

Extensis™

Extensis™
Portfolio 6™

Quick Start Guide
for Macintosh® and Windows®

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Introducing Portfolio 6

End the chaos...

Welcome to Portfolio 6 — a program that takes over the grunt work involved in getting you organized and ends the chaos of naming, tracking, and accessing digital files. Portfolio is designed to help individuals and workgroups keep their files organized, find them quickly when needed, and then distribute them to others via e-mail, CD, disk and the Web – with as little effort as possible. The program is designed to work with thousands, or even hundreds of thousands of files at a time, allowing both individual and large workgroups to keep things organized.

Why do I need Portfolio?

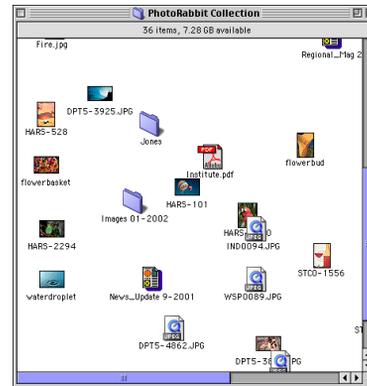
In these days of digital media, it's all too easy for your electronic files to disintegrate into a state of chaos. Without some way of making order out of this chaos, you can end up with some big problems: Pictures get lost. Fonts get separated from the documents they belong in. Wrong versions of images get used. Hours are wasted hunting down documents and copying them from machine to machine.

Portfolio is designed to get that kind of misery out of your life. Here are some of the tasks that Portfolio can help you with:

- Copy and rename files that you download from your digital camera.
- Find digital photos and other image files anywhere on your system by typing only a word or phrase
- Preview an entire CD-ROM of stock photography, without having to insert the CD

- Create a slideshow of your favorite images
- Build a web site containing a collection of images
- Collect a set of pictures to be burned on a CD
- Access your files with a simple double-click, without having to burrow through multiple folders to find them.

Turn this...



Into this...



What's new in Portfolio 6.0?

This version of Portfolio contains literally dozens of program refinements and a number of new features that bring unprecedented ease and automation to asset management. Significant new features include:

- **FolderSync:** A major product enhancement, FolderSync synchronizes your Portfolio catalog with your files and folders on disk in the most intuitive way possible. You can now copy, move, delete, and rename files on your hard drive or file servers using a simple drag-and-drop approach, without ever leaving the Portfolio environment. Because your physical files stay synchronized with your catalogs, Portfolio and non-Portfolio users can work together without confusion over how and where to find files.
- **Portfolio Express Palette:** This floating palette brings your organized digital library directly into your creative environment, with instant access to your files from anywhere on your system.
- **Custom QuickFind:** One of the most powerful — and convenient — search tools ever developed for Portfolio. With the new QuickFind, you can perform a search of any user-defined combination of fields right from the main catalog window. You don't have to open a window, pull down a menu, or click on a button
- **Create Web Pages:** Builds web pages based on your catalog contents with a few clicks, using professionally-designed templates.
- **Collect & Publish:** Automatically collects and copies images, linking them to a new catalog and generating a free browser in which

to view the catalog. The easiest way to publish a collection of images on CD.

- **Instant Cataloging:** A new super-fast way to bring items into Portfolio. Just Control-click (or right-click) any file, folder or disk to access an Add to Portfolio contextual menu that lets you catalog items as quickly as you get them.
- **Batch Renaming and Keywording:** This new cataloging option can rename your files, add keywords, and fill in other field values on the fly as items are cataloged — so you don't have to do it later.
- **Auto Move/Copy:** Grabs images from a CD or digital camera memory card and copies them into a new location automatically as they're being cataloged.
- **Saved Views:** Save and apply customized view attributes such as fonts, colors and borders to any gallery and apply them from a convenient menu right in the main window.
- **Send via E-mail:** E-mail your digital images from within Portfolio, using your default e-mail client.
- **Rotate Original:** This new command changes orientation of original JPEGs, not just the thumbnails.
- **EXIF Support:** Portfolio can now import metadata embedded within the images created by many of today's digital cameras.
- *A streamlined interface, more contextual menus, and many, many more enhancements.*

Using this QuickStart Guide

The purpose of this QuickStart Guide is to get you up and running with Portfolio 6 as quickly as possible — without getting bogged down in details or delving into many of the “deeper” features that give Portfolio much of its power and flexibility.

If you’re ready to dive into Portfolio’s power features, or do some heavy-duty customization or learn the program’s labor-slashing keyboard shortcuts, feel free to skip this QuickStart Guide and check out the full-blown Portfolio 6 User Guide that came with your software. It contains everything you need to become a Portfolio Pro: Complete documentation of every feature, plenty of time-saving tips for both creating and using Portfolio catalogs, and dozens of shortcuts.

If you’re new to Portfolio, however, this guide is probably the ideal starting point. It will show you how to quickly create a visual catalog of your digital files and get them organized. You’ll also learn how to use Portfolio to find files with lightning speed, collect them for distribution and turn them into web pages with as little effort as possible.

Installation & Setup

You can find instructions for quick and easy installation of Portfolio 6 on the Portfolio CD-ROM. If you downloaded Portfolio from the Extensis web site, you’ll find the information you need in the Read Me document that came with the downloaded software.

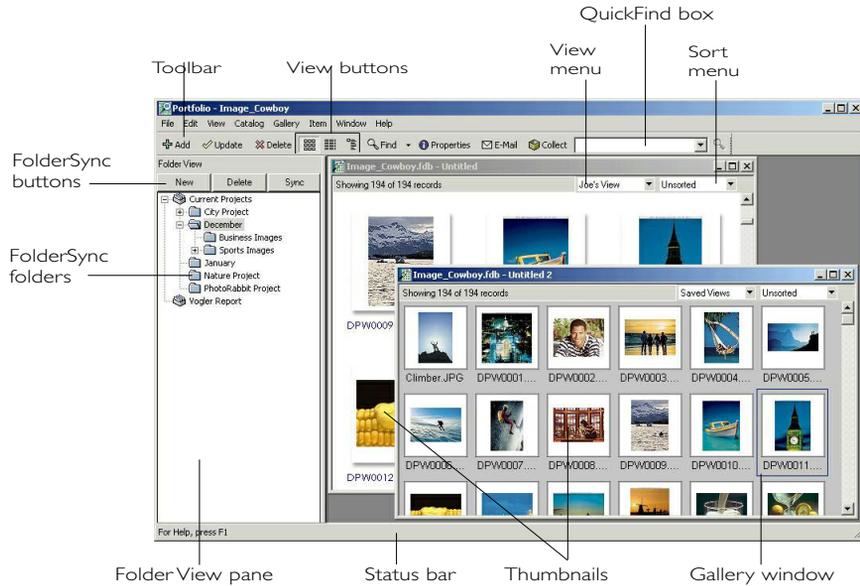
Overview

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

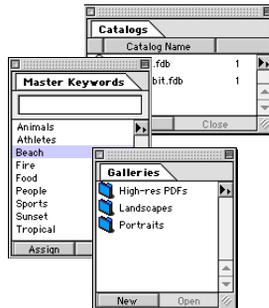
Setting up and using Portfolio involves these basic steps, all of which are covered in this QuickStart Guide:

- **CATALOG:** You have to “catalog” your files — adding them to a Portfolio catalog — so that Portfolio can find them, preview them and track them.
- **CUSTOMIZE:** Give your catalogs the look and style you want to make information easy to find and display.
- **ACCESS:** Preview files right in Portfolio, copy them to another disk, drag them into programs such as Photoshop® or QuarkXPress® or edit them by opening them in the application with which they were created.
- **ORGANIZE:** Using tools within Portfolio you can group, organize and categorize your files by adding keywords, descriptions, and other custom data.
- **FIND:** Type a word or phrase to locate any cataloged file and access it instantly. Search using dozens of different criteria.
- **DISTRIBUTE:** Send files via email, collect them for burning on a CD, publish them as web pages. Portfolio automates most distribution-related tasks.

The Portfolio Window



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



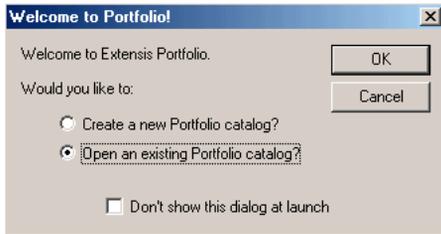
This page offers an overview of the Portfolio environment. Most of the features called out in this illustration are explained in the remaining pages of this QuickStart Guide. For more detail, see the *Portfolio 6 User Guide* that came with your copy of Portfolio.

Step One: Catalog your files

Before you can use Portfolio to manage and organize your collection of digital images, you have to “catalog” your files so that Portfolio can find them, preview them and track them for you.

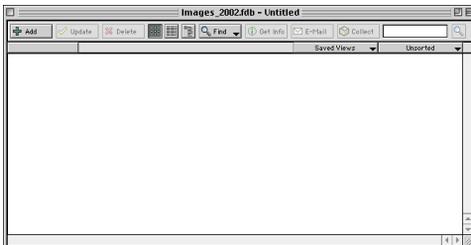
1. Create a new Portfolio catalog

The first time you launch Portfolio, a Welcome screen offers you two options: You can either create a new, empty catalog, or open an *existing* catalog.



Choose the “Create a new Portfolio catalog” radio button and click OK. A blank catalog containing no records is created and opens on screen.

You’re now ready to add items to the catalog.



NOTE: If you already have a catalog created by someone else or you’ve used previous versions of Portfolio, you can choose the Open command from the file menu to open an existing catalog with Portfolio 6. See the Portfolio 6 User Guide for details about opening and converting catalogs created with earlier versions of Portfolio, and connecting to catalogs served using Portfolio Server.

2. Drop selected files, folders or disks into your catalog.

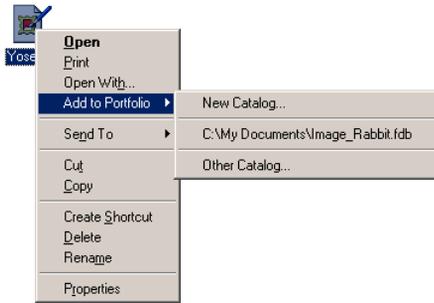
You can catalog individual files (such as a JPEG image, or an EPS graphic), or folders, or entire volumes (such as your hard drive, a CD-ROM or a Jaz disk).

The easiest way to do this is to simply drag a file, folder or disk icon right into the open catalog window to catalog it.



Portfolio is capable of cataloging virtually every type of digital file and will render a thumbnail preview of documents created in any of the most common graphics and video formats.

Alternatively, you can add items to your catalog using Portfolio 6's new Instant Cataloging feature. Control-click (on Mac) or right-click (on Windows) a file, folder or disk icon anywhere within the Macintosh Finder or Windows Explorer and choose the Add to Portfolio submenu to see a list of recently-used catalogs. Select the catalog to which you'd like the selected items added. If the catalog you need isn't listed, choose Other Catalog to open it.



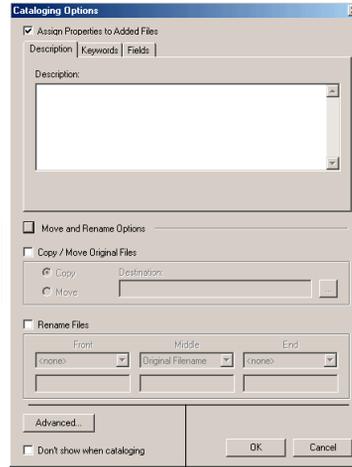
Control-click (Mac) or right-click (Windows) any icon to add items to your catalog right from the Finder or Windows Explorer

3. Set Cataloging Options

When you add items to Portfolio, there are many options available that determine exactly how Portfolio stores information about your files. You control these various options in the Cataloging Options dialog box, which pops open *each time* you catalog files (unless you specifically tell it not to do so by turning on the “Don't Show when cataloging” checkbox in the Cataloging Options window).

You can use the Cataloging Options dialog box to automatically rename, copy or move your files when cataloging them, or to add keywords, descriptions and other information about your

images. See the Portfolio 6 User Guide for complete details about using all of these cataloging options.



Rename batches of files as you catalog them using this section.

Move or copy files from their original location automatically with these options

The descriptions and keywords you type in here will automatically be added to each item you catalog

To simply add your files to the catalog without renaming or moving them, just click the OK button in the Cataloging Options dialog box to continue the cataloging process. Portfolio will examine each item and then add it to your catalog.

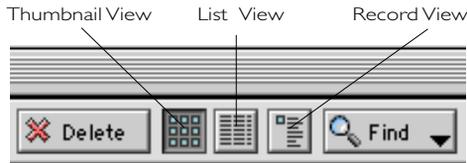


Step Two: Customize your views

Once you've cataloged your files, you can use Portfolio's various tools to display them in many different ways.

I. Select a view

Portfolio offers three different kinds of views — Thumbnail, List and Record — and each can be completely customized. Switch between the three views using the View buttons on the main Toolbar.



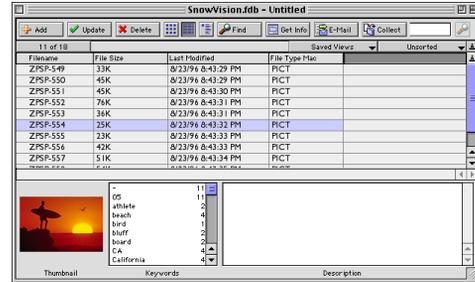
Thumbnail view

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

List view

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

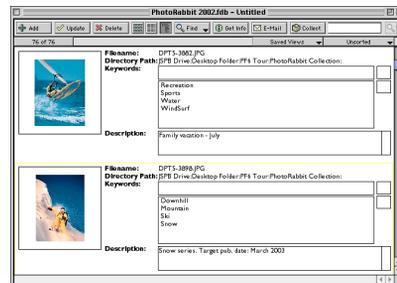
When in List View, a panel appears at the bottom of the gallery displaying the thumbnail of the currently selected record, along with its associated keywords and description.



Record view.

Record View allows you to view each cataloged item along with any stored data associated with it. In this view, you can see the list of all the keywords associated with a file, for example, or view an entire description, along with any other custom field data you may have entered.

Choose Record View when you want to access numerous details about a set of records without having to open and view the properties of each item one at a time.

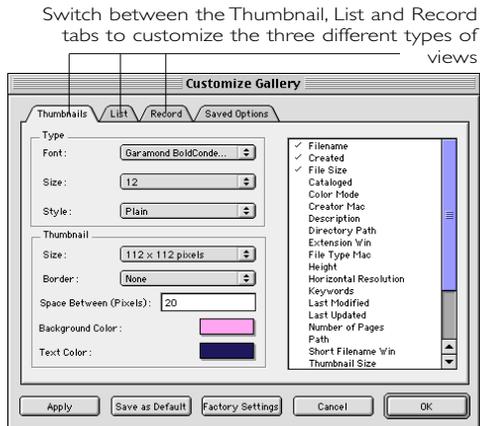


2. Customize the view

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

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

Use the various Type and Thumbnail settings to change the appearance of the Portfolio catalog. See the Portfolio 6 User Guide for detailed information about each customization option available in this dialog box.



3. Create galleries for your images

Each individual window in Portfolio is called a *gallery*. A gallery can display all of the items in your catalog — or a subset of them. By default, a Portfolio catalog contains only one gallery — a single window displaying all your cataloged items. At any time, however, you can open additional galleries (windows) and select exactly which items you want displayed in them.

Each gallery is a separate window into your catalog of images and each gallery can have its own *view* settings. You can also *save* galleries to preserve the particular view and selection of items in the gallery window. (Choose Gallery > Save.)

To open a new gallery, choose Gallery > New. Then fill the gallery with the items you want to include in it by doing one of the following:

- Choose Catalog > Find All to show all your cataloged items in the new window.
- Drag thumbnails from another gallery into the new gallery.
- Perform a search for a selected set of records — such as those containing a particular keyword. (See the “Finding your files” section for details on performing specific searches).



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

Step Three: Access your files

With your files neatly cataloged in Portfolio, it becomes incredibly easy to access and use them. Here are some of the things you can do with your files from within Portfolio:

1 Preview images, audio and video clips

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

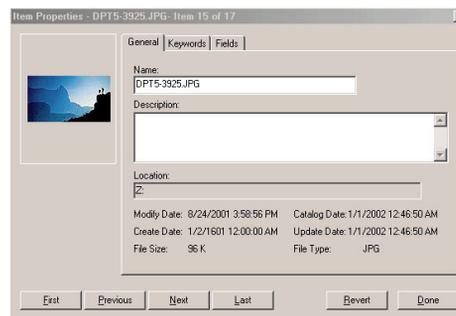
Double-click a thumbnail in any gallery window to preview it.



The Preview window has buttons that allow you to zoom in, zoom out or fit the image to the size of the Preview window. If you are previewing a multi-page document, such as a PowerPoint document or PDF file, the preview window has standard navigation buttons that allow you to move from page to page within the document.

2 Get detailed info about your files

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



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

Use four navigation buttons at the bottom of the Item Properties window — First, Next, Previous, and Last — to navigate from item to item in your catalog, so that you can get information about each item in succession.

3. Edit your files

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

In any Portfolio gallery, select the item you want to edit, then choose Choose Item > Original > Edit, or just press ⌘-E (Mac) or Ctrl-E (Windows). Portfolio launches the program needed to edit the original file and opens the file in that program.



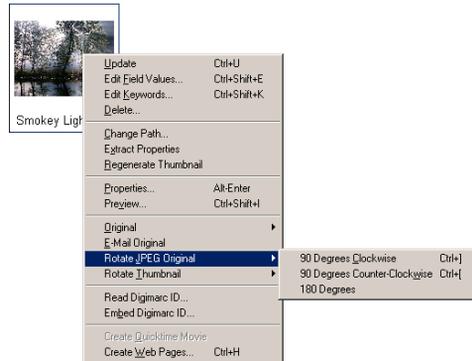
Portfolio generally remembers the name and location of the program last used to edit any particular type of file. If necessary (such as the very first time you attempt to edit a file of a particular type) you'll be prompted to choose an application. Portfolio will remember the choice in the future.

4. Rotate images

Portfolio can rotate JPEG images, making it easy for you to switch your digital photos from portrait to landscape orientation (or vice versa) without having to open and edit the files individually.

To rotate a JPEG image, select the item(s) you want to rotate. You can select an individual thumbnail or select multiple thumbnails. (To select multiple thumbnails, hold down the ⌘ key (Mac) or Control key (Windows) while clicking on each selection.

From the Item menu, choose Rotate Original JPEG and select one of the three submenu options: 90 degrees clockwise, 90 degrees counterclockwise, or 180 degrees.



5. Rename files

There's no need to go out to the Finder or Windows Explorer to rename files. Portfolio gives you several ways to do it:

- Rename an individual file by selected a thumbnail and choosing Item > Original > Rename, and type a new name in the Rename File dialog box.
- Select a thumbnail and press ⌘-Option-N (Mac) or Control-Shift-N (Windows), then type a new name in the Rename File dialog box.
- Open the Item Properties window for any item in your catalog and to type a new name in the Name field. To open Item Properties, select a thumbnail and click the Get Info button on the toolbar, or press ⌘-I (Mac) or Alt-Enter (Windows).

For other ways to rename files, see the "Managing your Files with Portfolio" section of the User Guide.

6. Use your files in other programs

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

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

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



- Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe

Photoshop, Illustrator or Macromedia FreeHand to open the image with that program.

- Drag a thumbnail to the desktop or a folder window to move the original file to that location.
- Option-drag (Macintosh) or Control-drag (Windows) a thumbnail to the desktop or a folder window to copy the original file to the new location.
- Drag a thumbnail into an e-mail message to send a copy of the image as an attachment.
- Drag a thumbnail into a QuarkXPress document to place the image in an XPress layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box; otherwise, Portfolio will create its own new picture box for the image.



Dragging thumbnails from Portfolio into QuarkXPress requires the presence of QX- Drag & Drop, an XTension that must be installed in Quark's XTension folder. The Portfolio 6.0 Installer attempts to install QX- Drag & Drop into the proper location during the Portfolio installation process. If, for any reason, this XTension was not installed during the initial Portfolio installation, you can copy to the XTension folder yourself from the Portfolio 6.0 CD or download it from the Extensis website.



The Portfolio Express palette provides an even easier way to use your cataloged files in other programs. Like Portfolio, it allows you to drag and drop thumbnails into other documents, but the compact palette floats above other document windows and can be accessed from within any other program with one keystroke. See the Portfolio Express chapter for details.

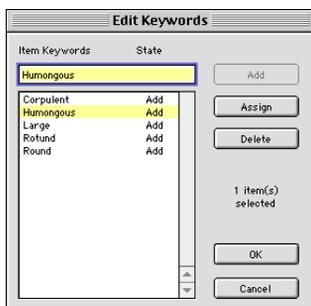
Step Four: Organize you files

One of the main purposes of Portfolio is to help you sort, arrange, categorize and organize your files. You've got several tools at your disposal to help you do this:

1. Use Keywords

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

To assign keywords, select the item(s) to which you want to assign keywords in a gallery window, then choose Item > Edit Keywords to open the Edit Keywords dialog. Type a keyword in the text box, then click Add. Click OK when you're done adding all the keywords.



You can also add keywords to your cataloged files using the Item Properties window, the Edit Field Values command and Record View.



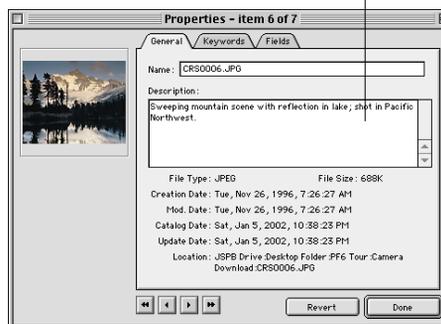
You can add keywords without typing! It's possible to have Portfolio add keywords automatically during cataloging by extracting keywords that are embedded in certain kinds of files or by creating keywords based on each item's name and filepath. See the Portfolio 6 User Guide for details.

2. Use Descriptions

Its easy to include a text description for each item you catalog. After you've added these descriptions, you'll be able to use them to search for files.

You can type descriptions in the Get Info/Item Properties window. Select an item in a gallery window and click the Get Info or Properties button in the Toolbar. The description field is on the General panel of the Get Info/Properties Window.

You can enter a description of up to 32,000 characters for each item in your catalog

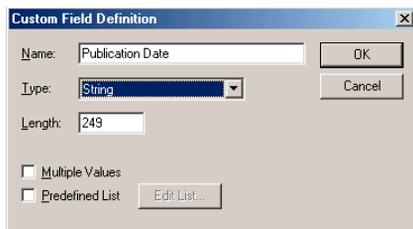


3. Use Custom Fields

Custom fields allow you to store just about *any* type of information you want — a date, a number, a block of text, or a URL — about the items you catalog, giving you much more flexibility when it comes to organizing, categorizing and search for your files. Portfolio allows you to create an unlimited number of custom fields in your catalogs.

Creating custom fields is an administrative function in Portfolio — meaning you have to open a catalog in Administrator mode in order to add them. To determine if you're in Administrator mode, pull down the Catalog menu. If the Administration command is dimmed out you're *not* in Administrator mode. Choose Catalog > Access, change the Catalog Access level to Administrator and enter the password if necessary, then Click OK.

To create a custom field, choose Catalog > Administration and switch to the Custom Fields tab. Click Add, name the new field, assign it a type (String, Date, Text Box, etc.), then click OK to return to the Catalog Administration dialog box, and click OK again to close it.

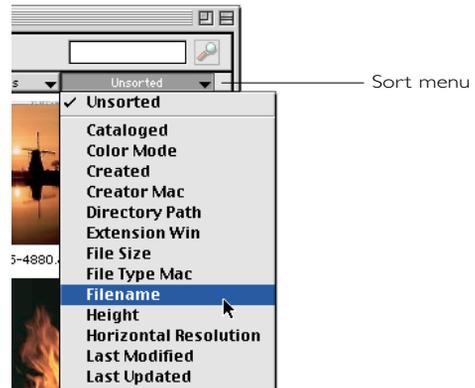


The various custom field types are fully explained in the Portfolio 6 User Guide.

4. Sort your records

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

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



To sort files, use the Sort menu available in the upper right corner of the status bar that runs along the top of each gallery window (right under the main Toolbar). By default, this menu simply says “Unsorted.” Choose any of the 22 criteria in the menu to apply a sort order to the current gallery.

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

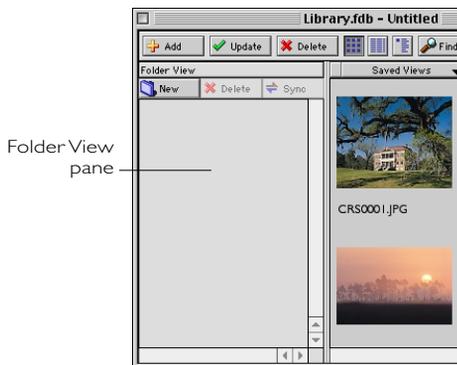
Step Five: FolderSync

FolderSync is the most powerful organizational tool in Portfolio 6 — a dramatic new feature that lets you *synchronize* the contents of any folder on your computer or network with your Portfolio catalogs — or vice versa.

Instead of just organizing your files *logically* within Portfolio, FolderSync enables you to organize them *physically* on disk as well.

1. Show the Folder View pane

If the Folder View pane isn't already visible in the main window, choose View > Folders to make the pane visible.



2. Add root folders to the Folder View pane.

FolderSync creates a link between specific folders on your computer system and items in a Portfolio catalog. To begin using FolderSync, you must tell Portfolio which folder (or folders) on your system you want it to “watch.” If you want Portfolio to monitor a hierarchy of nested

folders, you have to point Portfolio to the “root” or the *topmost* of the folders.

Click the  button at the top of the Folder View pane to select the folder on your system that you would like to keep synchronized with Portfolio. The folder (or folders) you select will now appear in a hierarchical listing in the Folder View.



3. Synchronize the folders with Portfolio

Whenever you add a new root folder (containing files) to the Folder View pane, its name initially appears in bold, indicating that it contains files that have not yet been synchronized with Portfolio.

Click the  button to force Portfolio to examine the contents of the selected folders and catalog any uncataloged items that are in those folders. The FolderSync dialog box appears, listing all the files Portfolio will catalog in order to synchronize with the folder. Click the Sync button to continue the cataloging process.

4. View the contents of a folder using Folder View

Double-click a folder in the Folder View pane and the files in the selected folder appear in the current Portfolio gallery.



Double-click folders here...

...to see their contents here

5. Move files on disk using the Folder View pane

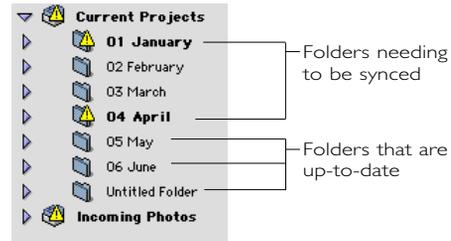
You can use Portfolio to easily move and copy cataloged files in or out of any of the folders that appear in the Folder View pane. In other words, there's no need to switch to the Macintosh Finder or Windows Explorer to move files from folder to folder as you organize them — Portfolio does it for you.

Just drag the thumbnail of any cataloged item into a folder displayed in the Folder View pane. Portfolio automatically moves the file into the corresponding folder on your computer system and updates the Portfolio catalog to reflect the file's new location.

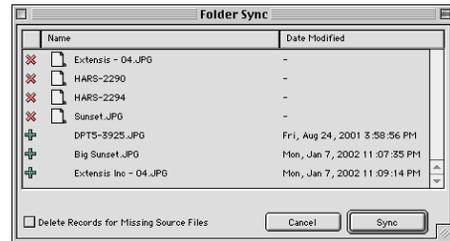
6. Stay synchronized

When the name of a folder in the Folder View pane turns bold, it means that the files in that folder have somehow changed since the last

time you synchronized the folder with Portfolio. A cataloged file may have been edited or renamed. Or a file was dragged into or out of the folder using the Finder (Mac) or Explorer (Windows).



To update your Portfolio catalog to reflect any of these changes, select the folder in the Folder View panel that needs to be synchronized. Confirm the changes that have been made in the FolderSync dialog box.



The dialog box lists every change that has been made in the folder since it was last synchronized with Portfolio. Files that have been removed appear with a red "X" while files that have been added to the folder appears with a green "+" sign. Files that have been modified or renamed appear with a yellow checkmark next to their names.

If, for any reason, you don't want Portfolio to be updated to reflect these changes (the wrong files were put in the folder by accident, for

example), click Cancel, and your Portfolio catalog will remain unchanged.

When you click the button Sync button in the FolderSync dialog box, Portfolio catalogs any new files in the folder, and updates the records of any previously-cataloged files that have been modified. Records for files that have been moved or are otherwise missing are deleted only if you turn on the Delete Records for Missing Source Files checkbox at the bottom of the dialog box.

Once you “synchronized” the folders in the Folder View pane should no longer be bold, as the contents are now up-to-date with the Portfolio catalog.



If files have been removed from a folder and you don't turn on the Delete Records for Missing Source Files checkbox in the FolderSync dialog box when using the Sync command, your folder will remain “unsynced” and in bold. This is because Portfolio still contains a record for a file that is no longer in that folder. To fully sync up the folder, activate the Delete Records for Missing Source Files checkbox and re-sync the folder.

7. Create and delete folders

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

To create a new root folder:

Make sure you don't have any existing folders selected in the Folder View pane. Click the New button at the top of the Folder View pane. In the folder selection dialog box, pick a location for the new folder and click the New button (Mac) or New Folder button (Windows). Click Choose or OK to confirm the selection. The folder you created will now appear as a new root folder in the Folder View.

To create a new subfolder:

Select one of the folders *already visible* in the Folder View pane. Click the New button at the top of the Folder View pane. A new folder is created as a subfolder of the one you had selected.

To remove a folder from Folder View:

Make sure you've selected a *root* folder and not a subfolder, then click the Remove button at the top of the Folder View pane.



Removing a root folder doesn't delete the folder from your hard disk or network, nor does it delete any of the files in it; it simply “disconnects” the folder from Portfolio.

To delete a folder:

You can delete subfolders using the Folder View pane. Select a subfolder, then click the Delete button in the Folder View pane. In this case, Portfolio will *delete* the folder on disk — not just stop watching it, as the warning indicates.



Step Six: Find your files

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

1. Search with QuickFind

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



To use it just click in the QuickFind box. Type a word or phrase in the box and press Return. Matching items appear in the current Portfolio gallery.

By default, QuickFind searches the filename, description and keyword fields, using a "contains" search. To change the fields that are searched by QuickFind, see "Configuring QuickFind Preferences" in the Portfolio 6 User Guide.



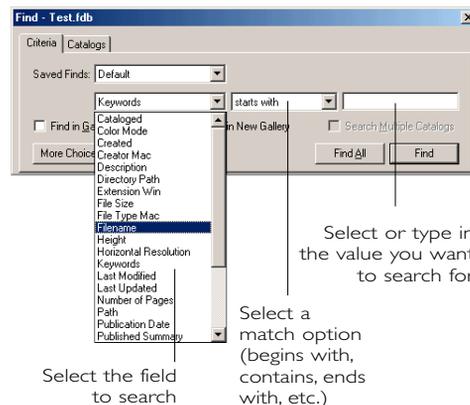
The text you've typed in the QuickFind box remains selected after you've pressed Return and performed a search. To do another QuickFind search, all you have to do is start typing another search word or phrase and press Return again.

2. Search with the Find command.

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

Click the Find button  on the toolbar or choose Catalog > Find.

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



Click the More Choices button to expand the window to include additional criteria. You can expand the window to include up to five different lines of search criteria.

See the *Portfolio 6 User Guide* for information on advanced search features, such as Saved Finds.

Step Seven: Distribute your files

An important aspect of managing your digital files is being able to quickly and easily distribute them to other users. Portfolio is equipped with several features designed to greatly streamline the job of collecting and sending your files to others — on disk and over the Internet.

1. E-mail files from Portfolio

You can send an image directly from Portfolio to your e-mail program as an attachment.

Select the item (or items) that you want to send from the current gallery window, then click the  button on the Toolbar.

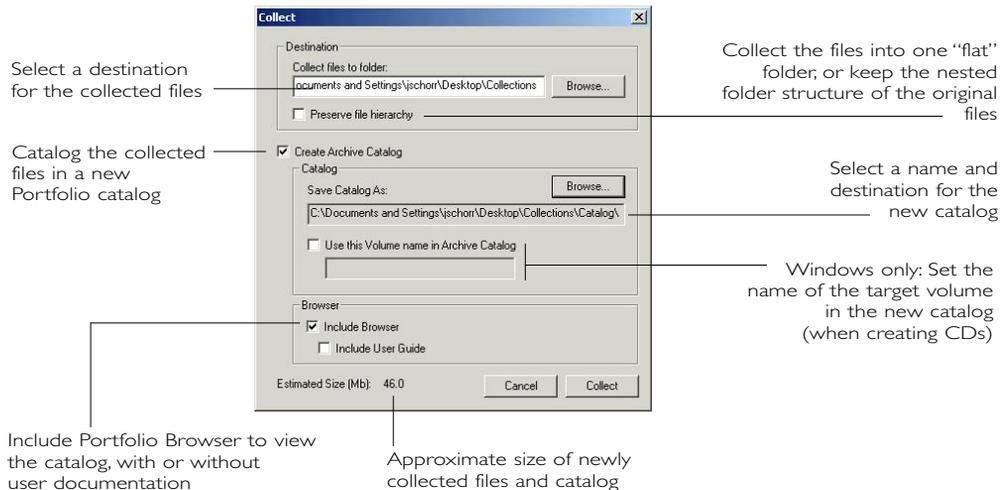
Portfolio launches the default e-mail program on your system, creates a new e-mail message, and adds the file(s) you selected as an attachment. All you have to do is address the e-

mail and fill in the subject and body text as usual.

2. Collect files for distribution

Use the Collect command to collect together a group of cataloged files, copying the files from their various locations on your computer system or network into a single location. The Collect feature can also create a new *catalog* containing those files, and even create a copy of Portfolio Browser — a simple, read-only version of Portfolio that you are free to distribute with your catalogs. This feature makes it especially easy to publish collections of images to CD-RW.

The Collect Window



When collecting files, make sure the files you want to include in your collection are the ones displayed in the current gallery.

Click the Collect button on the Toolbar, or choose Gallery > Collect. Then use the Collect dialog box (shown on the previous page) to set up the collection. Select a destination for the collection by clicking on the Folder button (Macintosh) or Browse button (Windows).

Include a catalog with the collection

If you want to create a new *catalog* for the collection, turn on Create Archive Catalog. If you don't need a new catalog for the files you are collecting, leave this option unchecked. If you turn it on, you have to specify a name and location for the new catalog.

Include a read-only browser

Turn on the Include Browser checkbox if you want to create a copy of the free Portfolio Browser for inclusion with your collection. This option is available only if you have chosen to create a new catalog for the collection. Turn on the Include User Guide if you want electronic documentation for the browser to be included in the collection.

When you click Collect, Portfolio will make copies of all the items in the current gallery and create a catalog, browser and documentation according to the options you specified.

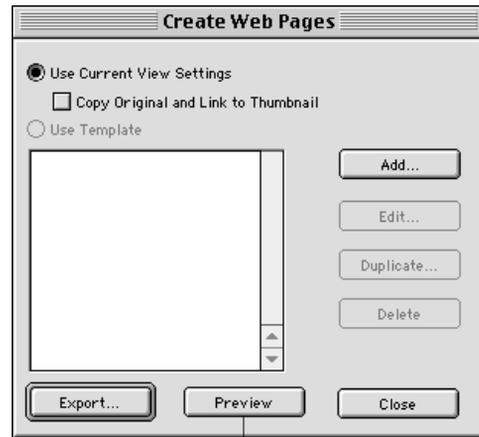
For complete details on using the Collect feature, see the Portfolio 6 User Guide. For a step-by-step guide to creating hybrid CDs using the Collect feature, see the "Creating Hybrid CDs with Portfolio" document on the Portfolio CD.

3. Create Web Pages

The Create Web Pages feature in Portfolio is designed to help you turn your catalogs into polished, professional-looking web pages with just a few clicks.

Start by selecting the thumbnails of the images that you want to include on your web pages. The Create Web Pages command acts only on *selected* items. If you want to include all the images displayed in your gallery window, choose Edit > Select All.

Next, choose Item > Create Web Pages, or press ⌘-H (Macintosh) or Ctrl-H (Windows).



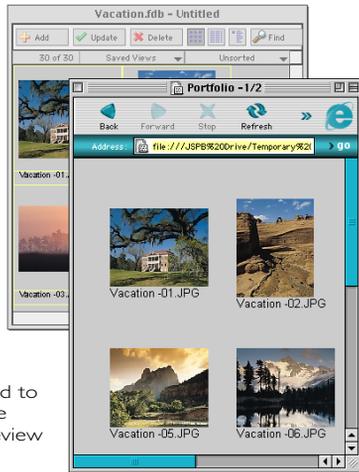
Click Preview to launch your web browser and see how the first of your web pages will look before you export them.

Web pages based on current view settings

For the quickest results, select the Use Current Settings radio button. With this option, the fonts, fields, thumbnail size and background color of the current gallery view are

automatically applied to create web pages that look very similar to the Portfolio catalog itself; you don't have to work with the underlying HTML code at all. To change the look of your web pages, just customize the Portfolio gallery using the Customize View command.

Click the Preview button if you want to see a quick preview of how your exported web pages are going to look. The Preview button launches your system's default web browser and opens the *first page* of your exported images.



Catalog converted to web page using Preview

If you don't like the result, switch back to Portfolio, close the Create Web Pages dialog box and edit the current gallery settings before trying again. If the preview looks good, return to Portfolio and click the Export button to save your web pages.

Web pages based on HTML templates

To create a more sophisticated web design, you can use one of the pre-defined HTML templates

included with Portfolio and listed in the Create Web Pages dialog box. Follow the same steps outlined above but choose the Use Template radio button and select a template from the list of pre-defined templates before clicking Preview or Export.

Web pages based on your own templates

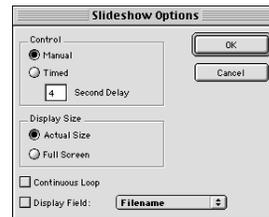
If you're familiar with HTML, you can create your own templates and use these to generate web page from Portfolio. To create a template, choose Item >> Create Web Pages, or press ⌘-H (Macintosh) or Ctrl-H (Windows) to open the Create Web Pages dialog box. Then, click the Add button to build a new template by typing (or pasting in) the appropriate HTML code.

See the *Portfolio 6 User Guide* for full details on working with HTML templates.

4. Create a slideshow

The Portfolio Slideshow feature lets you create self-running slide shows from your catalog images. You can also save slideshows as standalone QuickTime movies, so that you can distribute them to other users.

Set up a slideshow by choosing View > Slideshow Options. Set the options to create either a manual slideshow (in which you advance the slides with a mouse-click or keystroke) or a timed show that advances from slide to slide automatically.

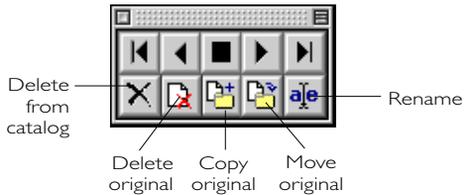


See the *Portfolio 6 User Guide* for details on the other Slideshow options.

Running a slideshow

To run a slideshow of your current gallery, choose View > Slideshow, or press \mathbb{S} -; (Mac) or Ctrl-; (Windows).

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



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



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

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

5. Create a QuickTime movie

The Export QuickTime Movie option exports slideshows from the catalog and saves them in QuickTime movie format. You can specify transitions for the movie when the slideshow is exported.

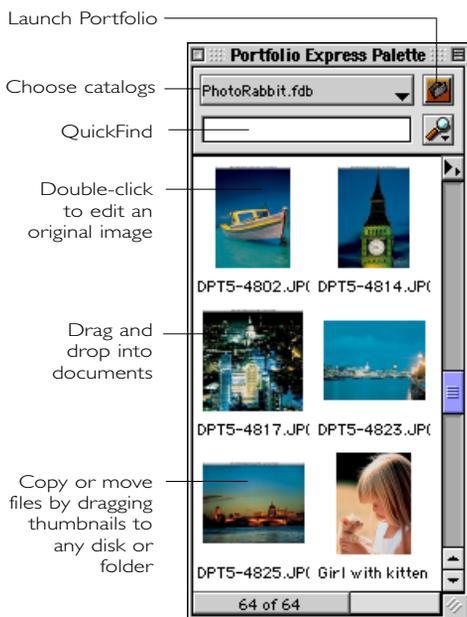
Open the gallery that you’d like to export as a QuickTime slideshow, then choose Item > Create QuickTime Movie, then set the movie options, including size, and transition type. See the *Portfolio 6 User Guide* for details.



Portfolio Express Palette

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

The Portfolio Express palette is a separate and distinct application from Portfolio. By default, it is installed in the same folder as the main Portfolio application and is configured as a startup application on your computer system.



I. Launch the palette

Macintosh: If you opted to have the Portfolio Express palette installed as a startup application, it should be running in the background. Press the default hotkey — Control-⌘-P — to make the palette visible. (You can confirm that it is running by checking your Application menu to see if Portfolio Express is listed among the programs that are currently active.) If the



The Portfolio Express palette runs as a background application

Portfolio Express application isn't running in the background, double-click the Portfolio Express icon in the Portfolio 6.0 folder on your hard drive to start it up.

Windows: If you restart your computer after installing Portfolio, the Portfolio Express palette should be running in the background. Press the default hotkey (Control-Shift-P) to make the palette visible. You can also double-click to Portfolio Express icon in the taskbar. If the Portfolio Express application isn't running in the background, choose Portfolio Express from Programs > Extensis > Portfolio 6.0 in the Start Menu.

Portfolio Express icon in the taskbar



2. Open a catalog with the palette

To open a catalog, choose the Open Catalog menu from the fly-out on the right side of the palette. To open a recently-used catalog, choose it from the catalog menu on the palette. The Portfolio Express palette remembers the last several catalogs you've opened.

If the catalog you want to open isn't on the menu of recently-used catalogs, choose Other Catalog from the menu and select any other Portfolio catalog to access it through the palette.

3. Set and use the Portfolio Express hot key

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

To set the hot key, choose the Set Hot Key command from the fly-out menu on the right side of the palette. On Windows, make sure the "Hot key enabled" checkbox is turned on. Then, click in the Hot Key field and press the key combination you want to use. On Macintosh, simply press the desired key combination when the dialog box opens. Click OK when you're done.



You can hide with palette (without quitting the Portfolio Express application) using any of the following methods:

- Click the close box in the palette title bar.
- Choose Hide Portfolio Express from the palette fly-out menu
- Press the hide/show hotkey

4. Search for files

To perform a QuickFind search using the palette, click in the QuickFind box, type a word or phrase in the box and then press Return. Matching items appear in the palette.



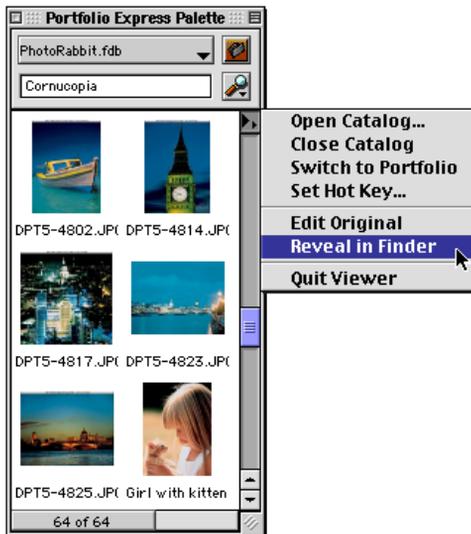
Type a search word and press Return

5. Access your files from the palette

You can use the Portfolio Express palette to directly access cataloged items in any of the following ways:

- Double-click a thumbnail to edit the original file. You can also do this by selecting a thumbnail and choosing the Edit Original command from the fly-out menu
- Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe Photoshop, Illustrator or FreeHand to open the image with that program.

- Drag a thumbnail into a drag-and-drop savvy document (such as Word or Adobe InDesign) on the Macintosh to place a copy of the image in that document.
- Drag a thumbnail to the desktop or a folder window to move the original file to that location.
- Option-drag (Macintosh) or Control-drag (Windows) a thumbnail to the desktop or a folder window to copy the original file to the new location.
- Select a thumbnail and choose the Reveal in Finder command (or, Reveal in Explorer, on Windows) from the fly-out menu to show the original file in the Finder (or Windows Explorer).



- Click the Portfolio button in the upper right corner of the palette, or choose the Switch to

Portfolio command from the fly-out menu to open the currently-open catalog in Portfolio.

- Drag a thumbnail from the palette into an e-mail message to send a copy of the image as an attachment.
- Drag a thumbnail into a QuarkXPress document to place the image in an XPress layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box; otherwise, Portfolio Express will create its own new picture box for the image.



Dragging thumbnails from Portfolio into QuarkXPress requires QX-Drag & Drop to be installed in Quark's XTension folder. The Portfolio 6.0 Installer attempts to install QX-Drag & Drop into the proper location during the Portfolio installation process. If, for any reason, this XTension was not installed during the initial Portfolio installation, you can copy to the XTension folder yourself from the Portfolio 6.0 CD.

For more detail about using the Portfolio Express palette, see the *Portfolio 6 User Guide*.

Security and Access Levels

Portfolio catalogs can be password-protected for security. In addition, as the Administrator of your catalog, you can assign varying levels of access to different users.

The four levels of access are:

- **Administrator:** This mode provides full access to all features. An administrator can assign passwords to other users, create custom fields, and control cataloging and startup options that other users can't. When a catalog is opened in Administrator mode, no one else can use it.
- **Publisher:** Publishers can add, remove, export and edit items in a catalog, but can't access administrative functions such as creating a new custom field, creating a master keyword list or changing passwords.
- **Editor:** In Editor mode, you can search, preview, access and edit information about cataloged items, but you can't add new items to a catalog, rename files, or export catalogs as web pages or QuickTime movies.
- **Reader:** As a Reader, you can view, search, preview and copy items — but you can't make any changes in the catalog. It's a read-only mode.

In Portfolio, each of these levels can have its own password (Level-based access). Alternately, you can assign an access level and password to individual users (User-based access) to more closely control who has access to a catalog and what level of access they have..



Important: A shared catalog cannot be accessed by other users when it is in use by the Administrator. Only one person at a time can access a catalog when it is in Administrator mode. If you can't log in using Administrator mode, it's likely because another copy of Portfolio (or the Portfolio Express palette) has the same catalog opened already.

1. Open a catalog in Administrator mode:

You'll need to open a catalog in Administrator mode if you want to create custom fields or create a master list of keywords.

Choose Catalog > Access, or press ⌘-J (Mac) or Ctrl-J (Windows). Select Administrator from the Mode pop-up menu, then enter the correct password (if a password has been set) and click OK.



2. Set passwords for your catalog

With a catalog open in Administrator mode (see above) choose Catalog > Administration. Go to the Passwords tab.

Choose between Level-based Access or User-Based Access. With Level-based Access you simply assign four passwords — one each for

the Administrator, Publisher, Editor and Reader access levels. The same password applies to all users logging in to a catalog at any given level.

With User-based Access, you assign a password *and* access level to *each individual user*.

Level-Based Access:

Click the Set button for each of the four levels to set a password.



User-based Access:

Turn on the User-based Access radio button, then click the Edit User Access button. In the User Access dialog box, click the New button, assign a username, password and access level for one user, then click OK, and repeat the steps as needed for each person who will be accessing the catalog. When you're finished adding users, click OK to return to the Catalog Administration dialog box.

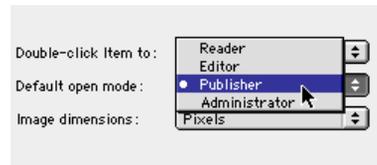


The catalog must be closed and reopened before the password changes take effect.

3. Set a default open mode

You can set your copy of Portfolio to open catalogs in one of the four access-level modes described on the previous page by default.

Open Edit > Preferences. In the General preferences panel, use the Default open mode menu to select an access level. This will be the level at which Portfolio attempts to open each catalog.



Of course, regardless of which level is set, you'll still need to know the password (if there is one) in order to open the catalog. Also, you can *change* the level at which you're accessing a catalog at any time by choosing Catalog > Access and switching to a different level in the Catalog Access dialog box.



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