

What's changed in Portfolio 6?

This document is designed to guide users who are familiar with Portfolio 5.x through the various feature enhancements and modifications that have been introduced in Portfolio 6. If you've never used Portfolio 5, we recommend skipping this document and reading the Portfolio 6 User Guide for a complete discussion of all features.

(NOTE: Features completely new to Portfolio are not covered in this document, which focuses only on existing features that have been modified, moved or renamed. For a list of Portfolio's new features, see page 2 of the Portfolio 6 User Guide.)

Menu commands

| IN PORTFOLIO 5 | IN PORTFOLIO 6 |
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| File > Export > HTML | Item > Create Web Pages |
| File > Export > QuickTime Movie | Item > Create QuickTime Movie <i>This feature has been enhanced with new ready-to-use templates, a Preview button to preview the first page of an export in a web browser, and options for copying original files during export and linking these to the web page thumbnails.</i> |
| File > Import > Cumulus Database | <i>Removed — however, you can export Cumulus data as text and then import directly into Portfolio 6 to preserve existing data.</i> |
| File > Recover | Catalog > Recover |
| File > Open Catalog on Startup | Catalog > Open on Startup |
| View > by Cataloged > by Filename, etc... | <i>Replaced by new Sort menu in upper right corner of gallery window.</i> |
| Catalog > Find Placeholder Records | Catalog > Find Other > Placeholder Items |
| Catalog > Find Document Text | Catalog > Find Other > Document Text |
| Catalog > Replace | Item > Edit Field Values <i>Instead of using Find and Replace, you now select a set of records using Find (or any other method) and then replace specific field values using the Edit Field Values command. This allows you to search and replace information in virtually any editable field using the full power of the Portfolio search engine and with a wider choice of replacement "actions" (such as Append, Remove, Delete, Delete All, etc...)</i> |
| Catalog > Update Items | Item > Update Items |
| Catalog > Delete Items | Item > Delete |

| In Portfolio 5 | In Portfolio 6 |
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| Catalog > Properties | Catalog > Catalog Properties |
| Catalog > Cataloging Options | Catalog > Advanced Options <i>The Cataloging Options of Portfolio 5 are now a part of the Advanced Options in Portfolio 6.</i> |
| Catalog > Missing Files | Catalog > Find Other > Missing Originals |
| Catalog > Slideshow | View > Slideshow |
| Catalog > Slideshow Options | View > Slideshow Options |
| Item > Item Properties | Item > Get Info/Properties |
| Item > Edit Original Item > Copy Original Item > Move Original, etc... | Item > Original > Edit Copy Move, etc... <i>All operations performed on an original file (and not just the thumbnail or record) have been moved to the Original submenu.</i> |
| Item > Create Placeholder Record | Catalog > Create Placeholder |
| Item > Zoom In Zoom Out Actual Size Fit to Window Switch to Original Image | <i>These commands are all available within the Preview window itself, either as buttons or from the contextual pop-up menu that appears when you right-click (or Control-click) a preview image.</i> |
| Window > New Gallery | Gallery > New |
| Window > List Galleries | Gallery > List |
| Window > Save Gallery/Save Gallery As | Gallery > Save/Save As |
| Window > Show Sorting | <i>Replaced by new Sort menu in upper right corner of gallery window. The name of the field used to sort the current gallery appears in the menu, in the upper right corner of the gallery window.</i> |

Preferences

| IN PORTFOLIO 5 | IN PORTFOLIO 6 |
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| General panel: Show Options Dialog on Add/Update | Cataloging panel: Do Not Prompt for Cataloging Options <i>Additional options have been added to this preference. You can optionally have Portfolio rename, copy files, and add field values during cataloging, even when the “Do Not Prompt...” checkbox is turned on — or restrict Portfolio from performing these tasks unless the Cataloging Options window is displayed first.</i> |
| General panel: Display Welcome Dialog | Cataloging panel: Show Welcome Dialog at Startup |
| General panel: QuickFind Opens New Gallery | <i>Same option now located in the QuickFind panel of Preferences.</i> |
| General panel: Prompt on Untitled Close | General panel: Prompt to Save Untitled Galleries |

Toolbar

| IN PORTFOLIO 5 | IN PORTFOLIO 6 |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New Open Connect to Server Help | <i>These buttons are no longer on the Toolbar, but the same commands can be accessed from the File and Help menus, and with keyboard shortcuts.</i> |
| QuickFind search field | <i>Still in the Toolbar, but with different functionality. In version 5, the QuickFind field searched only the Keywords field. In Portfolio 6, the QuickFind field searches the Filename, Keywords and Description fields by default, and can be customized to search any other fields as well in the QuickFind Preferences window.</i> |
| Find/Saved Finds | <i>These two buttons have been combined into one. Clicking the Find button opens the Find window. Holding down the mouse button when clicking pops up the Saved Finds menu (if there are saved finds available).</i> |
| Customize View | <i>This button is no longer on the Toolbar. Choose View > Customize or Gallery > Customize View or use the keyboard shortcuts (⌘-D on Mac; Control-D on Windows)</i> |

Add/Update Methods

IN PORTFOLIO 5

Cataloging Options > Modify Method:

Add
Update
Add & Update
Add Unconditionally
Update Unconditionally

IN PORTFOLIO 6

It's no longer necessary for you to choose a modify method such as "Update" or "Update Unconditionally."

When you drag items into a Portfolio 6 catalog, the following logic is automatically used to determine whether the item will be added (as a new item) or updated (as an existing item):

- 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.