Extensis™ Portfolio™ 6

User 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 renaming 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.

How Portfolio Works

It's quick and easy to view and retrieve images in Portfolio catalogs because the catalog stores only thumbnail images of the file — *not* the full document or image. Portfolio creates pointers to your original files, so the originals are always available for copying to applications, previewing, editing, and so on, while allowing the catalog itself to be fast and efficient.

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 on both Macintosh and Windows 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 6?

Portfolio 6 takes a completely fresh approach to the task of managing and distributing your digital files. 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 even 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.

• **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.

• **Edit Field Values tool:** A new window that lets you add, append, replace or delete values from any field with unprecedented ease.

• **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.*

Getting Started

System Requirements

To install and use Portfolio, you'll need the following hardware and software:

Portfolio 6 Macintosh:

• Mac OS 8.6 through 9.2
(Portfolio runs in Mac OS X's classic environment under Mac OS 9.2)
• Apple Power Macintosh
• A minimum of 32MB of application RAM
• 25MB of free hard disk space
• QuickTime 4.1.1 or higher strongly recommended

Portfolio 6 Windows:

• Windows 98, Windows NT 4.0, Windows 2000, Windows ME or Windows XP•
• Pentium (133MHz or faster recommended)
• 32MB of system RAM
• 25MB of free hard disk space
• QuickTime 4.1.1 or higher strongly recommended

Portfolio 6 Server Macintosh:

• Mac OS 8.6 through 9.2
• Apple Power Macintosh
• A minimum of 64MB of application RAM
• 25MB of free hard disk space
• QuickTime 4.1.1 or higher strongly recommended

Portfolio 6 Server Windows:

• Windows 98, Windows NT (Service Pack 6 or 6a); Windows 2000 (Service Pack 2); Windows XP; or Windows 98
• Pentium (133MHz or faster recommended)
• 32MB of system RAM
• 25MB of free hard disk space
• QuickTime 4.1.1 or higher strongly recommended

Portfolio 6 SQL Connect:

• Windows 98, Windows NT 4.0, Windows 2000; or Windows XP
• Pentium (133MHz or faster recommended)
• 32MB of system RAM
• Supports MS SQL Server 6.5, 7 and Oracle 8i.

Installation

You can find instructions for quick and easy installation on the Portfolio CD-ROM. If you downloaded the Portfolio installer from our web site, running the installer will place an informational Read Me on your hard drive.

When you install Portfolio, the following items will be placed on your hard drive:

Macintosh:

In the Extensis Portfolio 6 folder:

• Extensis Portfolio 6
• Portfolio Express 6
• Portfolio 6 Read Me
• Portfolio 6 User Guide.pdf
• HTML Templates folder
• Borders folder
• Saved Views folder
• Filters folder

In the System Folder:

• PortfolioCMPlugin (in the Contextual Menu Items folder)
• Optional: Alias of Portfolio Express 6 (in Startup Items)

Windows:

At the primary installation directory:

• Portfolio.exe
• Portfolio Express.exe
• Portfolio User Guide. pdf
• EToolbox.dll
• Gearpd.dll
• PortfolioCtxMenu.dll
• pstotxt3.dll
• Read Me.txt
• Portfolio6.tlb
• HTML Templates folder
• Borders folder
• Saved Views folder
• Filters folder

The following shortcuts are installed in the Start menu:

• Portfolio 6.0
• Portfolio Express (also added to the Startup group)
• Read Me
• Register Portfolio
• User Guide

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 or was sent to you via email if you purchased through our website. 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 +44 (0) 16 04 636300.

Technical Support

Technical Support is available directly through the Extensis web site. Go to *http://www.extensis.com/support/* and fill out an online support form for the quickest response. Our tech support representatives will respond by e-mail, usually within 24 hours on weekdays. You can also visit the Portfolio area on the Extensis website for answers to frequently asked questions and troubleshooting tips.

You can reach Technical Support 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.

A Portfolio 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.

The following overview is designed to give you an overall picture of how to set up and use Portfolio. Each basic step is given a quick summary, followed by a set of page references that tell you exactly where to go in this User Guide for more detailed instructions. Use this section to get the "big picture" — then jump into the chapters that follow for a step-by-step guide to each Portfolio feature.

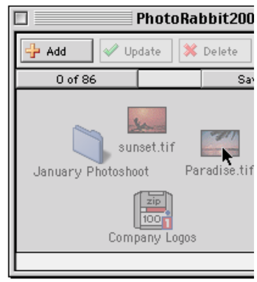
If you hate reading manuals, and want to start using Portfolio as quickly as possible, check out the brief Portfolio Quick Start Guide that came with your copy of Portfolio. In just a few pages, the Quick Start Guide provides streamlined instructions for setting up and using Portfolio without focusing on many of the details covered in the User Guide.

1. Catalog

You have to "catalog" your files — adding them to a Portfolio catalog — so that Portfolio can find them, preview them and track them. This process includes creating a new catalog document and then using various techniques to add your digital files — photos, illustrations, presentations, audio or video clips, and so on — to the catalog.

Adding files to your catalog is as easy as dropping them into an open catalog window, or using the Add to Portfolio contextual menu, which is available in the Finder or Windows Explorer — even when Portfolio isn't running!

Drop your digital media files into a Portfolio catalog to get the process started...



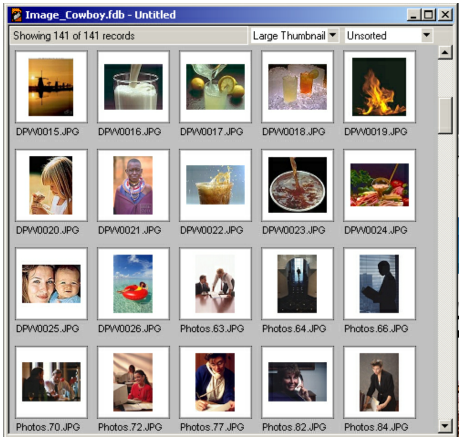
• *To create new catalogs, see page 9*

• *To open and access existing catalogs, see page 11*

• *To add items to a catalog, see page 14*

2. Customize

Give your catalogs the look and style you want to make information easy to find and display. Choose between thumbnail, list and record views. Customize each window (or *gallery*) in Portfolio to display the background color, thumbnail size, border, font, style, spacing, and sort order you want.



Give each gallery window in Portfolio its own look — from background color to fonts

• *To customize the look of a Portfolio catalog, see page 38*

• *To save custom views, see page 42*

• *To customize the Portfolio interface, see page 33*

3. 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.

Using the Portfolio Express palette, you can also open and access your cataloged images without even launching Portfolio. Pull up images from within QuarkXPress, Adobe Photoshop or any other application.

With Portfolio you don't have to launch other programs to see your images; you can preview them by double-clicking any thumbnail

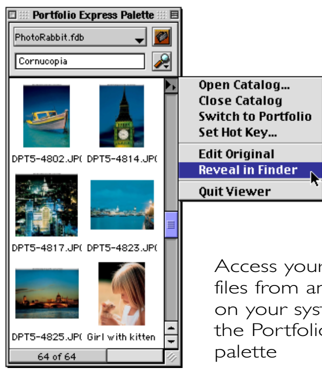
• *To preview files within Portfolio, see page 47*

• *To edit your original files, see page 50*

• *To use files in other applications, see page 53*

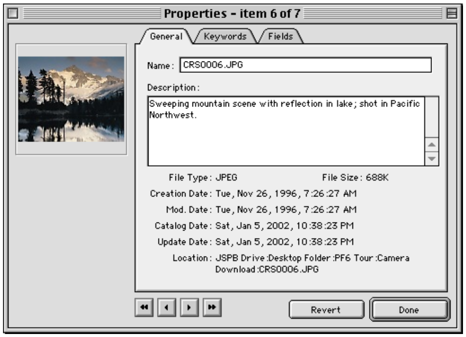
• *To use the Portfolio Express palette, see page 114*

4. Organize



Access your cataloged files from anywhere on your system with the Portfolio Express palette

Using tools within Portfolio you can group, organize and categorize your files by adding keywords, descriptions, and other custom data. There's no limit to the number of keywords and custom fields you can create.



Portfolio stores detailed information about each item you catalog, so you can get your work organized quickly

Portfolio allows you to organize files not only logically, but physically as well. Using the new FolderSync feature, you can add, delete and move folders on your hard drive or network right from within Portfolio, allowing you to manage your files more easily than ever.

• *To create and assign keywords, see page 69*

• *To use custom fields, see page 72*

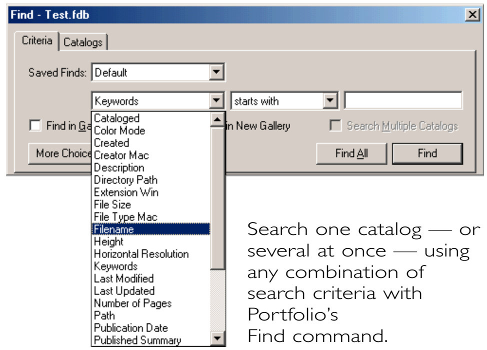
• *To group images into separate gallery windows, see page 80*

• *To edit information about your files, see page 77*

• *To use FolderSync to organize your files on disk, see page 61*

5. Find

Type a word or phrase in the QuickFind box on the main toolbar to locate any cataloged file and access it instantly. Use Portfolio's powerful search engine to find files using dozens of different criteria. Search an individual catalog, or search across multiple catalogs.



Search one catalog — or several at once — using any combination of search criteria with Portfolio's Find command.

• *To quickly locate a file using Portfolio's QuickFind box, see page 89*

• *To use the Find command, see page 91*

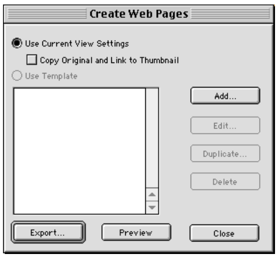
• *To perform multi-catalog searches, see page 96*

• *To search for text inside of PDF and text files, see page 97*

• *To save a set of search criteria for future use, see page 94*

6. Distribute

Rather than just help you organize your files, Portfolio assists you in *distributing* files to other users. You can send files via email with a click, or collect an entire group of cataloged images for burning to CD. The Create Web Pages command turns a gallery of images in your catalog into a ready-to-publish set of web pages.



• *To e-mail images from Portfolio, see page 99*

• *To collect files for copying to a disk or burning to CD, see page 100*

• *To include a catalog and free viewer application with your collections, see page 101*

• *To convert cataloged images into web pages, see page 104*

Outline of the User Guide

To help you find the information you need in this user guide, here's a brief outline of its contents:

Chapter 1: Introduction — Installation, system requirements and a description of Portfolio 6's new features.

Chapter 2: A Portfolio Overview — A "big picture" overview of the process of setting up and using Portfolio.

Chapter 3: Setting Up Portfolio 6 — Outlines the process of creating and opening catalogs, and adding items to them.

Chapter 4: Customizing Portfolio catalogs — How to customize the look of catalogs; creating and saving custom views.

Chapter 5: Managing your files with Portfolio — Using Portfolio to preview, move, copy, rename and edit your original files.

Chapter 6: Using FolderSync — How to use FolderSync to manage files on disk and keep your catalogs up to date.

Chapter 7: Organizing your files with Portfolio — Using keywords, custom fields, saved galleries and other tools to get your files grouped, categorized and organized.

Chapter 8: Finding files with Portfolio — Using Portfolio's search engine to locate your files quickly.

Chapter 9: Distributing files with Portfolio — Publishing your files by e-mailing them, burning them to CD or putting them on the web.

Chapter 10: Using the Portfolio Express palette — How to access your files from anywhere on your computer system with the Portfolio Express application.

Chapter 11: Catalog Administration — Setting up access levels and security passwords, creating custom fields and setting other administrative options in Portfolio.

Chapter 12: Using Portfolio Server — How to set up and administer the Portfolio Server for large workgroups.

Setting up Portfolio 6

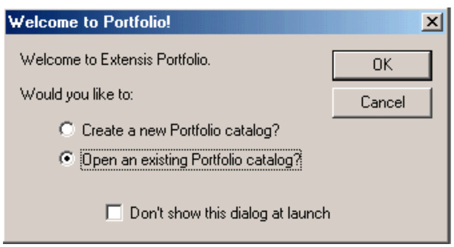
This chapter will show you how to set up Portfolio in order to organize, track and distribute your digital files. It will tell you how to create a new catalog, add items to that catalog and use Portfolio's powerful Cataloging Options to streamline the process of cataloging your collection of digital files.

Creating catalogs

Portfolio stores your collection of images, graphics, digital photos and other media files in a document called a Catalog. A catalog stores only thumbnail images of your files (along with whatever additional information you require), and pointers to your original files – not the files themselves (which you can store anywhere you want). As a result, Catalogs are relatively small, compact documents that let you preview and organize your files without becoming unwieldy.

Creating a new catalog when launching Portfolio

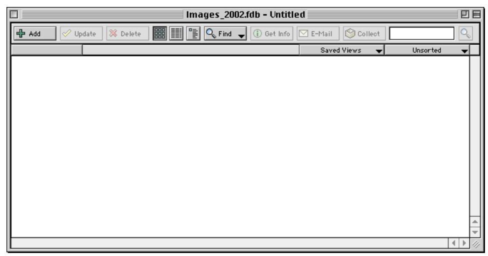
The first time you launch Portfolio, a Welcome screen offers you two options: You can either create a *new*, empty catalog, or open an *existing* catalog, as shown here.



Welcome Dialog Box options.

Create a new Portfolio catalog.

If you choose this option, you'll first be prompted to name and save a catalog. A blank catalog containing no records is created and opens on screen. You're now ready to add items to the catalog, using any of the methods described in "Adding Items to a Catalog."



Open an Existing Portfolio Catalog

Choosing this option presents you with a standard Open dialog. Select a Portfolio catalog to open it on screen.

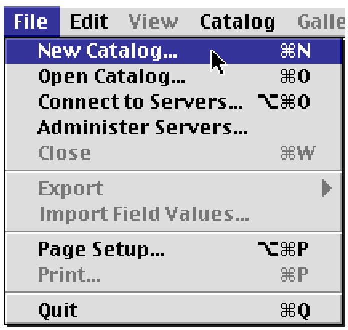
You can turn off the Welcome dialog box, so that you don't see it each time you launch Portfolio, by turning off the Show Welcome Dialog at Startup option in Preferences (Edit > Preferences) or by checking the "Don't show this dialog at launch" checkbox in the Welcome dialog box.

Other ways to create a new Portfolio catalog

There are two other ways to create a new Portfolio catalog — from within the Portfolio catalog itself, or on-the-fly when cataloging from the Desktop.

Creating a new catalog within Portfolio

Choose File > New, or Press ⌘-N (Mac) or Control-N (Win). A blank catalog containing no records is created and opens on screen. You're now ready to add items to the catalog, using any of the methods described in "Adding Items to Portfolio."



By default, Portfolio adds an extension of .fdb to the end of catalog names. Technically, this three-letter extension isn't required on the Macintosh platform, but preserving it ensures that your catalogs will be readable by both Mac and Windows users of Portfolio

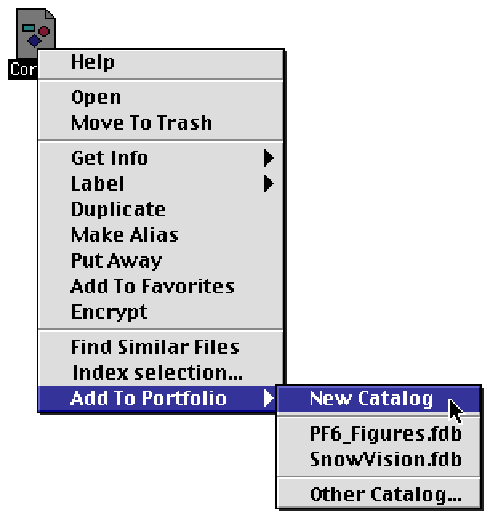
When cataloging from the Desktop

Portfolio lets you add items from your hard drive or network directly to a catalog by simply Control-Clicking or Right-clicking on them within Windows Explorer or the Macintosh Finder (see "Instant Cataloging," page 14). If you don't have a catalog ready to receive these items when cataloging, you can have Portfolio create one for you on the fly.

1 Control-click or Command-click on a file, folder, or disk to catalog it.

2 Choose Add to Portfolio > New Catalog.

3 Name the New catalog, then name and save the catalog as outlined in "Create a new Portfolio catalog" above.



Opening catalogs in Portfolio

In addition to the Welcome dialog box referred to on page 9, there are several other ways you can open an existing catalog in Portfolio.

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

When you create a Portfolio catalog, two files are saved — the catalog file itself (recognizable by the .fdb extension appended to the end of its name) and an administrative file (with an .adm extension) which controls administrative access to the catalog and is visible only when a catalog is open. There's no need for you to double-click this file, but it must remain in the same folder as the catalog.

• Use the recently-opened catalogs list in Portfolio's File menu (Windows version only). Recently-opened catalogs appear in the File menu, directly under the Print command. You can choose any of the catalogs listed to open them, bypassing the standard Open command.

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

Converting Catalogs from earlier versions of Portfolio

To access the new features added to Portfolio 6, catalogs created in Portfolio 5.0 (or earlier) must be converted to version 6 catalogs. Portfolio 6 can open version 5.x catalogs without conversion, in a limited browsing mode.

Opening a 5.x catalog with Portfolio 6 in Administrator mode allows the catalog to be converted.

Although Portfolio is capable of opening and converting catalogs created with Portfolio 4.x (and earlier), for best results we recommend that you first open and convert such documents using Portfolio 5, and then convert your catalogs from version 5.x to 6, as outlined below.

To convert a Portfolio 5.0 catalog:

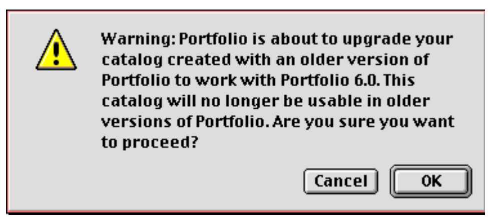
1 Make a backup copy of your original 5.x catalog.

2 With no catalog open, choose Edit > Preferences and set the Default open mode in the General Preferences panel 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.

2 Open the catalog to be updated.

You will be asked to confirm the conversion. *Once the catalog is converted to a Portfolio 6 catalog, you won't be able to open it using Portfolio 5.x.*



3 Click OK.

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

Choose Cancel to leave the catalog version unchanged, opening it in limited browsing mode.

Converting catalogs from an earlier version of Portfolio can take quite a bit of time — depending on the size of the catalog. We recommend performing such conversions on the fastest machine possible and also moving catalogs from network volumes or servers to a local hard disk before converting.

Catalog Access Levels & Security

Every Portfolio catalog 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 possible 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. By default, when you *create* a new Portfolio catalog, you have Administrator access to that catalog. 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. Alternatively, a catalog administrator can assign an access level and password to individual *users* to more closely control who has access to a catalog and what level of access they have.

For details on how to set up access-level passwords and create user-level access privileges for a Portfolio catalog, see the Catalog Administration chapter on page 121.

For now, here's what you need to understand about access privileges and security:

Opening a password-protected catalog

If a catalog administrator has protected a catalog with a password, you'll be prompted to enter the password each time you try to open the catalog. Simply select the Access Level you want to use (Administrator, Publisher, Editor or Reader) from the Level pop-up menu, then type in the password and click OK.

Setting a default open mode

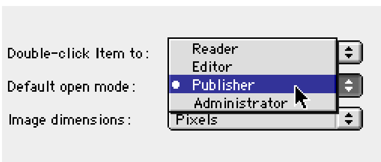
You can set your copy of Portfolio to open catalogs in one of the four access-level modes described on this page by default. If you know that you have Publisher-level privileges to your catalogs, for example, you can tell Portfolio to automatically open catalogs in Publisher mode.

Or, if you are the administrator of your Portfolio catalogs, you might want to have Portfolio always open catalogs on your computer in Administrator mode.

To set a default open mode:

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.



Changing your access level

At any time you can *change* the level at which you're currently accessing a catalog. For example, you may have opened a catalog in Publisher mode, but then need to make some changes to it (adding a new custom field, for instance) that requires administrative access. Without closing the catalog or quitting Portfolio you can change your access level from Publisher to Administrator, make the required changes, then switch your access back to Publisher again.

To change access levels:

1 Choose Catalog > Access, or press ⌘-J (Mac) or Ctrl-J (Windows), to open the Catalog Access dialog box.

2 Using the Level pop-up menu to switch to the desired access level.

3 If necessary, enter a password and click OK.

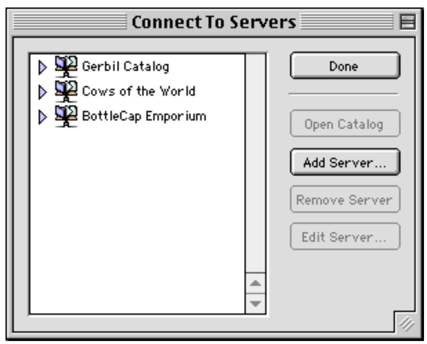
Opening a served catalog

If your workgroup is using Portfolio Server (which provides optimized performance for workgroups that share Portfolio catalogs across a network) you can open a Portfolio catalog using the Connect to Servers command.

To Open a catalog on a Portfolio Server:

1 Choose File > Connect to Servers, or press ⌘-Option-O (Mac) or Ctrl-Shift-O (Windows).

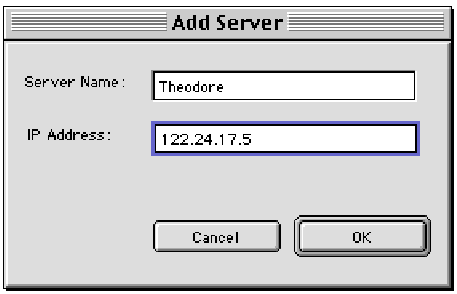
The Connect to Servers dialog will be displayed.



2. If a list of servers and catalogs appears, skip to step 4 on the next page. (You'll have to expand each server entry (by clicking the twisty triangle (Mac) or "+" symbol (Windows) to see which served catalogs are available. If the list is blank or if the server you want to access does not appear: Click Add Server.

The Add Server dialog will be displayed.

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



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

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

You will be asked to enter a password if the catalog requires it.

The next time you use the Connect to Servers command, all the servers you added—and all available catalogs on those servers—will be displayed on the list, ready to open.

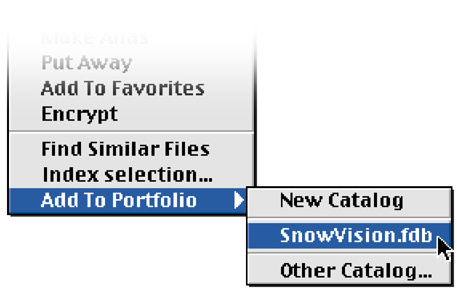
For more information on administering catalogs, and cervers, refer to the "Catalog Administration" and "Portfolio Server" chapters of this User Guide.

Adding Items to Portfolio

In order to organize and track your files with Portfolio, you must first add those files to a Portfolio catalog. To add items to a Portfolio catalog, you must have Publisher or Administrator access to the catalog (as explained on page 119). You can't add items to a catalog when in Editor or Reader mode.

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).There are five different ways you can add items to a Portfolio catalog.

• **Instant Cataloging.** This is a new, fast way to add items to Portfolio. Control-click (on a 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 command submenu to see a list of recently-used catalogs. Select the catalog to which you'd like the selected items to be added. If the catalog you need isn't listed, choose Other Catalog to open it.



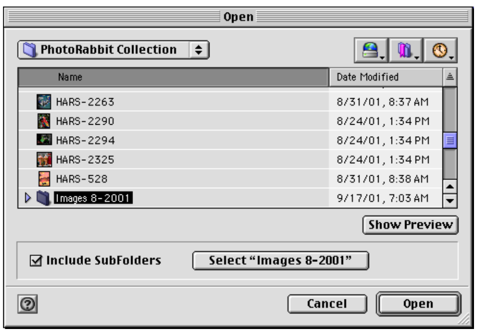
• **Drag & Drop**. Simply drag a file, folder or disk into an open catalog window to catalog it.

FolderSync. Add a folder from your computer or network to Portfolio's Folder View by clicking the New button in the Folder View pane, then click the Sync button to catalog the contents of the selected folder. See the FolderSync chapter on page 61 for instructions on using FolderSync.

Add button. Click the Add button in the main Portfolio Toolbar. Select any file, folder or disk in the Open dialog box. If you select a folder or disk, you can turn on the Include Subfolders checkbox to catalog any files that are inside folders nested within the selected folder or disk volume.

Catalog menu. Choose Add Items from the Catalog menu. Select any file, folder or disk in the Open dialog box. If you select a folder or disk, you can turn on the Include Subfolders checkbox to catalog any files that are inside folders nested within the selected folder or disk volume

You can also add items to Portfolio as a hands-off



background operation, using Background Cataloging. See page 43 for details.

Adding Placeholders

Normally, Portfolio creates a entry (also called a "record" or "item") for each digital file that you catalog. But, in some cases, you may want to enter a record in a Portfolio catalog for a file that doesn't exist — perhaps one that you haven't yet received or created. This is called a *Placeholder Record*. Think of a Placeholder Record as a stand-in for a file that you know you'll be including in your catalog, but that you don't have yet.

Placeholder Records behave just like other items in a Portfolio catalog. You can assign them keywords, add descriptions to them, perform searches for them, and so on. The only difference is that the Placeholder Record doesn't yet have a specific media file associated with it. At any point in the future, you can link a Placeholder Record to an actual file on disk, turning it into a regular Portfolio catalog item. If you give the Placeholder Record the same name as the file you eventually link it to, Portfolio can automatically find the file and catalog it when you update the Placeholder.

To create a Placeholder Record

1 Choose Catalog > Create Placeholder.

2 Name the Placeholder Record. Type the name into the Record's Filename field. If possible, this should be the name of the file that the Placeholder is standing in for – the one that you'll eventually use to replace the Placeholder. This will make updating much easier later on.

3 Specify a location (Optional). Click the "Specify folder on disk" button to set the location where you will eventually place the file that the Placeholder Record is standing in

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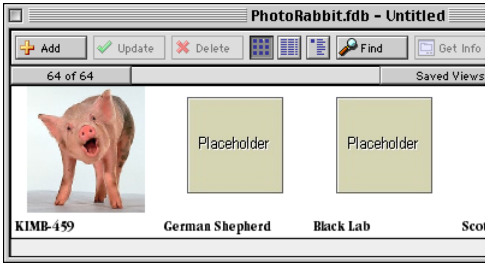
for. If you don't know where you're going to put the file, you can leave this blank. If you do know it, setting this location will make updating the Placeholder much easier.



4 Click OK. A new record with a thumbnail containing the words "Placeholder" appears in your catalog.

To link a Placeholder Record to a file

Linking a Placeholder Record to an actual file on disk turns it into a regular Portfolio catalog item.

1 Select the Placeholder Record.

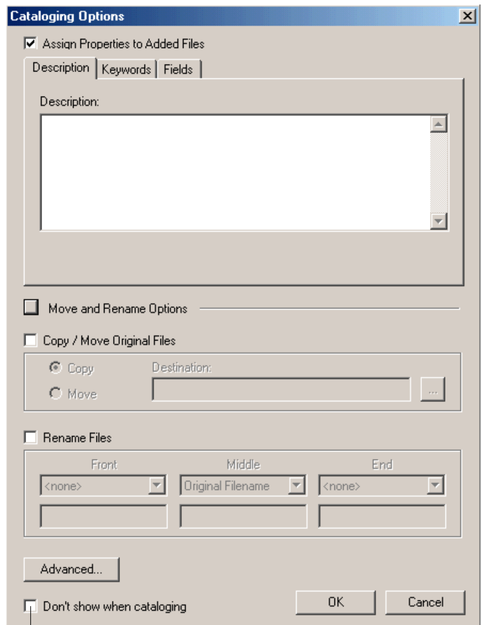
2 Choose Item > Update Items, or press Command-U (Mac) or Control-U (Win)

If the name of the Placeholder Record *exactly* matches the name of the file you're linking to, and you've specified the right *folder* in which to find it, the Update Items command will *automatically* link the record to the matching file.

If Portfolio *doesn't* see a file with the same name as the Placeholder Record in the current directory, you'll see an Open dialog box, in which you can locate the desired file. Select the file you want, then click Open.

Cataloging Options

When you add items to Portfolio, there are many options available that determine exactly how Portfolio stores information about your files. You can control these various options by choosing the Cataloging Options command from the Catalog menu. By default, the Cataloging Options window opens *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.



Turn on this checkbox if you don't want the Cataloging Options dialog to open every time you catalog files.

Cataloging Options in Portfolio allow you to perform very powerful tasks with a minimum of effort. Here are some of the things you can do when cataloging your images:

• Rename files

• Insert descriptive text about each cataloged file

• Add keywords

• Fill in custom fields associated with each record

• Copy or move files from one location to another

To change Cataloging Options, choose Cataloging Options from the Catalog menu, or press ⌘-Option-D (Mac) or Ctrl-Shift-D (Windows). This opens the Cataloging Options window (shown on the previous page), where you will find the options described below:

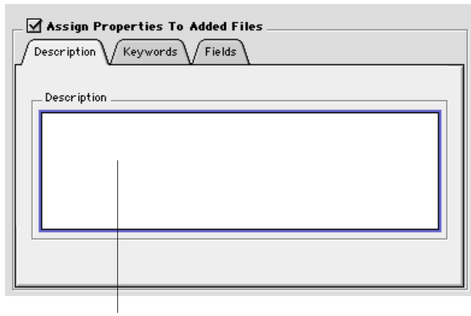
Assigning Properties

Portfolio allows you to store keywords and descriptions for each of the digital files that you catalog. In addition, you can create an unlimited number of custom fields to store other information about your files – dates, URLs, numbers, or any other data you wish. To set up custom fields in a catalog, see page 73.

Using Portfolio 6's new Cataloging Options window, you can assign these keywords, descriptions and other field values to your files while cataloging — rather than waiting and assigning them after you've cataloged the items.

Assigning a description during cataloging

Using this feature, you can insert a description into the Description field of each file as it is cataloged. For example, if you were cataloging a folder of pictures of the Grand Canyon, you could automatically assign the description "Photo of the Grand Canyon, taken on May 14, 2001" to each file as it is being cataloged. (Descriptions can be as long as 32,000 characters.)



The description you type in here will automatically be added to each record you catalog

1 In the Cataloging Options window, make sure the Description tab is active in the Assign Properties portion of the window.

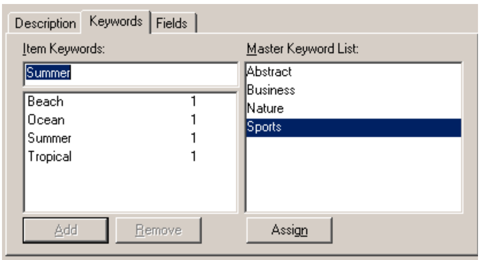
2 Type a description into the Description field.

3 Click OK.

4 The description you typed will be filled on all the items you now catalog.

Assigning keywords during cataloging

This feature adds the keywords you specify to each of the files you catalog in Portfolio. If, for example, you were going to catalog 100 photos of a tropical beach, you could assign keywords such as Beach, Ocean, Tropical, Sun or Seaside to each item *as it is being cataloged*, saving you the trouble of adding and assigning these keywords later.



1 In the Cataloging Options window, make sure the Keywords tab is active in the Assign Properties portion of the window.

2 In Keyword entry field, type in a keyword that you would like to add to each incoming item that you are about to catalog. Remember, the keywords you enter here will automatically be applied to all the items you catalog. Or, to use keywords that already appear in the Master Keyword list, select the words in the list and click the Assign button.

3 Press the Add button to add the keyword to the list of Keywords that will be added.

4 After you've inserted all the keywords you want to include, click OK.

5 The keywords you added will now be applied to the items as you catalog them.

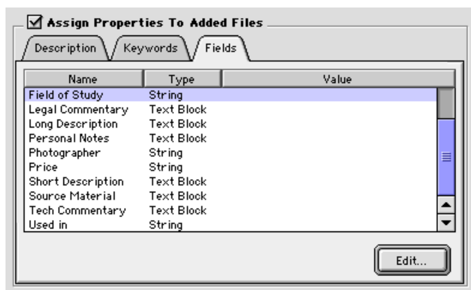
Assigning custom field values during cataloging

This option fills in values for any of the custom fields you've created in Portfolio as you catalog files in Portfolio. For example, if you've created a custom field that contains the name of the photographer who shot each digital photo that you catalog, you can have Portfolio fill in the photographers name on the fly as you catalog the images.

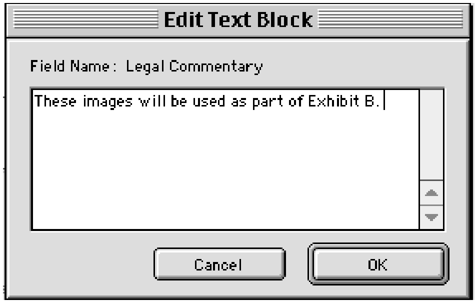
In order to assign field values during cataloging, you must already have set up custom fields in your Portfolio catalog. See Section 73 for instructions on how to do this.

1 In the Cataloging Options window, make sure the Fields tab is active in the Assign Properties portion of the window. You'll see a list of the custom fields available to you in the catalog. (If there are no fields listed, it means the catalog you are viewing does not contain custom fields.)

2 Double-click the name of the custom field to which you would like to assign a value.



3 Edit the field. Remember, the values you enter here will be applied automatically to *all* the items you next catalog. Click OK when you're done editing.



4 After you've edited the content for all the custom field values you want to assign when cataloging, click OK.

5 Custom fields for the items you next catalog will now be assigned the values you've set up.

Moving and copying files during cataloging

Portfolio can copy or move files when cataloging them, placing them in the exact location you want. This is useful if you're pulling images off of a CD-ROM, digital camera or memory card, and you want your Portfolio catalog to link to new copies of the files that are stored in a folder on your system or on your network, rather than the original CD or storage disk. Instead of first copying the files manually, and then cataloging them, you can have Portfolio handle both tasks — first copying the files for you, then cataloging them — in one step.

Move vs. Copy

When cataloging, Portfolio can either move or copy your original files. It's important to understand the difference: Copying a file makes a *duplicate* of it in the new location, leaving the original untouched. Moving a file places a copy of the file in the new location *and* removes it from its original location.

On the Macintosh, the "move" command will not delete an item from its original location if that location is on a different volume than the destination. It will only copy the file.

To have Portfolio move or copy files when cataloging:

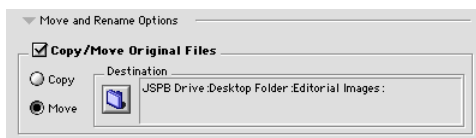
1 Expand the Cataloging Options window so that the Move and Rename Options are visible.

2 Turn on the Copy/Move Original Files checkbox.

3 Choose to either Copy or Move files by clicking the appropriate radio button. Remember, copying a file makes a duplicate of it in the new location, while moving it places a copy of the file in the new location and removes it from its original location.

4 Set a destination for the new files. Click the folder icon to select the location in which Portfolio will place the cataloged files.

5 Click OK. Portfolio will now either move or copy each file you catalog to the specified location.



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Renaming files during cataloging

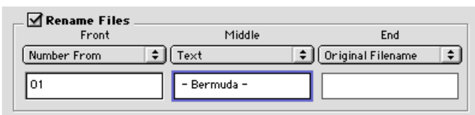
Portfolio can rename your files as you catalog them, saving you from having to rename each one of them individually. This is particularly useful if you're downloading images from a digital camera. As they are saved on the camera's memory card, the files may have generic names such as PIC000045.JPG, PIC000046.JPG, and so on. With Portfolio you can automatically replace those names with something more descriptive, such as "Bermuda Holiday 01, Bermuda Holiday 02, etc…"

Of course, you ultimately may want to give each *individual* file an even more specific name; Portfolio provides several easy ways to do this, after you've cataloged the images. See page 51.

To have Portfolio rename files during cataloging:

1 Expand the Cataloging Options window so that the Move and Rename Options are visible.

2 Turn on the Rename Files checkbox.



3 Choose a naming scheme using the three pop-up menus. The naming options available are:

Text. Type a descriptive text string up to 31 characters long.

Number from. Enter any number. If you catalog more than one file, Portfolio will increment the number by one when naming each file. If you enter the number 001, for example, and catalog three images, their names will contain the numbers 001, 002, and 003.

Original File name. Includes the original file name within your new naming scheme.

None. Does not apply any renaming scheme to your files.

You can apply these options in any order and combination to make up the front, middle and end of the new naming scheme.

4 Once you've entered the naming scheme you want, click OK to apply the cataloging options. The next files you catalog will be automatically renamed according to the scheme.

Remember to change these settings the next time you catalog items, or the same names and numbering will be applied to the next batch of files.

Hiding the Cataloging Options window

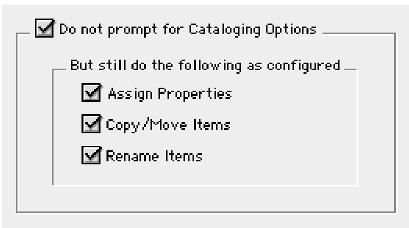
By default, Portfolio displays the Cataloging Options window *each time* you catalog a new file, folder or disk. This gives you a chance to modify these options before cataloging items. However, if you know that the options are set correctly and don't need to review them, you can choose to keep this window hidden by turning on the "Don't show when cataloging" checkbox at the bottom of the Cataloging Options window. This allows you to catalog files without an interrupting dialog box.

If, after keeping Cataloging Options hidden, you need to see them again in order to make changes, simply choose Catalog > Cataloging Options before cataloging a new item and turn off the "Don't show…" checkbox.

Preferences for Cataloging Options

You can also keep the Cataloging Options window hidden at any time by activating the "Do not prompt for Cataloging Options" checkbox in the Cataloging panel of the Preferences dialog box (available via Edit > Preferences).

The three checkboxes in the "But still do the following as configured" section of the Cataloging Preferences panel let you determine which cataloging options will be performed and which will be ignored *when the Cataloging Options dialog is configured to remain hidden.*



You can clear these checkboxes as a precaution against moving or renaming files unintentionally when cataloging. Leaving the Rename Items checkbox turned off, for example, means that Portfolio won't rename files as you catalog them unless you specifically show the Cataloging Options dialog box to confirm the renaming scheme.

Cataloging Summary. These checkboxes determine how Portfolio handles problems that it encounters when attempting to catalog files. If you want Portfolio to alert you to a problem — such as a corrupted file that cannot be cataloged— during the cataloging process turn on the "Report cataloging errors" checkbox. The second option, "Log cataloging errors to file" creates a text file in the same directory as your catalog, logging all cataloging activity.

Advanced Cataloging Options

For even greater control over how Portfolio handles the process of cataloging your files, click the Advanced button to open the Advanced Cataloging Options window. You can also choose Catalog > Advanced Cataloging Options to go directly to this window. The options available in the five panes within the window control the following issues related to cataloging new items:

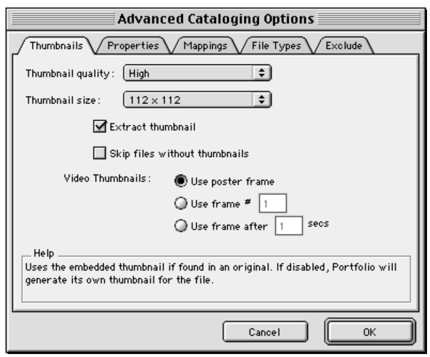
• The quality and size of thumbnail images.

• The type of information Portfolio extracts from your files when cataloging them.

• The creation of keywords from file names and paths

• The automatic import of TIF, IPTC and EXIF data into Portfolio

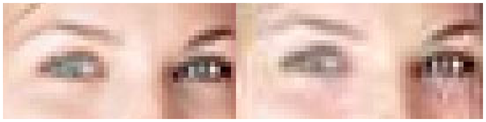
• File types that Portfolio automatically includes or excludes when cataloging.



Thumbnail Options

The options in this panel determine how Portfolio creates or extracts thumbnails of your images for use in a Portfolio catalog.

Thumbnail Quality. Determines the level of compression Portfolio applies to the thumbnails stored in your catalog. The High setting yields high-quality thumbnails (with low compression) but increases the total size of your catalog. The Low setting yields heavily-compressed thumbnails of lower quality, but smaller catalogs. The default is High. If you want to keep the size of your catalogs as small as possible, reduce this setting to Medium or Low.



A highly-magnified view of two thumbnails — one created with Portfolio's High quality setting (Left) and one created with the Low setting (Right). At normal size, there's not much difference.

This setting only applies if you choose to have Portfolio generate, rather than extract, thumbnails, as explained in the next section.

Thumbnail Size. This setting determines the size (in pixels) of the thumbnails created and stored by Portfolio — either 112 x 112 pixels, or 256 x 256 pixels. If you want to display 256 x 256 thumbnails in your catalogs, you must set the Thumbnail size to the higher setting. If your catalog views only require thumbnails that are 112 x 112, 64 x 64, or 32 x 32 pixels, you can leave this setting on 112. The lower setting will result in catalogs that are smaller in size.

Extracted vs. generated thumbnails. Many graphics and page-layout programs automatically create thumbnail-size preview images and embed them in saved files. By turning on the Extract Thumbnail checkbox, you can have Portfolio extract these embedded thumbnails instead of generating its own thumbnails during the cataloging process. In general, the thumbnails generated by Portfolio are of higher quality and of more consistent size than embedded thumbnails, so we recommend that you keep Extract Thumbnails turned off. There are, however, two reasons why you might want to turn Extract Thumbnails on:

• Using extracted thumbnails may improve the speed of cataloging, since Portfolio doesn't have to generate a thumbnail for each cataloged image.

• Using extracted thumbnails allows Portfolio to display thumbnails for files types not otherwise supported. For example, Portfolio can't generate a thumbnail for QuarkXPress documents, but it can extract the preview image that QuarkXPress 4.x and later embeds in each document. This enables you to display a thumbnail image for each cataloged QuarkXPress document, instead of just displaying a QuarkXPress icon.

If you don't want Portfolio to catalog files for which it can't either extract or generate a thumbnail, turn on the Skip files without thumbnails checkbox.

Video thumbnails. When you catalog digital movie files with Portfolio, you have a few additional thumbnail options.

• Use Poster Frame displays a thumbnail of the first frame of a cataloged movie.

• The Use Frame # options lets you select a specific frame that will be used to generate a thumbnail. You can select a frame that appears a specified number of seconds after the start of the video clip.

Properties Options

The Properties panel contains several options that control the kind of information Portfolio extracts from your files when cataloging them.

Extracting keywords and descriptions

Many graphics programs (such as Adobe Photoshop and Adobe Illustrator) allow you to include a text description and keywords when saving a file. Portfolio can automatically detect and extract this embedded information and add it to your catalog, saving you the trouble of having to re-enter the information manually. The options settings here apply both to when you add items to Portfolio and to when you update items, using the Update Item command or the Extract Properties command.

To extract keywords from files when cataloging:

1 Turn on the Extract keywords checkbox.

2 Each time you catalog a file, any keywords embedded in the file will automatically be added to that item's Keywords field in Portfolio.

When updating items in Portfolio, select the *Replace* radio button to have Portfolio replace keywords with the ones extracted from your files, or *Merge* to add the extracted keywords to those that have already been entered in Portfolio for each record. These radio buttons have no effect when you're adding new items to Portfolio.

To extract a description from files when cataloging:

1 Turn on the Extract description checkbox.

2 Each time you catalog a file, any description embedded in the file will automatically be added to that item's Description field in Portfolio.

When *updating* items in Portfolio, select the Replace radio button to have Portfolio replace any currently-saved descriptions with the ones extracted from your files. Choose Append to paste the extracted descriptions at the end of those that have already been entered in the Description field for each record in Portfolio. These radio buttons have no effect when you're adding new items to Portfolio.

Indexing document text

With the Index document text option turned on, Portfolio indexes the text of Adobe PDF (Portable Document Format) files, as well as plain text documents, when they are cataloged. Each word in the cataloged documents is saved in the catalog index, allowing for fast searches and retrievals.

Turning on text indexing slows down the cataloging of PDF files. It is recommended you turn this option on only if it is critical that you be able to search for text within PDF files when using Portfolio to retrieve documents.

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Exclusions. You have the option of excluding words from Portfolio’s text-indexing operations. You might want to exclude words in order to speed indexing time and reduce the size of your Portfolio catalogs.

To exclude words from text indexing:

1 Click the Edit Exclusions List

2 In the entry field, type a word that you want Portfolio to ignore when indexing

3 Click Add

4 Repeat Steps 2 and 3 to add as many words as necessary to the exclusion list.

5 Click OK.

Creating Keywords from Path

This is a powerful and important feature of Portfolio that can save you hours of typing. By turning on the Create keywords from paths checkbox, you can have Portfolio add keywords to each file you catalog, based on the name and location of each file on disk. Portfolio does this by examining the full path of each cataloged file and then extracting the words in all or part of that path to make keyword entries. The pop-up menu determines how much of the path is used to create keywords.

To illustrate how this works, imagine that you catalog a file with the following path on your computer:

```
Hard Drive: Current Projects:
Newsletter: Travel Photos: Bermuda:
SUNSET.JPG
```

Here’s a list of each of the pop-up menu options available and the resulting keywords produced when you catalog this file:

Menu option	Keywords produced
File Name	SUNSET.JPG
File and Folder name	SUNSET.JPG Bermuda
Path Name	SUNSET.JPG Bermuda Travel Photos Newsletter Current Projects
Path Name with Volume	SUNSET.JPG Bermuda Travel Photos Newsletter Current Projects Hard Drive

As you can see, by creating keywords from folder and path names, you can easily add a large number of meaningful keywords to the items in your catalog without having to type them. In the example above, you would now be able to easily search for the SUNSET.JPG picture in Portfolio simply by typing words such as *Sunset*, *Bermuda*, or *Travel* because they all were automatically added as keywords.

Creating Categories from Path

The Create Categories from Path feature works exactly like Create Keywords from Path, described above, except that the words Portfolio extracts from pathnames are used to make new Categories rather than keywords.

Categories are another organizational tool available within Portfolio. With Categories, you can create a hierarchical system of folders that allows you to organize groups of records visually.

For a discussion of Categories, see page 84.

⚠ *Creating categories is an Administration-level feature. You must be logged in as the catalog administrator to turn this on.*

Detecting watermarks

A Digimarc® watermark is special information that may be embedded in an original file, generally pertaining to copyright and licensed use of an image. Digimarc watermarks can be detected, displayed and embedded directly by Portfolio.

Portfolio detects Digimarc data automatically when cataloging files — provided that you have Portfolio set up to generate its own thumbnails. If you've chosen to extract thumbnails rather than generate them, Portfolio does not scan for watermarks, unless you have the Always detect Digimarc option turned on. This options forces Portfolio to generate thumbnails and examine files for watermarks — overriding the Extract Thumbnails option.

For more about reading and embedding watermarks, see page 58.

Mappings

This is an advanced feature that allows you to extract specific types of text data from certain kinds of digital images. Here are some examples:

• TIFF images created by scanners may have embedded tags that contain information about the scanner make and model, and other details about the creation of the files.

• Newswire photographs may contain embedded IPTC tags that contain caption, byline and source information.

• Photos from digital cameras may be tagged with EXIF data, which contains specific information about each photo, including shutter speed, date photographed, flash settings, and so on.

Typically, software that allows you to add such 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 copy the source file data into the Custom Field.

Portfolio provides ready-to-use Tag Codes for four popular formats:

- Photoshop
- IPTC
- TIF
- EXIF

You'll find the Tag Codes for these formats displayed in the Mappings tab of the Advanced Cataloging Options. 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.

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How to set up Mappings

To illustrate the process of setting up and using a mapping, here are the steps you would follow to extract the shutter speed EXIF tag from a digital photo and store it in Portfolio:

1 Create a custom field.
In order to store the shutter speed, you need a field in Portfolio in which to place the information. Go to Catalog > Administration and switch to the Custom Fields tab. Click Add, type "Shutter Speed" in the Name field, click OK and then click OK again in the Catalog Administration dialog box to close it. You now have a new custom field called Shutter Speed in your catalog. (See the "Portfolio Administration" section for much more detail on how to create custom fields.)

2 From the Mappings list in the Advanced Cataloging Options, scroll down to the EXIF tag with the title Shutter Speed and Tag code of 37377 and double-click it to open it.

3 In the Mapping dialog, use the Field pop-up menu to select the "Shutter Speed" custom field that you just defined. Change the State menu to On.

4 From the Action menu, choose either Replace (to replace the contents of the custom field you created in Step 1 with the tag data) or Append (to append the tag data to any existing data that may be in the custom field.)

5 Click OK to close the Mappings dialog box.

The next time you catalog photos containing EXIF data, Portfolio will automatically extract the shutter speed and place it in the Shutter Speed custom field that you defined.

Follow these same steps to set up mappings for other EXIF tags, as well as IPTC and TIF tags.

To Enable or Disable an existing Mapping:

After you've created mappings, you may want to enable or disable them temporarily, depending on the particular files that you are cataloging.

1 Open the Mappings panel in the Advanced Cataloging Options.

2 On a Mac, the small checkmark in the first column indicates that a mapping is enabled. Click in this column to toggle each mapping on (with a checkmark showing) or off (no checkmark). On Windows, double-click a mapping to open the Edit Mapping dialog box and change the State drop-down menu to On.

Remember, simply enabling a mapping in this list doesn't make it active. You have to set up the mapping (as described above), linking it to a specific custom field in your catalog, in order to import tag data.

Adding a Tag ID Code to the Mappings list

The most common embedded tags found in digital images are pre-set for you in Portfolio, but you can import data from *additional* embedded tags, as long as you know the proper ID code for each tag. Here's how you set up new mappings:

1 As with existing mappings, you need to create a Custom Field for each source file tagged field that you want to map.

Follow the steps described above in "How to set up Mappings."

2 In the Mappings panel of Advanced Cataloging Options, click the Add button.

3 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.

4 Assign one of your custom fields to the Tag by selecting it from the Field pop-up menu.

5 Set the State to On or Off, and select the appropriate Action from the Action pop-up.

6. Click “OK” to accept the settings and return to the Mappings tab.

7 Repeat these steps for all the tagged fields that you want to map.

Notes about Mappings:

• Mappings (that are enabled) are used both when you add new items to your catalog, and when you use the Update Items command to update existing records.

• You cannot map to keywords or descriptions.

• Some tags are automatically mapped to keywords or descriptions. These tag codes cannot also be used to map to a Custom Field.

• You cannot map one tag code to multiple Custom Fields (but you can map multiple tags to a single Custom Field, using the Append action.)

File Types

Portfolio is capable of cataloging virtually every type of digital file, and by default the program is set up to catalog all file types. But if you want Portfolio to catalog only specific *types* of files — such as JPEG or TIFF files — or to *ignore* (and therefore *not* catalog) certain types of files, you can set such limitations up in the File Types panel.

You may, for example, want to catalog all the digital photos on your hard drive, telling Portfolio to ignore every file except the JPEG and TIFF files that it finds. Or, you may decide you want to catalog every file in a folder *except* for font files. You can specify such exceptions in the File Types panel.

To exclude certain file types from being cataloged:

1 In the File Types panel of the Advanced Cataloging Options dialog box, change the radio button setting from Catalog All File Types to Catalog only the Following Type.

2 In the File Types list, clear the checkmark next to each file type that you don’t want Portfolio to catalog by clicking on the check mark.

To add a File Type to the list of files included/excluded

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.

1 Click the Add button in the File Types panel of the Advanced Cataloging Options dialog box.

2 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.

3 Click “OK” to add this file type to the list.

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File Type Preferences

When you define File Types in Advanced Cataloging Options, there are two checkboxes, giving you the choice of storing file type definitions in the *catalog* itself or as a user preference on *your computer*, or both.

Store in Preferences (Store "Locally" on Windows): With this preference, your decision to include or exclude certain file types will not affect other Portfolio users who choose to add items to the catalog.

Store in Catalog: All users of this catalog will include/exclude this type of file when cataloging.

Exclude

Using the Cataloging Options Exclude tab you can force Portfolio to ignore files with a specific *filename* 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 In the Exclude panel, select the file name search parameter from the pop-up menu: Begins With, Contains, or Ends With.

2 Enter the filename or partial name that you want to exclude from cataloging. Letter case (uppercase/lowercase) is ignored.

3 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"

Creating Disk Previews

Normally, Portfolio allows you to preview each item you catalog by directly opening the *original file* and displaying a preview of it within Portfolio. However, when cataloging files, you also have the option of creating *disk previews*, which allow you to preview images in Portfolio *without* the original file being present.

When Disk Previews is turned on, Portfolio saves it's own preview copy of each item in your catalog — separate from the original file itself — as a JPEG image in a location that you specify. Using Disk Previews offers two advantages:

• You can preview items in Portfolio much faster, because Portfolio doesn't have to render the file first. It simply opens the preview image.

• You can preview items that are offline. For example, if you create Disk Previews, you can view full-size previews of items cataloged from a CD-ROM without the CD even being mounted.

Of course, using Disk Previews will *slow down* the cataloging process (as Portfolio has to create a preview file for each cataloged image) and will require more space on disk, as Portfolio now has to store a preview file for each cataloged item.

Creating Disk Previews is an Administrative function in Portfolio, meaning that you must have Administrator-level access to enable this feature. *For more information about Administration, see page 119.*

To create Disk Previews:

1 Choose Catalog > Administration and open the Previews panel in the Catalog Administration dialog box.

2 Enable the Generate Previews checkbox.

3 Click the folder button to select a location for the preview images. This is where Portfolio will store each preview file — one for each item you catalog.

4 Set the level of Preview quality. This determines the level of JPEG compression Portfolio applies to the previews. Higher quality previews will take up more space on disk, but will be more faithful representations of your original images.

5 Set a maximum size (in pixels) for the preview images. The maximum size of the long side of a preview image is 1000 pixels. You can set the maximum size to any value between 100 and 999.

6 Click OK. Portfolio will now create a preview JPEG file for each image that you catalog.

Generating disk previews for files already cataloged

You can have Portfolio generate disk previews for your files, even *after* they've been cataloged, using the following procedure:

1 Turn on Generate Previews, as described on the previous page.

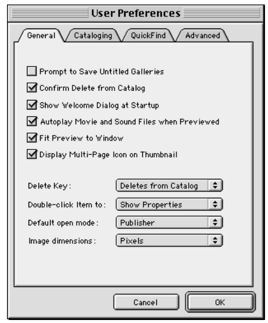
2 Select the items in your catalog for which you want to create disk previews.

3 Choose Item > Regenerate Thumbnail.

Disk previews also will be generated in you have Generate Previews turned on when updating an existing item in Portfolio.

Portfolio Preferences

Most of the user preferences contained in Portfolio's Preferences window (Edit > Preferences) are discussed elsewhere in this User Guide, in connection with the specific features to which the preferences relate. However, some of the preferences — those of a more general nature — are summarized in this section.

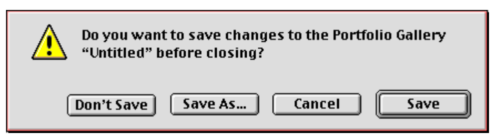


Preferences — General

These options primarily relate to how Portfolio displays thumbnails, shows previews and handles the deleting of cataloged items.

Prompt to Save Untitled Galleries: When selected, Portfolio will always prompt you to save untitled (unsaved) gallery windows with a dialog box like this:

If you leave this off, you'll be able to open a new gallery, then later close it without Portfolio prompting you to save it.



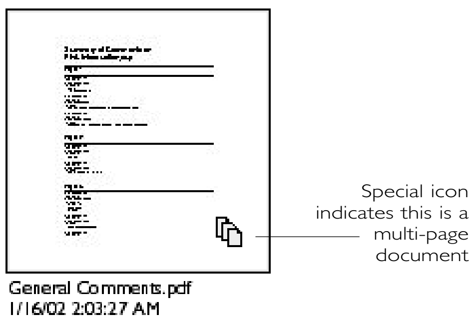
Confirm Delete from Catalog: By default, Portfolio warns you with a confirmation dialog box each time delete an item from a catalog, as this is an irreversible action. If you don't want the warning, turn this check box off.

Show Welcome Dialog at Startup: Turns off the Welcome dialog box that offers to open an existing catalog or create a new catalog each time you launch Portfolio.

Autoplay Movie and Sound Files When Previewed: When selected, movie and sound files are played automatically in preview windows; you don't need to click the Play button.

Fit Preview 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.

Display Multipage Icon on Thumbnail: When selected, a small multiple-page icon is added to the lower right-hand corner of PDF, PowerPoint®, and TIFF files that contain more than one page.



Delete Key: Choose to have the Delete key on your keyboard either delete items from the catalog or the gallery.

Double-click Item to: This option allows you to define how Portfolio behaves when you double-click a thumbnail. You can have it open the Item Properties window for the item, open a preview of the item, or open the original item for editing (using the file's "parent" application).

Default Open Mode: Set your copy of Portfolio to open catalogs in one of the four access-level modes (Reader, Editor, Publisher, or Administrator) described earlier in this chapter. See page 119 for details.

Image Dimensions: Select the unit of measure for displaying image dimensions. Applies to displays in gallery and preview windows. Note that pixels are the only unit of measure used in height and width fields.

Cataloging Preferences

These preferences are explained in detail earlier in this chapter, under the heading "Preferences for Cataloging Options" on page 21

QuickFind Preferences

The QuickFind preferences are covered in Chapter 8, under the heading "Customizing QuickFind searches" on page 89.

Advanced Preferences

You probably won't have to touch the Advanced Preferences; the default settings are correct for the vast majority of Portfolio users.

Index Node Size: This setting controls the block size written to the Portfolio database. As a rule, this number should be kept at 8K. (Older versions of Portfolio — prior to version 5.0 — *required* a smaller node size of 1K.)

Language: Sets the sort tables that are used for a catalog. If you create a catalog for a language other than English, change the language here so that values will sort properly in that language.

Use Aliases to Track Files: Available on the Mac version of Portfolio only, this option causes Portfolio to use aliases internally to track the location of cataloged files. The benefit is that if cataloged items are moved on disk, Portfolio can track *where* they've moved — just as an alias in the Mac OS can "follow" the movement of its original parent file. Turning this option on may make it easier for Mac users to track and find cataloged items whenever they've been moved on disk and it is necessary to update a catalog to reflect those changes.

Customizing Portfolio Catalogs

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

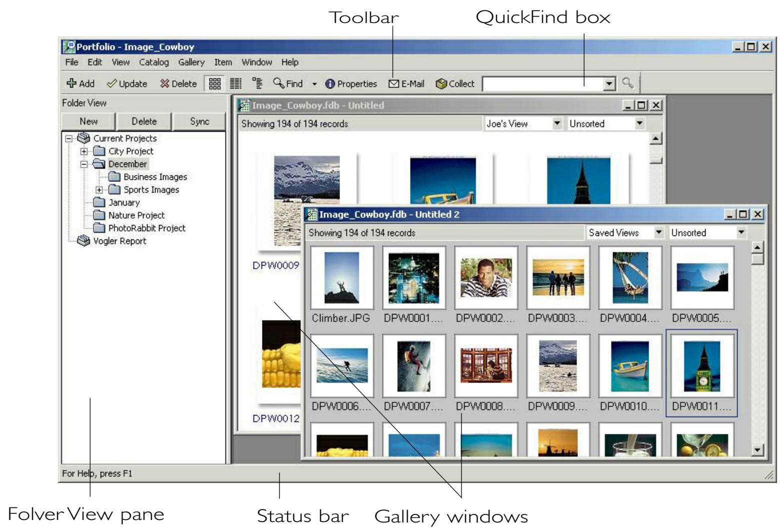
This section shows you how to completely customize the Portfolio environment to create catalogs that are styled and tailored to your exact needs.

Customizing the Portfolio environment

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

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

The Portfolio Window



You can hide or show the Toolbar by activating or deactivating the Toolbar command in the View menu.

QuickFind. One of the Toolbar's most powerful features is the QuickFind field. You can search for items in a catalog based on information in any searchable field simply by typing a string of text in the QuickFind field and pressing Return. You determine exactly which fields QuickFind searches by configuring the QuickFind panel in Edit > Preferences. See page for 89 for details on using QuickFind.

Folder View. The Folder View window allows you to display actual hierarchical folders from your computer system or your network within Portfolio. You can create, move and delete folders on your system, and move files into and out of them, without ever having to switch to the Finder (Macintosh) or Explorer (Windows). Folder View also lets you easily synchronize the contents of any folder on your computer or network with your Portfolio catalogs. For much more on using Folder View and FolderSync see the FolderSync section of "Managing Your Files with Portfolio."

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

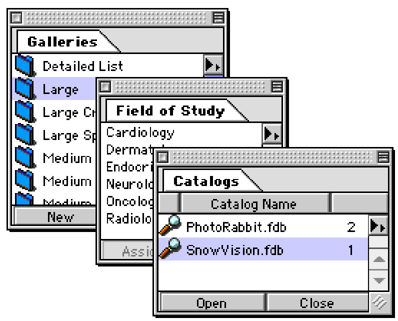
Dockable palettes

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

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

Categories. This palette allows you to organize your files into hierarchical categories and subcategories. The folders displayed in the Categories palette aren't "real" folders on disk; they're just virtual folders within Portfolio that allow you to organize groups of records visually. For information about how to use Categories, see page 84.

If you want to use portfolio to group your images into real folders on your hard drive or your network, use FolderSync instead of Categories.

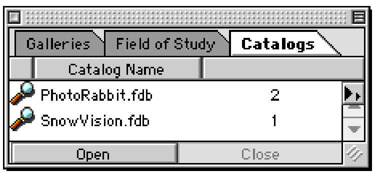


Galleries. Displays a list of all the saved galleries within the currently-opened catalog. Galleries are windows containing specific records within your catalog. For information about how to use Galleries, see page 80.

Master Keywords. If you have administrative access to Portfolio, you can set up a list of master keywords that can be used to organize, group, and categorize the items in your catalog. You define Master Keywords in the Keywording panel of Catalog > Administration. See the "Setting Up Master Keywords" section of Organizing Your Files with Portfolio. Once you've set up Master Keywords, you can assign them to records using this palette, and retrieve keyworded items using the palette's Find command.

Custom Fields. If, as the administrator of a Portfolio catalog, you've defined any custom fields that contain pre-defined values, each of these value lists can be opened as a palette from which you can both assign values to records and find records that containing those values. See "Displaying custom field as palettes" in Chapter 7.

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



The Scripts menu

Portfolio offers extensive scripting support via AppleScript on the Macintosh and via scripting languages such as Visual Basic, Visual C++, Java or any other scripting language that can be used to access OLE Automation.

The Scripts menu appears in Portfolio only when valid scripts of the types described above 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.

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

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

Catalogs, Galleries and Views

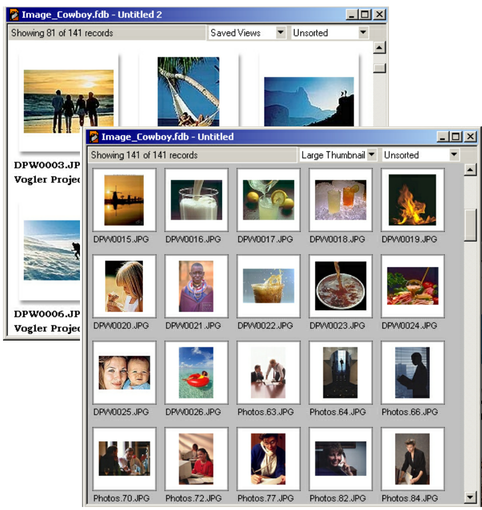
In order to understand your options when customizing Portfolio catalogs, it's important to understand the relationship between catalogs, galleries and views.

A *catalog* is the entire database containing all the items you've cataloged using Portfolio. You can display all these items at once, or a subset of those items based on a search or selection. You can create multiple catalogs and open them separately or at the same time. (Portfolio can keep as many catalogs open as you like, limited only by your computer's memory. It can also search for content in more than one catalog at a time. See page 96 for details.)

Each individual window in Portfolio is called a *gallery*. A gallery can display all of the items in your catalog — or a subset of them. Suppose you have 5,000 images in your catalog. Using one of Portfolio's search tools, you locate all images tagged with the keyword "Ocean" and find 135 matching images. In this case, you have a catalog of 5,000 images, but a gallery of 135 images.

With Portfolio, you can open and display more than one gallery at a time. Each gallery is a separate window or view into your catalog of images. You can also save a gallery — freezing a particular subset of your images in one particular window. Once you've saved a gallery, you can open that subset of images and display them in their own gallery window simply by selecting the name of the saved Gallery from the Galleries palette. A photographer may create a catalog of his entire body of work, but save one gallery containing portrait photos, and another gallery containing landscape photos. For information about saving and using galleries, see the Using Galleries section in the "Organizing Your Files with Portfolio" chapter.

Within each gallery window, you can also have multiple *views*. A View is a combination of attributes — background color, fonts, font color, thumbnail size, grid spacing, and field data— that determine the style of a gallery window.



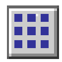
Two views of the same Portfolio catalog. Thumbnail size, border, font, background color and fields have been changed to create two galleries that provide different views of the same files

All of these attributes can be changed using the Customize View command and can be saved permanently as Saved Views that you can then apply to any gallery at any time.

One catalog can contain multiple galleries, and each gallery can be displayed using multiple saved views.

Thumbnail, Record, and List Views

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



Thumbnail view

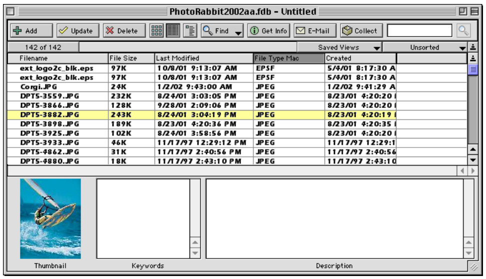
Thumbnail view, the default view in Portfolio, displays your cataloged items in an adjustable grid of small thumbnail-sized previews, as shown in the figure in the left column of this page. Information about each cataloged item appears under each thumbnail.

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

By default, only the filename for each item is shown in Thumbnail View, but you can choose to display the contents of *any* Portfolio fields under the thumbnails. Using the Customize View command, you can also choose from four different sizes of thumbnails, and select the font, size and formatting used to display field data. See "Customizing Gallery Views" below for details on doing this customization.

List view

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



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

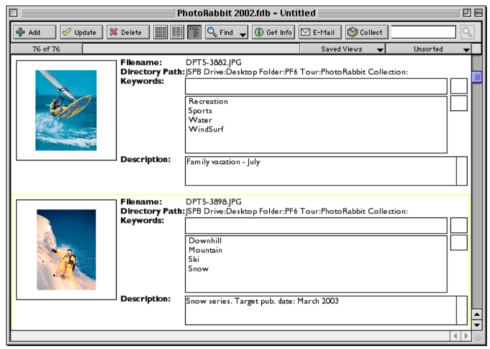
Switch to list view by clicking the List View button  on the main Toolbar, or by pressing ⌘-L (Mac) or Ctrl-L (Win).

Record view.

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

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

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



Record view options

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

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

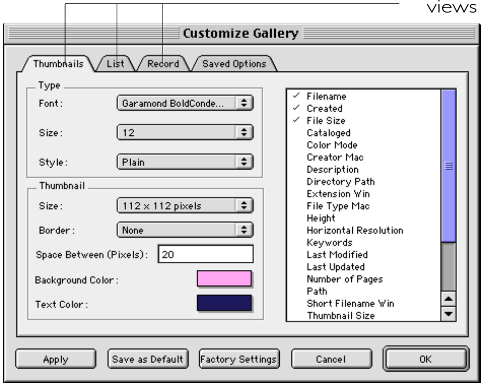
Show field names. Displays the name of each field used in a record view. This option is on by default, but turning it off makes record views more visually compact.

Edit. With this powerful option turned on, you can edit field information as you work with it in record view. For example, you can type in descriptions, add or remove keywords, or fill in other custom field values as you move from record to record.

Customizing Gallery Views

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

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



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

Type

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

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

Thumbnail size (available in Thumbnail and Record views only)

Choose from four different standard sizes, from 32 pixels by 32 pixels up to 256 pixels by 256 pixels. Note that Portfolio can't display thumbnails that are larger than the ones you generated when you first cataloged your files. By default, Portfolio generates thumbnails that are 112 by 112 pixels, so if you want to display 256 x 256 thumbnails in your catalogs, you must set the Thumbnail size to the higher setting in the Advanced Cataloging Options dialog before items are cataloged, as explained earlier in the previous chapter.

To generate larger thumbnails for items *already* cataloged, set the Advanced Cataloging Options the way you want, then choose Item > Regenerate Thumbnail to force Portfolio to build new thumbnails.

Border (available in Thumbnail and Record views only)

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

Creating new borders

You can create a custom border from any bitmapped image, such as a PICT, TIFF or BMP file. Create the border in a graphics program such as Photoshop, then simply copy and paste the border into Portfolio to apply it in a custom view.

To add a custom border:

1 Create the border in a graphics application.

To create borders that fit nicely around the thumbnails, follow the pixel dimensions shown in the following table:

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

2 Set the transparency color of the border.

Portfolio looks at the *center pixel* of your border image and sets that as the designated transparency color. Any part of your border that is the same color as the center pixel will appear transparent. This allows you to create borders that allow portions of the background color to show through. If you don't want the background color to show through any portion of your border, make sure the center pixel is a color that *isn't* used anywhere else in your border design.

3 Copy the finished border image to the clipboard in your graphics program.

If you've edited the image in a program such as Photoshop, make sure you've flattened the final image and that you're copying the whole image, not just a single layer of it.

4 Paste the new border into Portfolio.

Open the Customize Gallery dialog box if it's not already open (⌘-D on Mac, Ctrl-D on Windows) and from the Thumbnail options, choose Border > Edit. Click New to open the Define Borders dialog box. Then, click Paste to paste the border image.

Alternatively you can save the border image from your image-editing program as a standalone PICT, TIFF or BMP file, and then import the border into Portfolio using the Import button in the Define Borders dialog box.

5 Name the border and save it.

Type a name into the Border Name field and click Save. Click OK in the Borders list to return to the Customize Gallery dialog box.

6 Apply the border to a view.

Choose your newly-saved border from the Border menu and click Apply.

Border files saved into the Borders folder in the Portfolio 6 directory will be included in all new catalogs that you create.

Copying and pasting borders

You can copy custom borders from one Portfolio catalog to another, allowing you to transfer your favorite borders into a new catalog.

To copy a border to another catalog:

1 Open the Customize Gallery dialog box (⌘-D on Mac, Ctrl-D on Windows) and from the Thumbnail options, choose Border > Edit.

2 Select the border you want to copy from the saved borders listed in the Borders dialog box. Click Edit.

3 In the Define Borders dialog box, click Copy to transfer the border image to the Clipboard.

4 Paste the border. You can paste the border into another catalog (as outlined in the "Creating a new border" section above) or into an image-editing program in order to modify it.

Background color

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

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

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

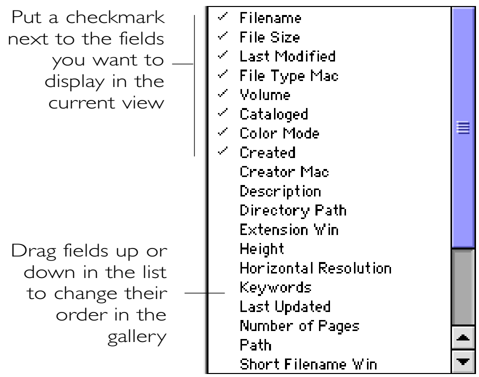
Fields

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

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

To show or hide fields

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



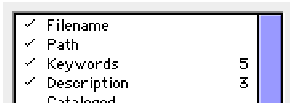
To change the order of fields

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

Controlling the display of multi-line fields

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

For such fields, the number of lines to be displayed in record view is shown to the right of the field name in the Fields list in the Customize Gallery dialog box, as shown here.



To change the number of lines displayed for each field:

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

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

Spacing (Thumbnail view only)

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

Thumbnail sizes

Choose from the four standard sizes: 256 x 256, 112 x 112, 64 x 64, or 32 x 32 pixels.

Saved Options

See the section on "Saved Options for a gallery" on page 82 for an explanation of these options.

Setting a catalog to open at startup

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

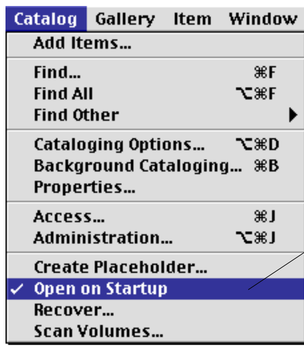
To set up a Catalog to open on startup:

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

— or —

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

A checkmark appears beside the menu command indicating that this catalog will be opened automatically when Portfolio is launched. By turning this setting on in various Portfolio catalogs, you can have multiple catalogs open automatically each time you launch Portfolio.



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

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

Setting a catalog to stay open

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

To keep a catalog permanently open:

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

2 Highlight the desired catalog.

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

Saving Your Customized Views

Once you've customized a gallery view — changing fonts, background color, border, hiding or showing various fields, and so on — you can save all these attributes as a *saved view*. You can then apply this view to *any* gallery in your catalog at any time, using the Saved Views menu. Several pre-defined saved views are included as part of Portfolio's default catalog configuration.

To save a view:

1 Use the Customize View command (as described in the previous section) to set up a view exactly as you want it and apply your settings to the current gallery window.

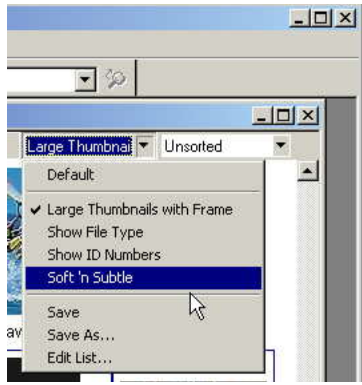
2 Choose Save (or Save As) from the Saved Views pop-up menu, which is to the left of the Sort menu on the status bar that runs along the top of the gallery window.

3 Name the view and click OK.

4 The name of the saved view now appears in the Saved Views menu.

To apply a saved view:

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



To rename or delete a saved view:

1 Choose Edit List from the Saved Views menu.

2 Select the view that you want to rename or delete from the list, then click the Rename or Delete buttons.

Setting a view as the default view

You can assign your current view as the new default view for a catalog, so that Portfolio will display that view every time the catalog is opened.

To set the current view as the default:

1 Choose View > Customize to open the Customize Gallery dialog box.

2 Click the Save as Default button (in the lower left corner).

3 Click OK to dismiss the dialog box. The current view is now the default for the catalog.

Restoring Factory Settings

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

Background Cataloging

Instead of manually adding items to Portfolio, you can automate the cataloging process by designating “watch” folders or directories that Portfolio will check at designated intervals. New files dropped in these folders will automatically be added to a catalog, and modified files will be updated.

Overview of Background Cataloging

When items are added to the designated “watch” folder, they are cataloged automatically, using the current settings in Cataloging Options (Catalog > Cataloging Options). Only new or modified items are cataloged. You can create as many different automations as you like, and specify a check frequency that the folders are checked in increments that range from 5 seconds to 1 day.

When the Background Cataloging dialog (Catalog > Background Cataloging) is opened, Portfolio verifies the path to the Watch folder. If a problem is encountered, an alert icon is displayed next to the automation. The automation cannot be enabled until the path is corrected or changed.

Running in Silent Mode

If you’re actually *using* Portfolio while Background Cataloging is turned on, you probably don’t want it interrupting your work when it’s time for it to do its job. That’s what “Silent Mode” is for — it keeps Background Cataloging completely in the background.

Normally, when Portfolio catalogs items, it displays a Cataloging Status dialog box, showing its progress as it examines each item and catalogs it.

When you turn on the Run in Silent Mode option in the Automations Settings dialog box, cataloging will proceed without displaying the Cataloging Status dialog box.

When running in Silent Mode, newly cataloged records will not be added to the active Gallery. This allows you to perform other work in Portfolio without being interrupted.

FolderSync vs. Background Cataloging.

Don’t confuse Background Cataloging with Portfolio 6’s new FolderSync feature.. Both involve interaction between your Portfolio catalog and the folders and files on your computer or network, but they serve different functions.

Background Cataloging simply automates the cataloging process. It watches a folder and if new files are added to the folder, it catalogs them — no questions asked. Background Cataloging is a one-way street; it brings new items *into* your catalog, and never removes them.

FolderSync also "watches" folders on disk, but it does so in order to *display* these folders within Portfolio and to help you *manage* the files they contain. You can use FolderSync not only to add new items to a catalog, but to create, move and delete files and folders right from within Portfolio. FolderSync alerts you to any changes made in "watched" folders, giving you the option of cataloging new items, removing items or updating them — anything needed to "sync" your catalog up with your files on disk.

To set up a Background Cataloging automation:

1 Choose Catalog > Background Cataloging.

The Background Cataloging dialog is displayed.

2 Click "New."

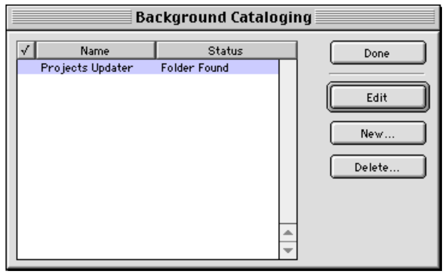
The Automations Settings dialog is displayed.

3 Enter a name for the automation.

4 Click the Folder button (or Browse button) and specify the folder that you want Portfolio to watch and automatically catalog.

Note: Do not select the same folder for Background Cataloging and Disk Previews. Doing so will disable Background Cataloging.

5 Turn on Include Sub-folder if you want Portfolio to watch (and catalog) any folders located within your target folder. Enable the Run in Silent Mode option if you don't want to be interrupted by the Cataloging Status dialog box while Background Cataloging automations are running (see "Running in Silent Mode" on the previous page).



6 When you have completed setting up the automation, click "OK."

7 Enable the automation by clicking to the left of the automation's name. Active Automations appear with a checkmark next to them in the Background Cataloging dialog box.

8 Click "Done."

To enable existing Background Cataloging automation(s):

1 Open the catalog for which you want to enable the Background Cataloging automation.

2 Choose Catalog > Background Cataloging.

Portfolio will check the pathnames for existing automations and display an alert icon if any problems were encountered.

3 Place a checkmark in front of each automation that you want to enable.

4 Click "Done."

Portfolio will begin checking the Watch folder at the interval specified for the automation.

To clear an alert icon associated with an automation:

1 Select the automation on the list, then click Edit.

2 Click the Folder icon and relocate the appropriate Watch folder.

3 Click Done to close the Automation Settings dialog.

4 Reopen the Background Cataloging dialog (Catalog > Background Cataloging) and verify that the alert icon is no longer present.

Reopening the Background Cataloging dialog forces Portfolio to recheck the path. If the dialog is not reopened, Portfolio will have no way of knowing that a correction has been made.

Catalog Properties

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

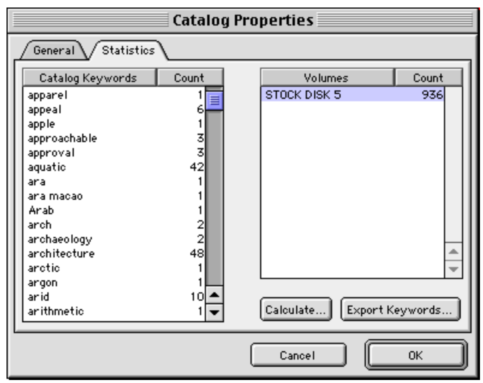
• Get details such as the total number of items in your catalog, total number of keywords used, catalog size on disk, creation date, and so on.

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

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

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

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



Managing your files with Portfolio

Once you've created a Portfolio catalog and filled it with your own digital files, there are many tools at your disposal that make it easy to view, organize and manage your work. This chapter will tell you how to use Portfolio to handle the following tasks:

• Preview images, audio and video clips and other documents

• Get detailed information about each file

• Edit original files

• Rotate images

• Rename files

• Keep your catalog up to date

Previewing & Editing Files

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

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

To preview an item:

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

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

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

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

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

Unless items were cataloged using the Disk Previews option (described on page 28 in the "Setting up Portfolio" chapter), Portfolio must be able to locate a file in order to preview it. If the original file that was cataloged cannot be found, Portfolio will prompt you to find the missing file. If the cataloged file was on a removable disk, such as a CD-ROM, Portfolio will prompt you to insert the missing disk.

If you want Portfolio to be able to show previews of images that are offline (on a CD-ROM that is on the shelf, for example) you must use the Disk Previews features, as described on page 28.

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The Preview Window

The Preview window has buttons that allow you to zoom in, zoom out or fit the image to the size of the Preview window. The Switch to Original button is active only if you're using Portfolio's Disk Previews feature, described on page 28 in the Cataloging Options section. Clicking it replaces Portfolio's own JPEG preview image with a fresh one created directly from the source file.

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

Previewing audio/video files

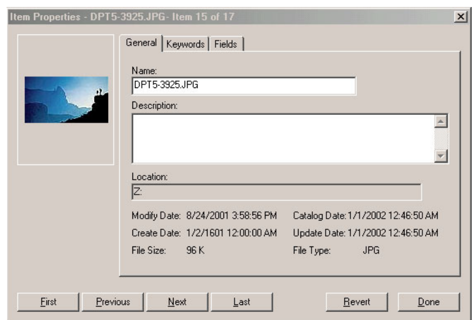
When you preview audio or video files, a standard QuickTime control bar appears in the Preview window, allowing you to play back the audio or video content. By default, playback begins automatically when you open a preview window.

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

Getting information about your files

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

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

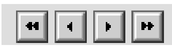


Make Item Properties open by default when you double-click a thumbnail going to Edit > Preferences and setting the "Double-click" item preference to "Show Properties" in the General panel.

Item Properties navigation buttons

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

Item Properties Navigation Buttons (WIndows)



Item Properties Navigation Buttons (Mac)

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

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

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

Editing information using Item Properties

The Item Properties window isn't just for *getting* information. You can also use this window to *edit* Portfolio records. You can add a description, rename files, add keywords and fill in custom fields using Item Properties. See the section on "Organizing your Files with Portfolio" for details on how to use Item Properties to edit records.

Rotating 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. This is especially useful if you've cataloged a number of photos from a digital camera and have a combination of horizontally or vertically aligned photos that need to be adjusted.

To rotate a JPEG image:

1 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.

2 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.

3 A progress dialog appears as each item is rotated.

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For quicker image rotation, you can press ⌘-] (Mac) or Control-] (Windows) to rotate a selected image clockwise, and Command-[(Mac) or Control –[(Windows) to rotate a selected image counterclockwise.

Portfolio rotates JPEG images only. To rotate images saved in other formats, you must open the files in an image-editing program and perform the rotation in the editing application.

Rotate Thumbnail only

Portfolio also gives you the option of rotating only the *thumbnail* of any image, leaving the original untouched. Follow the same procedure outlined above for rotating an original JPEG image, but choose the rotation commands from the Item > Rotate Thumbnail sub-menu instead.

Editing original files

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

To edit a file:

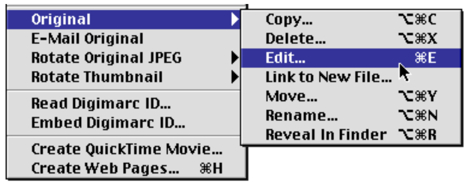
1 In any Portfolio gallery, select the item you want to edit.

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

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

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

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



The Original submenu lets you perform a number of operations on your original files

Moving, copying and deleting files

You can move, copy, rename, and delete your original files, all from within Portfolio. All of the actions that you perform on your original files can be accessed from the Original submenu in the Item menu.

To copy a file:

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

2 Choose Item > Original > Copy

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

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

To move a file:

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

2 Choose Item > Original > Move

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

Portfolio moves the original file(s) to the new folder location you specified and updates the catalog, automatically recording the new location of the cataloged items.

Copying items has no effect on your catalogs. Moving a file, however, updates its record in the Portfolio, with the path now pointing to the file's new location.

Renaming Files

Portfolio provides five ways to easily rename the original files that you catalog:

• You can rename files as you catalog them, using the batch Rename feature in Cataloging Options. This is useful for naming batches of files imported from a digital camera or scanner. See page 20 for details about using this feature.

• Rename an individual file by selecting a thumbnail and choosing Item > Original > Rename, and type a new name in the Rename File dialog box. This command is also available as a contextual menu within Portfolio, which you can access by Control-clicking (Mac) or right-clicking (Win) a thumbnail.

• 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).

• During a Slideshow, click the Rename button on the Slideshow controller and type a new name in the Rename File dialog box. See pages 108-110 for information about creating slideshows in Portfolio.

Linking to a new file

In certain situations, you may want to retain a Portfolio record — including its description, keywords, and other data — but link the record to a completely different file. For example, you might edit an image, then use the Save As command to save the file under a new name. You want Portfolio to point to the *new version of the* file, but still retain all the information you stored in the old record.

You can do this using the Link to New File command, which lets you hook up any existing item to a different original file.

To link an existing item to a new original file:

1 Select the thumbnail of the item you want to re-link.

2 Choose Item > Original > Link to New File.

3 Specify the new file.

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4 Portfolio catalogs the file, which is now linked to the existing item in your catalog, and updates the record with any new information (such as the new thumbnail image).

Removing items from a catalog

Portfolio provides several easy ways to *remove* items from a catalog. Keep in mind that deleting an item from a Portfolio catalog does *not* delete the original image; it simply removes Portfolio's internal record about the file. Your original file remains untouched.

You can delete original files using Portfolio, too. Use Item > Original > Delete. This will remove the record from Portfolio and move the original file to the Trash (Mac) or Recycle Bin (Windows). On the Mac, items on a networked volume deleted in this manner will be deleted without moving them to the Trash.

To remove an item from a catalog (without deleting the original file):

• Click the Delete button in the Toolbar.

• Choose Item->Delete

• Control-click (Mac) or right-click (Windows) on a thumbnail and choose Delete from the contextual pop-up menu.

• Press the Delete key.

You can configure the Delete key action in your Preferences to remove items from the current gallery instead of actually deleting them from the catalog. (To do so, go to Edit > Preferences and in the General Preferences panel, change the Delete key menu from Remove from Catalog to Delete from Gallery.)

The Confirm Delete warning

Whenever you delete an item from a catalog, using any of the methods listed above, Portfolio presents a confirmation dialog box to make sure you're performing the action you intended. The

dialog gives you the choice of deleting the item from the gallery (making it invisible, but leaving it in the catalog) or deleting it from both the gallery and the catalog.

If you *don't* want to delete the item from either the gallery or the catalog, click Cancel.

If you meant to delete the *original* file on disk, click Cancel, and choose Item > Original > Delete instead.

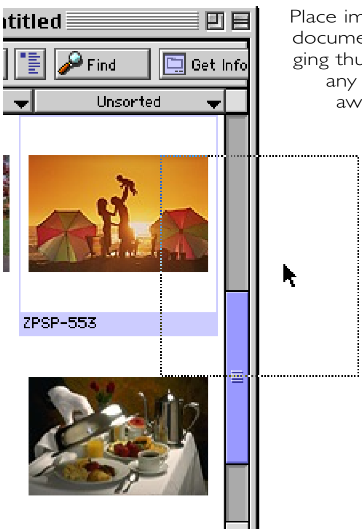
If you don't want the Confirm Delete warning to appear each time you delete an item, you can turn it off. Choose Edit > Preferences and clear the checkbox for Confirm Delete from Catalog in the General Preferences.

Dragging cataloged images into other programs

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

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

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



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

• 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 (Mac) or Control-drag (Win) 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. 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.

Keeping Catalogs Updated

In order for a Portfolio catalog to be useful, it has to accurately represent the actual files you have stored on your computer and on your network. This requires that you keep your catalogs up to date, so that Portfolio knows the location and status of every file in your catalog.

If you're using Portfolio's new FolderSync feature, described in the next chapter, keeping catalogs up to date is a breeze. Portfolio will automatically watch the folders on your hard drive or network containing your cataloged files and alert you any time a file is added, moved, deleted or edited. One click of the Sync button brings your catalog up to date with the files on disk. (See the next chapter for full instructions on using FolderSync.)

Even without using FolderSync, though, Portfolio contains several tools that make it easy to update any item in your catalog.

Understanding Portfolio's "update" logic

When working with Portfolio catalogs, it's important to understand how Portfolio determines whether a file is a *new* item (and therefore needs to be cataloged) or is an *existing* item that simply needs to be updated:

• If a file has a filename that does not match any cataloged items, Portfolio considers it *new* and catalogs it.

• If a file has a filename that matches an existing item, but has a unique *location* (path), Portfolio also considers it new and catalogs it.

• If a file's name and location *both* match, Portfolio recognizes it as an item that has already been cataloged. It then looks at the file's *modification date*. Items with matching modification dates are ignored (because they're identical to the items already in the catalog). Files with *different* modification dates are updated.

Updating files that have changed

Some reasons why you might need to update items in your catalog:

• You've moved, renamed, or deleted some of the files, folders and volumes in your catalog.

• You've edited some files and so Portfolio's information about these files (such as size and modification date) is no longer accurate.

• A cataloged image has been modified and the thumbnail in Portfolio no longer matches the actual content of the image.

Portfolio includes a suite of "update" commands that accommodate each of these situations.

Updating to change file location

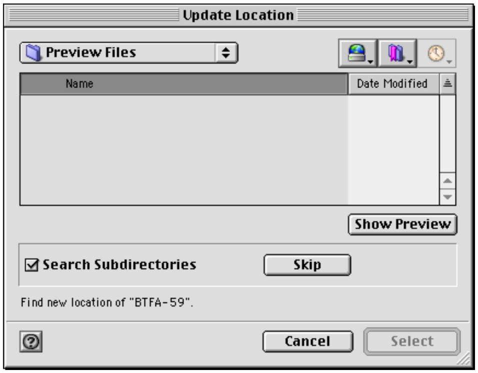
When a file has been moved to a new location — but nothing else about it has changed — you can update it quickly using the Change Path command.

1 Select the item(s) for which you want to update the path.

2 Choose Item > Change Path.

3 The Update Item dialog box opens, prompting you to find the designated file in its new location.

4 Select the file, then click Select (Mac) or Open (Windows)



5 The item in Portfolio now points to the correct location of the original file.

When you update a file using this method, Portfolio automatically searches for *other* files that need updating in the same directory and offers to update them as well. If you turn on the Search Subdirectories checkbox in the Update Location dialog box, Portfolio will look for matching files in the subfolders as well.

Updating path via drag-and-drop

If you *know* that you've moved some files that are in your catalog, there's an even easier way to update the catalog with the new path information — using drag and drop. This method will work only if you've moved cataloged files to a new location and have *not* changed the filenames.

1 In the Finder (or Windows Explorer) select the icons of the files that have been moved.

2 Hold down the Option key (Mac) or Control key (Windows) while dragging the icons into the Portfolio catalog. Make sure you're dragging the files into the same catalog in which they were *originally* cataloged before they were moved.

3 Portfolio presents a dialog, confirming that you want to update the path of these files.

4 Click OK. Note that this updates the path of the file only — not its thumbnail or any other properties.

When you use this method, files are matched by Filename in the Windows version of Portfolio and by Filename and Creation Date in the Mac version. Don't use this drag-and-drop method of updating on Windows unless you are sure you don't have duplicate filenames in your catalog.

Updating to Extract Properties

In some situations, you may find yourself with cataloged files that have been edited and now contain new *information* — such as embedded keywords — that is missing from the Portfolio record. Or, you may need to extract properties from files that were originally cataloged when the Extract Keywords feature was turned off in Advanced Cataloging Options. This can be done easily using the Extract Properties command. Extract Properties doesn't worry about the file's thumbnail or modification date; it just goes back to the original file, extracts any relevant information it can, and adds or replaces the information to the record in Portfolio.

1 Make sure you have your Advanced Cataloging Options set the way you want, with Extract Keywords and/or Extract Description turned on.

2 Select the item(s) for which you want to extract new information.

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3 Choose Item > Extract Properties.

4 Portfolio re-examines the file and updates all "metadata" in connection with it, such as file size, modification date, and embedded information.

Portfolio will replace, merge or append data based on the options you've chosen in the Properties tab of Advanced Cataloging Options. See page 23 for details.

Updating to Regenerate Thumbnails

This update command simply makes Portfolio re-examine each selected file and build a new up-to-date thumbnail image. It's useful if you originally cataloged items with the 112-pixel thumbnail setting and now would prefer to have 256-pixel thumbnails instead.

This feature is also valuable for generating (or updating) disk preview files for existing Portfolio records if Generate Previews is turned on in the Previews panel of Catalog Administration. (For information about disk previews, see page 28.)

1 Select the item(s) for which you want to generate a new thumbnail.

2 Choose Item > Regenerate Thumnail.

3 Portfolio re-examines each file and generates a new thumbnail for it.

Updating Everything

The Update command performs a *complete* update of each selected record that has been modified since you originally cataloged it, confirming the location of each file (or asking you to find it, if necessary), extracting properties from it, and generating a fresh thumbnail. In short, the Update command is the equivalent of using Change Path and Extract Properties and Regenerate Thumbnail. Note, however, that the Update command only updates items that have been modified since they were cataloged (as indicated by a newer modification date).

1 Select the item(s) you want to update. To update all items, choose Edit > Select All (⌘-A on Mac, Ctrl-A on Windows).

2 Choose Item > Update, or press ⌘-U (Mac) or Ctrl-U (Windows).

3 Portfolio searches for each item's source file using the pathname stored in the item record. If the source file is found, and its modification date is more recent than the one originally recorded in Portfolio, the record is updated. 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 your current Cataloging Options settings.

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

Find Missing Originals

If your files get moved, renamed, or deleted *after* you catalog them, it's possible for Portfolio to lose track of them. With the Find Missing Originals command, you can easily locate any such "lost" files and then either re-link them to Portfolio — or strip them out of your catalog.

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 Catalog > Find Other > Missing Originals, or press ⌘-M (Mac) or Ctrl-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.

Update: Initiates a catalog Update and allows you to manually locate the missing source file.

Delete: Deletes the item from the catalog.

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

Printing your catalogs

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

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

Printing Options

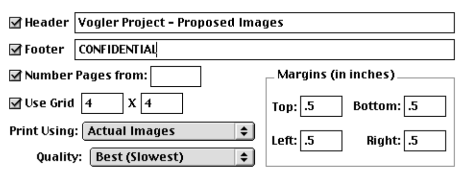
In the Print dialog box, you'll find the following options:

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

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

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

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



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

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

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

Printing Single Images

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

Using DigiMarc Watermarks

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

You can have Portfolio detect Digimarc data automatically when items are cataloged by selecting this option from the Advanced Cataloging Options window, as explained on page 25.)

Using the Read Digimarc ID command you can have Portfolio examine a file for a Digimarc watermark, then display information about the watermark. When Portfolio displays the Digimarc information you can click a button to go directly to the Digimarc website to obtain more information about the watermark's creator. You can also embed your own Digimarc watermark in an image file.

Detecting watermarks

If you have your Advanced Cataloging Options configured to detect watermarks, you can display the Watermark status of each file by displaying the Watermarked field in any gallery view. (See page 40 to learn how to display a specific field in a view)

If watermark detection is turned on and you display the Watermarked field, each item in your gallery will display one of three states: Watermark Detected,Watermark Not Detected, or Watermark Unknown.

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

Reading Digimarc watermark data

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

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

2 Choose Item > Read Digimarc ID.

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

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

Note: The Read Digimarc command can be used to detect watermark data in any catalog access mode, however watermark data will only be written to the database in Editor, Publisher, or Administrator mode.

Displaying the Digimarc Watermark URL:

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

Embedding Digimarc Watermarks

Portfolio allows you to embed a Digmarc watermark directly into a file using the Embed Digimarc ID command. Before you attempt this, keep the following important points in mind:

• You must be registered with Digimarc and have a unique Creator ID to be able to embed watermarks. Visit the Digimarc website at www.digimarc.com to register and get your ID.

• Portfolio can only embed watermarks in JPEG and certain kind of TIFF files. Portfolio does not embed watermarks in other file formats, in 16-bit or multichannel TIFF files, including CMYK images and grayscale images with alpha channels.

Watermarks are permanent data stored in your original files. It is strongly recommended that you save unwatermarked back ups of your images.

To embed a Digimarc watermark:

Select the item(s) that you wish to have watermarked.

Choose Item > Embed Digimarc ID

Enter your Creator ID and choose the data that you want to embed in the file. This can include a Copyright year, and an optional Content flag that marks images as Restricted or Adult.

Configure the Durability and Target Output settings for the watermark. For an explanation of these items, see the watermarking_guide.pdf on your Portfolio CD.

Click Embed to complete the process. Portfolio will add the specified data to the selected item(s).

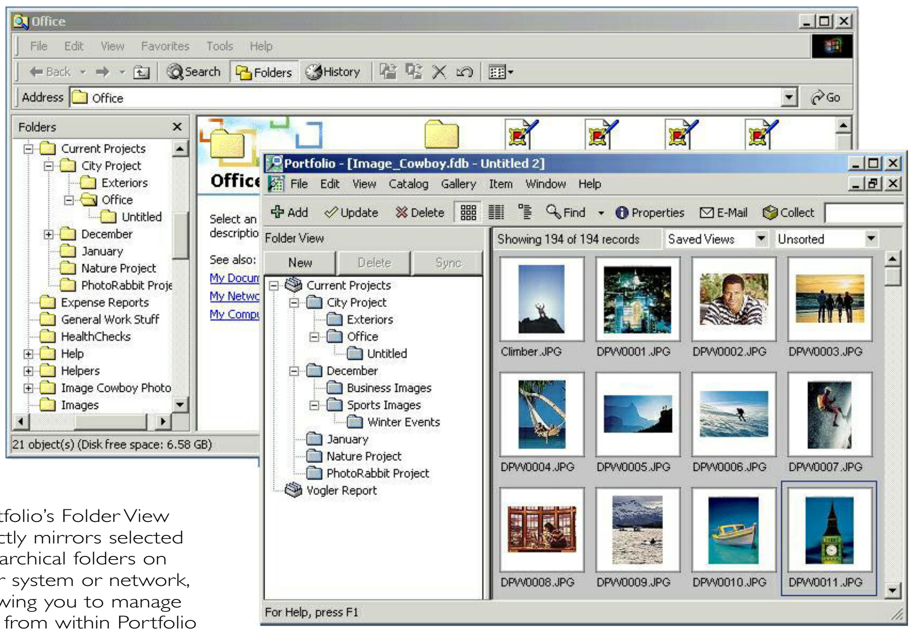
Using FolderSync

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

What is FolderSync?

FolderSync creates a link between specific folders on your computer system and items in a Portfolio catalog. Once you add a folder to FolderSync's Folder View panel, you can move items into that folder by simply dragging thumbnails into the folder from within Portfolio. Conversely, files that are moved into that folder on your computer system (using either the Mac's Finder or Windows Explorer) can automatically be cataloged in Portfolio, so that the contents of your Portfolio catalog exactly match the contents of your folders on disk.

FolderSync does more than just display the folders and files you have on disk; you can use it to create, move and delete folders, too, so that you can actually manage your disk files from within Portfolio — putting your cataloged files exactly where you want them.



Portfolio's Folder View exactly mirrors selected hierarchical folders on your system or network, allowing you to manage files from within Portfolio

Here are some of the typical ways you might use FolderSync:

• Use Portfolio to organize your files on disk by dragging thumbnails into folders from within a Portfolio catalog.

• Add an existing set of nested folders from your hard drive (or network) to Portfolio's Folder View and then catalog the contents of all the folders with one click of the Sync button

• Have Portfolio watch any number of folders on your network and provide a visual alert every time a file has been added, modified or deleted from those folders.

• Move cataloged files from one folder to another on your network, without having to leave Portfolio or manually update your Portfolio catalogs.

• Have other users in your workgroup add items to a catalog by simply dropping files into folders that are being watched by FolderSync; one click of the Sync button will bring them into your catalog.

Displaying the Folder View window

In order to use FolderSync, you must have the Folder View pane displayed in the main Portfolio window, as shown on the previous page. If it isn't already visible, choose View > Folders to make the pane visible.

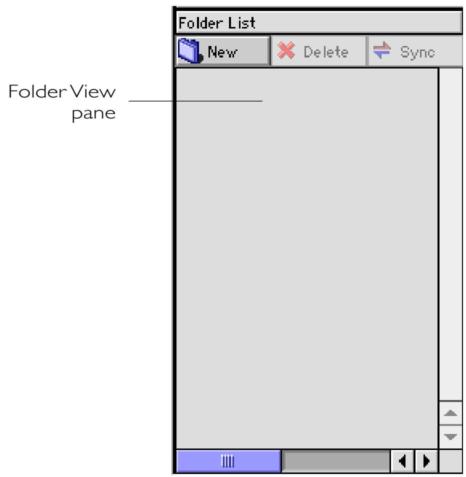
Initially, the Folder View pane is blank. Any folders on your hard drive or computer network that you want to keep synchronized with Portfolio will appear in this pane after you add them.

Adding a new root folder

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.

To add a new folder to Folder View:

1 Click the New button at the top of the Folder View pane.



2 Select the folder on your system that you would like to keep synchronized with Portfolio.

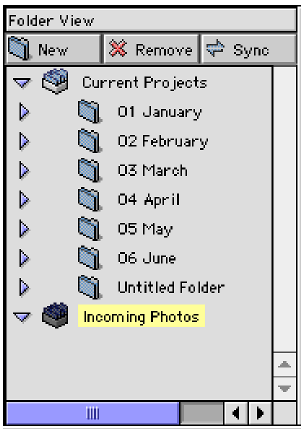
A standard dialog box opens, asking you to choose a folder. If you want Portfolio to monitor an entire hierarchy of nested folders, select the topmost (or "root") of the hierarchy. Portfolio will automatically "see" the subfolders and include them in Folder View. Click the Choose button (Macintosh) or OK button (Windows) to select the folder.

You can also use the New Folder button in the dialog to create a new folder on your system and add it to Portfolio's Folder View.

3 The folder (or folders) you selected will now appear in a hierarchical listing in the Folder View.

A root folder appears in Folder View with a small "filing box" icon.

4 Click the Sync button to synchronize the contents of the newly-added folders with the current Portfolio catalog.



Whenever you add a new folder to the Folder View pane, its name initially appears in bold, indicating that it contains files that have not yet been synchronized with Portfolio. Clicking the Sync button forces Portfolio to examine the contents of the selected folders and catalog any uncataloged items that are in the folder.

If you add empty folders to the Folder View pane, they don't appear in bold, because there are no files within them that need to be synchronized with Portfolio.

5 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.

Removing a root folder

When you remove a root folder from the Folder View pane, Portfolio stops "watching" the folder on disk, and no longer keeps the folder synchronized with the contents of your catalog.

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 remove a root folder from Folder View:

1 Select the root folder you want to remove in the Folder View pane.

Make sure you've selected a root folder and not a subfolder.

2 Click the Remove button at the top of the Folder View pane.

Be sure to use the Remove button in the Folder View pane, and not the Delete button on the main Portfolio, which is used to delete items from the Portfolio catalog itself.

3 Portfolio presents a warning that it will no longer watch the root folder that you are removing from the Folder View list. Click OK.

4 The root folder no longer appears in the Folder View list, meaning Portfolio will no longer track its contents for you. The items that were stored in the removed folder are *not* deleted from the catalog.

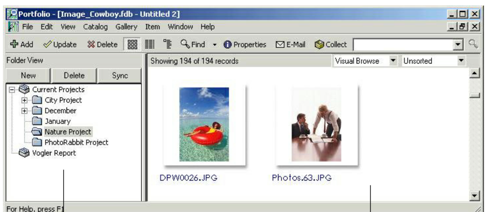
Viewing the contents of a folder using Folder View

Once you've added a root folder (from your hard drive or network) to the Folder View pane, you can use Portfolio to quickly view the contents of any available folder inside that folder, or in the root folder itself.

To view the contents of a folder:

1 Double-click a folder in the Folder View pane.

2 Files in the selected folder appear in the current Portfolio gallery.



Double-click folders here...

...to see their contents here

To view the contents of nested folders:

1 Hold down the Option key (Macintosh) or Control key (Windows) when double-clicking a folder in the Folder View pane.

2 Files in the selected folder and all of its sub-folders appear in the current Portfolio gallery.

NOTE: If the name of a folder in the Folder View window appears in bold, it means that files in the corresponding folder on your system were added, removed or modified since the last time you clicked the Sync button. If you want your Portfolio catalog to be updated to reflect those changes, click the Sync button either before or after double-clicking the folder.

Moving files 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.

To move an item into a folder using the Folder View pane:

1. Drag the thumbnail of any cataloged item into a folder displayed in the Folder View pane.

2. 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.

3. The thumbnail of the file disappears from the current gallery view to indicate that it has been moved.

Moving files from one folder to another:

1 Double-click a folder in the Folder View pane so that the files in the selected folder are visible in the current Portfolio gallery.

2 Drag the thumbnail of any cataloged item into another folder displayed in the Folder View pane.

3 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.

Moving files across volumes works just like the Finder/Explorer, copying the files to the new locations without deleting or moving the originals.

Copying files using the Folder View pane

To copy files from one Folder View folder to another, hold down the Option key while dragging the files on a Mac, or the Control key while dragging files on Windows. This works just as it does when copying files in the Finder or Windows Explorer.

When you copy a file from one Folder View folder to another, you are making a duplicate of that file — which will result in two identical copies of the original file and two records your Portfolio catalog. If you don't want duplicate files or records, be sure to move the file, not copy it, as explained on the previous page.

Creating new folders using FolderSync

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:

1 Make sure you don't have any existing folders selected in the Folder View pane.

2 Click the New button at the top of the Folder View pane.

3 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

4 The folder you created will now appear as a new root folder in the Folder View.

To create a new subfolder:

1 Select one of the folders already visible in the Folder View pane.

2 Click the New button at the top of the Folder View pane.

3 A new folder is created as a subfolder of the one you had selected.

Synchronizing your folders

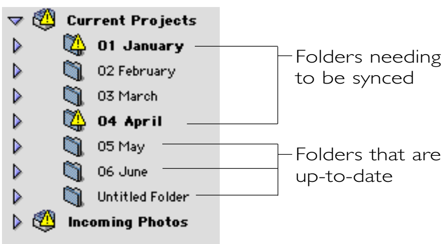
When the name of a folder in the Folder View pane turns bold, it means that the files in that folder have somehow changed since the last time you synchronized the folder with Portfolio. Among the possible "changes" that may have occurred:

• A cataloged file was modified.

• A file was removed from the folder using the Finder (Mac) or Explorer (Windows).

• A new file was added to the folder.

• An existing file was renamed.



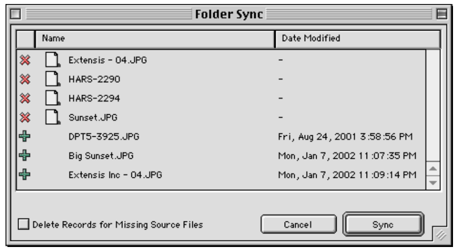
To update your Portfolio catalog to reflect any of these changes:

1 Select the folder in the Folder View panel than needs to be synchronized. Only folders with bold names require synchronization. To select multiple folders that need to be synchronized, just select the *parent* folder; the subfolders will be included in the sync automatically.

2 Click the Sync button.

3 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 appear 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.

4 Click the Sync button in the FolderSync dialog box.

When you click the button, 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.

5 The selected folder in the Folder View pane should no longer be bold, as the contents are now synchronized with the Portfolio catalog.

See the next page for important notes on using FolderSync

Important notes on using FolderSync

• Synchronized folders may stay "bold" for a few moments as Portfolio recans the folders in the Folder View panel to confirm the changes resulting from a sync.

This delay may be longer if many folders and files are in the directories that are being synced.

• 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.

• When you *rename* a file outside of Portfolio (using the Finder or Windows Explorer), the renamed file will be considered a "new" file by Portfolio when synchronizing. When you sync the folder containing the renamed file, the catalog record for that file — including its keywords, description and any other stored data — will be deleted and a new record will be created for the newly-named file. For this reason, we recommend using the renaming features *within* Portfolio to make such changes.

• When you *move* a file from one FolderSync folder to another outside of Portfolio (using the Finder or Windows Explorer), Portfolio recognizes the file has moved and turns *two* folders bold — the one from which the file was *removed* and the one to which it was *added*. *You must synchronize the parent folder of both of these folders at the same time in order for Portfolio to properly update the catalog*. Otherwise, Portfolio will delete the record for the file's original location and create a new record for the file in its new location. While this will keep your catalog up to date, it could result in you losing information that was stored in the original record. Portfolio will *always* update records properly when you move files from one FolderSync folder to another *within* Portfolio.

Switching to Windows Explorer or the Finder

You can easily switch from Portfolio's Folder View to the Windows Explorer or Mac Finder to see how your files appear in their actual folders on disk.

Windows: Right-click on the name of any folder listed in the Folder View pane.Choose Explore from the pop-up menu that appears.

Mac: Control-click on the name of any folder listed in the Folder View pane. Choose Reveal in Finder from the pop-up menu that appears.

Organizing your files with Portfolio

One of the main purposes of Portfolio is to help you sort, arrange, categorize and organize your files. This helps you work more efficiently, eliminates the problem of lost or misplaced files, and streamlines the process of finding and distributing your digital files on demand.

This chapter covers how to use the numerous tools within Portfolio that help you organize files with the minimum effort. These tools include:

- Keywords
- Custom Fields
- Galleries
- Categories
- The Item Properties window
- The Edit Field Values window

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.

Adding keywords automatically

Even if you haven't typed a single keyword in Portfolio, the images in your catalogs may already have at least some keywords. This is because Portfolio includes two features that keyword items *automatically* as they are cataloged:

- **Extract keywords.** If you have this option turned on, Portfolio extracts keywords that are embedded in certain kinds of documents. Many graphics programs (such as Adobe Photoshop and Adobe Illustrator) allow you to include embedded keywords when saving a file.) Images in many stock photography collections are keyworded in this manner. See page 23 for information about using the Extract Keywords feature.

- **Create keywords from path.** With this Advanced Cataloging Option, Portfolio adds keywords to each file you catalog, based on the name and location of each file on disk. See page 24 for information about using this powerful auto-keywording feature.

Seven ways to add keywords

Portfolio provides several convenient ways to add keywords to the items in your catalog:

METHOD 1: Add them during cataloging

Using Portfolio 6's new Cataloging Options, you can assign keywords to multiple items as they are being cataloged. For details, see the "Assigning keywords during cataloging" section on page 18.

METHOD 2: Use the Edit Keywords command

This method is useful if you have to add the same keywords to a number of different files:

1 Select the item(s) to which you want to assign keywords in a gallery window.

2 Choose Item > Edit Keywords, or press ⌘-Option-K (Mac) or Ctrl-Shift-K (Windows).

The Edit Keywords dialog opens. All the keywords that have already been assigned to at least one of the selected items are 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.

You don't have 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 Click OK to when you're done adding keywords.

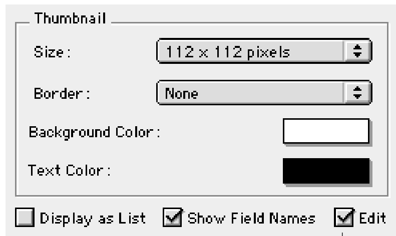
If you close the dialog by clicking Cancel, the keywords you added will not be applied.

METHOD 3: The Item Properties window

You can add keywords to each individual item through its Item Properties window (Choose Item > Properties, or Item > Get Info/Properties on the Mac). This method works particularly well if you have *different* keywords that you'd like to assign to *each* record. See the "Using the Item Properties window" section later in this chapter for details.

METHOD 4: Use Record View

You can also edit the keywords for any item directly when you're in a *record view* and have the Edit checkbox turned on in the Customize View dialog box.



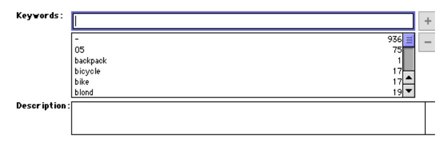
Turn the Edit option on when customizing a record view and you can add and remove keywords directly

To edit keywords in a record view:

1 Click anywhere in the Keywords field of the record to activate keyword editing.

2 To add keyword, type it in the text entry field, then click the "+" button.

3 To remove a keyword, select it from the list, then click the "-" button.



You can edit any editable data field in record view using this same approach.

METHOD 5: Keywording with Edit Field Values

Portfolio's new Edit Field Values command makes it easy to add, remove or replace keywords across an entire selection of items. For instructions on how to use it, see the "Using the Edit Field Values command" section later in this chapter.

METHOD 6: Use the Master Keywords palette

If the administrator of your catalog has created a set of master keywords, these are available on the Master Keywords palette. Choose Window > Master Palettes > Show Master Keywords to display the palette, or press ⌘-K (Mac) or Ctrl-K (Windows).

Setting up Master Keywords requires Administrative access to the catalog. See the Portfolio Administration chapter for details on creating master keywords.

To assign a keyword from the palette:

1 Select the item(s) to which you want to add a keyword.

2 Select the word on the Master Keywords palette that you'd like to assign to the item(s).

3 Click the Assign button on the palette.

You can also *drag and drop* keywords from the Master Keywords palette to assign them.

1 Drag a keyword from the Master Keywords palette and drop it on any thumbnail to assign the keyword to that item.

2 To assign keywords to multiple items, first select the items in the gallery, then drop a keyword on any one of the selected items. The keyword is automatically assigned to all the selected items.

METHOD 7: Drag and drop text

You can select text from any drag-and-drop savvy program (such as Microsoft Word) and drag the selection on to a Portfolio thumbnail to assign the words in the selected text as keywords.

Five ways to avoid typing keywords

If you find typing and entering keywords tedious — and most users do! — take note that several of the techniques referenced in this section are specifically designed to keep manual keywording to a minimum:

- Convert file and folder names into keywords when cataloging (see page 24).
- Assign keywords during cataloging using Cataloging Options (see page 23).
- Import an existing Master keywords list into the Master Keywords palette (see page 124).

• Drag and drop keywords onto thumbnails to assign them (see page 71).

• Use the Edit Field Values command to assign a keyword to multiple records (see page 78).

Removing keywords

There are four quick ways to remove unwanted keywords:

Use the Edit Field Values command to remove a keyword from a selected group of records. See the "Using the Edit Field Values command" section later in this chapter.

In the Keywords panel of the Item Properties window, select a keyword, then click Remove. You can Shift-click to select multiple keywords or ⌘-click (Mac) or Ctrl-click (Windows) to select multiple non-contiguous keywords in the list and delete them all at once.

In the Edit Keywords dialog box, select a keyword, then click Remove.

In a record view (with Edit enabled) you can select keywords and click the "-" button to delete them.

Viewing Keywords

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

• At the bottom of the gallery window in List view (View > List).

• In any thumbnail, record or list view (View > Record), if keywords have been included in the view.

• In the Keywords tab of the Item Properties dialog (Item > Item Properties: Keywords)

• In the Edit Keywords dialog box (Item > Edit Keywords).

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

The numbers that appear in keyword lists tell you how many times each word is used in the catalog. Double-click any keyword to perform a search for all records containing that word.

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 searching for your files.

Custom fields are perfect for organizing your files based on information that isn't strictly a "keyword" or a "description." For instance, you might want to add a field for a URL that points to a web site related to the cataloged image, or a "Photographer" field to a catalog of digital photos, or a field to hold price information or stock numbers.

Portfolio lets you create and use six types of custom fields:

• **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 single line text values. Can be used for any number of custom fields, including photographer or artist names.

• **Text Block:** Enter multiple lines of text with line breaks.

• **URL:** This field type is used for Web and other URL addresses. It creates an active hyperlink that can be displayed in gallery views.

Creating custom fields is an administrative function in Portfolio. To create custom fields, you must have Administrator-level access to the catalog. See the "Portfolio Administration" chapter for details.

Adding Custom Fields to a catalog

To add a custom field, you have to open your catalog in Administrator mode. 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.

2 Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).

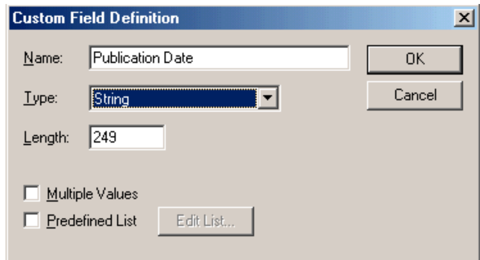
3 Select the Custom Fields tab.

4 Click Add.

The Custom Field Definition dialog box is displayed.

5 Enter a name for the field in the Name text box.

6 Choose the field type from the Type pop-up menu.



The field type determines the values that can be entered into this field. (See the "Guide to Custom Field Types below). *NOTE: Field types cannot be changed once they are defined.*

7 Select the appropriate remaining options for the field type you selected, then click "OK" to return to the Custom Fields tab.

8 When you have finished adding Custom Fields, click OK to close the Catalog Administration dialog.

Guide to Custom Field Types

The following is a complete guide to the attributes associated with each of the custom field types you can create in Portfolio.

Date/Time: 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 include multiple values, and/or can be configured as a predefined list.

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 "5/20/02" will not find a record which contains "5/20/02 3:00 pm" because the request is interpreted as "5/20/02 12:00:00." This is true even if the time is not being displayed.

Decimal: In this field type, you can enter decimal point numeric values with a precision up to 8 decimal points. Decimal fields can include multiple values, and/or be configured as a predefined list. To set the Precision, select it from the pop-up.

Integer: For regular numeric values. Integer fields include multiple values, and/or can be configured as a predefined list.

String: This field type is designed for single line text values. You can specify a maximum string length for the field by entering the number of allowable characters in the Length text box. The data in a String Field can be from 1 to 249 characters long, and include multiple values, and/or be configured as a predefined list. String fields cannot contain multi-lined text (for multi-line text, use Text Blocks).

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=0123 45; 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. .

URL fields cannot be set up with a predefined list, cannot have multiple values, and must have both title and URL fields filled.

Text Block: Text Blocks are multi-lined fields that can be any length up to 32K. This field type allows you to add multiple lines of text to records; you can include line breaks or carriage returns.

Text blocks are word-indexed, allowing even these longer fields to be searched extremely quickly. The Text Block field cannot be sorted or phrase-searched.

Multiple Value Lists

Multi-value lists allow you to specify custom fields (except URLs and Text Blocks) that can contain *more than one value*, such as multiple vendor names or multiple item pricing.

To set up a Custom Field with Multiple Values turn on the Multiple Values checkbox when setting up a custom field in the Custom Fields Definition dialog box, as outlined on the previous page.

Predefined Lists

With all custom fields (except URLs and Text Blocks) you can set up predefined lists of values so that users can select from your ready-to-use choices when filling in a custom field.

For example, suppose you create a custom field called Status that you use to track the completion status of each item in your catalog. You might define four values — Preliminary, In Progress, Final Review, Complete — and use those values to label your images. Here's how you would set up the pre-defined values:

1 When defining the Status custom field, turn on the Predefined List checkbox.

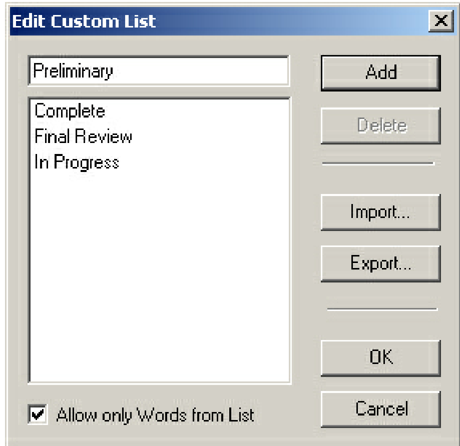
2 Click the Edit List button

3 In the Edit Custom List dialog box, enter each of the four values you want to use in this field; click the Add button to insert each item into the list.

4 If you want only these four terms to be used in this field, check the Allow only words from List checkbox.

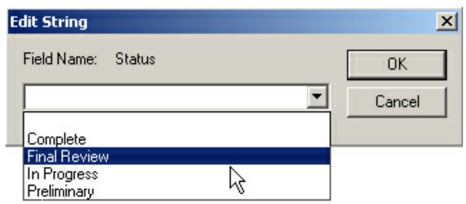
5 Click OK to finish defining the field.

Alternatively, you can *import* the values for a predefined list from a text file. In the text file,



each value should be separated by a hard return. Click the Import button in the Edit Custom List dialog box to select the text file and import the values into your predefined list.

Now, when users go to *edit* this field using any of Portfolio's standard field-editing tools (such as the Fields panel of the Item Properties window or the Edit Field Values dialog box, or a record view in which the Status field is displayed) the four predefined choices will be available via a pop-up menu (Mac) or drop-down menu (Windows), as shown here.



Editing and Using Custom Fields

Once custom fields have been defined, you can edit them in your catalog using most of the same methods discussed earlier in this chapter for editing keywords:

- Add them during cataloging by assigning field values in the Cataloging Options dialog box, as explained on page 18.

- Open the Fields panel of the Item Properties window and double-click on a field to edit its contents.

- Customize a record view so that your custom fields are visible and the Edit option is turned on in the Customize View dialog box. See page 38.

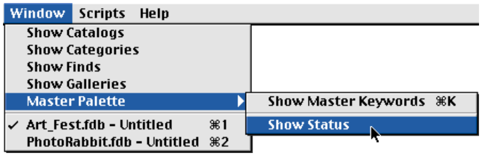
- Use the Edit Field Values command to add, remove or replace the content of any field across a selection of records.

Displaying custom fields as palettes

To make using custom fields even easier, Portfolio has the ability to display the values you set up in a predefined list as a *palette* — similar to the Master Keywords palette described earlier in this chapter. This allows you to easily assign field values with just a few clicks — and without having to open individual records.

When you create a custom field with a predefined list of values, a new palette bearing the name of that custom field automatically appears in the Windows menu, under the Master Palettes submenu.

To use the example given earlier, creating a custom field called Status with a list of four predefined values would add a Show Status command to the Window > Master Palettes submenu, as shown here.

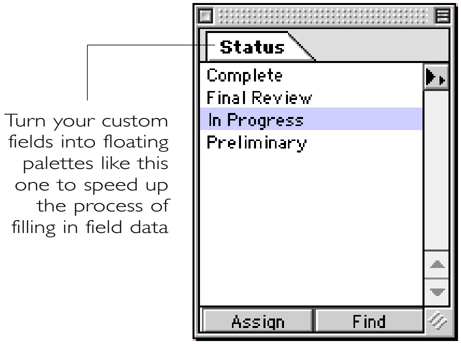


Choosing the Show Status command opens a new palette called Status, containing the predefined list of values that you can use in the custom field.

Assigning custom field values using a palette

Custom field palettes (also called Master Palettes) work exactly like the Master Keywords palette described earlier:

1 Select the item(s) for which you want to fill in a field value.



2 Select the entry on the custom field palette that you'd like to assign to the item(s).

3 Click the Assign button on the palette.

You can also *drag and drop* the entries from custom palettes on to thumbnails to assign them.

1 Drag a value from a custom field palette and drop it on any thumbnail to assign the entry to the corresponding custom field for that item.

2 To assign values to multiple items, first select the items in the gallery, then drop a custom field palette entry on any one of the selected items. The value is automatically assigned to all the selected items.

Returning to the example of the custom field containing job status: To assign 10 items in your catalog the status of In Progress, you would select those items in the gallery window, click on the words “In Progress” on the Status custom field palette (as shown above) and then click the Assign button.

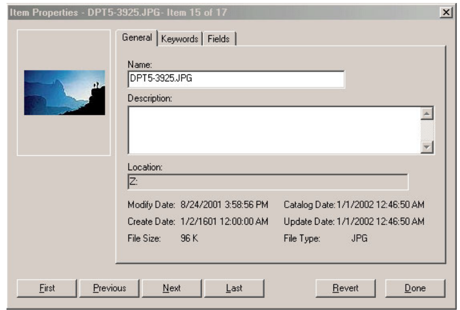
Editing and replacing record information

Portfolio stores a great deal of information about your files — keywords, descriptions, and so on. This section covers the best ways to edit that information — both on an item-by-item basis and in batches.

Using the Item Properties/Get Info Window

An easy way to quickly add and edit information about your files is the Item Properties window, described in the “Getting information about your files” section on page 48.

Using the Item Properties window’s navigation buttons and keyboard shortcuts, you can easily move from item to item in your catalog, typing descriptions and adding custom field data for each record.



For example, suppose you need to add a text description to the Description field of 25 different items in your catalog. Here’s how you could use Item Properties to quickly add the information

1 Select the thumbnails of the 25 items you want to edit.

You can Shift-Click in a gallery to select a range of thumbnails. To select multiple non-contiguous items in a gallery window, ⌘-Click (Macintosh) or Control-click (Windows) the thumbnails.

2 Open the Item Properties window.

You can do this by clicking the Get Info/Properties button on the toolbar, or by pressing ⌘-I (Mac) or Alt-Enter (Windows). The information for the first of your selected images is displayed in the Item Properties window.

3. Click in the Description field and type your description.

4. When you’re done typing the description, press ⌘-Right Arrow (Mac) or Alt-Right Arrow (Windows) to advance to the next record.

The Item Properties window moves directly to the next selected item, so you can type in the next description.

5. Repeat Steps 3 and 4 until you've filled in the Description field for all 25 selected items.

You can use this same technique — navigating from item to item within the Item Properties window — to edit keywords and custom field data for any cataloged file.

Batch record editing

The Item Properties window (described above) is useful for editing field values for *individual* files — typing a unique description for each file, for example — but sometimes you need to edit add or remove the *same* information for a number of items. For example, you might want to:

• Assign the keyword "sunset" to 70 different images at once.

• Add a photographer's name to a custom field for all 150 items in the current gallery.

• Clear all the descriptions and keywords for all the items in your Portfolio catalog.

• Find all the occurrences of one particular keyword and replace it with a different keyword.

To handle these tasks, use the Edit Field Values command, described below.

Using the Edit Field Values command

Edit Field Values is designed to speed up the process of adding, removing and editing values in virtually all editable Portfolio fields, including Keywords, Description, and any of your custom fields.

To edit field values:

1 Select the thumbnails of the items you want to edit.

The Edit Field Values commands operate only on selected items. If you want to edit values in all the records in a gallery, choose Edit > Select All to select the entire gallery.

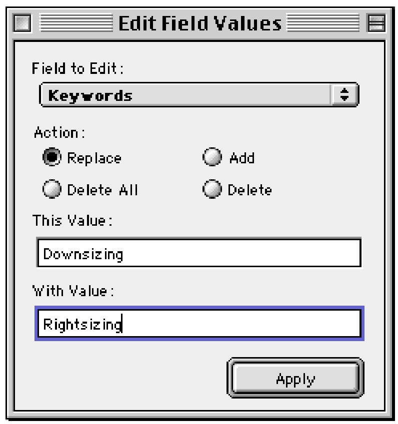
2 Choose Item > Edit Field Values to open the Edit Field Values dialog box.

3 Select the field you want to edit from the Field to Edit menu.

All editable fields — including your custom fields — are displayed in the menu.

4 Select an action from the Action radio buttons.

Depending on the field you choose to edit, you can Replace, Delete, Add or Append data.



5 Specify the value that you want to add, change, or delete in the Value field. In the case of a Replace action, you have to specify both the value you're replacing and the value you're replacing it with.

6 Click the Apply button.

Sorting records

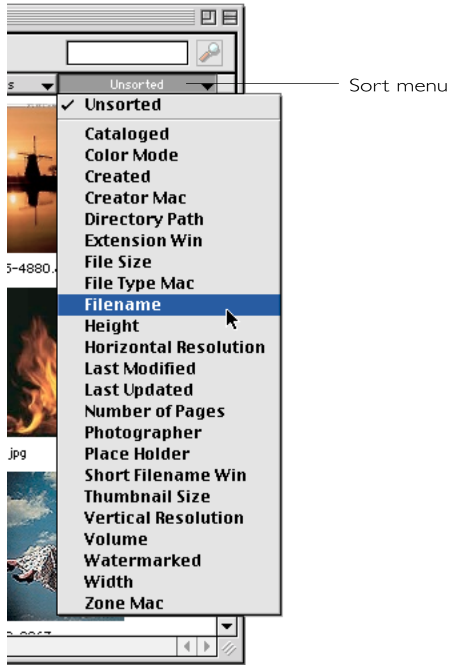
You can sort the contents of a Portfolio catalog by most fields — including any of the custom fields that you create. Sorting items by filename, size, color mode, file type, or other criteria can make it easier to browse through and organize a collection of files.

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

Sorting a gallery

To sort files, use the Sort menu available in the upper right corner of the status bar that runs along the top of each gallery window (right under the main Toolbar). By default, this menu simply says "Unsorted." Choose any of the 22 criteria in the menu to apply a sort order to the current gallery. (By default, galleries are always sorted by the order in which items were cataloged.)

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



Keeping a gallery permanently sorted

If you want to keep a gallery *permanently* sorted, you can set a sort order when you customize a gallery view.

1 Choose View > Customize to open the Customize Gallery dialog box and switch to the Saved Options pane.

2 In the Sorting section, turn on the Keep Sorted checkbox.

3 Choose the field to use for sorting and sort order (ascending or descending) from the pop-up menus.

4 Click OK to apply the sort settings.

When you have the Keep Sorted option turned on for a gallery window, the Sort menu in that window is dimmed out.

Organizing with Galleries

Another useful tool for sorting, grouping and organizing files in Portfolio is to create and save multiple galleries — separate windows that allow you to display different groups of the items contained in your catalog. Each gallery can have its own style and sort order. (For a general explanation of galleries, see page 35.)

Opening a New Gallery

By default, a Portfolio contains only one gallery — a single window displaying all your cataloged items. At any time, however, you can open additional galleries (windows) and select exactly which items you want displayed in them. For example, you may have a large catalog containing 5,000 images, but would like one window that contains only the 20 images that you plan to use for a specific project. You can create a new gallery to view those 20 selected items.

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

To open a new gallery:

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

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

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

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

• Drag thumbnails from another gallery into the new gallery.

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

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

• Perform a search for a selected set of records — such as those containing a particular keyword. (See the "Search Tools" chapter for details on performing specific searches).

Saving a Gallery

After opening up a new gallery you have the option of *saving* it — freezing a particular subset of your images in one particular window. Once you've saved a gallery, you can open that subset of images and display them in their own gallery window simply be selecting the name of the saved gallery from the Galleries palette.

To Save a Gallery:

1 Make sure the gallery window contains all the items you want and and looks just as you want it to be saved.

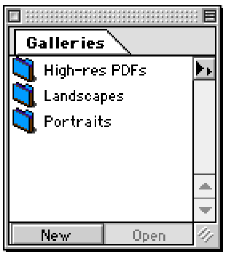
2 Sort or manually reorder the gallery items exactly as you want them to appear.

3 Choose Gallery > Save, or press ⌘-S (Mac) or Ctrl-S (Windows).

The “Save Gallery” dialog box is displayed.

4 Enter a name for the Saved Gallery, then click OK.

Your saved gallery will appear in the list of galleries when you choose Gallery > List, and on the Galleries palette.



Each gallery you save is listed on the Galleries palette. Choose Window > Show Galleries to open the palette. Double-click a gallery in the palette to open it.

To open a saved gallery:

1 Double-click the gallery that you want to open on the Galleries palette (Window > Show Galleries), or select the gallery name on the palette and click the Open button.

— or —

1 Choose Gallery > List Galleries, or press ⌘-Option-G (Mac OS) or Ctrl-Shift-G (Windows) to open the Saved Galleries list.

2 Double-click the the gallery that you want to open from the list, or select the gallery name and then click the Open button.

To rename a gallery:

1 Choose Gallery > List Galleries, or press ⌘-Option-G (Mac OS) or Ctrl-Shift-G (Windows) to open the Saved Galleries list.

2 Select the gallery you want to rename and click the Rename button.

3 Type the new name in the Rename Gallery dialog box and click OK.

— or —

1 Select the gallery you want to rename on the Galleries palette and choose Rename Gallery from the palette’s fly-out menu.

To delete a gallery:

1 Choose Gallery > List Galleries, or press ⌘-Option-G (Mac OS) or Ctrl-Shift-G (Windows) to open the Saved Galleries list.

2 Select the gallery you want to delete and click the Delete button.

— or —

1 Select the gallery you want to delete on the Galleries palette and choose Delete Gallery from the palette’s fly-out menu.

Making changes to saved galleries

If you make changes to a saved gallery — finding a different set of items in the window, or modifying the view settings, for example — you'll be asked if you want to save the changes when you try to close the gallery. The options are:

Save: Overwrites the current Saved Gallery.

Cancel: Returns to the Gallery.

Save As...: Allows you to save the changes to a new Gallery name, preserving the previously saved gallery intact.

Don't Save: Discards the changes and closes the Gallery.

Saved Options for a gallery

Normally, a saved gallery contains a specific subset of your files. But using the Saved Options panel of the Customize Gallery dialog box, you can create "dynamic" galleries that automatically *search* and *sort* your current records according to specific criteria. Using these options you can create a gallery that:

• Automatically retrieves files based on a saved set of search criteria when opened.

• Automatically sorts records based on a specific field when opened.

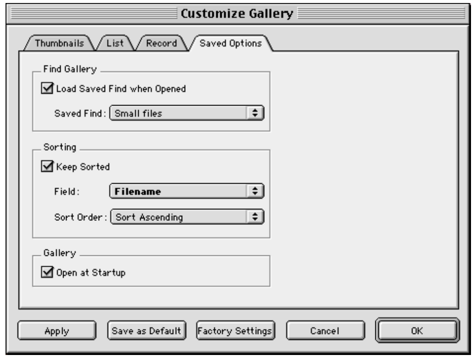
• Automatically opens whenever you open the catalog.

To set up these options, choose Gallery > Customize View switch to the Saved Options panel.

To set up a Find Gallery:

A Find Gallery is one that automatically performs a saved search each time it is opened:

1 In the Saved Options panel of the Customize Gallery dialog box, turn on the Load Saved Find when Opened checkbox.



2 Select the search criteria that you want to use from the Saved Find menu.

In order to create a Find Gallery, you have to have already created at least one Saved Find. See page 94 in Chapter 8 for instructions.

3 Click OK, then *save* the gallery, as explained in the "Saving a gallery" section earlier in this chapter.

Each time your Find Gallery is opened, the records will be searched and selected using the Find criteria in the Saved Find that you designated in step 2.

To set up a self-sorting gallery:

1 In the Saved Options panel of the Customize Gallery dialog box, turn on the Keep Sorted checkbox.

2 Choose the field you want to use as the sort key from the Sort Order menu.

3 Click OK, then *save* the gallery, as explained in the “Saving a gallery” section earlier in this chapter.

Each time this saved gallery is opened, the records will automatically be sorted using the sort order you specified.

Setting a gallery to open at startup

You can set up your catalog so that a specific gallery is displayed when the catalog is initially opened.

1 In the Saved Options panel of the Customize Gallery dialog box, turn on the Open at Startup checkbox.

2 Click OK to save the setting.

— or —

1 Open the Catalogs palette.

2 Choose Open Gallery at Startup (or Display Gallery on Open from the palette fly-out menu on the Catalogs palette.

The specified Gallery will open automatically whenever this catalog is opened.

Deleted Items in saved galleries

If items that are in a saved gallery are *deleted* from the catalog while you are using a different gallery, the items will still be displayed when the saved gallery is opened. However, the thumbnail will be appear as “Item Deleted.” To eliminate the missing items from the Gallery, choose View > Refresh, then resave the gallery.

Deleting Items from a Gallery

When items are deleted from a gallery, they are removed only from the current view, not from the catalog. This allows you to create galleries that display exactly the images you want to see. If 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.

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

1 Select the item(s) that you want to delete.

2 Click the Delete button on the Toolbar.

3 Select the Delete fromGallery radio button in the dialog box, then click OK.

— or —

2 Choose Item > Delete.

3 In the Confirm Delete dialog box, choose Delete from Gallery, then click OK.

— or —

2 choose Edit > Cut. You can also press ⌘-X (Mac) or Ctrl-X (Windows).

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

If you have your preferences properly configured, you can also delete items from a gallery by pressing the Delete or Backspace key. By default, the Delete key removes items from your catalog, but you can change the delete key action to Delete from Gallery in the General panel of Preferences. See page 38.

Using Categories

Portfolio offers the ability to organize groups of records visually, using a folder-like hierarchy which is accessible through the Categories palette.

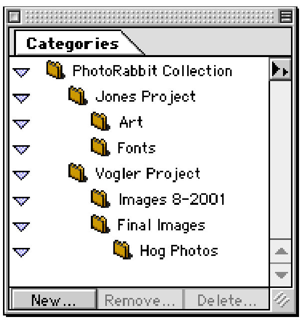
For example, you might want to use this feature to:

• Organize all the versions of a job file, such as low and high resolution images, RGB version, CMYK files, etc.

• Arrange all the elements of a print job, such as the document files, images, and fonts

• Categorize your image content using a system of hierarchical "keywords" so that you have a general category, (such as Animals) within which is nested narrower topics (Birds) and sub-topics (Waterfowl).

The Categories palette consists of a hierarchy of folders that are linked to items in the catalog. By double-clicking a folder icon on this palette



you can display all the cataloged items in a folder and, optionally its subfolders.

Using options on the Categories palette you can create the folder hierarchy manually, then drag items from the catalog onto the Categories palette folders to link them. Or you can catalog an entire job of items in nested subfolders automatically by dragging folders from the desktop (Mac) or Explorer (Windows) directly onto the Categories palette. When you drag folders onto the Categories palette, items in those folders are automatically added to the catalog and linked to their respective category folders (sub-directories become sub-categories).

By working with data the other direction—dragging folders from the Categories palette to the hard drive—you can create a copy of an entire job (folders, subfolders, and the cataloged contents), or any number of individual folders and contents, on any local or network volume in one easy step.

Categories vs. FolderSync

The Categories feature is similar to Portfolio 6's new FolderSync feature. Both Categories and FolderSync help you organize your digital files into an hierarchical folder structure — but they take very *different* approaches to these tasks.

The Categories feature uses a nested folder structure to help you organize your files. But the folders you see on the Categories palette are *virtual* folders. While they can be *based on* a set of folders from your computer system, they aren't real folders that exist on your network or hard drive. They simply provide a way for you to mentally group and organize files within the Portfolio environment. There's no "live" link between the folders on your computer and the "folders" in the Categories palette. When you drag items into folders on the Categories palette, nothing happens to the original files on disk; they stay where they are.

The Categories palette also can *generate* a brand new set of folders on disk that exactly mirror the hierarchy that you set up on the palette — but it can't *move* files into *existing* folders on your system.

FolderSync, on the other hand, allows you to organize your files in *real* folders on disk. Double-clicking a folder in Portfolio's Folder View shows you the actual contents of that folder on disk. With FolderSync, there is always a "live" connection between Portfolio and the folders on your hard drive or network. When you move and group files in Portfolio using FolderSync, you *are* moving the original files, in real time, on your hard drive or network. Foldersync isn't just a categorization tool, it's a *file management* tool.

While the Categories feature is a powerful organizational tool, most users are best served by using FolderSync, which organizes files both logically and physically on disk.

Creating categories

To begin working with Categories, choose Window > Show Categories to open the Categories palette (as shown on the previous page). You must have Administrator access to a catalog in order to create categories.

To add an existing folder to the Categories palette:

1 Make sure the Categories palette is open.

2 On your computer, use the Finder (Mac) or Explorer (Windows) to locate the folder and sub-folders that you wish to add to the Category.

3 Drag the top-level folder from the Finder/Explorer and drop it onto the Categories palette in Portfolio, or onto another folder on the palette.

The folder hierarchy will be recreated on the Categories palette, and folder contents will be cataloged and linked to the appropriate folders on the palette.

4 Double-click a folder to display the cataloged contents in a Gallery window.

To create a new category using the Categories palette:

1 On the Categories palette, click the New button or choose New from the palette fly-out menu.

You will be prompted to enter a name for the folder.

2 Enter the folder name, then click OK.

A folder is created at the selected level (below the currently selected folder) on the Categories palette.

3 Continue creating folders (steps 1 and 2) until all the folders have been created.

4 Drag the folders up and down as necessary until the folder hierarchy is as you like it.

Use the insertion bar to gauge exactly where to drop each folder.

To remove a Category:

1 On the Categories palette, select the Category that you want to delete, then click the Delete button at the bottom of the palette, or choose Delete Category from the fly-out menu.

Assigning items to categories

Once you've established categories, you can use them to group cataloged files.

To link cataloged items to an existing category:

1 Make sure you've got the Categories palette open.

2 Select the item(s) that you want to categorize, then drag and drop them into the desired category on the Categories palette.

The selected Gallery items will be linked to the folder.

— or —

1 Select the items in the gallery.

2 On the Categories palette, select the target category.

3 From the Categories palette fly-out menu, choose Apply Records to Category.

The selected Gallery items will be linked to the category "folder."

To display cataloged items in a specific category:

1 Double-click the desired category folder on the Categories palette.

2 Items in the selected folder will be displayed in the Gallery. If you want to display items in a Category and all sub-categories, choose Show Records in Sub-categories from the palette fly-out menu.

Items in the selected folder and all sub-folders will be displayed in the Gallery.

To remove cataloged items from a category:

1 Select the items that you want to remove from the category.

2 Click the Remove button on the Categories palette, or choose Remove Records from Category from the fly-out menu.

The selected catalog items will be removed from the category folder, but not from the Gallery or Catalog.

Creating folders on disk

After you've categorized you files, Portfolio can replicate your organized folder structure on disk. Note that this process doesn't move your original files; it makes *copies* of your files in a new location, based on the folder structure on the Categories palette.

To create a category-based file and folder structure on disk from your Categories:

1 On the Categories palette, select the top-level folder that you want to create the Category from.

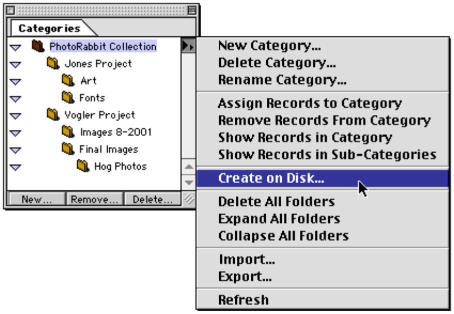
2 Drag the folder to the Finder (Mac) or Explorer (Windows).

A dialog is displayed asking if you want to create one folder for all the items, or if you prefer to maintain the folder hierarchy.

— or —

1 Choose Create on Disk from the palette fly-out menu, then choose a folder where you want the items to be stored.

2 Click Create one folder to have all items placed in a single folder, or Create all folders to maintain folder hierarchy.



Portfolio will create new “real” folders on disk that correspond with each of the folders on the Categories palette and a copy of each original file will be placed in the appropriate folder.

Generating Categories automatically

Portfolio allows you to create categories automatically based on the names of the folders that contain the files you catalog.

To illustrate: Suppose you have a file stored in a folder called September, which is nested inside a folder called Current Assignments. If you have Create Paths as Categories turned on in the Advanced Cataloging Options, then when you catalog the file, Portfolio will automatically create categories called September and Current Assignments, — and will link the cataloged file to those categories.

You must have Administrator-level access to a catalog in order to generate categories.

To set up the Create Paths as Categories, read about the Advanced Cataloging Options on page 25.

Finding files with Portfolio

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

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

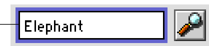
- Using the Toolbar's QuickFind field
- Performing advanced, multi-criteria searches
- Searching across multiple Portfolio catalogs

To quickly find your cataloged files when you're not running Portfolio or when you're working in other programs, such as Adobe Photoshop or QuarkXPress, use the Portfolio Express palette, as described in the next chapter. The Portfolio Express palette is the quickest way to grab the files you need for use in other programs.

QuickFind

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

QuickFind box in the Toolbar



To perform a QuickFind search:

1 Click in the QuickFind box

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

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

3 Matching items appear in the current Portfolio gallery.

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

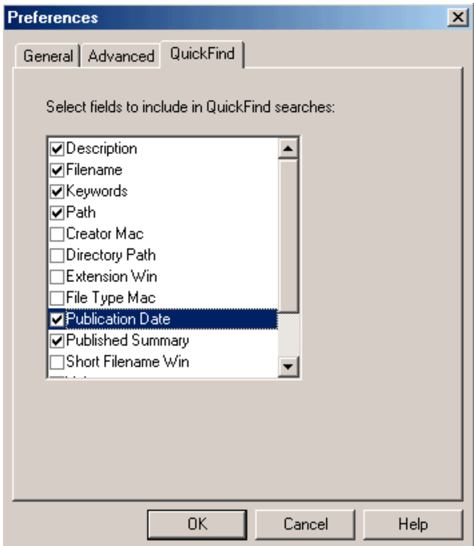
Customizing QuickFind searches

You can choose exactly which fields QuickFind includes (and which it ignores) when doing searches by adjusting the QuickFind Preferences. This is what makes the QuickFind so powerful; you can "tune" it to perform any multi-field search you want. The settings you choose in QuickFind preferences, also affect the QuickFind box in the Portfolio Express palette (explained on page 61.)

Changing the QuickFind Preferences:

1 With a catalog open, choose Edit > Preferences, and switch to the QuickFind panel.

2 In the list of fields, choose the ones you want to include in QuickFind searches by clicking next to them.



Fields included in a QuickFind search appear with a checkmark next to them. QuickFind searches the filename, description and keyword fields by default. Turning on the “QuickFind opens new Gallery” checkbox causes the results of a QuickFind search to be displayed in a new gallery window.

3 Click OK to confirm your settings.

QuickFind preferences are saved on a catalog-by-catalog basis. In other words, each catalog has its own QuickFind preferences and has to be configured separately. This also means that all users who have shared access to a catalog have to use the same QuickFind settings.

Searching from palettes

The Master Keywords palette and any other palettes you may have created from custom fields (see page 76) also provide an easy way to perform simple searches without having to open any dialog boxes.

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

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

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

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

Using the Find Command

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

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

There are three ways to access the Find window:

• Click the Find button  on the toolbar.

• Choose Catalog > Find.

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

Finding all items

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

• Choose Catalog > Find All.

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

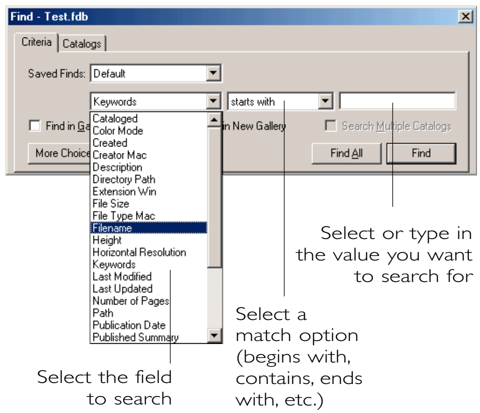
• Open the Finds palette and click the Find All button.

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

Searching for specific items

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

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



See the table on the next page for a description of the attributes you can use in your search.

3 Select a match option from the middle menu.

There are anywhere from 8 to 14 different options, depending on the field you're searching. You can look for perfect matches (such as "equals" or "matches") or less rigid matches (such as "contains" or "does not end with").

Search Criteria Options

Available using the Find Command

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

All fields are indexed for faster searching

Search Criteria Options (continued)

Available using the Find Command

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

All fields are indexed for faster searching

4 Select the other Find options.

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

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

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

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

5 Click Find to start the search.

Searching using multiple criteria (complex searches)

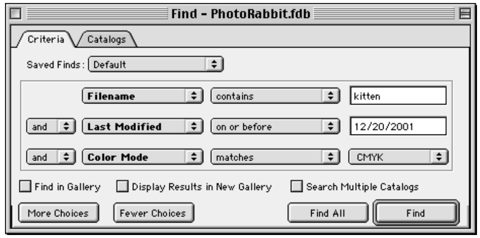
The Find window also allows you to perform more complex searches based on multiple criteria — matching file type, creation date *and* keyword, for example.

To perform a complex search:

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

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

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



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

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

4 Click Find to start the search.

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 select the Find from the pop-down menu using the Saved Finds button on the Toolbar, or double-click the saved find on the Finds palette.

To save a Find:

1 Set up your search in the Find dialog box, as described above.

2 Choose Save As from the Saved Finds pop-up menu.

3 Type a name for the new find in the Save Find dialog box.

4 Click OK to return to the Find window.

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

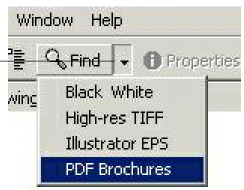
To use a Saved Find:

You can activate a Saved Find in several ways:

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

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

Click on the black triangle to pull down the Saved Finds menu from the Toolbar



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

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

• "Attach" the Saved Find to a Saved Gallery, so that opening the gallery automatically runs the find. (To do this, go to the Saved Options panel in the Customize Gallery dialog box and turn on the Load Saved Find when Opened checkbox; see "Saved Options for a gallery" on page 82.)

To change the attributes of a Saved Find:

1 From Criteria panel in the Find window, choose the Find you want to change from the Saved Finds pop-up menu.

— or —

1 From the Finds palette, choose the Find you want to change and the choose Edit Find from the fly-out menu.

2 Modify the search criteria using the standard Find dialog options, then choose Save from the Saved Finds pop-up menu.

To Rename, Duplicate, or Delete a Saved Find:

1 From Criteria panel in the Find window, choose Edit List from the Saved Finds pop-up menu.

2 In the List Saved Finds dialog box, select the Saved Find that you want to edit.

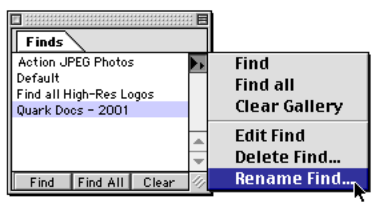
3 Click the appropriate button to Rename, Duplicate or Delete the Find.

4 Click OK to return to the Find window.

— or —

1 From the Finds palette, select the Find that you want to rename or delete.

2 From the fly-out menu, choose Delete Find or Rename Find.



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 the Find command will be preset to 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.

Searching Across Multiple Catalogs

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

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

To search multiple catalogs:

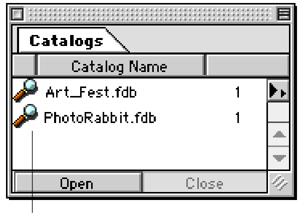
1 Open all catalogs that you wish to include in the search.

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

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

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

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



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

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

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

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

Finding Placeholder Items

You can easily locate all of the placeholders that you created so that you can keep track of which placeholders you have created, update one or more placeholders from the source file, or delete them if they are no longer needed.

For information about creating and using Placeholder Records, see pages 15-16.

To find all Placeholder records, choose Catalog > Find Other > Placeholder Items. A new Gallery will be opened, and all the Placeholder records will be displayed.

Finding Document Text

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

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

To find text in a cataloged document:

1 Choose Catalog > Find Other > Document Text.

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

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

4 Click Find to start the search.

Finding Missing Originals

The Find Missing Original command is a specialized search that verifies that there is still a valid path pointing to an original file for each item in your catalog. If Portfolio can't find a file on disk corresponding with each catalog item, it lists the missing originals so that you can either update your catalog or delete the items.

To locate missing files:

1 Choose Catalog > Find Other > Missing Originals, or press ⌘-M (Mac) or Ctrl-M (Windows).

2 Any missing items will be displayed in the Missing Files dialog box.

3 To update or delete any of items for which an original is missing, select the missing item in the list, then click the Update or Delete buttons.

Notes on Searching

Keep the following points in mind when working with the Portfolio search engine:

Indexing

Portfolio indexes all fields to speed searching. Fields, including Text Block custom fields are indexed at the *word* level, which means that you can search these fields quickly by individual words but not by phrases.

When you search on indexed fields, choose "matches" or "starts with" from the modifier pop-up menu for the fastest possible searches. Searches using "contains" or "ends with" can be slower when working with very large catalogs.

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 “9/15/99” will not find a record which contains “9/15/99 3:00 pm” because the request is interpreted as “9/15/99 12:00:00 am.” This is true even if the time is not being displayed.

Portfolio stores dates following the computer’s Date and Time settings. If Short Dates are used, Portfolio only records the last two digits of the year, possibly resulting in erroneous find results. To avoid this potential problem, use the operating system’s Long Dates format.

Distributing files with Portfolio

Ultimately, most of the digital files you work with every day probably end up *going somewhere*. You may e-mail documents to colleagues, burn images to a CD, upload files to a remote file server, or publish them on a web site.

That's why 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 other users. This chapter covers:

- E-mailing files from Portfolio
- Collecting images for archiving and publication
- Creating web pages from cataloged images
- Creating slideshow presentations of your images

E-mailing files

Portfolio 6 now makes it possible to e-mail images and other digital media files to other users from within a Portfolio catalog by connecting directly to your computer's e-mail program. This provides a convenient way to distribute images or send out proofs without having to manually launch your e-mail program and attach an image in order to send it.

To e-mail a file from Portfolio:

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

2 Click the E-mail button on the Toolbar.

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

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

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

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

Collecting images for distribution

As a Portfolio user, you might frequently find it useful 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. This is the purpose of Portfolio's new Collect command, which not only copies and collects files, but 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. Automatically collecting images, linking them to a new catalog and generating a browser in which to view the catalog streamlines the process of sharing Portfolio context with other users and makes it especially easy to publish collections of images to CD-RW.

Here are some of the ways you might want to use the Collect feature:

• Copy files scattered across your network on to a single Zip or Jazz disk or CD-RW for archiving or distribution to another user.

• Copy a select set of images to a new folder on the network so others can use and access them

• Create a new catalog containing only the images you select (leaving your original catalog unchanged) and send this along with its associated files to another user.

• Burn a collection of images to CD-RW, including not only the images, but a catalog of those images, and Portfolio Browser, so that other users can open and view the catalog without having to buy or own Portfolio.

Using the Collect command

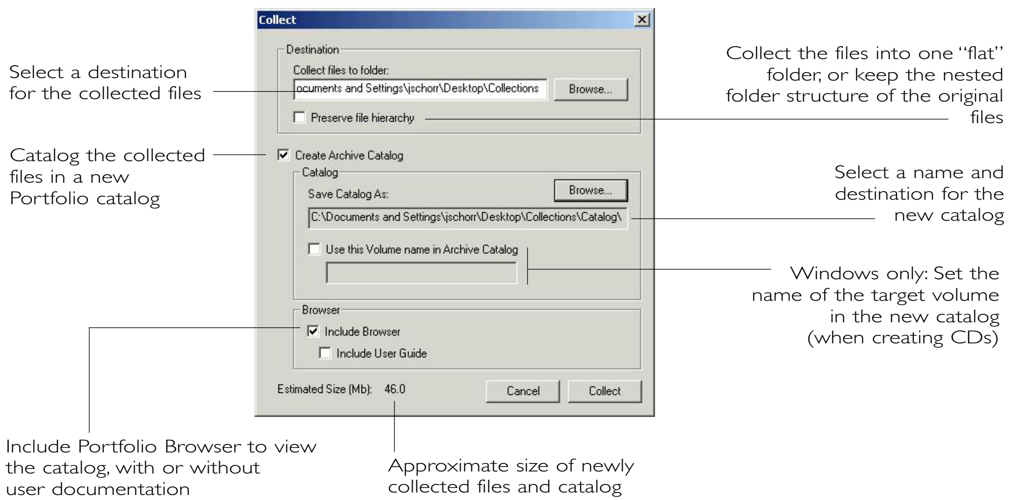
Portfolio's Collect feature operates on a whole *gallery* of images at once. Therefore, the first step when using it is to set up your current gallery so that it contains *only the files you want to include in your collection.* You can do this by:

• Performing a search that reveals only the files you want to include.

• Double-clicking a Folder View folder to reveal only the contents of a particular folder.

• Creating a new gallery (by choosing Gallery > New) and then dragging only the items you want into the new gallery.

The Collect Window



• Selecting and deleting thumbnails that you don't want to include using the Delete key (assuming that in your General Preferences, you have the Delete key set to remove items from a gallery, not delete them from a catalog).

Preserving Folder Hierarchy

When collecting files, Portfolio gives you the option of preserving the *folder hierarchy* of the collected files. By default, this option is turned off, meaning that Portfolio collects all the files into a single folder — regardless of how the originals were arranged on disk.

If you turn on the Preserve Folder Hierarchy check box in the Collect dialog box, Portfolio will reconstruct the entire nested folder structure of the collected files when it copies them, exactly mirroring the hierarchical arrangement of the originals. The hierarchy always starts with the topmost (parent) folder that contains all the files you've selected.

Creating an archive catalog

If you turn on the Create Archive Catalog option in the Collect dialog box, Portfolio automatically creates a new catalog for the files you are collecting. The items in the new catalog are linked to the new copies of your files, not the originals. This is especially useful when you are collecting to another disk (such as a CD) because it ensures that the catalog is pointing to the copies of the files that you are distributing, not to the ones still on your own hard drive or network.

The new catalog created by the Collect command is a clone of your original catalog, preserving all your custom fields, data, and saved views. This makes it easy to distribute catalogs with exactly the look and style that you want.

It is not recommended that you save the archive catalog into the same folder as the collected images, as this might make it difficult for users of your collection to locate and open the catalog file itself. Instead you might save the catalog to the root level of your destination and collect the images into a separate subfolder called "Images"

Setting a volume name (Windows only)

When creating a CD on Windows, it's critical that you correctly set the name of the destination volume, so that the paths in your new catalog point to files on the soon-to-be-burned CD, and *not* to your own hard drive or network volume. To make this possible, the Windows version of Portfolio includes an option in the Collect window called "Use this Volume name in Archive Catalog." By putting the name of the CD volume that you are creating in this field, your archive catalog will include *that name* in the final path for your collected files.

Creating a Portfolio Browser

Portfolio Browser is a free read-only version of Portfolio. The Portfolio Browser application allows users to open a Portfolio catalog, view thumbnails and previews, perform searches using keywords and other criteria, but it doesn't allow them to add, edit or remove items from a catalog. It also doesn't connect to catalogs served by Portfolio Server in a networked environment.

You are free to distribute a copy of Portfolio Browser with any of the catalogs you create using your copy of Portfolio. The Collect feature has the ability to create and include the Portfolio Browser with your collection automatically, saving you the trouble of having to manually find and copy the application yourself each time you distribute files.

The Collect command can only create and include Portfolio Browser for the specific platform — Mac or Windows — on which you are running Portfolio. If you are running Portfolio on Macintosh, but also want to include a Windows version of the Portfolio Browser (to make a hybrid CD, for example) you'll have to copy the Windows version of the browser from your original Portfolio CD. (You might want to keep a copy of the browser on your hard drive, so that you can copy it as needed, without having to retrieve it from the original CD each time.)

To collect files with the Collect command:

1 Make sure the files you want to include in your collection are the ones displayed in the current gallery.

2 Click the Collect button on the Toolbar, or choose Gallery > Collect.

3 Select a Destination for the collection.

Click the Folder button (Macintosh) or Browse button (Windows) to select a folder into which your new collection will be copied. You can select an existing folder, or create a new one in the Choose a Folder/Browse for Folder dialog box.

4 Turn on Preserve Folder Hierarchy if you want Portfolio to copy the collected files into hierarchical folders.

Leave this unchecked if you want the files collected into a single folder. See the "Preserving Folder Hierarchy" section above for an explanation of this feature.

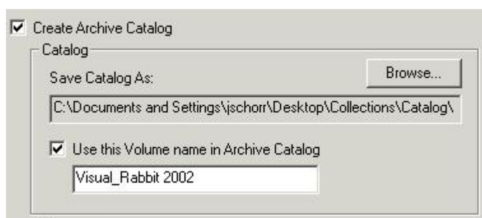
5 If you want to create a new catalog for the collection, turn on Create Archive Catalog.

See "Creating an Archive Catalog" above for an explanation. 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.

The Create Archive Catalog command won't work if other users are logged into the catalog. This is because Portfolio must ensure that no changes are taking place in the catalog when cloning it. Make sure that no other copies of Portfolio (or the Portfolio Express palette) have the catalog open when you use create an archive catalog.

6 Windows users: If you are burning the collection to a CD, turn on the "Use this Volume name in Archive Catalog" and fill in the name that you will ultimately give to the CD, so that the paths in your archive catalog will work correctly. (See discussion of this feature on the previous page)

7 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.

8 Note the total size of your collection (in megabytes) in the Estimated Size field near the bottom of the window to make sure you have sufficient room on the target volume for the collection.

9 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.

Creating CDs from Portfolio

The Collect feature (described immediately above) is perfect for creating CDs of your cataloged images. Portfolio handles most of the tasks involved — copying files to a destination disk, creating a new catalog for the files, and generating a copy of Portfolio Browser.

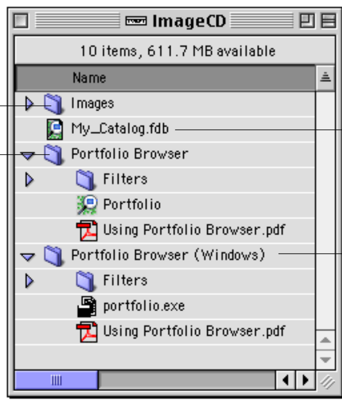
For a step-by-step guide to creating hybrid CDs using the Collect feature, see the "Creating Hybrid CDs with Portfolio" document on the Portfolio CD. (You can also download this document from the Extensis website.)

How to set up a CD using Collect

When using the Collect feature to burn images to CD along with a catalog and a copy of Portfolio Browser, you can organize the collected files however you want — in a series of nested folders, or a single flat folder — but a structure similar to the one shown below is strongly recommended.

Collect the images themselves into their own root folder; include as many subfolders as you want

Include the free Portfolio Browser, which is collected into its own folder



Keep the archive catalog file separate from the images and easily accessible

If you're making a hybrid Mac/Win CD, don't forget to include a copy of Portfolio Browser for the both platforms. A copy of the Mac and Win browsers is available on the Portfolio 6 CD

Web Publishing with Portfolio

Portfolio 6 offers two different levels of web publishing support. On the more basic level is the new **Create Web Pages** feature. This makes it extremely easy to create web pages from your Portfolio catalogs without having to build pages from scratch or work directly with HTML code. The web pages generated using the Create Web Pages feature are static web pages — a frozen "snapshot" of your Portfolio content at the moment you export it.

On a more sophisticated level is **PortWeb**, a web server plug-in that establishes a connection between a web server and either a Portfolio Server or a Portfolio catalog on disk. PortWeb provides a dynamic link between web-based users and Portfolio catalogs, so users can search a Portfolio database using only a web browser to submit queries. With PortWeb, you can do dynamic web publishing, so that users who browse your website see up-to-the-minute content when querying Portfolio. Setting up and using PortWeb requires a good knowledge of web server configuration and administration.

PortWeb is not installed with Portfolio 6, but is available to you at no additional charge as a registered Portfolio user. Download the PortWeb plug-in, along with accompanying documentation, from the Extensis web site. See the Portfolio 6 READ ME file for details.

Creating 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. You have three options for generating web pages:

• You can create simple web pages based on the look of your current gallery.

• You can generate more complex pages based on a set of pre-defined HTML templates that can be modified or used "as is."

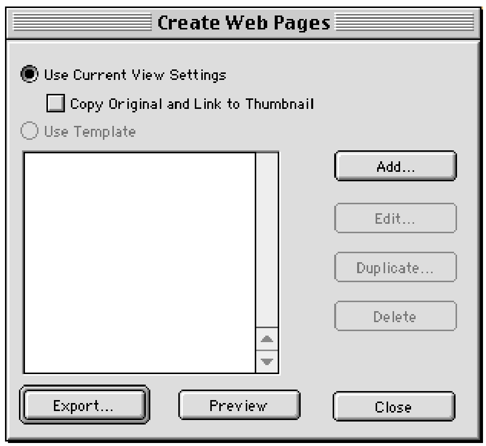
• With some knowledge of HTML, you can create and save your own HTML templates to build custom web pages that include your own images, logos, headers, footers, and so on.

In this section, we'll cover each of these methods:

To create web pages based on a Portfolio gallery:

1 Select 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.



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

3 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 (see pages 38-43 for complete details on how to do this) and the same formatting is used in the generation of the web pages.

(To generate web pages containing more complex HTML formatting, don't turn on Use Current View Settings. Instead, activate the Use Templates radio button and use one of the pre-defined HTML Templates available in the Create Web Pages dialog box, or create your own HTML template, as explained in the next section.)

Some attributes of a customized view cannot be converted to HTML and will not appear in your exported web pages. Specifically, borders and spacing (between thumbnails) are not converted.

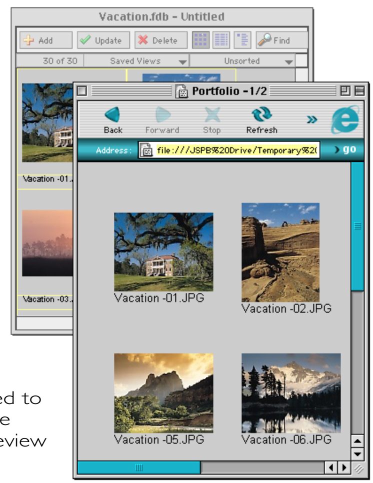
IMPORTANT: When creating web pages, Portfolio exports thumbnails at the size they were when cataloged, not at the selected display size in the Gallery window. For best results, make sure your cataloged images all have stored thumbnails of a uniform size (either all 112 x 112, or all 256 x 256). Use the Regenerate Thumbnails command (page 55) if you need to recreate consistently-sized thumbnails

4 (Optional) Turn on the Copy Original and Link to Thumbnail checkbox.

Turn this option on if you want the thumbnails in your web pages hyperlinked to full-size copies of your original files. With this option active, Portfolio automatically copies original files into an Images folder that resides within the target folder for your web pages. It also adds the needed HTML tags to your web pages so that the thumbnails are linked to the original files in the Images folder. (Relative links are used, so the links remain valid even if you move the folder containing your web pages to another computer — such as a web server — after creating them.)

Keep in mind that some of your original files may not be in a format that can be opened in a web browser. Linking to originals in such cases may result in a hyperlink that downloads the original instead of displaying it in the web browser.

5 Preview your web pages by clicking the Preview button.



Catalog converted to web page using Preview

Click this button if you want to see a quick preview of how your exported web pages are going to look. The Preview button launches

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your system's default web browser and opens the first page of your exported images. 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.

NOTE: Hyperlinks to local files won't work in the Preview page, so you'll only be able to view the first page of your HTML export. To create working hyperlinks and view all exported pages, use the Export command. The Preview button is designed only to give you a quick preview of how an exported page will look.

6 If the preview looks good, return to Portfolio and click the Export button.

Portfolio prompts you to enter a file name for the first web page, and specify a location for the HTML files that are created.

If more than one page of HTML is required to display all the images you selected, Portfolio generates additional pages and places them in the same location as the first file. All the Web page files 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.

7 Click "Save" to start the export process.

Portfolio also creates a folder named "Thumbs" at the same location as the Web pages. Portfolio stores JPEG thumbnails of each of the selected items in the Thumbs folder. If you chose the "Copy Originals and Link to Thumbnails" option in Step 4, Portfolio also creates an Images folder for the copies. 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.

To create web pages based on an HTML Template:

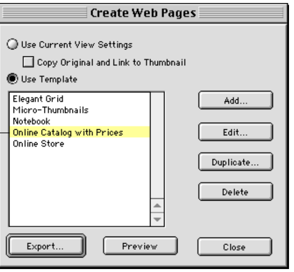
To create a more sophisticated web design, you can use one of the pre-defined HTML templates included with Portfolio and listed in the Create Web Pages dialog box.

Here are the steps for using a template to export your web pages:

1 Follow Steps 1 and 2 above, selecting the images you want to include in your web pages and opening the Create Web Pages dialog box.

2 Activate the Use Template radio button.

3 Select a template from the list of pre-defined templates.



Use a pre-defined template for a polished looking web page

4 (Optional) Click Edit to open the Edit HTML dialog box.

This allows you to adjust some of the template settings so you can "fine-tune" the results of your HTML export. (If you have a knowledge of HTML, you can edit the code used to generate the Header, Footer and Item sections of the web pages, as outlined below in the next section.)

5 In the Table Grid fields, enter the number of rows and columns of thumbnails that you want to display on each page, then click Save.

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.

6 Follow Steps 5 and 6 above to preview and export your web pages.

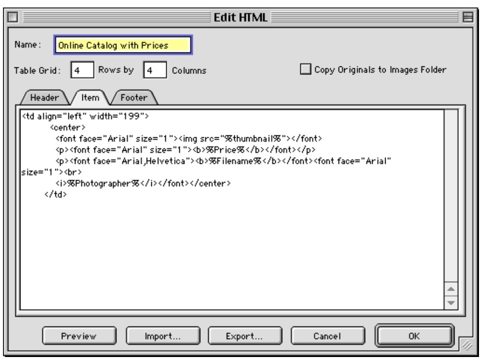
Creating your own HTML templates

With a good working knowledge of HTML, you can create your own templates and use these to generate web pages:

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.

Working with the Edit HTML dialog box

The three HTML data tabs in the Edit HTML dialog represent the three portions of an HTML document (Header, Item, Footer). 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:

- The header must contain the <HTML> tag and the <BODY> tag.
- Because the grid layout is generated as a table, the Header must end with a <TABLE> tag.
- See the “Export HTML Macros” section below for acceptable macros within the Header.

Item:

- The item tab should contain all of the formatting for a particular table cell, including the opening <TD> tag and the closing </TD> tag.
- 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).
- The key to properly configuring the Item tab is in using macros. Please refer to other parts of this section for information on how to use macros.

Footer:

- The Footer must start by closing out the table with a </TABLE> tag.
- The Footer should close out with </BODY> and </HTML> tags.
- See the “Export HTML Macros” section for acceptable macros within the Footer..

Export HTML 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 table on the next page lists the supported macros within the different blocks

Technical Notes on Exporting HTML

• 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.

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

Example: <TEXTAREA COLS=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.

• 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.

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. You can even save slideshows as standalone QuickTime movies, so that you can distribute them to other users.

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

When locating items for a Slideshow, if a disk preview is available, it will be displayed. If no disk preview is found and the source file cannot be found, the item thumbnail is displayed.

To set up a Slideshow:

1 Choose View > Slideshow Options.

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

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

4 Set the other slideshow options.

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

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

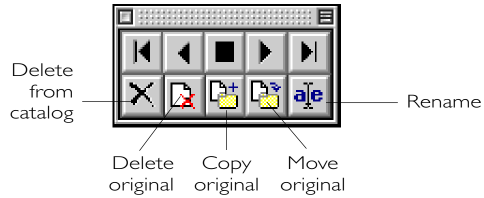
To run a Slideshow:

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

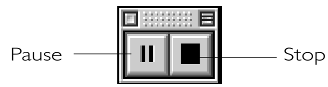
NOTE: A slideshow can contain still images, 3D images, movies, and sounds. Anything that can be previewed in Portfolio can be displayed in the slideshow.

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

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



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



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

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

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

Edit during Slideshows

The manual controller (shown above) allows you to delete, copy, move and rename files during a slideshow. With this feature, you can use a slideshow to preview a number of images at full-screen and organize them as you go.

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Auto-starting slideshows

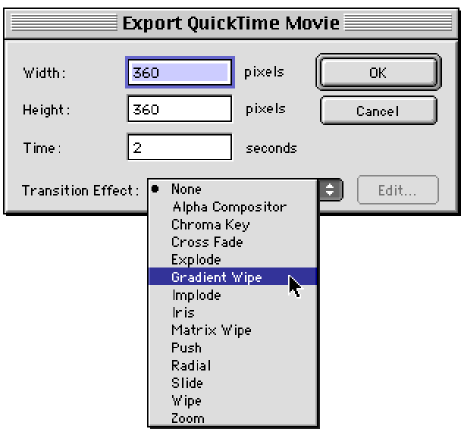
You can also have a slideshow run automatically when a catalog is opened. To set this up go to Catalog > Administration and open the Startup tab (this requires that you have administrative access to the catalog). In the On Startup section of the panel, turn on the Run Slideshow checkbox.

Saving a slideshow as 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.

To export a slideshow as a QuickTime movie:

1. Open the gallery that you'd like to export as a QuickTime slideshow.



2.Choose Item > Create QuickTime Movie.

A dialog box will be displayed asking you to enter specifics about the size of the movie.

3. Set the movie size (in pixels), the timing of each slide and the Transition Effects you'd like to use

4. Click OK and save the movie file.

5. You will be asked to name the movie file and specify the location where you want to save it.

6. Click "Save."

If the original image (the item's source file) cannot be found when the Slideshow is exported, the catalog thumbnail is exported instead. If you export a QuickTime movie file (.mov), the resulting movie file will be blank.

Macros used in Portfolio's HTML Templates

All Blocks

%prev%	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. Example: <A HREF="%prev%">Previous Page</A> Results: A hyperlink ("Previous Page") is displayed. When clicked, it takes the user to the previous page in the generated series.
%next%	Link to next page. This will be the name of the next file generated in the series of files. If this is the last file in the series, the name of the current file is substituted. Example: <A HREF="%next%">Next Page</A> Results: A hyperlink ("Next Page") is displayed. When clicked, it takes the user to the next page in the generated series.
%page%	Substitutes a number indicating which page in the series is being generated. Example: <TITLE>Portfolio Search - %page%</TITLE> 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 <BODY> tag.)

Item Block Only

%thumbnail%	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. Example: <IMG SRC="%thumbnail%"> Results: Thumbnail is displayed on the web page.
%fieldname%	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). Example: <B>%filename%</B> Results: "image001.jpg" is displayed in bold. (Assuming the record's filename is "image001.jpg".)

Macros used in Portfolio's HTML Templates (cont'd)

%fieldname^x%	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. Example: <A HREF="%myurl%^2">%myurl%^1</A> 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.)
%fieldname%@x	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. Example: %keywords%@0 Results: The keyword list for the record is displayed as a drop-down list, with the first keyword displayed. Example: %keywords%@5 Results: The keyword list for the record is displayed as a scrolling list box that is 5 rows in height.

Using the Portfolio Express palette

The Portfolio Express palette, new to Portfolio 6, 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.

Some of the ways you can use the Portfolio Express palette include:

• Locate images quickly using the palette, then double-click them to open them in Adobe Photoshop, or any other image-editing software you specify.

• Open the palette when in QuarkXPress to find and place images in an XPress layout, without having to use the Get Picture command.

• When writing an e-mail message, grab an image from the palette and drag it in as an e-mail attachment.

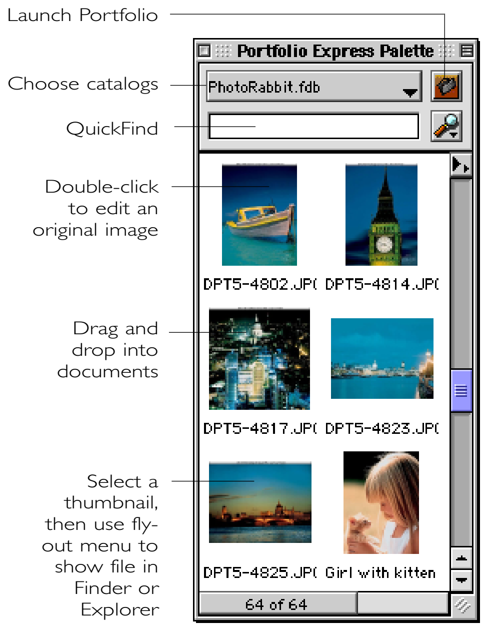
• Grab logos, clip art, or other images from the palette and drag them straight into a PowerPoint slide or Word document (Macintosh only).

• Find any image on disk with unprecedented speed by simply pressing the Portfolio Express hotkey, selecting the image on the palette and choosing the Reveal in Finder/Reveal in Explorer command.

• Copy original image files to a new location or another disk by simply dragging thumbnails from the palette directly to the new location.

The Portfolio Express palette is designed to provide quick, easy access to your images from anywhere on your system. It doesn't allow you to catalog new items in Portfolio, edit existing Portfolio records, add keywords, or perform any other file management tasks. The job of the Portfolio Express palette is make it easy for you to grab cataloged items and use them. To edit your Portfolio catalogs and do any other file management, use the main Portfolio application (which you can launch from the palette).

Portfolio Express Palette



Setting up Portfolio Express

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.

To launch Portfolio Express for the first time:

Macintosh: If you opted to have the Portfolio Express palette installed as a startup application, it should already be running. 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 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: The Portfolio Express palette will be installed as a startup application, and should be running in the background. Press the default hotkey (Control-Shift-P) to make the palette visible. You can also double-click the Portfolio Express icon in the System Tray. If the Portfolio Express application isn't running in the background, choose Portfolio Express from Programs > Extensis > Portfolio 6.0 in the Start Menu.

Configuring Portfolio Express palette as a startup application

If, for some reason, the Portfolio Express palette is not configured to run in the background automatically on the startup of your computer, you can set it up to do so. Having Portfolio Express start and run automatically in the background makes it possible for you to access your images the moment you need them by simply pressing the Portfolio Express palette hot key.

Making Portfolio Express auto-start on Macintosh:

1 Drop an alias of the Portfolio Express application into the Startup Items folder located inside the System Folder.

2 On restart, Portfolio Express will launch automatically.

Making Portfolio Express auto-start on Windows:

1 From the Start menu, choose Settings > Taskbar & Start Menu.

2 In the Taskbar and Start menu Properties dialog box, switch to the Advanced tab.

3 Click the Advanced button.

This opens the Start Menu directory.

4 Drag a shortcut of the Portfolio Express palette program into Start Menu > Programs > Startup.

5 Any items in this Startup folder will be launched automatically the next time you restart your computer.

Opening Catalogs with the Portfolio Express palette

The first time you launch the Portfolio Express palette, the palette is blank, with the words "no open catalogs" displayed in the catalog menu.

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.

Once you've opened catalogs using the palette, you can switch among them using the catalog menu at the top of the palette. (Opened catalogs are always listed at the top of the menu.)

Opening a Portfolio catalog with the Portfolio Express palette is just like opening a catalog with the main Portfolio application. If the catalog is password-protected, you'll be prompted to enter the appropriate password in order to open the catalog from the palette.

The Portfolio Express Hotkey

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 hotkey.

To set the hotkey for the Portfolio Express palette:

1 Choose the Set Hot Key command from the fly-out menu on the right side of the palette.

2 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.

3 Click OK to activate the new hotkey.

The hotkey both hides and shows the Portfolio Express palette.

Hiding vs. Quitting

In order for the palette to be available via hotkey or by double-clicking the palette icon in the Windows System Tray, the Portfolio Express application has to be running in the background. Therefore, when closing the palette, it's recommended that you *hide* the palette, without *quitting* the application itself.

To hide the palette:

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.

To quit the palette application:

There may be times when you want to quit Portfolio Express completely, so that it is no longer running in the background. (If you do so, you'll have to re-launch the application in order to use the hotkey and access the palette again.) You can quit the application using any of the following methods:

• Choose Quit Portfolio Express from the palette's fly-out menu.

• On Macintosh, switch to Portfolio Express using the Application menu, then choose File > Quit.

• On Windows, right-click the Portfolio Express icon in the System Tray and choose Exit Portfolio Express from the pop-up menu.

Searching for files using Portfolio Express palette

Once you have a catalog opened in the palette, you can search for any item using the QuickFind box located near the top of the palette, just below the catalog pop-up menu.

The QuickFind box in the Portfolio Express palette works exactly like the QuickFind box in the main Portfolio application (see page 89 in Chapter 8). It allows you to search for files based on the content of any combination of fields. The specific combination of fields included in the QuickFind search is determined by the QuickFind Preferences in Portfolio (see "Customizing QuickFind searches" on page 89).

Perform a QuickFind search from the palette

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

Finding all items from the palette

To display all items in a catalog, click and hold on the "magnifying glass" button to the right of the QuickFind field to access a Find All pop-up menu.

Accessing (and using) files from the Portfolio Express 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

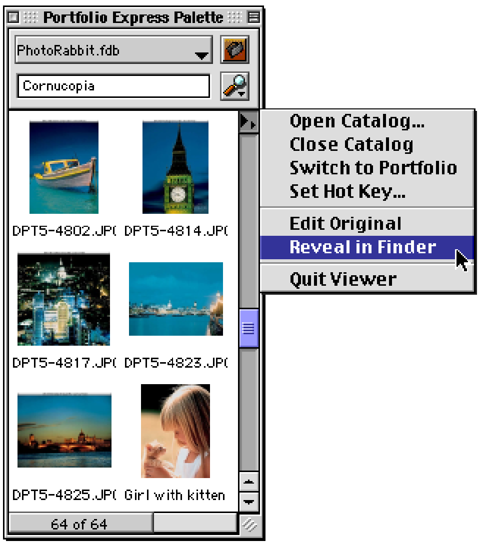
• Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe Photoshop, Illustrator or FreeHand to open the image with that program.

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

• 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 the Portfolio Express palette (or from Portfolio itself) 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.

Catalog Administration

Portfolio is specifically designed to be used in workgroups, with multiple users sharing catalogs over a network.

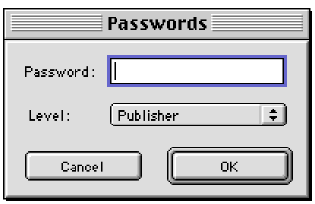
In such a networked environment, it's critical that you be able to control not only who can access a catalog, but what *level* of access that user should have.

To illustrate: In a workgroup, one user may be tasked with *configuring* a Portfolio catalog, while someone else might have the job of adding new items to the pre-configured catalog. Still other users might have responsibility only for *using* items that others have put in the catalog. Each user requires a different level of access to the catalog. Portfolio allows you to set up such access levels, as explained below.

In addition to covering access levels, this chapter also explains how to maintain Portfolio catalogs and how to use catalog functions in a multi-user environment. It also covers specific Portfolio functions that are reserved only for the catalog Administrator, but that are critical for setting up a useful and convenient cataloging system.

Catalog Access Levels

Portfolio catalogs can be password-protected for security. When passwords are set by the catalog



Administrator, users are prompted to enter a password each time they open a catalog.

As the Administrator of your catalog, you can also assign varying levels of access to different users — controlling which functions users can or cannot use within Portfolio.

The four possible 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. When you create a new catalog, you are automatically in Administrator mode for that catalog.

- **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, Alternatively, you can assign an access level and password to individual *users* (which is called "user-based access," as explained later in this chapter) to more closely control who has access to a catalog and what level of access they have. Whether you assign passwords by access level or by user, access levels function the same.

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.

About Administrator Mode

Administrator — the highest level access — provides access to all catalog functions, including creating custom fields and editing the Master Keyword List. Other users can enter data in custom fields that the Administrator creates, 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 and 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. 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.

Opening a catalog in Administrator mode:

You'll need to open a catalog in Administrator mode if you want to create custom fields,create a master list of keywords, set passwords or access any of the other features in the Catalog Administration dialog box.

To log in using Administrator mode:

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.

For more information about changing your current access level, see page 13 in Chapter 3.

Password-protecting a catalog

You can add password-protection to any catalog. Because multiple users can use a single Portfolio catalog simultaneously across a network, password protection is strongly recommended when a catalog is shared on a network. Password protection is not necessary, however, if you are the single user of a catalog on your own computer.

The first step in password protecting a catalog is to decide which of Portfolio's two access methods you want to use — Level-based access or User-based access:

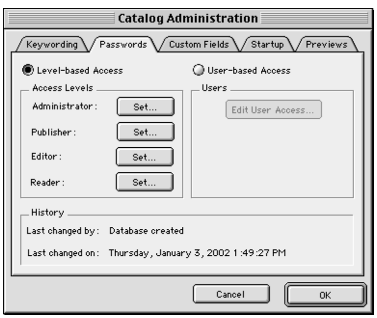
- **Level-based access:** Level-based access allows all users to open a catalog in any one of the four levels (Reader, Editor, Publisher, or Administrator) with a single shared password. In other words, no matter how many catalog users there are, you set up only four passwords — one for each of the standard access levels. All users logging in with the same access level (all "Publishers," for example) also share the same password. This was the standard access method available in earlier versions of Portfolio.

- **User-based access:** User-based access allows you to assign different access levels and passwords for *each individual user*.

To choose an access level method:

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

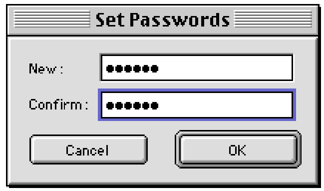
2 Choose between the Level-based Access or User-Based Access radio buttons.



3 You're now ready to set passwords using the access method you've chosen.

Setting passwords (with Level-based Access)

Simply click the Set button for each of the four levels to set a password for each level in the Set Passwords dialog box. Click OK after entering and confirming each password.



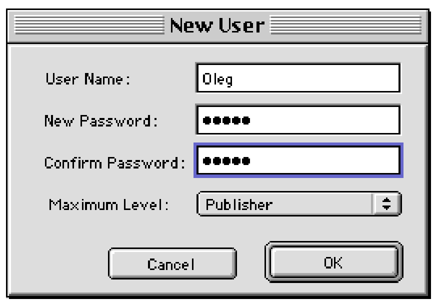
Passwords must be between 4 and 12 characters in length.

Setting passwords (with User-based Access)

With User-based access, you'll have to set up a password for each user who will be accessing your catalog

To set user-based access passwords:

1 Make sure you've turned on the User-based Access radio button in the Passwords tab of the Catalog Administration dialog box.



2 Click the Edit User Access button.

3 In the User Access dialog box, click the New button, assign a username, password and access level for one user, then click OK.

4 Repeat the previous step as needed for each person who will be accessing the catalog.

5 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.

To change individual users and/or passwords:

1 In the Catalog Administration dialog box, click the Edit User Access button.

The Users and Groups dialog box is displayed.

2 Select the desired user, then click Edit or Delete, depending on what changes you want to make.

Once a catalog is password-protected with a password for any access level, a password prompt is displayed whenever the catalog is opened. Users can then choose their access level from the Level pop-up menu, enter the correct password and click OK to open the catalog.

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. If you only set an Administrator password, however, you won't need to enter a password to access the catalog in other access levels.

Importing and Exporting user lists

If you plan to have a group of users accessing multiple Portfolio catalogs, you can create a Users list in one catalog, then export it for use in other catalogs, rather than having to enter username and password information manually in each catalog.

To export a User Access list:

1 Open the catalog in Administrator mode, as explained earlier in this chapter.

2 Choose Catalog > Administration to open the Catalog Administration dialog box

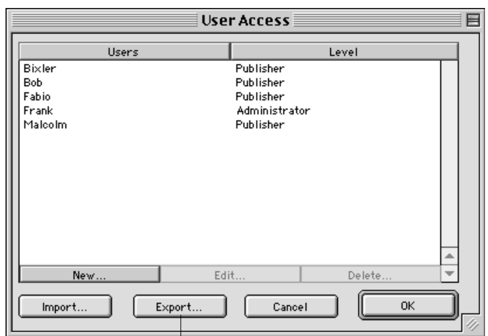
3 Click the Passwords tab.

4 Under the User-level Access section, click the Edit User Access button.

5 Click Export.

6 Enter a name and location for the text file that will be created from the Users list.

7 Click Save.



Export user lists for use in other catalogs

To import a Users list:

1 Open the catalog in Administrator mode, as explained earlier in this chapter.

2 Choose Catalog > Administration to open the Catalog Administration dialog box

3 Click the Passwords tab.

4 Under the User-level Access section, click the Edit User Access button.

5 Click Import.

6 Locate and open the text file containing your Portfolio Users and Groups list.

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.

One of the best ways to ensure consistent use of keywords is to set up a list of Master Keywords as a catalog administrator

Once you've set up a Master Keyword list, your list automatically appears in a number of places within Portfolio:

• On the Master Keywords palette (visible by choosing Window > Master Palettes > Show Master Keywords).

• In the keywords panel of the Item Properties window.

• In the keywords panel of the Cataloging Options window.

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

To add keywords to the Master Keywords list:

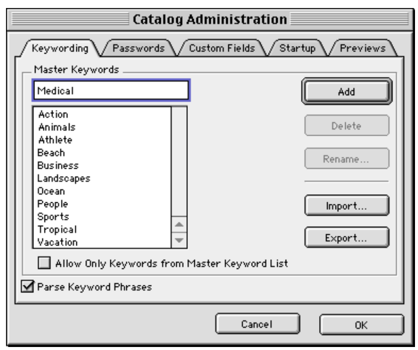
1 Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).

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 In the Keywording panel of the Catalog Administration dialog box, select the specific keyword that you want to Rename or Delete, then click the appropriate button.

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

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

Deleting a keyword from the Master Keyword list does not remove it from any items that have that keyword assigned to them. If you want to change keywords that have already been applied to items (changing all occurrences of "Fast" to "Rapid," for example) use Item > Edit Field Values to replace one keyword with another.

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 Return character, so you can also import lists of Master Keywords from any suitable text file.

To Export a list of Master Keywords:

1 Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).

2 Click the Keywording tab to select it.

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 Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).

2 Click the Keywording tab to select it.

3 Click the Import button on the Keywording tab and locate the file containing the keywords that you want to import.

The keyword list *must* be a plain text file with a hard Return character separating each keyword entry.

4 Click Open.

The keywords will be added to the Master Keywords list.

Adding Custom Fields

Portfolio allows you to create an unlimited number of custom fields to store text, dates, URLs or other types of information associated with items in your catalogs. Creating and using custom fields is fully covered in Chapter 7 (see pages 72-77).

Setting Catalog Startup Options

As a catalog administrator, you also have control over a number of actions that occur when a catalog is opened.

These options are available on the Startup panel of the Catalog Administration dialog box.

Open Find Dialog: Turn this option on if you want Portfolio's Find command to automatically be activated at startup, allowing you to immediately begin a complex search. This can be useful if you know the first action that you typically perform in Portfolio involves using the search criteria controls in the Find dialog box.

Open MKL Palette: Opens the Master Keywords Palette on startup, saving users from having to open it manually.

Run Slideshow: Puts Portfolio into full-screen Slideshow mode on startup, presenting a slideshow (using whatever Slideshow options you've designated) on the default items in your catalog. This can be useful if you're using Portfolio to give kiosk-style presentations and want to launch immediately into the presentation when someone opens a catalog. See page 108 for details about using the Slideshow feature.

Disable Link to Original: This option disables the ability to preview an image within Portfolio using the Preview command.

Turning on Disable Link to Original does not prevent a user from being able to find, move or otherwise access an original file on disk, as long as the user has appropriate network access privileges. It simply disables Portfolio's internal link to the original file for the purpose of opening and previewing it.

Custom Splashscreen: You can add your own splashscreen to a Portfolio catalog so that this screen appears (for a duration of four seconds) each time a catalog is opened. When you launch Portfolio, the custom slashscreen appears immediately after the standard Portfolio 6 splashscreen.

To add a custom splashscreen:

1 In the Startup panel of Catalog Administration, click the Open button in the Custom Splashscreen section.

2 In the Open dialog box, select a JPEG image to use as splashscreen.

3 The selected image will appear in the Custom Splashscreen section of the dialog box and will be used as a splashscreen the next time you open the catalog.

To remove a custom splashscreen:

1 In the Startup panel of Catalog Administration, click the Clear button in the Custom Splashscreen section.

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 necessary.

Setting Preview Options (Disk Preview)

The administrative options allows to you create disk previews of each item you catalog, so that you can preview images in Portfolio *without* the original file being present. For complete details see page 28 in Chapter 3.

Importing and Exporting Data

Portfolio includes some powerful tools for importing data into a catalog or exporting it out for use in other applications.

Using the Import Field Values command you can bring data from an another database *into* Portfolio by matching fields from the database with specific fields in Portfolio. Conversely, you can export values from any Portfolio field into a text file for use in a database or spreadsheet, for example. You can also export keyword and description as pnot data that can be embedded directly into most files and can be accessed from within programs such as Photoshop.

Importing field values into a catalog

To set up a database file for import into a Portfolio catalog, it should be exported from your database application as a plain text file, with tab-delimited fields and a carriage return between each record.

See the technical notes at the end of this section for more information about formatting a text file for import.

The first record in the text file should contain the database field *headers*. (This first record will be used to match your database fields with fields in your Portfolio catalog and will not be imported as a record.)

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

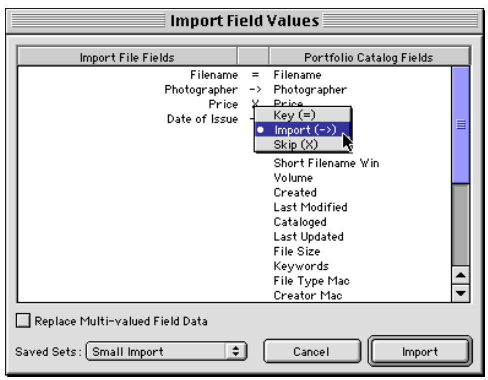
To Import Field Values:

1 Make sure you've set up any custom fields in your catalog needed to store the data you're about to import. For information about creating custom fields, see page 73.

2 Make sure the data you're trying to import is a plain text file, formatted as described above with a tab separating each field value and a return separating each record.

3 Choose File > Import Field Values and locate the text file to be imported.

The field headers from the text file should appear along the left column of the Import Field Values dialog box, under the heading Import File Fields.



4 Match each field header in the text file with the appropriate Portfolio catalog field name listed in the right-hand column. 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, as shown above. This allows you to select the appropriate import operator — Key, Import or Skip — for each field. The operators work as follows:

Key (=) defines the key relationship. The selected field in the imported data will be searched for matching values in the corresponding field in the Portfolio catalog. Only one Key relationship can be designated for the import.

Import (-->) indicates that the field in the text file will be imported into the catalog field indicated to the right of the arrow.

Skip (x) indicates that the field in the text file will not be imported into the catalog.

5 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.

6 When you are ready to import the database, click "Import."

Portfolio will examine the field value data in the second record in the text file (the first record with actual *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. 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, data in any field which does not match the paired Portfolio field type, is skipped.

Replace Multi-valued Field Data

When this checkbox in the Import Field Values dialog box is turned on, 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.

Exporting data to a text file

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

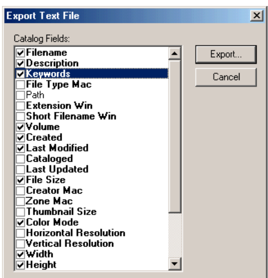
To export catalog fields as text:

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

To select the *entire* catalog, choose Catalog > Find All.

2 Choose File > Export > Text File. (on Windows, choose File > Export to Text File).

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 importing 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.

Exporting pnot Data (Mac version only)

The Macintosh version of Portfolio allows you to embed the keywords and descriptions you create in Portfolio directly into your original image files. Portfolio places this embedded data in the *pnot* resource within each file, so that the information can be accessed using any Mac program that can open and read pnot data, such as Photoshop. Once you've exported pnot data, you can view keywords and descriptions for your original images within Photoshop itself using Photoshop's File Info command.

Before exporting pnot data make sure your catalog is up to date, so that Portfolio can successfully find all the selected original image files. You also may want to verify that the original 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.

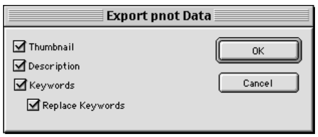
To export pnot data to your original files:

1 Select the items to which you'd like to export the keyword and description data.

If the original file for any item cannot be found, it will be skipped.

2 Choose File > Export > pnot Data...

3 Using the checkboxes, select the data you would like to export to the original files — Description, Keywords, and Thumbnail.



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. Turning on Thumbnail embed's Portfolio's own thumbnail version of the image back into the original file.

4 Click OK.

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

You can view this information by opening an image with embedded data in Photoshop and using the File Info command. The Description data from Portfolio is placed in the Caption field within Photoshop.

Because this data is embedded in files as a Mac resource, it will not be visible in Windows applications.

Importing and Exporting Views, Borders and HTML Templates

You can transfer saved views, thumbnail borders and HTML Templates (used to create web pages) from catalog to catalog using Portfolio's import and export capabilities.

The saved view, border and HTML files that you place in the Saved Views, Borders and HTML Templates folder in the Portfolio 6 application folder will automatically be included in each new catalog that you create.

To export a saved view:

1 From the Saved Views pop-up menu (in the upper right corner of each gallery windows) choose Edit List.

2 In the Saved Views window, select a view that you want to export.

3 Click the Export button

4 Choose a name and destination for the exported view, which will be saved as a .pvw file. Click Save.

Views saved into the Saved Views folder in the Portfolio 6 folder will automatically be included in all new catalogs.

To import a saved view:

1 From the Saved Views pop-up menu (in the upper right corner of each gallery windows) choose Edit List.

2 In the Saved Views window, click the Import button

3 Choose a saved view file from the Saved Views folder (in the Portfolio 6 folder) or from another location where you've exported view files.

4 Click Done.

To export an HTML Template:

1 Choose Item > Create Web Pages.

2 In the Create Web Pages dialog box, click on the name of the HTML template you want to export, then click the Edit button.

3 In the Edit HTML dialog box, click Export, choose a name and destination for the exported template, which will be saved as an html file. Click Save.

Templates saved into the HTML Templates folder in the Portfolio 6 folder will automatically be included in all new catalogs.

To import an HTML Template:

1 Choose Item > Create Web Pages.

2 In the Create Web Pages dialog box, click the Add button.

3 In the Edit HTML dialog box, click the Import button.

4 Choose an HTML template from the HTML Templates folder (in the Portfolio 6 folder) or from another location where you've exported HTML template files. Click Open.

5 Give the imported template a name by filling in the Name field in the Edit HTML dialog box, then click Save.

For more on using HTML templates see pages 106-108 and pages 11-112.

Importing a thumbnail border

Borders created in other programs and saved as PICT, TIFF or BMP files can be imported into Portfolio and used as frames around thumbnails in both thumbnail and record views. See pages 39-40 in Chapter 4 for details about using and importing borders.

Maintaining a Catalog

This section covers some of the work you may have to do to keep your catalogs in good condition.

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 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 Recover command on an open catalog.

2 Choose Recover from the Catalog menu.

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

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 a Windows NT or Mac OS 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.

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.

SQL Server: Using Portfolio SQL Connect software you can keep catalogs on your SQL server and access them from the Portfolio client. This provides all of the advantages of using Portfolio to manage your catalogs, but keep the data on your SQL Server. Portfolio SQL Connect software is sold separately.

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 might 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 earlier in this chapter on pages 120-123. Whether or not your catalog is password-protected, it is essential that you set up the necessary network access conditions.

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.

Administering Served Catalogs

Catalog Administration is a single-user function. That is, a catalog that is open in Administrator mode cannot be opened by anyone else.

On the Portfolio Server, where catalogs are shared with other users simultaneously, this means that others will not be able to access the catalog while you are using it in Administration mode. When you open a catalog as the Administrator, all other users are locked out.

If other users have the catalog open when you change to Administrator mode, they will be logged off immediately. To prevent this from happening, we suggest that you use options in the Server Administration dialog (see Chapter 12) to give users a time period in which to log themselves off (by closing the catalog), or give them a time period after which they will be logged off.

To prevent users from being logged off inadvertently, a served catalog cannot be opened in Administrator mode, even if you set the Default Open Mode to Administrator in the Preferences dialog box. In this case, the catalog will default to Publisher mode when it opens. You can then alert your users and switch to Administrator mode (Catalog > Access).

While you have the catalog open in Administrator mode it will not appear on the Connect to Servers dialog for other users even though the catalog is still being served. To release the catalog for other users, either close it or change to a different access mode (Publisher, Editor, Reader).

For additional information on setting up catalogs on a Portfolio Server, see the next chapter of this User Guide.

Administering Portfolio Server

The Portfolio Server is a powerful catalog server, allowing access to Portfolio catalogs using standard Portfolio 6 application software. Unlike typical server applications however, the Portfolio Server is easy to set up and use, and requires almost no maintenance.

This chapter covers the setup, configuration of and administration of Portfolio Server.

While standard Portfolio 6.0 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

• Connection to Portfolio SQL Connect (software sold separately)

With Portfolio Server you can:

• Connect remotely to the server (using TCP/IP)

• Manage the Server and Catalogs from the standard Portfolio 6 application (client)

• Keep Catalogs open on the Server while they are being administered

Server vs. Catalog Administration

When using the Portfolio 6.0 application in conjunction with the Portfolio Server, two different types of Administration are available:

Server Administration: The Server Administrator has permission to administer the Portfolio Server. In addition, the Server Administrator creates, opens, and closes Catalogs on the Server. Client access is added through adding special multi-user serial numbers to the Server. Server Administrator duties are described in this section.

Catalog Administration: The Catalog Administrator has permission to access Administrator level functions for particular Catalog(s). Catalog Administration is discussed starting on page 119.

System Requirements for Portfolio Server

Macintosh:

Mac OS 8.6 through 9.2
Apple Power Macintosh
A minimum of 64MB of application RAM
25MB of free hard disk space
QuickTime 4.1.1 or higher strongly recommended
TCP/IP Services installed

Windows:

Windows 98, Windows NT (Service Pack 6 or 6a); Windows 2000 (Service Pack 2); Windows

XP; or Windows 98
Pentium (133MHz or faster recommended)
32MB of system RAM
25MB of free hard disk space
QuickTime 4.1.1 or higher strongly recommended

Portfolio 6 SQL Connect:

Windows 98, Windows NT 4.0, Windows 2000; orWindows XP
Pentium (133MHz or faster recommended)
32MB of system RAM. Windows NT 4 or 2000, Pentium, 32MB RAM; supports MS SQL Server 6.5, 7 and Oracle 8i.
TCP/IP Services installed

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).

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.

Installing the Server

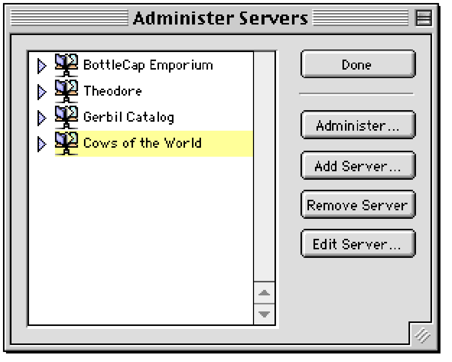
Installing the Portfolio Server is quick and easy. Simply launch the installer and allow it to guide you.

The Portfolio Server application has no interface itself; access to Server features is handled through standard Portfolio 6.0 application software.

Note: On Windows, the Portfolio Server is a system service. This service must be started on the Server before it will be active. To do so, open the "Services" Control Panel. Select "Portfolio Server" from the list and click "Start."

To access a Portfolio Server:

Open the Portfolio 6.0 application. From the File menu choose "Administer Servers..." Select a Server, then click "Administer." From the Administer Services dialog you can add and administer one or more Portfolio Servers.



Administering a Portfolio Server

Portfolio Servers are accessed and administered from the Portfolio 6 application via the Administer Servers command.

Once a Portfolio Server has been made available to the network, the Server Administrator can:

- Create Catalogs to be served
- Serve and Unserve catalogs
- Open and close Portfolio SQL Connect (sold separately) catalogs
- Log off individual users

• Set/change Server Administration passwords

• Add multiple user access by entering special multi-user serial numbers

Refer to other sections of this Portfolio User Guide for assistance in creating, managing, and administering catalogs.

Adding a Portfolio Server

Before you can serve catalogs on your Portfolio Server you must make the server available—that is, tell the Portfolio application where to find the server. You do this through the Server Administration dialog.

To add a Portfolio Server:

1 Launch the Portfolio 6 application.

You do not need to have a catalog open.

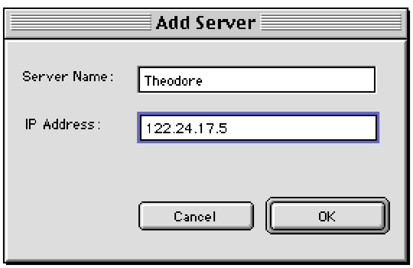
2 Choose File > Administer Servers.

The Administer Servers dialog will be displayed. If no servers have been added, the servers list will be blank.

3 Click Add Server

4 Enter the name and IP address for the Server.

5 Click OK



The Server is added to the list and will be available for users to access. Selecting the Server name on the list will activate the Administer, Remove Server, and Edit Server buttons.

Accessing a Portfolio Server for Administration

When one or more Portfolio Servers have been added (made available), you can administer them by creating and serving Catalogs. To do that, you must first access the Server through the Server Administration dialog.

To access a Portfolio Server:

1 Launch the Portfolio 6.0 application.

The Portfolio Server can be accessed via the Portfolio application from anywhere on the network or internet. With Portfolio 6.0 there is no separate Server Administration software.

2 From the File menu, choose “Administer Servers.”

The Administer Servers dialog is displayed.

If no server names appear on the list, you will have to add them before they can be administered.

3 Select the desired Portfolio Server from the list, then click “Administer...”

You will be asked to enter the Server Administrator password. The first time you access a Portfolio Server as the Administrator, you will be prompted to serialize the Server.

4 Enter the Server Administrator password, then click “OK.”

The first time you access a Portfolio Server as the Administrator the password will be blank. You can enter a password, or just click "OK" and set the password later.

The Server Administration dialog for the selected Portfolio Server will be displayed, and any served catalogs for that Server will be listed.

You can view any users connected to served catalogs by clicking the expansion icon, or by double-clicking the catalog name.

From the Server Administration dialog you can create, serve and unserve catalogs, log off users, set the password for the selected Server, and add the Server serial code.

Creating Catalogs on a Server

From the Administration dialog for the selected server you can create new (empty) catalogs to be served on a Portfolio Server.

To add a Catalog to a Portfolio Server:

1 Open the Server Administration dialog (File > Administer Servers > [select server] > Administer).

2 Click New.

The New Catalog dialog will be displayed.

3 Enter the name of the catalog that you wish to create.

On Windows, and on Mac OS if compatibility with Windows users is required, catalogs must be given an ".fdb" filename extension.

4 Click OK.

The Catalog will be added to the list of Catalogs in the "Catalogs" folder on the Server machine.

— or —

1 Create a Catalog from the Portfolio client.

2 Copy the catalog (via the operating system) to the Portfolio Server's "Catalogs" folder.

You can now serve the catalog to make it available to your users.

Serving and Unserving Catalogs

To serve (open for use) a Catalog on a Portfolio Server:

1 Open the Server Administration dialog (File > Administer Server > [select server] > Administer).

2 Click "Serve..."

A list of available Catalogs on the Portfolio Server will be displayed.

— or —

2 Navigate through folders and volumes accessible to the Portfolio Server to locate the Catalog to be served.

Catalogs do not have to be located in the Catalogs folder to be served.

3 Select the Catalog that you want to serve, then click "Serve."

The Catalog will become available to Portfolio users.

When a catalog is first served it is opened automatically in Administrator mode. To make the catalog available to users, close the catalog or change access mode to a level lower than Administrator (Publisher, Editor, or Reader).

To unserve a Catalog on a Portfolio Server:

1 Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).

2 From the list of served Catalogs, select the Catalog that you wish to unserve (make unavailable).

3 Click Unserve

If users are connected to the Catalog, a warning dialog will be displayed. You can enter a delay time in minutes before the Catalog closes.

Connected users will be notified of the imminent closing so that they can close open windows and connections related to that Catalog.

Notes on Unserved Catalogs

• 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. What this means is that the client machine must have access via the file system to the original file in order to perform functions that require the source file, such as Preview (unless the option "Generate Previews" was enabled when the item was cataloged); Copy; Move; Rename; etc.

• Server Port number: The Portfolio Server operates via port 2903. 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.

Logging Off Users

1 Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).

2 From the list of served Catalogs, locate the Catalog with users that you wish to log off, then click the expansion arrow to view a list of active users on the Catalog.

3 Select the user that you want to log off.

4 Click Log Off User.

That user will be logged off immediately.

To allow users a time frame within which they can log themselves off (by closing their copy of the catalog), use the Unserve command.

Server Administrator Password

To set or change the Portfolio Server Administrator password:

1 Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).

2 Click Set Password

The Set Password dialog will be displayed.

3 Enter and confirm the new Server Administrator password, then click “OK.”

To exit the dialog without affecting the password, click “Cancel.”

Serialization

In Portfolio 6.0, the Portfolio Server is activated with a single Portfolio Server serial code. (Portfolio SQL Connect is activated with a single SQL Serial Code.)

The first time you attempt to administer a Portfolio Server you will be prompted to enter the serial code. You can also access the Serial Codes dialog from the Server Administration dialog (File > Administer Servers > [select server] > Administer > Serialize).

Multi-user serial numbers (licenses) allow users to connect to the Portfolio Server, up to the limit of users for that serial number. The multi-user serial number is entered at each workstation when the Portfolio 6.0 application (client) is installed. The Portfolio Server tracks how many connections are open at one time, and limits access to the catalog to the maximum number of connections for that serial number. To add additional connections, simply contact Extensis Customer Service to purchase additional multi-user serial numbers.

To serialize a Portfolio Server:

1 Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).

2 Click Serialize.

The Serial Codes dialog is displayed.

3 Click Add.

The Add Serial Code dialog is displayed.

4 Enter the Portfolio Server Serial Code (and/or SQL Connect Serial Code), then click OK.

When you click OK you will be returned to the Serial Codes dialog. The newly entered codes will be listed.

5 Click Done to return to the Server Administration dialog.

Removing a Portfolio Server or SQL Connect Serial Code

This feature is helpful if you wish to move a serial number from one server to another, such as when setting up a Portfolio Server in a different location.

Note that the serial can be used on only one Portfolio Server at a time.

To remove the serial number from a Portfolio Server, or to remove SQL Connect:

1 Open the Administration dialog for the server (File > Administer Servers > [select server] > Administer).

2 Click Serialize

The Serial Codes dialog is displayed.

3 Select the Serial Code that you wish to remove, then click Delete.

The serial code will be removed from the list, and those connections will no longer be available on the selected server.

Providing Users with Access to Served Catalogs

Once a catalog is served you will want to give users access to the catalog. The process from a Server Administration standpoint is summarized here.

To access served catalogs:

1 Note the name given to the Portfolio Server(s) that you wish to give access to.

Server names are displayed on the Connect to Servers dialog (File > Connect to Servers) and the Administer Servers dialog (File > Administer Servers).

2 Give this name to your Portfolio users.

3 On the user's machine, launch Portfolio 6.0, then choose File > Connect to Servers

The Connect to Servers dialog will be displayed.

4 Choose Add Server and enter the name and IP address of the Portfolio Server.

The client application will poll the Server and display any catalogs being served.

5 Click OK then click Done.

The user can now open catalogs served on that Server.

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 can access a served catalog in Administrator mode, but all other users must be logged off first. You can log users off from the Server Administration dialog, or users can simply disconnect.

• 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.

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 User Guide.

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