

Using the Portfolio Express Palette

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

Some of the ways you can use the Portfolio Express palette include:

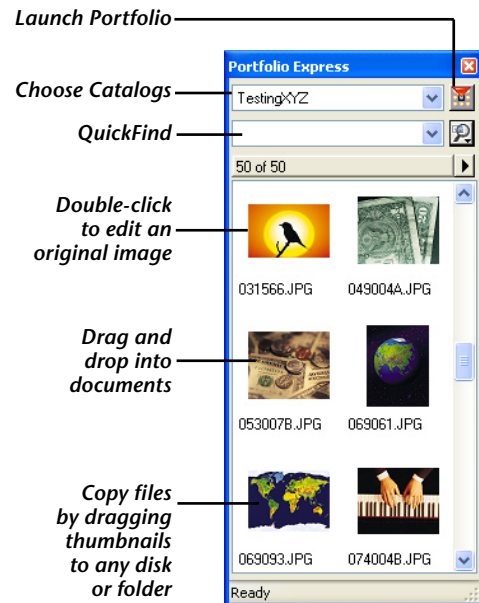
- *Locate images quickly using the palette, then double-click them to open them in Adobe Photoshop, or any other image-editing software you specify.*
- *Open the palette and drag an image into any drag-and-drop sensitive application, such as Microsoft Word or Adobe InDesign.*
- *When writing an email message, grab a file from the palette and drag it on to the message to attach the original file.*
- *Grab logos, clip art, or other images from the palette and drag them straight into a PowerPoint slide or Word document.*
- *Find any image on disk with unprecedented speed by simply pressing the Portfolio Express hot key, selecting the image on the palette and choosing the Reveal in Finder/Reveal in Explorer command.*

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).

The Portfolio Express palette runs entirely in the background, so you won't see an icon appear for it in the Macintosh Dock or the Windows Taskbar.

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.

To launch Portfolio Express for the first time:

Macintosh: To launch Portfolio Express, double click the Portfolio Express icon. On the Macintosh the Portfolio Express is not installed as an auto-start application by default.

Windows: The Portfolio Express palette is installed as a startup application, and should be running in the background. Press the default hot key (Control-Shift-P) to make the palette visible, or double-click the Portfolio Express icon in the System Tray .

If the Portfolio Express application isn't running in the background, choose Start > Programs > Extensis > Portfolio > Portfolio Express.

Configuring Portfolio Express palette as a startup application

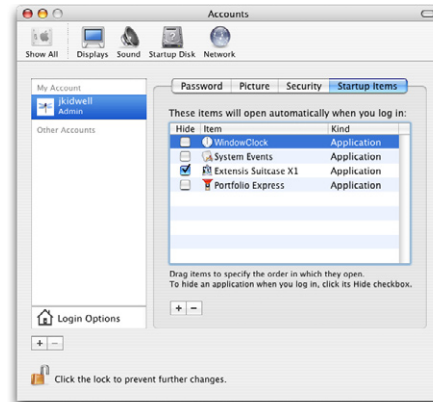
Having Portfolio Express start and run automatically in the background makes it possible for you to access your images the moment you need them by simply pressing the Portfolio Express palette hot key.

On the Macintosh, the Portfolio Express palette is not initially configured to automatically start when you turn on your machine.

Making Portfolio Express auto-start on Macintosh:

1. Open the System Preferences dialog box.
2. Open the Accounts window.

3. On the Startup Items tab, click the "+" button.
4. In the Add dialog box, navigate to the Portfolio directory. Click to highlight the Portfolio Express icon and click **Add**.



The next time you start up your computer, Portfolio Express launches automatically.

Making Portfolio Express auto-start on Windows:

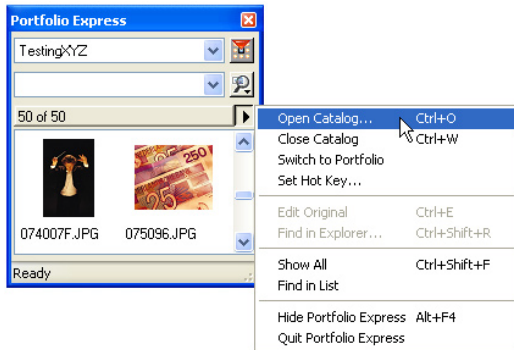
1. In the Windows Explorer, navigate to \\Documents and Settings\\All Users\\Start Menu\\Programs\\Startup.
2. Open a new Explorer Window and navigate to where you installed Portfolio. This is typically:
\\Program Files\\Extensis\\Portfolio\\
3. From the Portfolio folder, Alt-Click and drag the Portfolio Express icon to the Startup menu.

A shortcut is created to Portfolio Express. The next time you restart your computer, Portfolio Express will automatically start.

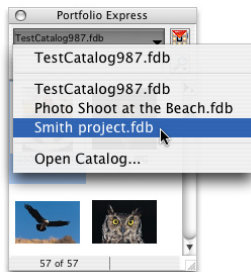
Opening Catalogs with the Portfolio Express palette

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 Open 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. (Open catalogs are always listed at the top of the menu.)



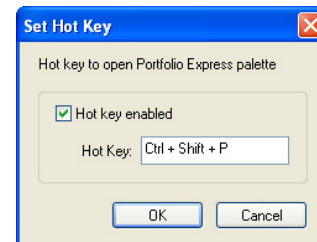
Opening a Portfolio catalog with the Portfolio Express palette is just like opening a catalog with the main Portfolio application. If the catalog is password-protected, you’ll be prompted to enter the appropriate password in order to open the catalog from the palette.

The Portfolio Express Hot Key

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

To set the hot key 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” check box 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 hot key. The hot key both hides and shows the Portfolio Express palette.

Hiding vs. Quitting

In order for the palette to be available via hot key 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 the 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 hot key 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 Windows, right-click the Portfolio Express icon in the System Tray and choose Exit Portfolio Express from the menu.*

Searching for files using Portfolio Express palette

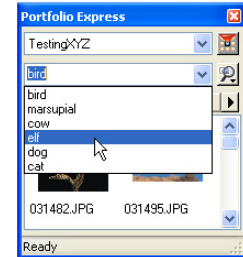
Once you have a catalog opened in the palette, you can search for any item using the QuickFind box located near the top of the palette, just below the catalog drop-down menu.

The QuickFind box in the Portfolio Express palette works exactly like the QuickFind box in the main Portfolio application. 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.

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.

You can also choose a recently used QuickFind search from the drop-down menu and then click the magnifying glass.



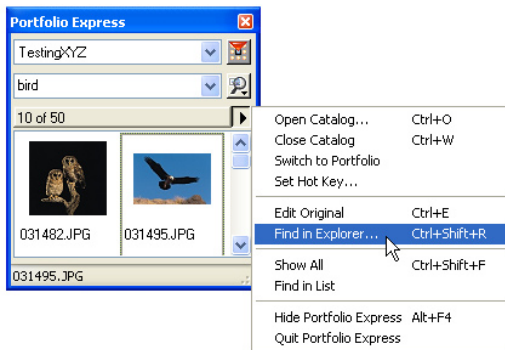
Finding all items from the palette

To display all items in a catalog, click and hold on the "magnifying glass" button to the right of the QuickFind field and choose Show All from the 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 Microsoft Word or Adobe InDesign) to place a copy of the image in that document.*
- *Right-click (Win) or Ctrl-click (Mac) on a thumbnail and choose Find in Explorer (Win) or Reveal Original (Mac) from the menu.*
- *Select a thumbnail and from the fly-out menu choose Find in Explorer (Win) or Reveal in Finder (Mac).*



- *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 email message to send a copy of the original file as an attachment.*
- *On a Macintosh, 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.*



On the Macintosh only, 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 copied into Quark's XTension folder from the Portfolio CD.