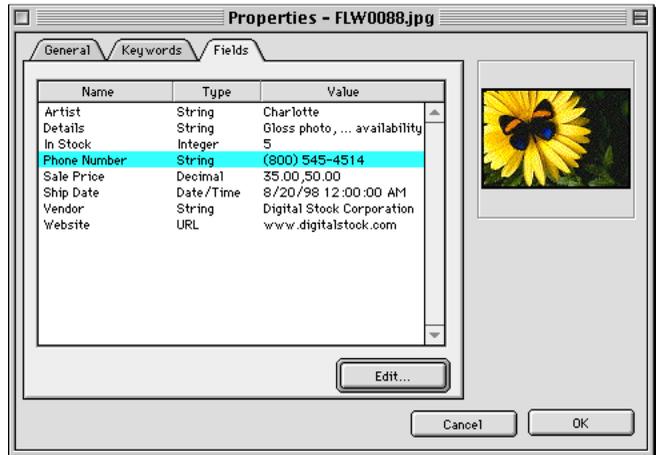
Item Properties—Fields Tab

- A Custom Fields tab
- B Thumbnail Preview: Displays the thumbnail for the selected Gallery item.
- C Custom Field List: Lists all the Custom Fields that have been created for the catalog, even if no values have been assigned to a field.
- D Edit: Opens the appropriate Edit dialog for the selected Custom Field (*see page 110*).
- E Cancel: Closes the dialog without saving changes in any of the tabs.
- F OK: Closes the dialog and saves changes to all the tabs.



To Edit existing Custom Fields:

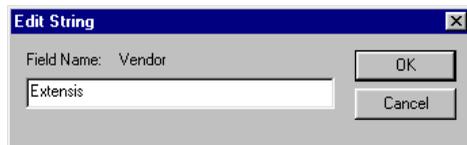
1. Select an item in a Gallery window, then choose Item > Item Properties.
2. In the Item Properties dialog, click the “Fields” tab to select it.



All custom fields for the catalog are displayed, even if no data is currently entered in a field for the selected item.

3. Select the field you want to change, then click “Edit...”
The “Edit” dialog box for the field will be displayed. This dialog differs for the different field types— see *page 110*.
4. Type the appropriate value in the text box, then click “OK” to close the edit dialog.

Field Type	Data Example
Date/Time	8/20/98 1:15 pm
Decimal	50.00
Integer	100
String	Text
URL	www.extensis.com



If you enter a value that is incorrect for the field type, clicking “OK” produces no result. (Re-enter the proper value type or click “Cancel.”)

5. Click “OK” to close the dialog and accept the changes.

Custom Field Editing Dialogs

Custom Field values are entered from the Item Properties dialog (Item >Item Properties). The following six editing dialogs are available. See "Adding Custom Fields" starting on page 140 for additional information on field types.

- A Single-line string: Enter text strings. Number of characters allowed is set when the custom field is created.
- B Multi-line string: Enter text strings that can be displayed on multiple lines.
- C Pre-defined list: Select an entry from the pop-up list of pre-defined values.
- D Multi-value list: Enter a value to add to the list.
- E Date/Time: Enter date and time using the syntax mm/dd/yy mm:ss.
- F URL: Enter a title for the URL and the URL string. The text in the Title field is what will appear in the URL field for the item. Clicking the Title launches the selected browser and opens the indicated URL.

C

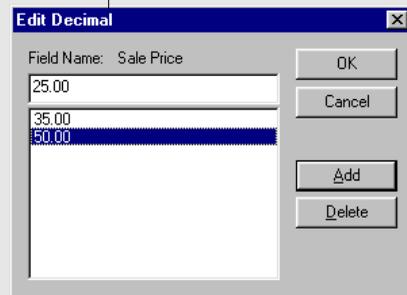
Pre-defined List



The dialog box is titled "Edit String". It contains a label "Field Name: Artist" above a text input field containing the text "Charlotte". Below the input field are two buttons: "Cancel" and "OK".

D

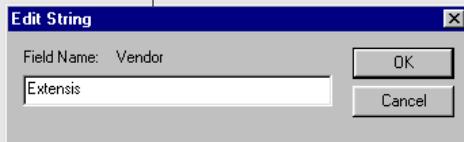
Multi-value List



The dialog box is titled "Edit Decimal". It contains a label "Field Name: Sale Price" above a text input field containing "25.00". Below the input field is a list box containing three values: "35.00", "50.00", and "50.00". The "50.00" value is selected. To the right of the list box are four buttons: "OK", "Cancel", "Add", and "Delete".

A

Single-line String



The dialog box is titled "Edit String". It contains a label "Field Name: Vendor" above a text input field containing the text "Extensis". Below the input field are two buttons: "OK" and "Cancel".

E

Date/Time



The dialog box is titled "Edit Date/Time". It contains a label "Field Name: Publish Date" above a text input field containing the text "8/28/98 4:20 pm". Below the input field are two buttons: "OK" and "Cancel".

B

Multi-line String



The dialog box is titled "Edit String". It contains a label "Field Name: Details" above a multi-line text input field containing the text "Gloss photo, Two sizes - large and small, year round availability". Below the input field are two buttons: "Cancel" and "OK".

F

URL



The dialog box is titled "Edit URL". It contains a label "Field Name: Website" above two text input fields. The "Title:" field contains "www.extensis.com" and the "URL:" field contains "http://www.extensis.com". Below the input fields are two buttons: "Cancel" and "OK".

Replacing Keywords, Descriptions, and Field Values using Search Parameters

You can easily replace keywords, descriptions, and Custom Field values for multiple items in a catalog at the same time using Portfolio's powerful Replace function. For example, if you have defined a Custom Field for the print date for your images and the print date for some of those images slips by a week, you can replace the incorrect date in that field for all the affected images at once. You can even search on a different field than the field being replaced, and you can choose to search all the items in the active Gallery, or limit the search to only the selected items.

Find and Replace

A Context: Determines search context. Options are:

Replace all Items in Gallery: Replaces the indicated field value of all the records in the active Gallery with the value defined in the Replace clause. Disables the Find clause.

Search Selected Items: Limits the scope of the Find to the currently selected items in the active Gallery.

Search Gallery: Searches the entire active Gallery for matching records.

B and C Find clause: Sets the parameters of the search.

Fields pop-up: Displays all fields, including Custom Fields. Indexed fields are displayed in bold (Indexed fields yield faster searches).

Operator pop-up: Defines the search operator. List changes depending on find field type (**B**).

Search value: Enter the string to be searched for.

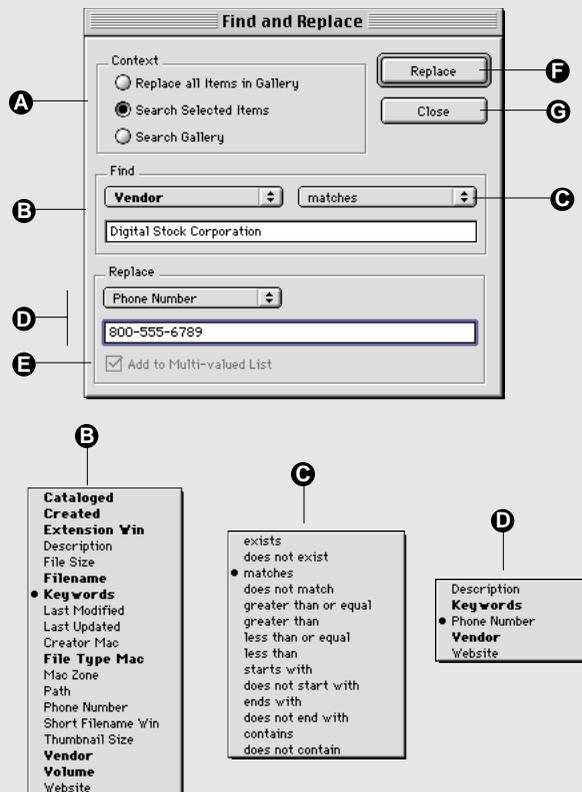
D Replace clause: Determines which field value will be replaced.

Replace text box: Enter the string that will be used to replace the existing string.

E Add to Multi-valued List: Controls how multi-valued fields are handled. See page 113.

F Replace: Click to initiate the Find and Replace operation. If the field is a single value field, the entire contents of the replacement field are replaced.

G Close: Click to close the dialog box.



To Replace items based on field values:

1. Choose **Replace...** from the Catalog menu (or press **Command+Option+R** (Mac OS) or **Ctrl+Shift+R** (Windows)).

The “Find and Replace” dialog box appears.

2. Select the Context of the search using the Context radio buttons.

- **Replace all Items in Gallery:** Disables the Find and forces the Replace value into all records in the Gallery.
- **Search Selected Items:** For the selected items, Replace the value for all records matching the search criteria.
- **Search Gallery:** For all items in the Gallery, Replace the value for all records matching the search criteria.

Unselected records are not affected.

3. Enter the parameters of the Find by selecting the field to be searched and a search clause from the pop-ups, then enter the text string to search on.

Note: This step does not apply if you selected “Replace all Items in Gallery” in step 2.

4. Enter the parameters of the Replace by selecting a field to be replaced from the Replace Field pop-up, then enter the data string that will replace the existing data in the selected field.

If the field you selected is a Multi-valued field, indicate whether you want the Replace value added to the list of existing values, or to replace the value indicated in the Find value field.

Note: Exercise caution when you perform a Replace where the Find field is different than the Replace field and “Add to Multi-valued List” is unchecked, as the entire contents of the Replace field will be replaced.

5. Click **“Replace.”**

Item records matching the Find criteria will be located, and data in the indicated Replace field will be replaced.

Note: Because the “Replace” command in Portfolio is replacing field data in item records that are already being displayed, and is not (like the Portfolio “Find” command) searching for items to display, the “Replace” command has no effect on the Gallery (other than to show any field data that was replaced during the Replace operation).



Tip

You can populate Custom Fields based on information in existing fields. This can be handy when you want to add a new field based on existing information and/or move existing information into a different field. For example, you might search for every record that has a particular vendor name in the Description field and move that vendor’s name to a custom “Vendor Name” field. Then you might search all the records again using the Vendor Name, and add the vendor’s web address to a custom “Vendor Website” field.

Add to Multi-valued List Checkbox

The Multi-valued List option is only available when a Custom Field defined as a Multi-value List is selected in the Replace clause.

There are four possible options for replacing multi-valued fields. These are based on the type of search being conducted, and whether the “Add to Multi-valued List” checkbox is On (checked) or Off (unchecked). An example of each is given below. The first three options are fairly straight-forward. The fourth can be extremely powerful, but unless understood fully, may lead to unwanted results. If you are interested in applying the fourth scenario, you may want to experiment with a small, unwanted catalog until you fully understand the ramifications.

For the following, assume that you have a Multi-valued List with two items it: “cat” and “dog.”

Examples and Results:

Option 1: You want to search for all records containing “cat” and add the word “snake” to the list. To accomplish this, enter “cat” in the Find field, enter “snake” in the Replace field, and turn the “Add Multi-value” checkbox On. This results in a multi-value list containing “cat,” “dog” and “snake.”

Option 2: You want to search for all records with some commonality and add “snake” to the value list. To accomplish this, enter your search parameter in the Find field (such as a creation date or partial filename), enter “snake” in the Replace field, and turn the “Add Multi-value” checkbox On. This results in a multi-value list containing “cat,” “dog” and “snake.”

Option 3: You want to search for all records containing “cat” and replace the word “cat” with the word “snake.” To accomplish this, enter “cat” in the Find field, enter “snake” in the Replace field, and turn the “Add Multi-value” checkbox Off. This results in a multi-value list containing only “snake” and “dog.”

Option 4: You want to search for all records with some commonality and replace the entire value list with the word “snake.” To accomplish this, enter your search parameter in the Find field (such as a creation date or partial filename), enter “snake” in the Replace field, and turn the “Add Multi-value” checkbox Off. This results in a multi-value list containing *only* the word “snake.” This can be helpful when you want to replace the entire value list and start over again with new values. After replacing the list with a single value you can perform a regular Find to locate all the items with that value and add the other list items in the normal way.

Preparing Documents and Images for Cataloging

Portfolio works directly with many products to make cataloging fast and easy. This section describes how to prepare documents in various applications so that cataloging them is as easy as possible.

Adobe Photoshop 3.0.x and 4.0.x, and 5.0.x

You can save thumbnails, keywords and captions from your Photoshop documents for use in Portfolio catalogs.

To include a thumbnail and preview in Photoshop:

1. Choose “General...” from the Preferences submenu in Photoshop’s File menu.
2. Click “More.”
3. In the Image Previews section of the dialog box, select “Always Save.”
4. Click “OK.”

To include keywords and captions in Photoshop:

1. Choose “File Info” from Photoshop’s File menu.
2. Enter your caption in the caption field.
3. Click “Next” to switch to the “Keywords” panel.
4. Enter your keywords.
5. Click “OK” to close the dialog box.

Adobe Illustrator 7.0 and 8.0

Illustrator automatically saves a thumbnail that Portfolio can display into native (.ai) files.

For Illustrator EPS files, in the Save Options dialog, choose to save both a thumbnail and a preview.

Adobe PageMaker 6.5 (Macintosh only)

PageMaker saves thumbnails that Portfolio can display in the catalog.

Tip

You can use Portfolio Mappings (Catalog > Cataloging Options: Mappings tab) to extract all user added data in the File Info fields of Photoshop files. See *page 92* for details.

Tip

Macintosh: Included on the Extensis CD for Portfolio users is a free Quark XTension “Extensis QX-Drag&Drop.” This powerful XTension gives QuarkXPress the ability to accept drag and drop items, such as the items in your Portfolio catalogs. Before you can use this XTension you must run the QX-Drag&Drop Installer to install it in your Quark XTension folder.

Tip

Macintosh: Included on the Extensis CD is the XTension “Visions Edge Preview Editor Lite,” which allows you to save full-color thumbnails of your QuarkXPress documents. Refer to the instructions accompanying the XTension for help. (*Extensis cannot offer Technical Support for Preview Editor Lite.*)

QuarkXPress 3.31 and above (Macintosh only)

You can save thumbnails of your documents for use in Portfolio catalogs.

To attach a thumbnail in QuarkXPress:

1. **When saving a QuarkXPress document, make sure that “Include Preview” is selected in the QuarkXPress Save dialog box.**

This will save a black-and-white thumbnail of the first page of your Quark document.

Scripting

A number of Portfolio commands can be accessed through Scripting.

Macintosh: Portfolio supports AppleScript and any other OSA-compliant scripting language.

Windows: Portfolio supports OLE Automation, which can be accessed by a number of scripting languages such as Visual Basic, Visual C++, Java, etc.

For information and examples on the scripting interface for each platform, refer to the “Scripts” folder on the Extensis CD.

Note: Extensis Technical Support cannot provide instruction on how to use the various scripting languages.

The Scripts Menu

The scripts or applications that you write to automate Portfolio can be conveniently launched from within the catalog using a special Scripts menu. This menu is installed in the Portfolio menu bar when valid scripts are placed in a folder named “Scripts” located in the same folder as the Portfolio application. Scripts and applications located in the Scripts folder are added to the Scripts menu and are available as regular menu commands.

This feature is particularly useful for creating custom commands for catalog users. For example: A script could be written that takes the currently selected items and adds the current date to a custom “Publish Date” field in each record. By placing this script in the Scripts folder located in the Portfolio application folder, the user can execute the script by selecting it from the Scripts menu, without needing to know anything about scripts. In fact, the menu item would appear to be a built-in function of Portfolio.

Tip

The Macintosh uses the “-” (dash) character to signify a break in menus. Because of this rule, do not create scripts with a “-” as the first character of the filename.

Importing and Exporting

This chapter describes how to Import field values from a database into Portfolio catalogs, allowing you to automate some of your keyword and field entries, as well as convert existing catalogs into Portfolio catalogs. Also covered is the Portfolio Export function, which allows you to export catalog data to a text file, to create simple Web pages of catalog items, and to export “pnot” data (Macintosh only).

Data can only be imported into keywords, description, and Custom Fields. Built-in fields, like Color Mode, Created, etc., cannot be changed on importing.

Technical Notes About Importing and Exporting

1. URL fields are exported and imported with the import and export fields separated by the Group Separator character (just like keywords—see table on *page 119*).
2. URL fields are special when importing: If the “Replace Multi-valued” checkbox is Off, existing data in a URL field will not be changed by imported data; empty URL fields can still receive data. If the checkbox is On, existing URLs will be replaced as expected with the imported data.
3. Color Mode is exported as a number, not a string, as follows:

Unknown	=	0
Black & White	=	1
Grayscale	=	2
RGB	=	3
CMYK	=	4
YUV	=	5 (TIFF; also known as YCbCr)
Lab	=	6
YCKK	=	7 (JPEG)
4. Custom Fields of type Date/Time always import/export Time, even if the “Display Time” checkbox is Off. (*See page 143.*)
5. Custom Fields of type String always import/export carriage returns, even if the “Multi-line Display” checkbox is Off. If multi-line data is imported and you do not turn this checkbox On, only the first line of data may be visible.

Importing Field Values

Using Portfolio's "Import Field Values" you can bring data from an external database into Portfolio by matching fields from the database with fields in Portfolio.

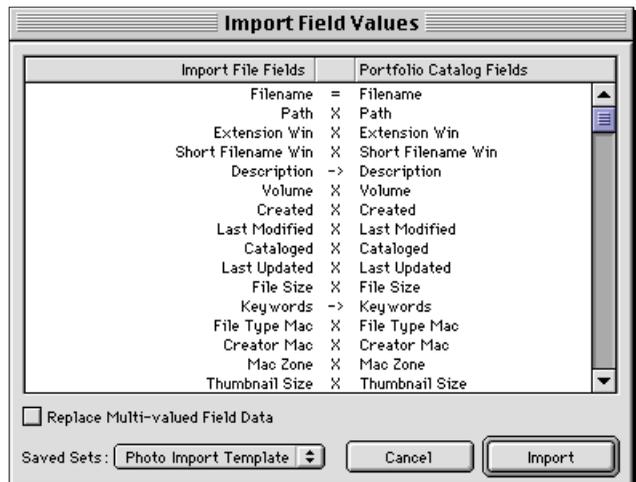
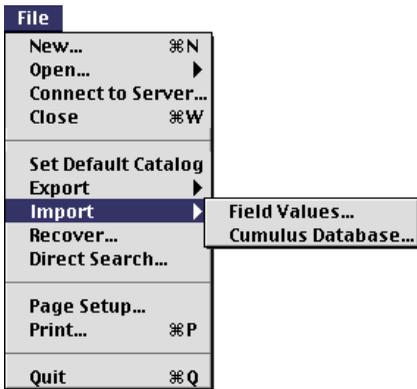
To set up a database file for import into Portfolio, it should be exported as text, with tab delimited fields and carriage return delimited records, and should have field headers included (the first record in the text file is assumed to contain the database field headers and is therefore not imported).

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

To Import Field Values:

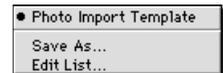
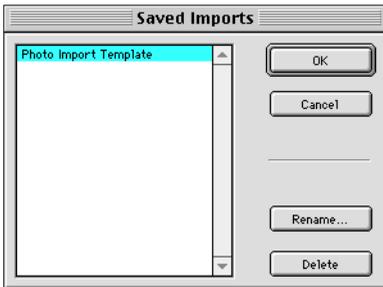
1. From the File menu in Portfolio, choose Import > Field Values.
2. Locate the text file to be imported.
3. Match each Import File Field headers from the database (these should be in the first record) with the appropriate Portfolio Catalog Field name.

Move the File Fields and Portfolio fields up and down the list to reorder their relative position. Click between the two columns to activate the Import pop-up menu. This allows you to select the appropriate import operator: Key, Import, or Skip.



Symbol Function Description

=	Key	Defines the key relationship. The selected Import File Field will be searched for matching values in the Portfolio Catalog Field. Only one Key relationship can be designated for the import, and only Portfolio Indexed fields can be designated as the Key field.
-->	Import	Indicates that the Import File Field will be imported into the Portfolio Catalog Field indicated to the right of the arrow.
x	Skip	Indicates that the Import File Field will not be imported.



4. When you have finished setting up the import fields, you can save the settings for future use. To do so, select “Save As...” from the Saved Sets pop-up menu.

5. When you are ready to import the database, click “Import.”

Portfolio will examine the field value data in Record #2 (the first record with data, since the first record holds the field headers) for appropriate data types by comparing each value in the record with the paired Portfolio field type specified at the start of the import (step 3, *page 118*). If a value does not match, a warning is presented, allowing you to cancel the import.

If all record types match, Portfolio will import the data. As the import progresses, if data in any field of a record does not match the paired Portfolio field type, that data is skipped.

Replace Multi-valued Field Data

When checked, values imported into a Multi-valued field overwrite the values in the Portfolio record. When unchecked, the values being imported are added to the end of the list in the Portfolio record.

Technical Notes about Importing Text Files

Because the import text file is delimited by tabs between fields and carriage returns between records, make sure your data does not contain either of these characters within a field, as it will cause unexpected results on Importing. Portfolio follows the ASCII standard by recognizing ASCII 11 as the Vertical Tab character. This character should be used to denote a linebreak within a field (such as in a text block like the Description field). Portfolio also recognizes ASCII 29 as the Group Separator character. This character should be used to delimit values within a multi-valued field (such as the Keywords field). If you are exporting multi-line or multi-valued data from other databases, make sure to use these characters. Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

Export to HTML

The Portfolio Export to HTML function allows you to export catalog items as static Web pages, for posting on a Web Server.

You can specify either that the HTML pages produced will be based on the items and the layout of the currently active Gallery view, or you can specify that Portfolio export the pages using a custom HTML settings file (Template). Information on creating such a template (by directly editing the HTML code) is given on *page 124*.

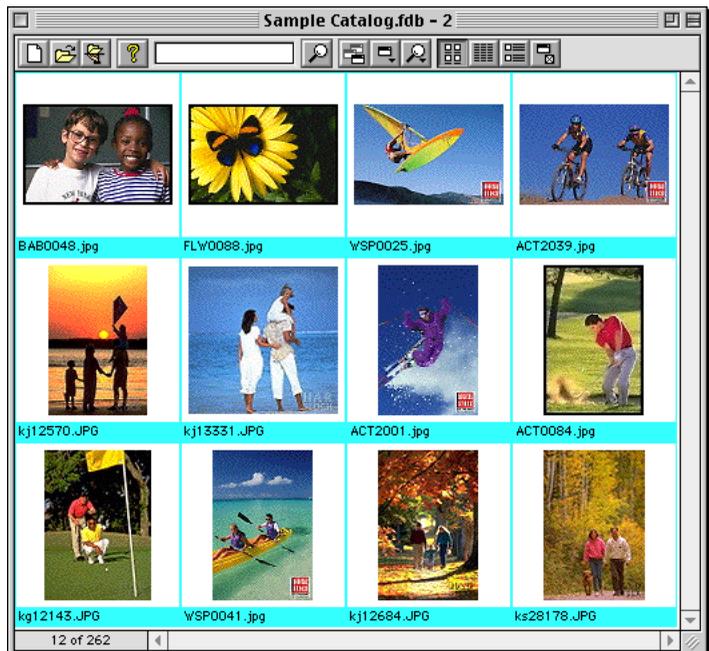
To export catalog items as Web pages just as they appear in the active Gallery:

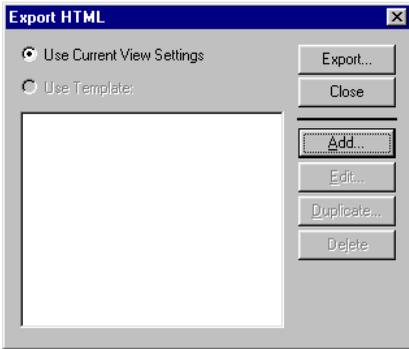
1. **Select the desired Gallery view and customize it so that it looks just like you want it to look when viewed on the Web. Thumbnails are exported in the order that they displayed in the catalog.**

Portfolio creates the Web page layout with the items positioned just as they are in the Gallery, so you may want to reorder the items to create just the right display.

2. **Select the records that you want to export.**

You must indicate which items in the Gallery you want to export.

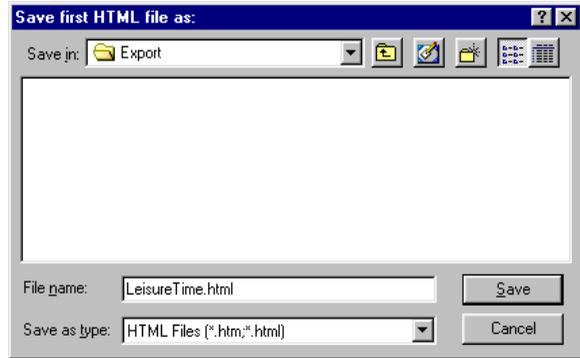




3. Choose **File > Export > HTML** [Command+Option+H (Mac OS) or Ctrl+Shift+H (Windows)].

The Export HTML dialog will be displayed.

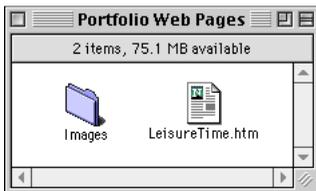
4. In the Export HTML dialog, choose “Use Current View Settings,” then click “Export.”
5. Portfolio will ask you to enter a file name for the first HTML page, and locate where to save the HTML file that are created.



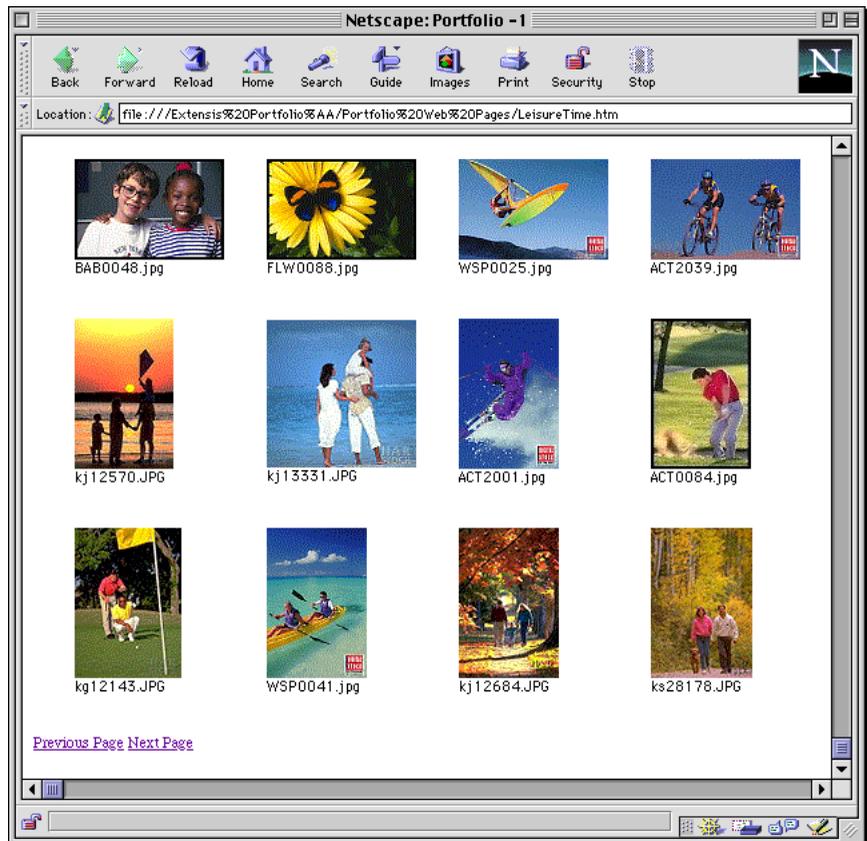
If more than one page of HTML is required (depending on how many records were selected), Portfolio will generate additional pages and place them in the same location as the first file. All the Web page files will start with the file name you entered, followed by a hyphen (“-”) and a number corresponding the page number. For example, if the first file was named “PortWeb.htm”, the second file will be named “PortWeb-1.htm,” etc.

6. Click “Save” to start the export process.

Portfolio will also create a folder named “Images” at the same location as the Web pages. Portfolio will store JPEG thumbnails of each of the selected items in the Images folder. If any files (either the HTML files or the thumbnail images) already exist in this location, you will be asked whether you want to replace the files or stop the export process.



7. Open the new Web page(s) in your Web browser to preview the results.



Portfolio's HTML Export process generates relative links. This allows you to upload the folder of exported items (all the HTML pages and the Images folder) to your Service Provider or to a Web site on your corporate intranet and have the items published without hand-coding any HTML and without manually linking the images and pages. Contact your Internet Service Provider or System Administrator for assistance in uploading and publishing your folder of catalog Web pages.

Technical Notes about Exporting HTML

1. Portfolio does not export borders in the HTML documents. Any border settings in the Gallery view will be ignored.
2. Portfolio exports thumbnails at the size they were when cataloged, not at the selected display size in the Gallery window. If the thumbnails in the catalog were stored at different sizes, the HTML output will display the thumbnails at different sizes. It is generally recommended that the exported records all use the same size thumbnails. If you do have thumbnails of different sizes, use the Modification Method “Update Unconditionally” and enable Regenerate Thumbnails (Cataloging Options: Rules tab); this forces the thumbnails to be reset to one size. Be aware that the 256 x 256 thumbnails are roughly four times larger than the 112 x 112 thumbnails, so download times over the Internet could be significantly longer if you use this size, depending on the user's bandwidth.

Creating Catalog Web Pages from an HTML Template

Besides being able to automatically export HTML based on the current Gallery setup, Portfolio can export your catalog items as Web pages using HTML coding that you provide. This gives you great flexibility in creating catalog layouts for the Web.

The HTML information that you enter can be saved as a template. Any HTML Templates that you create are saved within the Portfolio catalog, so you can quickly export any set of records to Web pages using your pre-defined formats at any time.

To export catalog items as Web pages using an HTML Template:

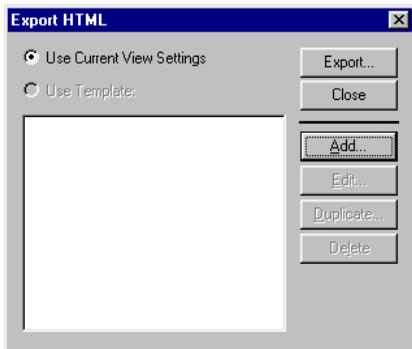
1. In the active Gallery, select the records that you want to export as Web pages. The records will be exported in the order they are displayed in the gallery, so rearrange the records if desired.
2. Select File > Export > HTML (or press Command-Option-H [Ctrl+Shift+H]).

The Export HTML dialog will be displayed.

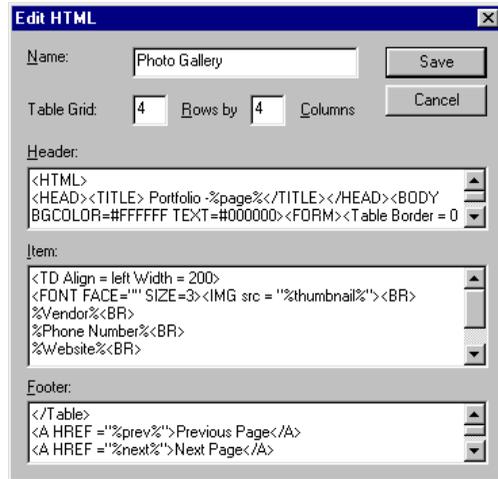
4. In the Export HTML dialog, click “Add...” to create a new HTML Export Template.

The Edit HTML dialog will be displayed, showing the HTML codes and tags representing the current Gallery view.

5. Enter a name for the template.

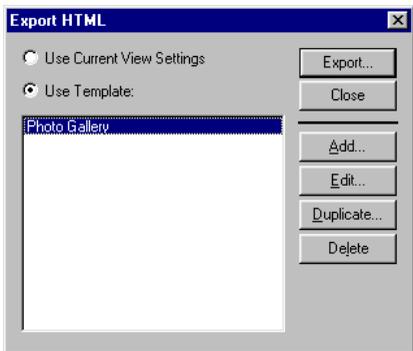


6. Choose the number of rows and columns of thumbnails that you want to display on each page.



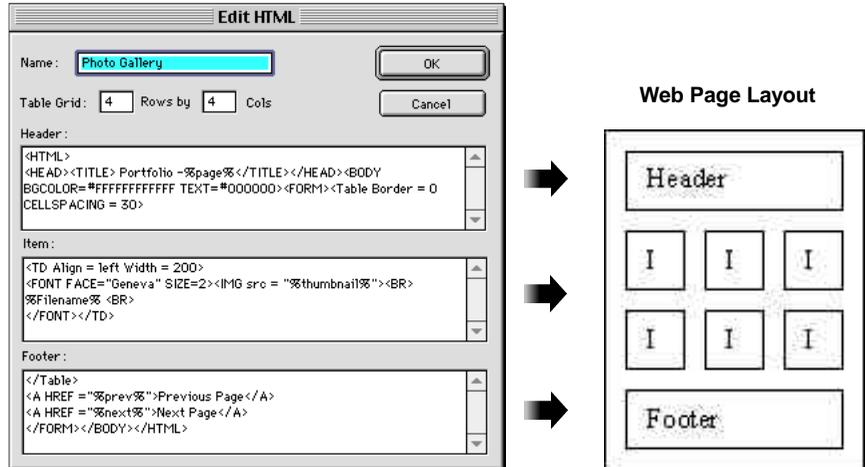
This selection controls how many items fit on a page, and as a result, how many pages are generated for each export based on the number of items you have selected.

7. Edit the HTML as necessary to produce your desired result. See the following section for details about the three HTML data blocks.
8. Click 'OK' to save the Template and return to the Export HTML dialog.
9. In the Export HTML dialog, choose the "Use Template" radio button and select your template in the list.
10. Click "Export" to generate the Web page(s) based on the information you configured in the template.



The HTML Template

The three HTML data blocks in the Edit HTML dialog represent the three portions of an HTML document. The Header is the set of tags at the top of the file, the Item is the set of tags written once for each record being written into a page, and the Footer is the set of tags written at the end of the file.



The following rules apply to each block:

Header:

1. The header must contain the `<HTML>` tag and the `<BODY>` tag.
2. Because the grid layout is generated as a table, the Header must end with a `<TABLE>` tag.
3. See the “Macros” section (*page 127*) for acceptable macros within the Header.

Footer:

1. The Footer must start by closing out the table with a `</TABLE>` tag.
2. The Footer should close out with `</BODY>` and `</HTML>` tags.
3. See the “Macros” section (*page 127*) for acceptable macros within the Footer.

Item:

1. The item block should contain all of the formatting for a particular table cell, including the opening `<TD>` tag and the closing `</TD>` tag.
2. Portfolio will generate the row tags (`<TR>` and `</TR>` on its own, based upon the grid dimensions). Do not include these tags in any of the cells (unless you are adding your own rows at the top or bottom of the table).
3. The key to properly configuring the Item block is in using macros. Please refer to the following section for information on how to use macros.

Macros:

Portfolio uses a macro language in the HTML Templates to allow for substitution of variable data at the time the HTML files are actually generated. All macros start and end with a % sign, so the proper use would be `%macro%`. To display a "%" sign in the actual HTML, use two consecutive % signs in the template (i.e. "%%" in the template produces one "%" in the generated output). The macros are case-insensitive.

The following tables list the supported macros within the different blocks:

All Blocks

<code>%PREV%</code>	<p>Link to previous page. This will be the name of the previous file generated in the series of files. If this is the first file in the series, the name of the current file is substituted.</p> <p>Example: <code><AHREF = "%PREV%">Previous Page</code></p> <p>Results: A hyperlink ("Previous Page") is displayed. When clicked, it takes the user to the previous page in the generated series.</p>
<code>%NEXT%</code>	<p>Link to next page. This will be the name of the previous file generated in the series of files. If this is the last file in the series, the name of the current file is substituted.</p> <p>Example: <code><AHREF = "%NEXT%">Next Page</code></p> <p>Results: A hyperlink ("Next Page") is displayed. When clicked, it takes the user to the next page in the generated series.</p>
<code>%PAGE%</code>	<p>Substitutes a number indicating which page in the series is being generated.</p> <p>Example: <code><TITLE>Portfolio Search - %PAGE%</TITLE></code></p> <p>Results: The text "Portfolio Search – 1" is displayed in the title bar of the browser window. (Assuming this is the first page in the series and assuming this tag is placed in the header prior to a <code><BODY></code> tag.)</p>

Item Block Only

<code>%THUMBNAIL%</code>	<p>Substitutes a relative path to the thumbnail file for the current record (located in the Images subfolder). This is most commonly used to display the thumbnail on the page.</p> <p>Example: <code></code></p> <p>Results: Thumbnail is displayed on the web page.</p>
<code>%FIELDNAME%</code>	<p>Substitutes text data from the named field in the current record. For multi-valued fields, the text will be displayed as comma-delimited values (the same way it is displayed in Thumbnail view).</p> <p>Example: <code>%FILENAME%</code></p> <p>Results: "image001.jpg" is displayed in bold. (Assuming the record's filename is "image001.jpg".)</p>
<code>%FIELDNAME^x%</code>	<p>Substitutes the value x from a multi-valued in the current record. If there are less than x values in the field, an empty string is substituted. x can only be a value between 1 and 9. The primary use of this field is for URLs.</p> <p>Example: <code><AHREF=%MYURL%^2>%MYURL%^1</code></p> <p>Results: A hyperlink is generated in which the source is the URL value of the field (i.e. the second value in MYURL), and the text displayed on screen is the title value (i.e. the first value in MYURL.)</p>
<code>%FIELDNAME%@x</code>	<p>Substitutes text data from from the named field in the current record. However, the data in the field will be displayed as either a drop-down list or a scrolling list box. This macro is intended primarily for multi-valued fields. Substituting a value of 0 for x results in a drop-down list being generated. Substituting a value of 1 through 9 for x results in a scrolling list box of x lines being generated.</p> <p>Example: <code>%KEYWORDS%@0</code></p> <p>Results: The keyword list for the record is displayed as a drop-down list, with the first keyword displayed.</p> <p>Example: <code>%KEYWORDS%@5</code></p> <p>Results: The keyword list for the record is displayed as a scrolling list box that is 5 rows in height.</p>

Technical Notes on HTML

1. Using the `%FIELDNAME%@x` makes use of two different form controls (the drop-down menu and the scrolling list box). Because of this, the page must contain a `<FORM>` tag for these tags to be interpreted properly.

The `<FORM>` tag can be either in the Item block or in the header. If you plan to have a separate set of form controls on the page, put the `<FORM>` tag towards the beginning of the item block (usually just after the `<TD>` tag) and the `</FORM>` tag towards the end (usually just before the `</TD>` tag). This will prevent the controls from accidentally causing data to be submitted via your Submit control.

2. To display a large text box for a multi-line field, wrap the field in a TEXTAREA tag.

Example: `<TEXTAREACOLS=50 ROWS = 3 WRAP = "SOFT" NAME = Description>%Description%</TEXTAREA>`

Results: This will cause a scrollable box 3 rows by 50 characters to be drawn with the contents of the record's Description field displayed. Note that this is also a FORM control, so the previous note regarding FORM tags applies here as well.

3. As with any HTML code, results will vary based on what make and version of browser the viewer is using. It is recommended that you test the generated results with any browsers with which you anticipate your visitors might access the pages.

For more information on the specifics of creating pages for the Web and coding in HTML, consult any of the excellent tutorials and reference guides available on the Internet, or check your local bookstore or library for additional information.

Export to Text File

You can export your Portfolio catalog data to a text file, and you can specify which fields will be exported and which fields will be skipped. Only data for the selected items in the active Gallery will be exported.

To export catalog fields as text:

1. In the Gallery window, select the items for which you want to export text data.

To select the entire catalog, choose View > Find All [Command+' (Mac OS) or Ctrl+' (Windows)] and then Edit > Select All [Command+A (Mac OS) or Ctrl+A (Windows)].

2. Choose Export > Text File... [Command+Option+T (Mac OS) or Ctrl+Shift+T (Windows)].

3. Click in the left-most column of the Catalog Fields list to enable or disable items from export. A checkmark indicates that the item will be exported.

4. Click “Export.”

5. Enter a name for the file and indicate the storage location, then click “OK.”

Portfolio will begin exporting the records and will display a progress bar to keep you posted on its progress. When exporting is complete, you will have a tab-delimited text file containing information from each item record that you selected. In the file, each field within a record is delimited by a tab, and each record is delimited with a carriage return.

Technical Notes about Exporting Text Files

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

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

Tip

Macintosh: Click and drag in the checkmark column to quickly add or delete checkmarks for multiple entries.

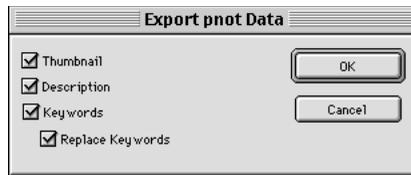


Export “pnot” Data (Macintosh only)

The Export “pnot” Data function embeds standard “pnot” resources created in Portfolio, such as keywords and description, directly into each selected item’s source file for use in programs like Photoshop.

To update item source files with “pnot” data:

- 1. Select the items whose source file you want to add “pnot” resources to.**
Item’s whose source file cannot be found will be skipped.
- 2. Choose File > Export > pnot Data...**
- 3. Select the data you would like to add to the source files. Options are: Thumbnail, Description, and Keywords.**



If you select Keywords, you can elect to replace any keywords currently embedded in the item’s source file, or append the keywords to the end of any existing list.

- 4. Click “OK.”**

The data fields you selected will be written to the source files of the selected items.

When the export has been completed, Portfolio will display a summary of how many records were successfully updated.

For more information on the Macintosh “pnot” resource search the Apple’s Developer website at:
<http://www.apple.com/developer>

Tips

Before exporting pnot data you may want to select the “Missing Files” command (Catalog > Missing Files) to find and update missing links to ensure that pnot data is exported for all the selected files.

You may also want to verify that the source files you want to add the data to are not stored on a CD or other write-protected volume and therefore cannot be updated with the new data.

Catalog Administration

Tip

Most of the procedures in this chapter require Administrator level access.

This chapter describes how to maintain Portfolio catalogs and how to use catalog functions in a multi-user environment. For help administering a Portfolio Catalog Server, see *page 153*.

For information on network access to shared catalogs, see page 150. For information on accessing a Portfolio Server, see page 24.

Catalog Security / Access Levels

Catalog Access Levels

There are four access levels that can be established for a catalog: Administrator, Publisher, Editor and Reader. Each level can have its own password.

Administrator level allows access to all catalog functions, including creating Custom Fields and editing the Master Keyword List. Other users can enter data in the Custom Fields, and apply keywords to items from the Master Keywords List.

The Administrator is responsible for setting all access level passwords, and Administrator is the only access level that can change passwords. When a catalog is created it is automatically given Administrator level access, so that you will have access to all the features functions necessary to set up the catalog.

Important: A shared catalog cannot be accessed by other users when it is in use by the Administrator. Conversely, you cannot switch to Administrator level if other users have the catalog open. Multiple users can have Administrator access (if they know the password) but only one person at a time can access the catalog when it is in Administrator mode.

Portfolio access levels are inherited; that is, the Administrator level includes the privileges of all other levels (in addition to its other privileges), the Publisher level includes the privileges of the Editor and Reader levels, and so on.

You can change catalog access level by selecting “Access” from the Catalog menu (*page 133*).

Tip

If you need to know a password for a catalog and are unsure who the Administrator is, select Catalog > Catalog Properties: General, and look for the option “Password set by:”



Tip

You can change the access level that is set by default when catalogs are opened on your machine. To do so, select Edit > Preferences, then select the desired opening mode access level from the pop-up menu.

To change your Access Level to a catalog:

1. **Open the catalog.**
2. **Choose “Access...” from the Catalog menu [or press Command+Option+B (Mac OS) or Ctrl+Shift+B (Windows)].**
3. **Select the desired access level, then enter the correct password (if a password has been set).**

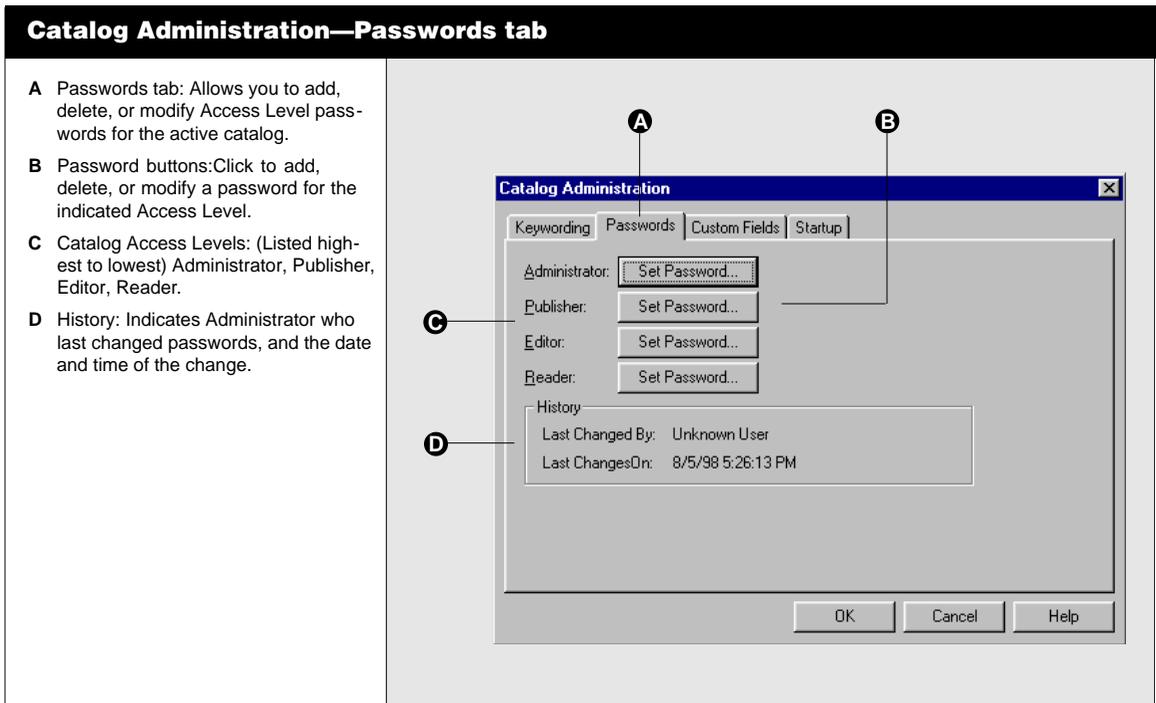
Catalog Access Levels

Catalog Feature	Reader	Editor	Publisher	Administrator
View a catalog	Ü	Ü	Ü	Ü
Search a catalog	Ü	Ü	Ü	Ü
Preview items	Ü	Ü	Ü	Ü
Copy item source files	Ü	Ü	Ü	Ü
Run Slideshows	Ü	Ü	Ü	Ü
Assign keywords to items		Ü	Ü	Ü
Create and edit thumbnail borders		Ü	Ü	Ü
Edit keywords, descriptions and custom field values		Ü	Ü	Ü
Import field values		Ü	Ü	Ü
Replace field values		Ü	Ü	Ü
Add items to an existing catalog			Ü	Ü
Delete or Rename an item's source file			Ü	Ü
Export to HTML			Ü	Ü
Export "pnot" data			Ü	Ü
Export text file			Ü	Ü
Import Cumulus database			Ü	Ü
Move item source files			Ü	Ü
Set Slideshow options			Ü	Ü
Save Galleries			Ü	Ü
Save Finds			Ü	Ü
Update cataloged items			Ü	Ü
Define Custom Fields				Ü
Assign Passwords				Ü
Create a Master Keywords List				Ü
Set Startup Options				Ü

Setting Catalog Passwords

Multiple users can use a catalog simultaneously across a network, within the restrictions of their access privileges. Therefore, password protection is strongly recommended when a catalog is available to multiple users. Protection is not necessary, however, if you are the single user of a catalog on your own computer.

You can set passwords when you first create a catalog, or if you have Administrator privileges for the catalog.



To set or change catalog passwords:

1. **Open the catalog.**
2. **Select "Administration..." from the Catalog menu.**
The Catalog Administration dialog box is displayed.
3. **Click the Passwords tab.**
4. **Click "Set Password..." for the desired Access Level.**
The "Set Password" dialog box is displayed.

Tip

You can use a higher level password to access all lower levels. For example, if you know the Administrator password, you can enter it to access Publisher level. This is handy if you need to switch out of Administrator mode in order to share the catalog with other users.

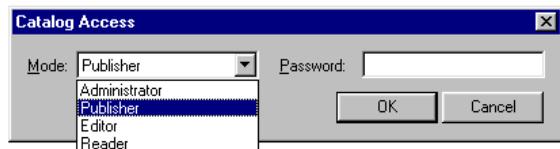
5. Type the new password in the appropriate text box, type it again in the Confirm box, then click “OK.”

Enter the new password in the Confirm field to verify that you entered it correctly. Passwords must be between 4 and 12 characters in length.

A dialog box titled "Set Passwords" with two text input fields. The first field is labeled "New:" and the second is labeled "Confirm:". Both fields contain a series of dots representing a password. Below the fields are two buttons: "Cancel" and "OK".

6. Repeat steps 4 and 5 for the other passwords that you want to set.
7. Click "OK" to close the Catalog Administration dialog box and save the new password(s).
8. Close the catalog and reopen it to put the password(s) into effect.

Once a catalog is password-protected with a password for any access level, Passwords access selections are displayed when the catalog is opened. Users can then choose their access level from the Access Mode pop-up menu, enter the correct password and click “OK” to open the catalog.

A dialog box titled "Catalog Access" with a dropdown menu labeled "Mode:" and a text input field labeled "Password:". The dropdown menu is open, showing a list of access levels: Administrator, Publisher, Editor, and Reader. The "Publisher" option is currently selected. Below the input fields are two buttons: "OK" and "Cancel".

Note: Even if you set only a Reader password, users logging in as Editor, Publisher, or Administrator will need that Reader password to gain access to the catalog. For example, if you only set an Administrator password, you won't need to enter a password to access the catalog in other access levels.

Creating a Master Keywords List

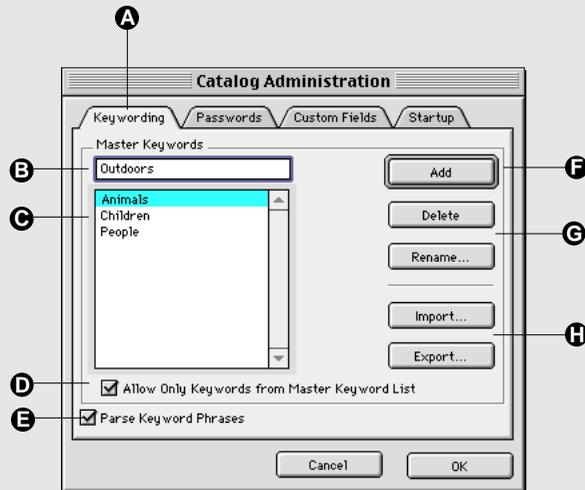
Establishing a Master Keywords list for a catalog can help you maintain consistent keywords among the items in the catalog, or across catalogs. With a Master Keyword list, you can ensure that only the keywords in the list are used in the catalog.

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

Note: Master Keywords are not dynamic. That is, when you change or delete a Master Keyword in the “Catalog Administration” dialog box, that Master Keyword is not automatically changed in any items to which it’s been applied.

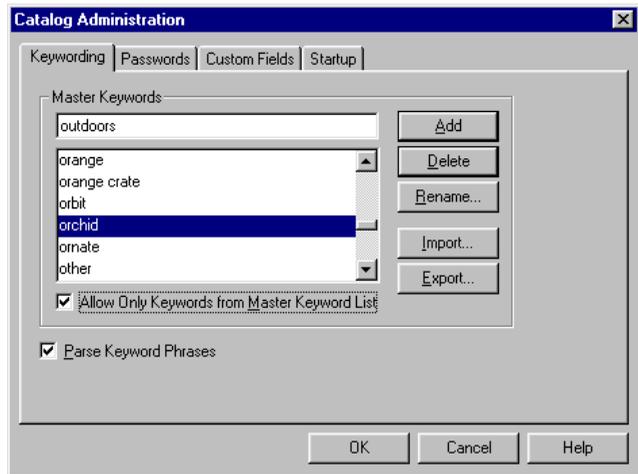
Catalog Administration—Keywording tab

- A** Keywording tab: Allows you to add items to and edit the Master Keywords list.
- B** Keyword text box: Type new keywords in the text box.
- C** Master Keywords list
- D** Allow Only Keywords from Master Keywords List: Forces users to assign only keywords that appear on the Master Keywords list.
- E** Parse Keyword Phrases: allows keyword phrases (keywords consisting of more than one word) to be parsed into individual keywords.
- F** Add: Click here to add the keyword in the keyword text box (**B**) to the list.
- G** Delete and Rename: Select one or more keywords from the list to Delete. Select keywords one at a time to Rename; the keyword is renamed in the list only—the name change is not applied to catalog items.
- H** Import and Export: Export Master Keyword list to a text file for importing into another catalog. Import from a text file or Master Keyword list exported from another catalog.



To add keywords to the Master Keywords list:

1. Choose **Catalog > Administration...** [Command+H (Mac OS) or Ctrl+H (Windows)].
2. Click the **Keywording** tab to select it.



3. Type new keywords into the text box at the top of the dialog, then click “Add.”

If you enter a word that is already on the list, the “Add” button will be dimmed.

4. When you have finished adding Master Keywords, click “OK” to save the changes and close the dialog.

To Rename or Delete Master Keywords:

1. Choose **Catalog > Administration...** [Command+H (Mac OS) or Ctrl+H (Windows)].
2. Click the **Keywording** tab to select it.
3. Select the keyword that you want to Rename or Delete, then click the appropriate button.

If you selected Rename, enter a new name for the keyword.

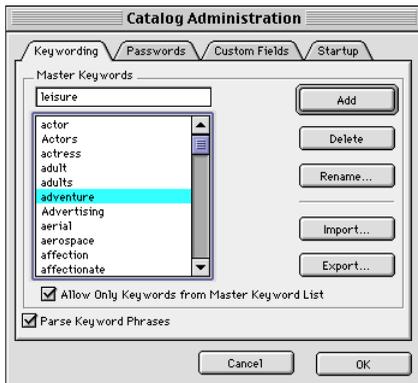
4. When you have finished working with Master Keywords, click “OK” to close the dialog and save the changes.

Note: Deleting a keyword from the Master Keyword list does not remove it from any items that have that keyword assigned to them.

Exporting and Importing Keywords

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

Portfolio exports keywords to a file in which each keyword is delimited by a carriage return, so you can also import lists of Master Keywords from any suitable text file.



Tip

If you decide you do not want to keep the keywords after they have been imported, click Cancel in the Catalog Administration dialog to close the dialog without saving the imported keyword list.

To Export a list of Master Keywords:

1. **Open the catalog that contains the Master Keywords that you want to export. You will need to have Administrator access (Catalog > Access).**
2. **Choose Catalog > Administration... [Command+H (Mac OS) or Ctrl+H (Windows)], then select the Keywording tab.**
3. **Click “Export...”**
4. **Specify a name and location for the exported file, then click “Save.”**

To Import any list of keywords to the Master Keywords list:

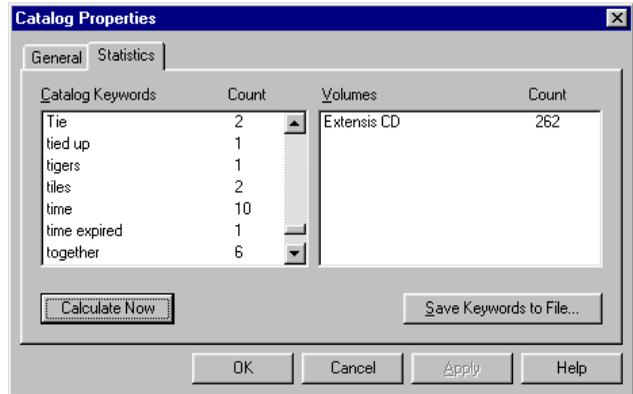
1. **Open the catalog that you want to import the keywords into. You will need to have Administrator access (Catalog > Access).**
2. **Choose Catalog > Administration... [Command+H (Mac OS) or Ctrl+H (Windows)], then select the Keywording tab.**
3. **Click “Import...”**
4. **Locate the file containing the keywords that you want to import, then click “Open.”**

The keywords will be added to the Master Keywords list.

To Export regular catalog keywords:

1. **Open the catalog that contains the keywords that you want to export. (You do not need any special permissions to export standard keywords).**
2. **Choose Catalog > Catalog Properties... [Command+Option+J (Mac OS) or Ctrl+Shift+J (Windows)].**
3. **Select the Statistics tab.**

4. On the Statistics tab, click “Calculate..” (Mac OS) or “Calculate Now” (Windows).



Portfolio will build a list of catalog keywords. If the catalog has many records, this may take some time.

5. Click “Export Keywords..”
6. Specify a name and location for the exported file, then click “Save.”

The keywords will be saved to a file in which each keyword is delimited by a carriage return, so that it can be imported into the Master Keywords list of another Portfolio catalog (*see page 138*).

Parsing Keyword Phrases

Portfolio offers an option that allows keyword phrases (keywords consisting of more than one word) to be parsed into individual keywords. For example, adding the keyword phrase “Mother and child” with keyword phrase parsing on would result in “Mother and child,” “Mother,” “and,” and “child” being added to the item.

The advantage of parsing keyword phrases is it allows the user to do a very fast “Starts with” or “Matches” search on words that would otherwise not be found without using a “contains” search. In the example above, searching on “Starts with child” will only return the item if keyword parsing is on.

To enable or disable keyword phrase parsing: Click this option on the Catalog Administration Keywording tab. The checkmark indicates that parsing is enabled.

Adding Custom Fields

Portfolio Catalogs consist of a number of predefined fields. These system fields, such as Filename, Path, Created and so on, categorize the file information for each item in a catalog, allowing you to search for specific items based on that information.

In addition to the predefined system fields, you can define Custom Fields to hold specialized information about catalog items. For instance, you might want to add a field for Web site URLs to a catalog of GIF files, or a “Photographer” field to a catalog of photographic images.

There are five Custom Field types from from which to choose:

- **Date/Time:** Enter date and/or time values. You could use this field type to create a Custom Field for image publication dates, for example.
- **Decimal:** Enter decimal point numeric values. This field type would be useful for custom fields containing stock image prices.
- **Integer:** 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).
- **String:** Enter text values. This field type can be used for any number of custom fields, including photographer or artist names.
- **URL:** This field type is used for Web and other URL addresses. It creates an active hyperlink on Windows and on Mac OS systems with Internet Config properly set up. You can enter any reference in URLformat including: http, ftp, telnet, gopher, even local files or applications. This field can be used to allow users to click on a web address to go directly to a specific site; or using a mailto:username@site.com entry, automatically create a mail message addressed to the username@site that you enter.

You add data to Custom Fields either by typing it into the item record (Item > Item Properties: Fields tab), by extracting data from the source file and mapping it to the appropriate Custom Field (Catalog > Cataloging Options: Mappings tab), or by importing them (File > Import > Field Values).

Note: When you copy records from one catalog to another, if the catalogs have matching Custom Fields, field data will be copied along with other record data. In other words, if you want to copy Custom Field data from one catalog to another, you must create identical Custom Fields in each one.

Field Type Data Example

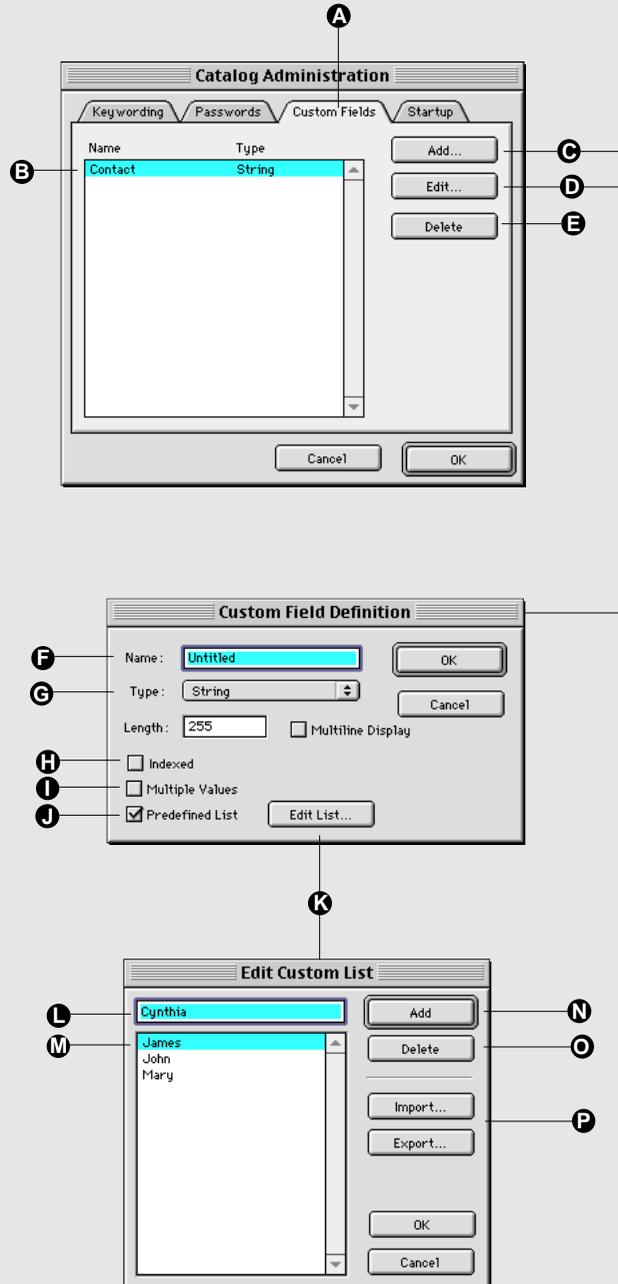
Date/Time	8/20/98 1:15 pm
Decimal	50.00
Integer	100
String	Text
URL	http://www.extensis.com

Tip

Macintosh: Portfolio uses Internet Config (installed with QuickTime 3.0) to determine what application handles the URLtype. Refer to your Internet Config documentation for details.

Catalog Administration—Custom Fields

- A** Custom Fields tab: Allows you to add, delete, or modify Access Level passwords for the active catalog.
- B** Custom Fields list
- C** Add: Click to access the Custom Fields Definition dialog to add and define Custom Fields.
- D** Edit: Select a Custom Field from the list, then click here to access the Custom Fields Definition dialog to edit the selected Custom Field.
- E** Delete: Select a Custom Field from the list, then click here to Delete it.
- F** Name: Enter a name for the Custom Field, or change the name of an existing field.
- G** Type: Select the type of field. See pages 143 through 146.
- H** Indexed: Click to indicate that this is an indexed field.
- I** Multiple Values: Click to allow the field to contain multiple values.
- J** Predefined List: Click to indicate that the field will include a predefined list.
- K** Edit List: Click to open the Edit Custom List dialog.
- L** Entry Box: Enter field list values one at a time in the text box, then click "Add" to add it to the list.
- M** Field data list: Displays the predefined data list for the selected Custom Field.
- N** Add: Click to add the value entered in the text box (L) to the predefined data list.
- O** Delete: Select one or more names (Mac OS) or individual names (Windows) from the predefined data list (M) that you want to remove from the list, then click Delete. The names are removed from the Predefined Data list, but not from any items that they have been assigned to.
- P** Import and Export: Export the Predefined Data list to a text file for importing into another catalog. Import from a text file or Predefined Data list exported from another catalog



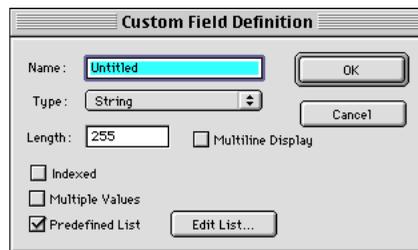
To add Custom Fields to a catalog:

Note: Once a Custom Field has been created and added to the catalog's Custom Fields list, only the field Name, Display Time (Date/Time fields only), Multiline Display (String fields only), and Predefined List options can be changed.

1. Choose **Catalog > Administration...** [Command+H (Mac OS) or Ctrl+H (Windows)].
2. Select the **Custom Fields** tab.
3. Click **“Add...”**

The “Custom Field Definition” dialog box appears.

4. Enter a name for the field in the **“Name:”** text box.



5. Choose the field type from the **“Type:”** pop-up menu.

The field type determines the values that can be entered into this field. (See page 143.) Field types cannot be changed once they are defined.

6. Select the appropriate remaining options for the field type you selected, then click **“OK”** to return to the **Custom Fields** tab.
7. When you have finished adding Custom Fields, click **“OK”** to close the **Catalog Administration** dialog and save changes made on any of the tabs.

For more information on setting up each Custom Field type, see *pages 143 through 146*.

Custom Field Restrictions

1. Multi-valued String cannot be displayed as multilined.
2. String fields with a predefined list cannot be displayed as multilined.
3. URL fields cannot be set up with a predefined list.
4. URL fields cannot have multiple values.
5. URL fields cannot be indexed.

Custom Field Types

Date/Time

The dialog box is titled "Custom Field Definition". It has a "Name:" field containing "Ship Date" and an "OK" button. Below that is a "Type:" dropdown menu set to "Date/Time" and a "Cancel" button. There are three checkboxes: "Display Time" (checked), "Indexed" (unchecked), and "Multiple Values" (unchecked). At the bottom, there is a "Predefined List" checkbox (unchecked) and an "Edit List..." button.

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

Note: Times are always assumed when searching on Date/Time fields. That is, if a time value has been entered into the field (either by extraction from the source file when the item was cataloged, or by entering a time in the field) and then hidden by turning off “Display Time,” the time will still be noted by Portfolio when a search is generated. For example: Searching for “5/20/98” will not find a record which contains “5/20/98 3:00 pm” because the request is interpreted as “5/20/98 12:00:00.” This is true even if the time is not being displayed.

The dialog box is titled "Custom Field Definition". It has a "Name:" field containing "Sale Price" and an "OK" button. Below that is a "Type:" dropdown menu set to "Decimal" and a "Cancel" button. There is a "Precision:" field set to "2". There are three checkboxes: "Indexed" (unchecked), "Multiple Values" (checked), and "Predefined List" (unchecked). At the bottom, there is a "Predefined List" checkbox (unchecked) and an "Edit List..." button.

Decimal

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

The dialog box is titled "Custom Field Definition". It has a "Name:" field containing "In Stock" and an "OK" button. Below that is a "Type:" dropdown menu set to "Integer" and a "Cancel" button. There are three checkboxes: "Indexed" (checked), "Multiple Values" (unchecked), and "Predefined List" (unchecked). At the bottom, there is a "Predefined List" checkbox (unchecked) and an "Edit List..." button.

Integer

This field type allows you to enter regular numeric values. Integer fields can be Indexed, include multiple values, and/or be configured as a predefined list.

The dialog box is titled "Custom Field Definition". It has a "Name:" field containing "Artist" and an "OK" button. Below that is a "Type:" dropdown menu set to "String" and a "Cancel" button. There is a "Length:" field set to "15" and a "Multiline Display" checkbox (unchecked). There are three checkboxes: "Indexed" (unchecked), "Multiple Values" (unchecked), and "Predefined List" (checked). At the bottom, there is a "Predefined List" checkbox (checked) and an "Edit List..." button.

String

This field type allows you to enter text values. You can specify a maximum string length for the field by entering the number of allowable characters in the Length text box. String fields can be indexed, include multiple values, and/or be configured as a predefined list. You can elect to have String fields displayed on multiple lines up to by enabling the “Multiline Display” option. This option is disallowed if the String field has been set up with multiple values or as a predefined list.

URL



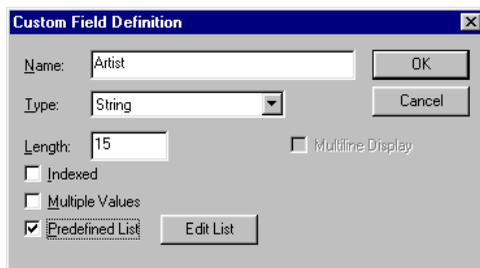
This field type allows you to enter Web and other URL addresses. If the syntax is correct for a URL, the data will become an active hyperlink on Windows, and on Mac OS systems with Internet Config properly set up. To create an active link, enter any reference in URL format including: http, ftp, telnet, gopher, even local files or applications. Typically URL data might look like: <http://www.extensis.com>; <ftp://ftp.extensis.com/pub/file1.zip>; <http://www.extensis.com/buynow/cgi?sku=012345>; <mailto:username@extensis.com>.

When you edit a URL to add data to it (Item > Item Properties) the Title that you enter is displayed in the record and becomes the active link (Portfolio links the Title to the actual URL in the URL field). You can give the URL any Title you like—the Title does not need to refer to the actual URL.

Note: When importing data into a URL field (Import > Field Values), Portfolio treats the URL field as a multi-valued field with two values. The first value is the Title and the second value is the URL address. If you wish to import URLs into Portfolio they must conform to this format. Portfolio follows the same formatting when exporting URL data. For more information on importing field values, see page 117.

Predefined Lists

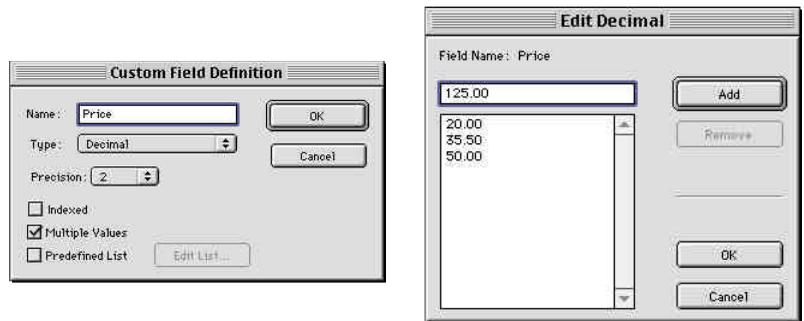
You can create Predefined Lists of items for your Custom Fields. By predefining field entry data you can provide master lists of data that users can select from when entering data in Custom Fields. All of the Custom Field types except URL can be set up with a predefined list.



Like the Master Keywords list, this ensures that the exact same data is entered in the data field every time. For example, you might want to create a list of your standard vendors and enter the appropriate vendor name to an item's record by selecting it from the list. Deleting an item from a predefined list does not delete it from items that have that data assigned.

Multiple Value Lists

Multi-value lists allow you to specify Custom Fields that can contain more than one value. Keywords is an example, but you might want to define other multi-value lists, such as multiple vendor names or multiple item pricing.



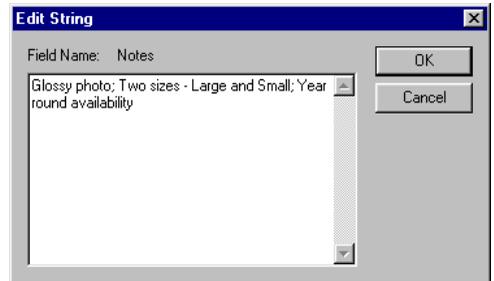
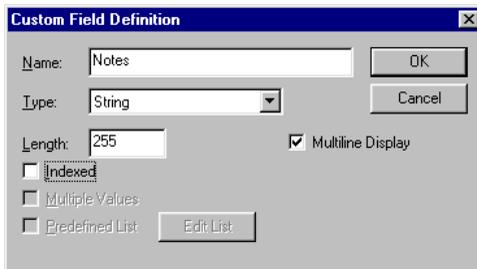
To set up a Custom Field with Multiple Values: Open the Custom Fields Definition dialog (Catalog > Administration: Custom Fields tab and click "Add"). Choose any field type except URL, then click "Multiple Values."

As with all Custom Fields, you add data to the list of values by typing it into the item record (Item > Item Properties: Fields tab), by extracting data from the source file and mapping it to the appropriate Custom Field (Catalog > Cataloging Options: Mappings tab), or by importing it (File > Import > Field Values.)

You can specify how many lines are made available to display the multiple value data in Record view (View > Customize: Record tab). In the Record tab Fields List, fields that have (or can have) multiple lines of data display a number in the right-most column (see *(O)* on page 67). To change the number of display lines, select a number from the Display Fields pop-up (Macintosh) or enter a number in the Edit String dialog (Windows). If no additional lines have been selected, this number defaults to 1.

Multiline Display

Enabling Multiline Display gives you a multiple-line scrolling text box when you edit the field (Item > Item Properties: Fields tab). This allows you to add as much information in the box as you have allowed for in the Length field. The Multiline Display option applies only to String fields, and only to String fields that do not have multiple values and do not use a predefined list.



To create a Multiline display Custom Field: Open the Custom Fields Definition dialog (Catalog > Administration: Custom Fields tab, click “Add”). Choose field type “String” and click the “Multiline Display” checkbox.

You can specify how many lines are made available to display the multiline data in Record view (View > Customize: Record tab). In the Record tab Fields List, fields that have (or can have) multiple lines of data display a number in the right-most column (*see (O) on page 67*). To change the number of display lines, select a number from the Display Fields pop-up (Macintosh) or enter a number in the Edit String dialog (Windows). If no additional lines have been selected, this number defaults to 1.

Indexing Custom Fields

You can elect to have any number of Custom Fields indexed so that searching these fields is faster. You can also sort on single-value fields that are indexed. See *page 38* for more information on indexed fields.

Setting Catalog Startup Options

The Startup Options allow you to determine which, if any, processes will be run automatically when the catalog is opened. Options are:

- Open Find Dialog
- Open MKL (Master Keywords List) Palette
- Run Slideshow
- Display Custom Splashscreen

Note: Large splashscreens add to catalog size and can take a long time to load. It's good practice to size your splashscreen so that it is no larger than the screen.

Catalog Administration—Startup tab

A Startup tab: Allows you to determine which, if any, processes are run automatically when the catalog is opened.

B Open Find Dialog: Automatically opens the Find dialog when the catalog is opened.

C Open MKL Palette: Automatically opens the Master Keywords List Palette when the catalog is opened. Handy if you publish catalogs and want to present the Master Keywords palette automatically to your users.

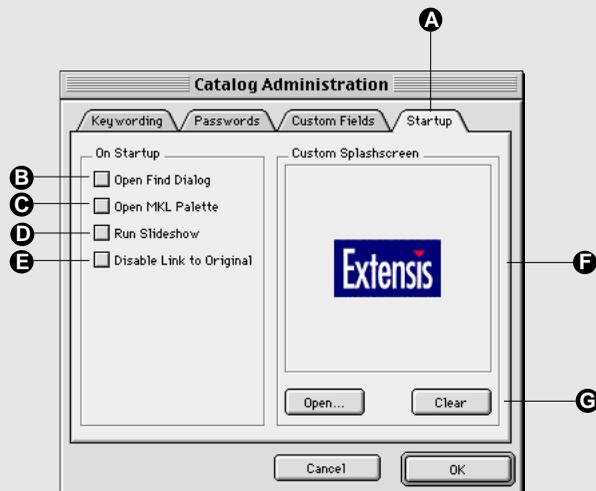
D Run Slideshow: Opens the catalog and automatically initiates a Slideshow based on the items in the active Gallery and the Slideshow Options.

The source files must be available for the slideshow to work. See page 74 for more information on slideshows.

E Disable Link to Original: Disables the ability to preview the original image. This is useful when you are distributing a catalog to clients without the source files.

F Custom Splashscreen: Import a JPEG file to be displayed when the catalog is opened. If an image appears here, it is automatically displayed for 4 seconds when the catalog is opened.

G Open and Clear: Use these buttons to Open a JPEG file to be used as the Catalog Splashscreen. Click Clear to remove the image and open the catalog without a Splashscreen.



Maintaining a Catalog

Catalogs—especially large ones—that are heavily used and frequently updated can become out-of-date. In addition to routinely backing up all catalogs and source files (and keeping the backups in a safe place), it is a good idea to perform other housecleaning tasks regularly as well. Portfolio provides the catalog manager or administrator with tools that can help with routine catalog maintenance.

Exporting catalogs as text files: See page 130.

Removing Items from a Catalog

The “Delete Items...” command lets you clear a catalog of unwanted or out-of-date items or references.

To remove specific items from a catalog:

1. In the catalog Gallery window, select the items that you want to delete.
2. Select “Delete Items...” from the Catalog menu.

The “Delete Items” dialog box is displayed.

3. Select “Delete from Catalog” (Mac OS) or “Delete from Catalog and Gallery” (Windows), then click “OK.”

Note: Select “Delete from Gallery” if you want to remove the item from the Gallery window only; the item remains in the catalog when you click “OK.”

— or —

1. In the Gallery window select the items that you delete and press **Option+Delete** (Mac OS) or **Ctrl+Backspace** (Windows).



Checking for Missing Files

You can easily determine if any file references in a Portfolio catalog are no longer valid using the “Missing Files...” command [Choose Catalog > Missing Items, or press **Command+Option+M** (Mac OS) or **Ctrl+Shift+M** (Windows)]. Portfolio only checks for missing files on mounted volumes. See page 85 for more information on the Missing Files command.

Recovering Damaged Catalogs

Should you ever have trouble opening a Portfolio catalog and suspect that it may have been damaged, you may be able to recover it using the Recover command. Another time to run the Recovery command run is when you experience crashes when sorting or searching on a particular field.

To Recover a catalog:

- 1. Close the catalog that you want to recover.**

You cannot run the Recovery command on an open catalog.

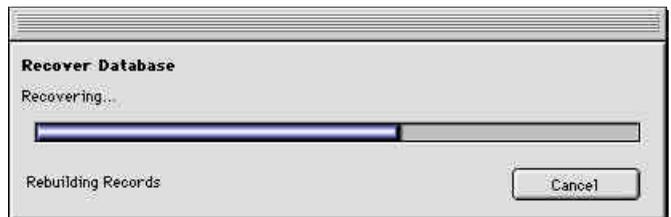
- 2. Choose “Recover...” from the File menu, or press Command+Option+V (Mac OS) or Ctrl+Shift+V (Windows).**

A directory dialog box is displayed.

- 3. Locate the catalog you want to recover, then click “Open.”**

A second directory dialog box is displayed.

- 4. Type a new name for the recovered catalog, select where you want to save it, then click “Save.”**



A progress window is displayed as Portfolio checks the catalog and attempts to repair the damage.

- 5. When the completed status report is displayed, click “OK.”**

Open the recovered catalog to verify that all the items are intact.

Using Portfolio on a Network

Tip

If someone deletes an item from a multiuser catalog and that item is in one or more of your saved Galleries, an "Item Deleted" icon appears in place of the item thumbnail. Choose "Refresh" from the Catalog menu to remove these icons from the Gallery, then resave the Gallery.

A single Portfolio catalog can contain references to source files on multiple hard disks, network servers, CD-ROM discs, or removable disks, whether these media are mounted or not. When Portfolio needs to retrieve a source file that resides on a network volume, it automatically mounts that volume, prompting for a volume password when required.

If a source file is stored on removable media, such as floppy disks or CD-ROMs, Portfolio prompts for the disk by name. Portfolio also prompts for source files that have been moved or renamed.

Shared Catalogs

Portfolio provides two ways to share catalogs in a multi-user, networked environment:

Filesharing: Filesharing uses standard system networking to share catalogs on either a dedicated file server somewhere or on a user's computer (provided that filesharing is turned on). Users connect to these catalogs by choosing Open, navigating to the particular volume, and selecting the catalog itself. Each user's Portfolio application (client) intelligently sets flags within the catalog file itself to control things such as when other users are allowed to access the catalog, and when other users should be blocked from writing to a particular record. For example, when one user writes to a record, other users accessing the catalog are blocked from writing to that record. Filesharing does not require the addition of Portfolio Server software, but fewer users can access catalogs simultaneously. Catalog operations like searching are much slower than with Portfolio Server software installed.

Client/Server: In this networking scheme, special Portfolio Server software is used to manage catalogs on an NT server machine. The Portfolio Server application opens the catalogs, and monitors the network for clients. End-users, running standard Portfolio application software (client), access the Server using the "Connect to Server" command. Once connected to the server users can select catalogs to open. The server software then controls all catalog access. Portfolio Server software allows a larger number of simultaneous users, and most catalog operations are performed significantly faster. *Note: The number of users permitted to connect simultaneously is set by the multi-user license agreement. Additional connection requests will be refused by the Portfolio Server when this limit is reached.*

Tip

In cross-platform environments, be sure that network server and volume names are the same for each platform. This allows Portfolio to locate files between platforms.

Network Security Protection

Your organization is authorized to use as many copies of Portfolio as designated in your site license agreement. When you run Portfolio on a network, the application checks the network to see how many copies of Portfolio with the same serial number are running. If the program finds that more duplicate serial numbers are in use than are in the site license agreement, an alert box appears. Click “OK” to close the alert box. Another user must quit Portfolio before you can launch the copy that you want to use.

If you did not purchase a Portfolio site license, only one copy of Portfolio per serial number may be in use on your network.

Filesharing Network Concerns

In a typical network scenario, many users would open Portfolio, locate items they want, and leave Portfolio running in the background while they switch to other applications to edit source files, work on other documents, read e-mail, and so forth. Meanwhile, at any given time, only some of those users would be actively using the catalog to search for and preview items they might be interested in, while fewer still might be adding or updating items, keywords, or descriptions.

The greater the number of users who have a catalog open, the slower individual searches will be, depending on what tasks the users are performing in Portfolio. The speed of the network and computer can also affect the performance of Portfolio.

If you want to limit who can write to or read from a catalog, you can set passwords as described in “Catalog Access Levels” on *page 133*. Whether or not your catalog is password-protected, it is essential that you also set up the network access conditions described in the table below.

If you are experiencing performance problems in a multi-user network environment, your situation may benefit from installing a Portfolio Server to manage catalog access.

Managing Source Files

There are many ways to organize the source files for items in a Portfolio catalog. Each strategy has advantages and disadvantages, but considering the options and planning ahead can save you time in the long run and significantly increase Portfolio's usefulness to you and your workgroup.

One of the key benefits of using Portfolio is that you do not need to remember where a source file is located or what it is called. However, because Portfolio can use filenames, folder names, or entire pathnames as keywords, and because you can then use those keywords to help in searching, a rational plan for naming and organizing files and folders is helpful.

Each workgroup must ultimately decide what works best for its own situation based on how the group works and how work flows through it. Here are a few suggestions that might help in your planning.

Organizing Source Files

One of the most obvious ways to organize files into folders is to set up a series of folders for each project, client, or category (for example, travel, business or architecture). Within a folder, use subfolders to partition related files appropriately.

Another approach is to organize files into folders by file type, by parent application, or by department of origin (for example, Marketing, Sales or Publications).

Once you've organized your files into folders, it's easy to include the files into Portfolio catalogs.

Naming Source Files

Use naming and organizing strategies together to make the most of keyword searching in Portfolio. Once you have decided how to organize your files, consider the following alternatives for naming them:

- Use file extensions to indicate file type. This is very important when using Portfolio in a cross-platform environment, where you'll want to keep Windows file naming restrictions in mind when naming Macintosh files and vice versa.
- Use number or alphabetic prefixes to help sort items in ways that matter for the kinds of files you use. For example, you might use frame numbers for images from a single photo shoot or counter or time code readings for sounds, movies, or images digitized from video or audio tape.

Server Administration

The Portfolio Server is a powerful catalog server, allowing users to access Portfolio catalogs using standard Portfolio 4.0 application software. Unlike typical server applications however, the Portfolio Server is easy to set up and use, and requires almost no maintenance.

While standard Portfolio 4.0 application software is capable of providing access to shared catalogs through standard system filesharing, the Portfolio Server provides superior performance in multi-user situations. Using the Portfolio Server instead of regular system networking yields:

- Increased performance in a networked environment
- Increased number of simultaneous connections
- Ability to connect remotely (using TCP/IP)

When used in conjunction with the Portfolio Server, the Portfolio application is referred to as the “client” application.

System Requirements

- Pentium PC (233 MHz or faster recommended)
- Microsoft Windows NT4.0 or higher (Server or Workstation)
- 32M RAM (64M RAM or more recommended)
- TCP/IP Services installed

Server hardware requirements are based on performance. The Server will function on any WinNT 4.0 system, but performance will probably be unacceptable if used with any system below the listed requirements. In addition, the Portfolio Server software will normally benefit a great deal from a faster processor, more physical memory, multiple processors, faster network connections, and faster hard drives (such as Ultrawide SCSI drives).

Installing the Server

Installing the Portfolio Server is quick and easy. Simply launch the installer and allow it to guide you.

Note: Extensis does not provide Technical Support for configuring TCP/IP Services, setting up DNS services, configuring a firewall, or other networking issues. For assistance with these issues, please consult your System Administrator or the product vendor's technical support.

Getting Started

The Portfolio Server application consists of a single dialog that controls which catalogs are being served. From this dialog you can also see how many users are connected to each catalog, and optionally display a list of connected users.

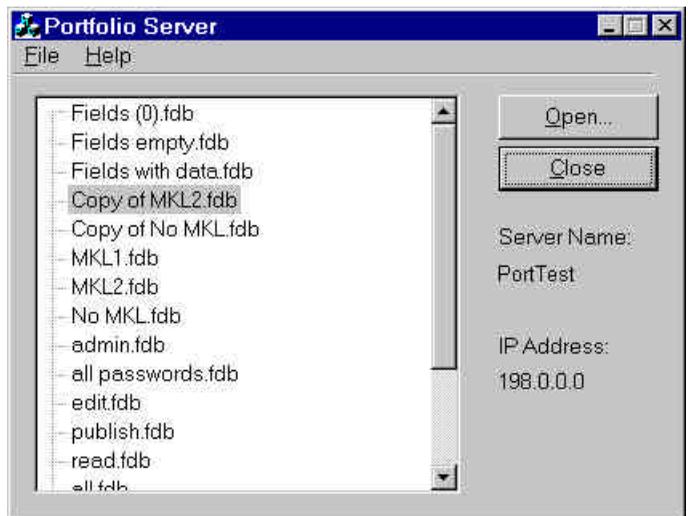
Note: Portfolio catalogs are created using standard Portfolio 4.0 software. Refer to other sections of this Portfolio User Guide for assistance in creating, managing, and administering catalogs.

To get the Server up and running:

1. Launch the Portfolio Server application.

When the Portfolio Server application is launched, it looks for a folder named “Catalogs” located in the same directory as the server application. Any catalogs stored in this Catalogs folder are opened and served automatically.

The Portfolio Server dialog is then displayed.



The Open button allows you to locate and open Portfolio catalogs not located in the Catalogs folder when Portfolio Server was launched, or to open additional catalogs after the Portfolio Server is running. The Close button allows you to close selected catalogs and take them off line. The box on the left lists the open catalogs by name and the number of users accessing each one.

2. Drag and drop catalogs that you want to open into the open Portfolio Server dialog.

The catalog names will be displayed in the list, indicating that those catalogs are now being served.

— *or* —

2. Click “Open...”

3. From the Open File dialog, locate and select a Portfolio 4.0 catalog that you want to share, then click “Open.”

The catalog name will be displayed in the list, indicating that the catalog is now being served.

Notes on Serving Catalogs:

- The Portfolio Server cannot serve Portfolio 3.0 catalogs. To use these, convert them first with the Portfolio 4.0 application (*see page 18*).
- The Portfolio Server cannot serve a catalog that is in use by either the Portfolio application (via filesharing) or another Portfolio Server, or one that is locked or on a locked volume.

Providing Users with Access to Served Catalogs

Once a catalog is served you will want to give users access to the catalog. Detailed user instructions are given on *page 24*. The process from a Server Administration standpoint is summarized here.

To access served catalogs:

1. Note the IP address of the server machine.

This number is displayed on the right side of the Server dialog.

2. Give the IP address to the users of the Portfolio 4.0 client.

3. On the user's machine, launch Portfolio 4.0, then choose File > Connect to Server...

The Connect to Server dialog will be displayed.

4. Choose “Add Server...” and enter wither the IP address or the name of the server.

The client applicaton will poll this IP address and display any catalogs being served at this address.

5. Double-click on the desired catalog to open it.

Notes on Accessing Served Catalogs:

- Client machines must have TCP services active to access the Server. For Mac OS clients, the machine must be using Open Transport TCP 1.1 or higher; classic networking is not supported.
- Clients cannot access a served catalog in Administrator mode. You must close the catalog on the Server and open it in the Portfolio 4.0 application via filesharing to gain Administrator access.
- The client application will attempt to open the catalog in the mode set in the user's Preferences. If the preference is set to Administrator, the client application will automatically attempt to connect to the catalog in Publisher mode.

Note: The user will be asked to enter a Password if the catalog requires it.

- For more information on installing and using the client, refer to the other sections of this Portfolio User Guide.

Managing the Server

The Portfolio Server was designed to be as simple to administer as possible. Catalogs are displayed in the list. If any users are connected to a catalog, a plus sign will appear to the left of the catalog. Clicking on this causes a list of users to be displayed beneath the catalog. This list can be collapsed again by clicking the minus sign to the left of the catalog.



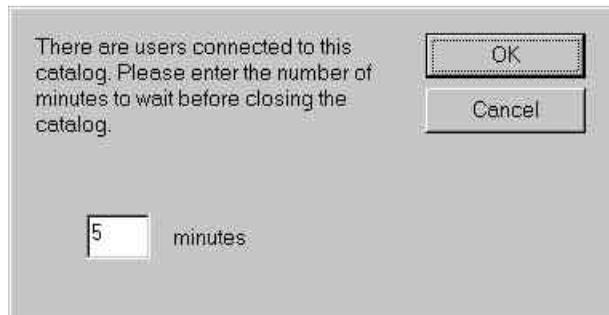
Logging Connections

This command (in the File menu) allows you to track who is connecting to which catalogs. When enabled, the Server will log each time a user connects to, or disconnects from, a catalog. The Logging setting is remembered between sessions.

Closing Catalogs

1. **On the Server, select the catalog in the list that you want to close, then click “Close.”**
2. **If clients are connected to the catalog, you will be prompted to enter a delay period for the server to wait before closing the catalog.**

An alert will be broadcast to all connected users, informing them that the catalog will be closing. It is generally recommended that you allow the users several minutes to exit the catalog, so that they can complete any actions that they may be performing at the time.



3. **After the delay time has expired, the Server will close the catalog.**

Note that this will not close the catalog on the user's end. If a user tries to perform a catalog task that requires communication with the Portfolio Server (such as updating or searching), an alert will be displayed on their machine indicating that the catalog is unavailable.

Notes on Closed Catalogs:

- **Client access:** Clients should disconnect from closed servers. If they do not, they may run into unexpected errors if they continue to try to use a closed catalog.
- **Portfolio Server and source images:** As with the filesharing model of multi-user Portfolio access, the Server does not serve the original files, only the records of cataloged items (see “Portfolio Basics” on *page 10*). What this means is that the

client machine must have access via the file system to the original file in order to work with it (Preview, copy, etc.).

See page 150 for tips on filesharing in a mixed Macintosh and Windows environment.

- **Server Port number:** The Portfolio Server operates via port 8793. In order to avoid conflicts with other applications, make sure no other server software is using this port on the server machine. (We are currently unaware of any other application that uses this port address.) Be aware that if you have clients attempting to access the server through a corporate firewall, you may have to have the network administrator open a hole in the firewall for this port.

Appendix A: Keyboard Shortcuts

Command	Macintosh Hotkey	Windows Hotkey
Create a new catalog	Command+N	Ctrl+N
Open an existing catalog	Command+O	Ctrl+O
Connect to Server	Command+Option+O	Ctrl+Shift+O
Print a Gallery	Command+P	Ctrl+P
Page Setup	Command+Option+P	Ctrl+Shift+P
Cut Gallery Items	Command+X	Ctrl+X
Copy Gallery Items	Command+C	Ctrl+C
Paste Gallery Items	Command+V	Ctrl+V
Undo	Command+Z	Ctrl+Z
Select all items in a catalog	Command+A	Ctrl+A
Master Keywords Palette (Open/Close)	Command+K	Ctrl+K
Thumbnail view	Command+T	Ctrl+T
List view	Command+L	Ctrl+L
Record view	Command+R	Ctrl+R
Customize Gallery	Command+D	Ctrl+D
Sort by Other	Command+Option+D	Ctrl+Shift+D
Find specific items in a catalog	Command+F	Ctrl+F
Find all items in a catalog	Command+'	Ctrl+'
Replace	Command+Option+R	Ctrl+Shift+R
Add items to a catalog	Command+E	Ctrl+E
Update items in a catalog	Command+U	Ctrl+U
Cataloging Options	Command+J	Ctrl+J
Catalog Properties	Command+Option+J	Ctrl+Shift+J
Preferences	Command+Option+E	Ctrl+Shift+E
Recover	Command+Option+V	Ctrl+Shift+V
Export Text File	Command+Option+T	Ctrl+Shift+T
Export HTML	Command+Option+H	Ctrl+Shift+H
Administration	Command+H	Ctrl+H
Change Access Level	Command+Option+B	Ctrl+Shift+B
Close a catalog	Command+W	Ctrl+W
Quit / Exit	Command+Q	Alt+F4

Command	Macintosh Hotkey	Windows Hotkey
Item Properties	Command+I	Alt+Enter
Preview Original	Command+B	Ctrl+B
Edit Original	Command+M	Ctrl+M
Copy Original	Command+Option+C	Ctrl+Shift+C
Move Original	Command+Option+Y	Ctrl+Shift+Y
Delete Original	Command+Option+X	Ctrl+Shift+X
Find Original	Command+Option+F	Ctrl+Shift+F
Rename Original	Command+Option+N	Ctrl+Shift+N
Rotate Thumbnail 90° CW	Command+]	Ctrl+]
Rotate Thumbnail 90° CCW	Command+[Ctrl+[
New Gallery	Command+G	Ctrl+G
List Galleries	Command+Option+G	Ctrl+Shift+G
Save Gallery	Command+Option+A	Ctrl+Shift+A
Slideshow	Command+S	Ctrl+S
Slideshow Options	Command+Option+S	Ctrl+Shift+S
Online Help	Help	F1

Function	Shortcut
Preview an item	Double-click the item in any Gallery view Double-click the item thumbnail in the "Item Properties" dialog
Search using keyword	Double-click the keyword in List or Record view Double-click the keyword in the "Item Properties" dialog box Double-click the keyword in the "Catalog Properties" dialog box Double-click the keyword in the Master Keywords Palette
Remove item from Gallery window	Select the item and press Delete
Remove item from catalog	Select the item and press Option+Delete (Macintosh) Select the item and press Ctrl+Backspace (Windows)

Function	Shortcut
Move between Gallery items	Arrow keys
Scroll one screen at a time	Page Up / Page Down
Go to Top of Gallery window	Home (Macintosh) or Ctrl+Home (Windows)
Go to Bottom of Gallery window	End (Macintosh) or Ctrl+End (Windows)
Go to First item in the Row	Home (Windows Thumbnail view only)
Go to Last item in the Row	End (Windows Thumbnail view only)

Appendix B: File Types

Format	Mac File Type	Windows Extension	Extract Thumbnail	QuickTime 3.0	Portfolio 4 Native	Inso ImageStream
Windows and OS/2 Bitmap	BMPp	.bmp, .dib		ü	ü	
FlashPix	FPIX	.fpx	ü			ü
Graphics Interchange Format (GIF)	GIFf	.gif			ü	
Animated Graphics (GIF)	GIFf	.gif		ü		
Joint Photo Experts Group (JPEG)	JPEG	.jpg	ü		ü	
Kodak PhotoCD	PCDI	.pcd				ü
Macintosh Picture	PICT	.pct		ü	ü	
PC PaintBrush		.pcx				ü
Portable Network Graphics	PNGf	.png		ü		
Adobe Photoshop 2.5 - 5.0	8BPS	.psd	ü	ü*		
Truevision Targa	TPIC	.tga		ü		
Tagged Image Format (TIFF)	TIFF	.tif	ü		ü	
Adobe Illustrator 3.0 - 7.0	TEXT	.ai	ü			ü**
Adobe Illustrator 8.0	TEXT	.ai	ü			
CorelDRAW 3.0 - 8.0		.cdr				ü
CorelDRAW Presentation Exchange		.cmx				ü
Micrografx Drawing		.drw				ü
Micrografx Designer		.dsf				ü
Encapsulated Postscript	EPSF	.eps	ü			ü
Adobe Acrobat	PDF	.pdf				ü
Microsoft Powerpoint 2.0 - 8.0	SLD8	.ppt				ü
Postscript Interpretive		.ps				ü
Microsoft Windows Metafile		.wmf				ü
QuickTime Movie	MooV	.mov		ü		
AVI Video		.avi		ü		
AIFF Sound file	AIFF	.aif		ü		
WAVE Sound file	WAVE	.wav		ü		
MIDI Sound file	MIDI	.mid		ü		
Macintosh Sound file	sfil	.snd		ü		
QuickDraw 3D Metafile	3DMF	.3dmf		ü		
Macromedia Freehand 5.0 - 8.0	AGD2		ü***			
Adobe PageMaker 6.5	AB65		ü***			
Multi-Ad Creator	MuAd		ü***			
QuarkXPress 3.3 - 4.0	XDOC		ü***			
Deneba Canvas	drw5		ü***			

* Translator does not support multi-layer files without Composite Layer/2.5 Compatibility turned on.

** Inso translator only supports through version 7

*** Mac OS only

Appendix C: Mappings

The following entries in the Mappings list are created automatically when a new catalog is created. To map these fields and tags to Portfolio Custom Fields (or enter additional fields), see *page 92*.

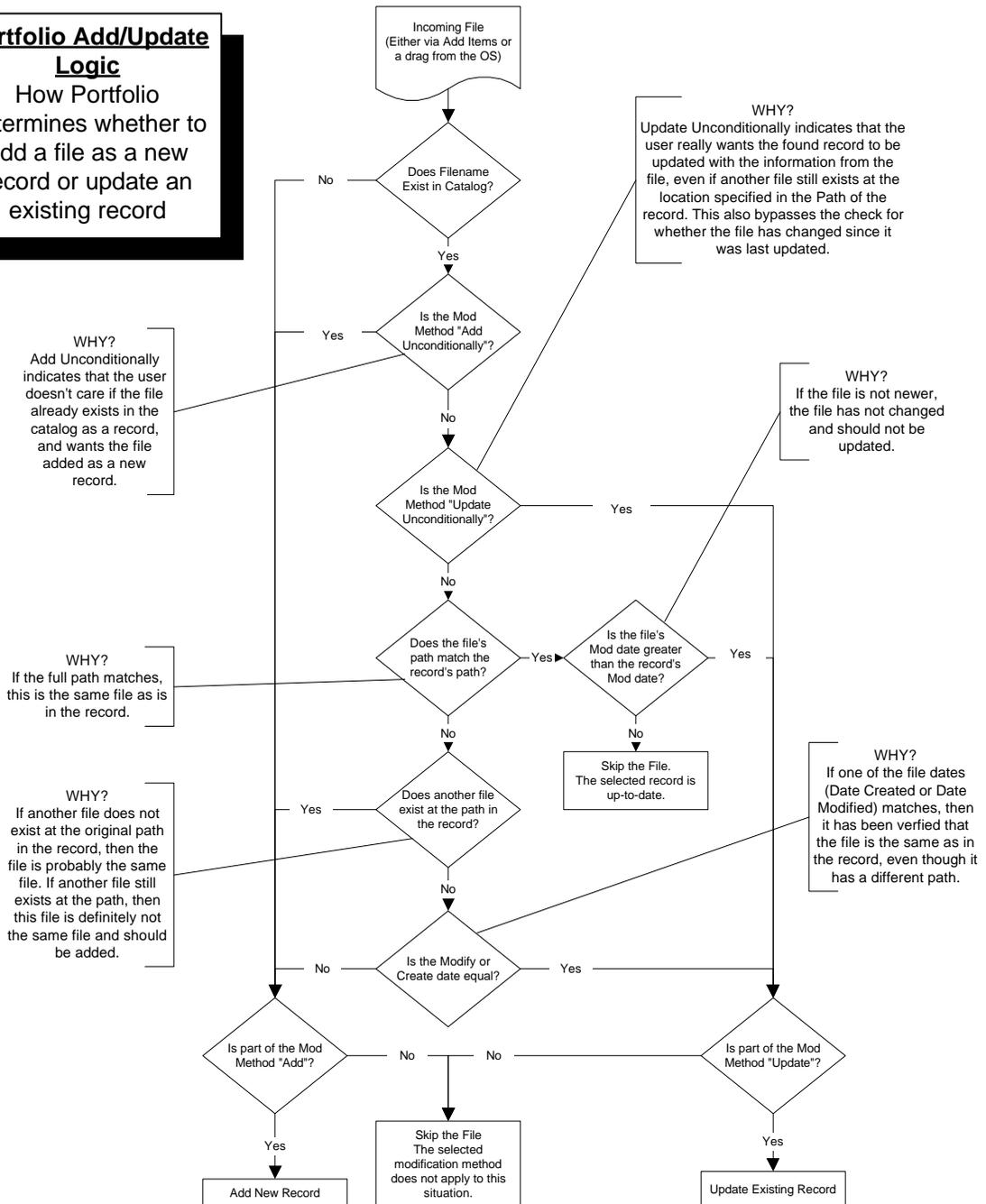
Type	Field	Code
TIFF	Document Name	269
	Image Description	270
	Scanner Make	271
	Scanner Model	272
	Page Name	285
	Creating Software	305
	Date & Time	306
	Artist	315
	Host Computer	316
	Ink Names	333
	Target Printer	337
Copyright	33432	
Photoshop	URL	1035
IPTC	News Wire	286
	Object Name	517
	Urgency	522
	Category	527
	Supplemental Category	532 (multiple)
	Keywords	537 (multiple)
	Instructions	552
	Date Created	567
	Time Created	572
	Byline	592
	Byline Title	597
	City	602
	State	607
	Country Code	612
	Country	613
	Transmission Reference	615
	Headline	617
	Credit	622
Source	627	
Copyright	628	
Caption	632	
Caption Writer	634	

Appendix D: Add/Update Flow Diagrams

Portfolio Add/Update

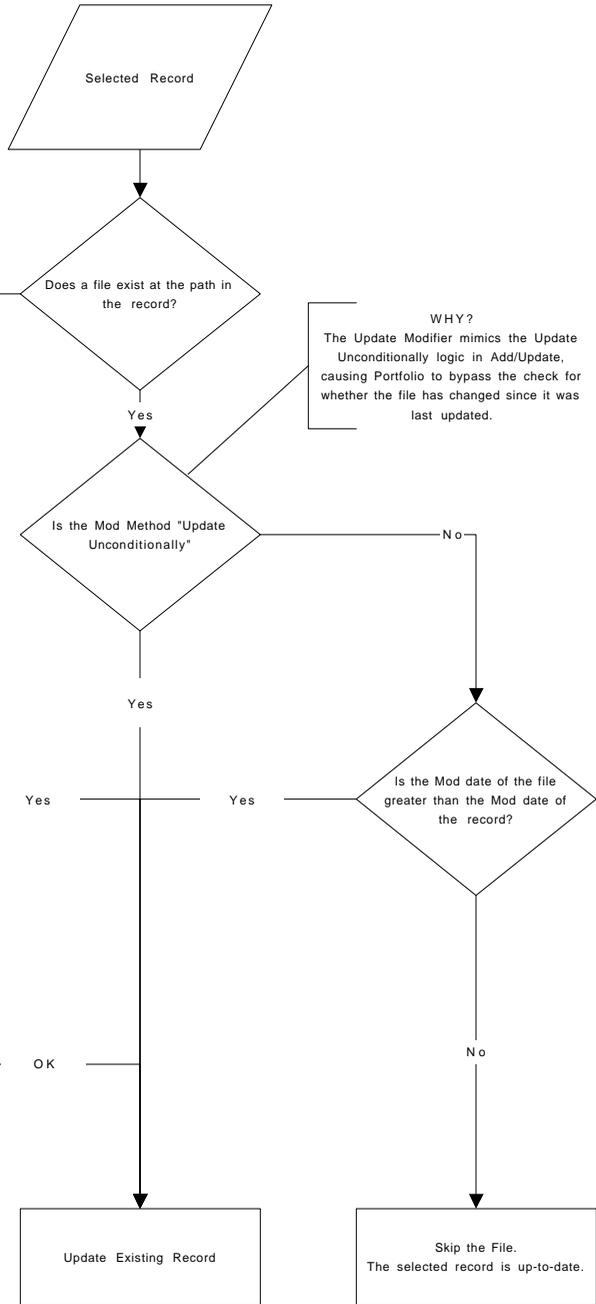
Logic

How Portfolio determines whether to add a file as a new record or update an existing record



Portfolio Update Items Logic

How Portfolio updates a selected record in the catalog



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