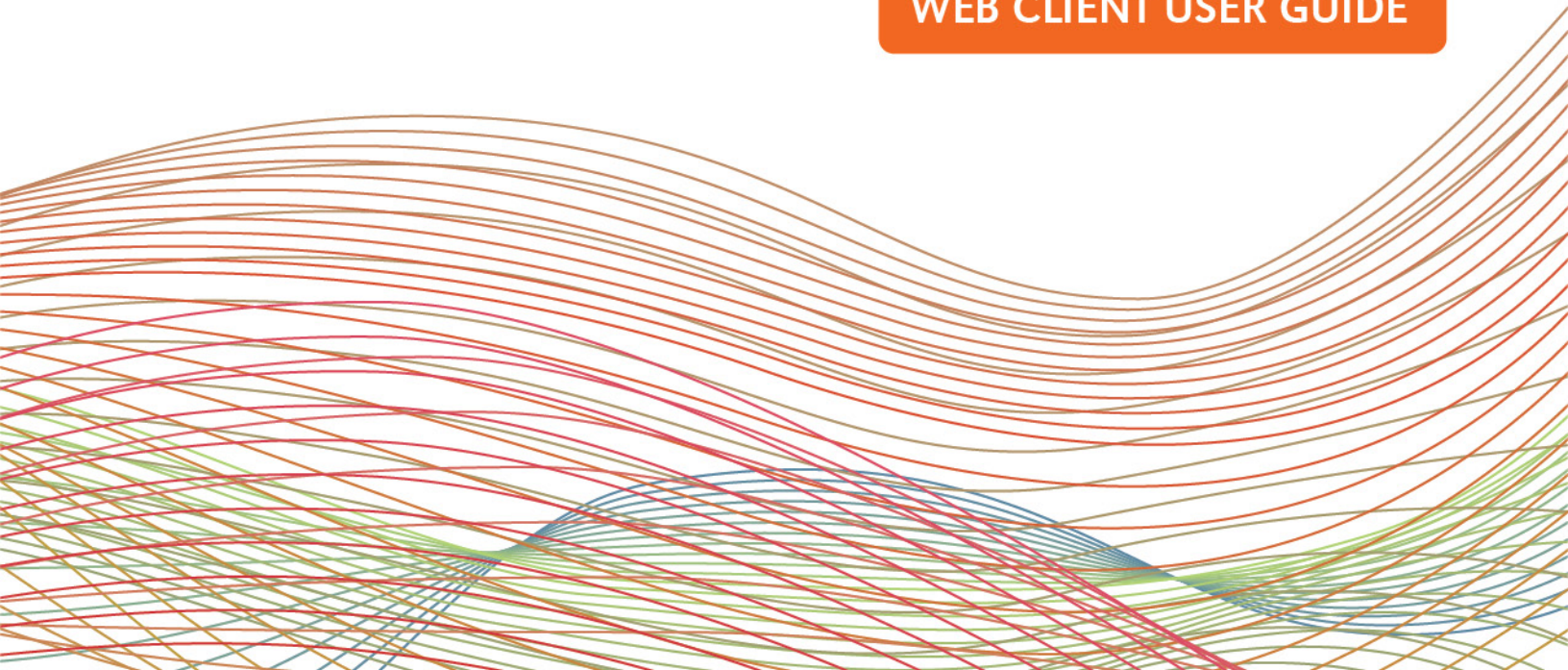


Extensis™

# PORTFOLIO Server™

WEB CLIENT USER GUIDE



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Portfolio Web Client 10.1

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# Welcome to Portfolio Server

Portfolio Server improves your efficiency by providing fast, easy access to the correct files in the right formats. It helps you centralize all your documents, photos, and audio and video files to provide a single location for your organization's important files and related information.

Portfolio Server includes the Server Admin web application, Web Client for browser-based access, and Desktop Client and Express applications for Mac and Windows systems.

- The Server Admin application lets you administer your server, create catalogs and user accounts and manage user access.
- The Portfolio Web and Desktop Clients let users add and organize assets in catalogs, apply metadata, perform searches and download assets in a variety of formats for use in their workflow. The Portfolio Express application provides drag and drop access to assets, across applications.

Each application has extensive, searchable online help. In the browser-based Server Admin and Web Client applications, click **Help** in the top right of the browser window to open the Help system. In the Desktop Client applications, pull down the **Help** menu to open the Help system.

In the Help system, use the panel on the left to browse through the Contents or Index, or search for a specific word. Many pages also have hyperlinks to related topics.

## Portfolio Web Client

The Portfolio Web Client gives a powerful front end for adding assets and editing metadata, searching, and downloading files.

The most common Web Client tasks include:

- **Uploading files**
- **Editing file information:** Add keywords and metadata.
- **Organizing assets using Galleries and Smart Galleries**
- **Organizing files and folders:** Add, move, and rename files and folders.
- **Finding assets**
- **Downloading files**
- **Batch Processing (converting) files**

# What's New in this Release

The Portfolio Web Client is faster, more powerful, and easier to use.

The Web Client provides a web-based connection to catalogs served by Portfolio Server. This makes it easy to deploy to users without requiring the installation of specialized asset management software on desktops. Users of the Portfolio Web Client can automate everyday media-processing tasks, as well as have access to the most popular Portfolio features:

- Rich search and download capabilities
- Upload files to AutoSync folders
- Organize files on disk
- Batch convert files
- Enter and embed metadata

The Portfolio Web Client 10.0 includes these new features:

- **Video and Audio:** More powerful support for video and audio in Portfolio Server is at your fingertips in the Web Client. Play preview clips, add audio and video to slideshows, and download video and audio files to disk. NetMediaMAX users can also convert video and audio files to multiple formats.
- **Batch Find:** Use a list of identifying criteria (such as file names) to quickly find disparate items.
- **Contact Sheet:** You can quickly create a PDF containing 1, 2, 4, 9, or 16 images per page; see **Contact Sheets** on page 38.
- **Filtered Fields:** You can choose the set of fields to display in the Properties pane, and the order they will be listed in. This way, you can focus on the information you use regularly.
- **Field Chooser:** Select the fields that are displayed in the catalog's Main Window.
- **Saved View state:** The settings you specify in Grid and List View are saved when you switch catalogs or exit the Web Client. Your view for each catalog is restored when you log in again, from any computer or browser.
- **AutoSync improvements:** AutoSync is much faster, and gallery, folder, and catalog icons have been modified to better reflect their current AutoSync status. For additional information about AutoSync status, you can double-click an icon in the gallery list. You can also manually start the AutoSync process to catalog files immediately.

Enhancements to the Web Client's file format support and automation capabilities are available with the NetMediaMAX Solution Pack. This add-on allows users to seamlessly leverage distributed server-side media-processing and exploit the full power and scalability of Portfolio Server.

Capabilities offered by Portfolio NetMediaMAX include:

- **Expanded output:** Easily convert to/from additional file formats, like PSD, PDF, PNG, TGA and many more. (Visit the Extensis web site for the latest supported formats.)
- **Faster Media Processing:** Distributes media processing across a cluster of media engines for faster conversions, metadata and cataloging operations.
- **Audio-Video Processing:** Catalog and convert between multiple audio and video formats.
- **Automation:** Unlock advanced media-processing to fully automate complex tasks and produce high-quality output.

# Other recent enhancements

These enhancements were introduced in Portfolio Web Client 9.5:

- **Flagged items:** You can mark assets to work on without first creating a gallery or moving items around.
- **“Last Cataloged” organizer:** Shows all assets cataloged by the current user during the current session.
- **Single-item download:** Single items can be downloaded without the need to compress or decompress.
- **Single-item rename:** Rename a single item by changing its name in the Properties panel, rather than having to create a “batch rename” process.
- **Simpler menus:** Main menu names have been simplified and revisited to use fewer sub-menus.
- **Keyboard shortcuts and shortcut menus:** Common functions now have keyboard shortcuts, and right-clicking on items gives a menu of available options.
- **Login niceties:** The catalog last catalog used is automatically opened and the first page is displayed.
- **Remember settings:** The server saves your settings: gallery view, page size, and which panels to display. When you start a new session, you don’t have to spend time setting up your work space.
- **Preview Mode:** The new Preview Mode allows you to view a single image using as much screen space as possible, pan and zoom images, and download with a single click.
- **Streaming previews:** Users no longer need to have access to the location where preview files are stored; instead, the Portfolio Server will stream the preview to the client, allowing access to high-quality previews without adding to network access and permission worries.

# Getting Started

Portfolio Web Client 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 catalog or perform a search for a needed item using the Portfolio Web Client's powerful search engine.

**Catalog:** Files must be uploaded to the catalog so that Portfolio can find them, preview them and track them. See:

- **Uploading Items to a Catalog** on page 14.

**Customize:** Display items in your catalog the way that you want with galleries and view options. See:

- **Creating a New Gallery** on page 23.
- **Main Window View Options** on page 11.

**Access:** Preview, download and convert files from Portfolio Server. See:

- **Previewing Items** on page 12.
- **Downloading Files** on page 37.
- **Batch Process** on page 37.

**Organize:** Using the Portfolio Web Client you can group, organize and categorize your files by adding keywords, descriptions, and other custom data. See:

- **Keywords and Custom Fields** on page 33.
- **Editing Item Properties** on page 29.

**Find:** Type a word or phrase to locate any catalogued file and access it instantly. Search using a wide array of criteria automatically stored by Portfolio. See:

- **Finding Files** on page 17.
- **QuickFind** on page 17.
- **Using the Find Tool** on page 18.
- **Batch Find** on page 17.

## Installing Portfolio

While the Portfolio Web Client requires no actual installation software, to use the Portfolio Web Client, you must connect with a compatible web browser that has Adobe Flash 10 installed.

For more information about installing Adobe's Flash player see: <http://www.adobe.com/products/flashplayer/>.

In addition, your Portfolio administrator must give you access to catalogs on Portfolio Server. When you are granted membership in a catalog, that catalog becomes available to you through the Portfolio Web Client.

## System Requirements

For the most up-to-date information about the latest release of Portfolio Server, please visit the Extensis website at <http://www.extensis.com/en/support/documentation/?fs=/en/support/documentation/portfolio/>.

# Connecting to Portfolio Server

To connect to Portfolio Server, you must first have the access information from your Portfolio Server Administrator. This includes the following information:

- The Portfolio Server IP Address or server name
- The Portfolio Server's port number
- Your user name
- Your password

To connect to Portfolio Server:

1. Open a supported web browser.
2. In the address field, enter the IP address or server name followed by a colon and the port number. The default port for connecting to Portfolio Server is 8090. For example:  
`http://192.168.0.1:8090`  
`http://servername:8090`
3. Select your preferred language from the drop-down menu.
4. Enter your user name and password and click **Login**.

## **NOTE**

Portfolio Server 10 Professional and Enterprise can be set up so that you can use your network login and password; check with your Portfolio Administrator to see if this has been set up for you.

# The Portfolio Web Client User Interface


The Portfolio Web Client user interface is designed to allow you to quickly upload, find and utilize your files. The major areas of the window are:

- |   |   |
|---|---|
| <b>A Main Toolbar</b>                       | The main toolbar shows the major commands and menus. Some commands are only available with NetMediaMAX, and some commands require a specific access level or custom permission. |
| <b>B View, Sort, and Find options</b>       | These tools allow you to choose how items are displayed, and to find items in your catalog.   |
| <b>C Item Proxies and the Field Chooser</b> | Item Proxies allow you to work with specific subsets of items in the Main Window; the Field Chooser lets you choose what item information to display in the Main Window.        |
| <b>D Organizer pane</b>                     | The Organizer pane shows catalogs, folders, and galleries: groupings that you impose on your digital assets to keep them organized.   |
| <b>E Main Window pane</b>                   | Shows a subset of items in your catalog, either in a list, a grid of thumbnail images, or previewed one at a time.  |
| <b>F Item Properties pane</b>               | Displays file system and metadata information for one or more items in the Main Window.   |
| <b>G Navigation Toolbar</b>                 | The Navigation tools allow you to specify how many items are shown at a time, and to navigate through pages of items.   |

## **A. Main Toolbar**

The main toolbar is displayed across the top of the Portfolio Web Client interface. This toolbar contains commonly required functions for use with catalogs, such as uploading and downloading files.

## B. View, Sort, and Find

The Main Window of the Portfolio Web Client can display items in three different view modes:  Grid, List, and Preview. Depending on your workflow, each view mode has its advantages.

You can sort the Main Window's contents on any item data field, in either ascending or descending order.

Use QuickFind to instantly search common item data fields, or switch to Advanced Find to search for items using a number of criteria.

## C. Item Proxies and the Field Chooser


Item proxies allow you to copy or move a pre-defined subset of displayed items: all items on all pages, all items on the current page, or the selected items on the current page.

The Field Chooser allows you to choose item data fields to display with each item in the Main Window.

## D. Organizer pane

The Organizer pane at the left side of the window shows all catalogs that are available to you, and the galleries and folders within each catalog.

To view the galleries and folders of a catalog, click the triangle to the left of the catalog name. Click a catalog, gallery, or folder to display the items it contains in the Main Window pane.

The Organizer pane can be hidden and displayed using the double arrow icon  at the left side of the Toolbar.

## E. Main Window pane

The Main Window displays item thumbnails and data within your catalog. When you select a catalog, gallery or folder in the Organizer pane, the Main Window pane displays items within your selection.

With the main toolbar at the top, and the navigation toolbar at the bottom, you refine how items are displayed within the Main Window. For example, you can control:

- How many items are displayed per page.
- The sort order of items on the page.
- Whether to display a grid or list view of your items.
- The size of the thumbnail image in grid view.


The Main Window also displays the results of any QuickFind or other search of the catalog.

## F. Item Properties pane

The Item Properties pane displays file system and metadata information for items selected in the Main Window pane. Many of the fields displayed in the Item Properties pane can be edited directly.

When you select a single item, all of that item's catalog information and metadata is displayed in the Item Properties pane. Any metadata that is edited is applied only to the selected item.

When you select multiple items, the Item Properties pane displays the fields that are common to all selected items. Any metadata edits are applied to all items in the selection.

You can hide the Item Properties pane using the double arrow icon  at the right side of the Toolbar.

## G. Navigation Toolbar

The navigation toolbar at the bottom of the window allows you to further control how many items are displayed in the Main Window, the size of the thumbnails displayed, the ability to add and remove galleries and much more.

## Shortcut Menus

When you have selected items in the Main Window or an organizer in the Organizer pane, you can access common functions from a shortcut menu. Select the items, then right-click the mouse on one of the selected items to reveal a menu of functions you can perform on the selected element.

## Main Window View Options

### Grid view

Grid view displays a thumbnail of each item and the item's file name. Change the size of the thumbnail using the slider in the bottom toolbar. Thumbnails can be 112 x 112, 256 x 256, or a file preview.

### List view

List view displays a scrollable list of files with a small thumbnail, flag status, and the file's path, name, and modification date.

### Preview mode

Preview mode allows you to view large previews of the files you select in Grid or List modes. You can zoom in and out, download the file, view file metadata, preview other files from the selection, or play a slide show of the selected files.

You can enter Preview mode by clicking the Preview Mode icon or by double-clicking an item (or one of a group of selected items) in either Grid or List view.

## View Fields

You can choose the properties that you want to display for each item in Grid and List views from the **View Fields** drop-down menu. The fields shown on the menu are those currently displayed in the **Item Properties** pane.

To change what is displayed in the **Item Properties** pane, see *Choosing Properties to View* on page 28.

### Refresh


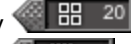

To update the current view, click the Refresh button in the toolbar at the top of the Main Window.

## Selecting items

In Grid and List views, select a single item by clicking it once. You can select a range of items by clicking the first, holding down the Shift key, then clicking the last item in the range. You can select scattered items by holding down the Command key (Mac) or Control key (Windows) and clicking each item.

## Using item proxies

You can use item proxies for copying a subset of items in the Main Window to a folder or gallery.

- Drag the Found Items proxy  to copy all the items on all pages in the Main Window.
- Drag the Displayed Items proxy  to copy all the items on the current page in the Main Window.
- Drag the Selected Items proxy  to copy only the selected items on the current page.

When you drag a proxy, the left end will include a green dot to indicate that you can copy the items to the container your mouse pointer is over, or a red X to indicate that you can't copy them here.

The number on the proxy graphic indicates how many assets are represented by the proxy.

## Previews

Previews are automatically generated as needed. The maximum preview image size or audio/video clip duration can be specified for each catalog by the Portfolio Administrator in the Portfolio Server Admin application.

Some file types do not support thumbnail or preview images; for these types of files, the file icon is shown instead.

## Navigation buttons

At the bottom of the Main Window, the navigation buttons allow you to control the number of items displayed per page in the Main Window, as well move between pages.



The **Items per page** drop-down menu allows you to change the number of items displayed on each “page” of Grid view or List view: 20, 50 or 100 items per page.

The paging controls allow you to switch between multiple pages in the Main Window: First page, Back one page, Forward one page and Last page. Additionally, you can enter a specific page number to jump directly to that page.

## Previewing Items


Portfolio Web Client can display a full size preview of the item in the Main Window from either Grid or List view.

In Grid view, you can display large previews by dragging the size slider to the far right.



All the normal options of the Grid view are available.

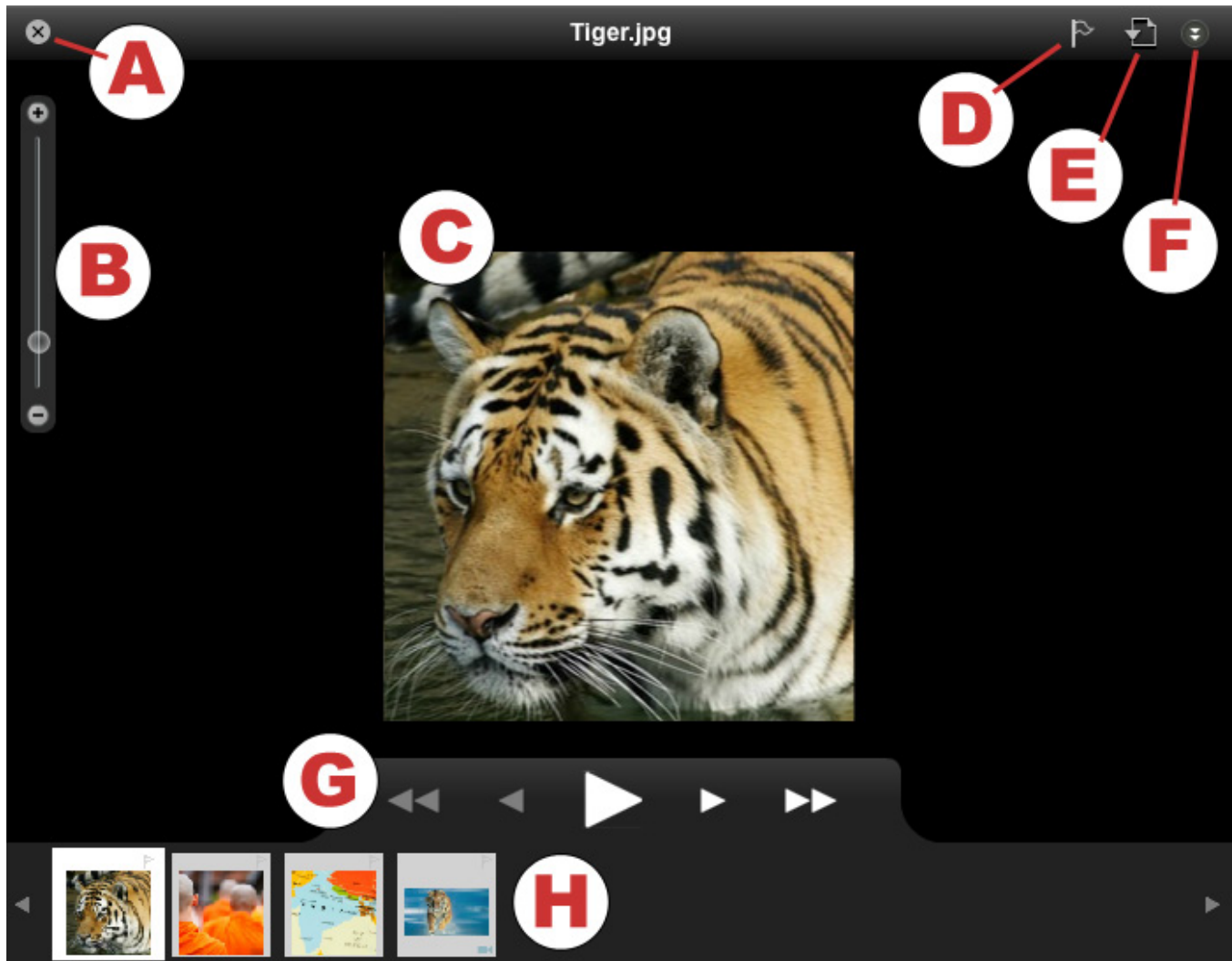
In Grid or List view, you can select one or more items and view them in Preview mode. To view items in Preview mode:

- Double-click an item;
- Select several items and double-click one of them;
- Select items and click the Preview mode icon. 

You can preview all items in a folder or gallery by clicking on the organizer, then clicking the Preview mode icon.

## Preview mode controls

When you enter Preview mode, the Main Window shows just the large image preview. Move your mouse to temporarily reveal the Preview controls; they will fade out when you stop moving the mouse. You can use the mouse or keyboard shortcuts to access these features.



- A Close** Exits Preview mode and returns to your previous view.  
Shortcut: Esc
- B Zoom** Zooms the image preview in or out. (You can't zoom a video or audio preview clip.) When zoomed, you can click in the image and drag to pan the image.  
Shortcuts: + (zoom in), - (zoom out), 0 (100% or fill the window)
- C image** The asset preview: an image or playable media clip.
- D Flag** Flags the picture for inclusion in the Flagged Items gallery.  
Shortcut: B
- E Download** Download the file to your workstation.
- F Details** Show/Hide image details.
- G Navigator** Navigate through images in the filmstrip, or start/stop a slideshow of the images.  
Shortcuts: Home (first image), Left arrow (previous), Spacebar (play/pause slideshow), Right arrow (next), End (last image)
- H Filmstrip** Shows thumbnails of the images available in Preview mode. Click an image to preview it.

# Cataloging Files

There are a number of ways to add items to a catalog.

- You can upload items to the Portfolio Server directly from the Portfolio Web Client. This requires an AutoSync folder, which can be created by your Portfolio Administrator when the catalog is created or later using the Portfolio Desktop Client.
- You can add files to a “watch folder” on your computer. The Portfolio Server needs to have access to this folder.
- You can catalog files using the Portfolio Desktop Client.

## Uploading Items to a Catalog

You must have permission to upload files to Portfolio Server using the Web Client. When you upload an item with the Web Client, the file is uploaded to the selected folder and catalogued by Portfolio Server.

### To upload items with the Portfolio Web client:

1. Start your web browser and connect to Portfolio Server using the Web Client. See **Connecting to Portfolio Server** on page 9 for details.
2. In the **Organizer** pane, select a catalog to upload files. To upload files to the catalog, you must have the appropriate access level.
3. Click the triangle to the left of the catalog name to display the folders in the catalog.
4. Select the folder where you would like to upload files.
5. Click **Upload** on the toolbar.
6. Browse to the file or files to upload.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file. To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
7. Click **Select** (Mac) or **Open** (Windows) to upload the selected files. File upload status is displayed at the bottom of the Main Window in the Navigation toolbar. For a more detailed report of file upload status, see **Jobs** on page 41.

### NOTE


While uploading audio or video files, Portfolio Server will create a preview clip. The preview may not be available immediately; when a clip is available to play, the file’s icon will show a small “play” indicator. You can double-click the file to open it in Preview Mode and play the preview clip.

## Deleting Items from a Catalog

There are three ways to delete items while in a catalog, and it is important to recognize the distinction between each of them. These include:

- Deleting original files from disk
- Deleting items from a Catalog
- Deleting items from a Gallery

The key difference in each of these options is the source of the item selection within a catalog, gallery or folder.

 The **Delete** button is located at the bottom left of the Main Window, and only appears when an item is selected in the Main Window.

### Deleting using the shortcut menu

Besides using the **Delete** button, you can right-click on a selected item, gallery, catalog, or folder and choose **Delete Selection** (for items) or **Delete Contents** (for a container). **Delete Contents** will remove the items from a container but leave the container in place.

## Deleting original files from disk

When you delete an original file from disk, all catalog references to the file are removed. Exercise care when using this option to ensure that files are not accidentally deleted.

### To delete original files from disk:

1. In the Organizer pane, select a catalog.
2. Select the folder that contains the file.
3. In the Main Window, select the file that you want to delete the original from disk.
4. Click the **Delete** button [ — ] in the lower left corner of the Main Window.
5. Click **Delete from Disk**.

## Deleting items from a catalog

Deleting items from a catalog only removes the entry from the catalog, and does not affect the original file.

### **NOTE**

If you delete a file entry from a catalog, and the file exists in an AutoSync folder or other watched folder, it will be re-added to the catalog by Portfolio Server. To avoid this, you should move the file to an unwatched folder, then delete it from the catalog.

### To delete an item from a catalog:

1. In the Organizer pane, select a catalog.
2. Select the folder or gallery that contains the file.
3. In the Main Window, select the file that you want to delete from the catalog.
4. Click the **Delete** button [ — ] in the lower left corner of the Main Window.
5. Click **Delete from Catalog**.

## Deleting items from a Gallery

Deleting items from a gallery does not remove the items from the catalog, as with deleting items from a catalog, is not destructive to the original file. The record of the file is deleted.

### To delete an item from a gallery:

1. In the Organizer pane, select a catalog.
2. Select the gallery that contains the file.
3. In the Main Window, select the file that you want to delete from the gallery.
4. Click the **Delete** button [ — ] in the lower left corner of the Main Window.
5. Click **Delete from Gallery**.

## Access Levels

There are four built-in access levels that determine the functionality that is available to each user in a catalog. Access levels are assigned by the Portfolio Administrator.

For example, you may have the Publisher access level for one catalog, but only a Reader access level for another. Check with your Portfolio Administrator for your access level details.

**NOTE:** If you are a member of a catalog, you can access that catalog using either the Web Client or Desktop Client.


**Catalog Administrator:** This is the highest access level and allows access to all functionality available. Catalog Administrator access should not be confused with the Portfolio Server Administrator who has access to all server settings. Catalog Administrators have access to advanced operations in the Portfolio Desktop Client, like editing custom fields, metadata mappings and AutoSync folder settings.

**Publisher:** If you have the Publisher level access, you are able to upload and delete items from a catalog as well as update all metadata for files in a the catalog. Publishers can also create galleries.

**Editor:** Users with Editor level access are able to modify metadata, such as entering keywords and custom field values.

**Reader:** If you have Reader level access, you may only view items in the catalog. You cannot add, remove or edit metadata for items in the catalog.

Your Portfolio Administrator may also give you specific access to other features of the Portfolio Web Client. These include the ability to:

- **Access Files and Customize Convert Settings:** This gives you access to a file conversion dialog where you can specify the file format and other settings when downloading originals.
- **Download Originals:** Allows you to download original files from catalogs using the Portfolio Web Client.
- **Embed Metadata:** Allows you to edit metadata that can be embedded in a file. Embeddable metadata is indicated with the  icon.
- **Manage Convert Presets:** When enabled, you are able to save any custom settings from the file conversion dialog as presets for future use. Presets can be accessed by any user with this permission.
- **Manage Public Galleries:** When this setting is enabled, you can create, update, and delete public galleries.
- **Run Media Scripts:** Available to users of NetMediaMAX, this allows you to run a script for servers enabled with this feature.

# Finding Files

There are two ways to search for files with the Portfolio Web client.

QuickFind allows you to quickly search your catalog for files. QuickFind only searches a few common catalog fields, and will give you search results very quickly.

Advanced Find gives you options for performing a search using up to five criteria, or for searching a single field for multiple values.

The multiple-criteria Find can be customized to search your catalog for any type of data tracked by Portfolio Server. You can refine your search with the Find dialog, then update the displayed results.

Batch Find lets you search a single field for a list of values. You can easily find a group of items that have unique identifiers (such as file names or part numbers).

## QuickFind


The easiest and most accessible search tool in the Portfolio Web Client is QuickFind. Located in the Toolbar at the top of the Main Window, QuickFind searches on three fields: Filename, Description, and Keywords.



QuickFind only searches what is selected in the Organizer pane. Selecting a catalog searches the entire catalog, but selecting a gallery only searches the items in that specific gallery.

To perform a QuickFind search:

1. In the Organizer pane, select a catalog, folder, or gallery.
2. Type a word or phrase in the QuickFind box and press **ENTER**.
3. Matching items are displayed in the Main Window.

To clear the Main Window of the QuickFind search results, click the Clear Results button  at the right end of the QuickFind field.

## Batch Find

Batch Find takes a list of values and finds the Portfolio assets that match those values in a single field.

### Example:

You have a list of parts, and your Portfolio catalog includes a custom field for Part Number. With a list of part numbers from the parts list, you can quickly find all the assets in your Portfolio catalog that match those part numbers.

Batch Find is available for Text and Number fields (including fields that can contain multiple values, such as Keywords).

## Using Batch Find

To perform a Batch Find:

1. Click the triangle to the left of the **QuickFind** field to open the Advanced Find window.
2. Click the **Batch Find** tab.
3. Choose the field you want to search from the drop-down menu.
4. Enter your search criteria, one item per line, in the field next to the drop-down menu.  
**TIP:** You can paste text that has one search item per line into this field.
5. Click the **Search** button.

The Web Client will display the items that match your search criteria. If some items in your list were not found, these will be reported as an error.

A single entry in your list may match more than one Portfolio record. In the example above, your Portfolio catalog may have multiple photos of some parts; searching for such a part number would return all the photos related to that part.


## What Next?

What do you need to do with the results of your search? You will probably want to work with them as a group, so it is a good idea to add them to a gallery, either an existing gallery that you need these records in, or a new gallery devoted to them. (You can also add them to the Flagged Items gallery.)

By adding the search results to a gallery, you avoid the risk of clearing the results list, and can use the QuickFind or Advanced Find features to locate other items in your catalog.

See **Creating a New Gallery** on page 23 for information on creating a gallery.

See **The Flagged Items Gallery** on page 26 for information on the Flagged Items gallery.

To add all the found records to a gallery, you can drag the Found Items proxy  to the desired gallery.

See **Using item proxies** on page 11 for more information about item proxies.

You can also use the Batch Process command, edit item metadata, and perform any other actions you would normally do with catalog items.

## Using the Find Tool

Find can be used to locate files by searching data in any field in the catalog. The Find tool is considerably more flexible and powerful than the QuickFind tool. Where QuickFind searches on three parameters for files, the Find tool searches on up to five parameters.




- |                          |  |                                |   |
|--------------------------|--|--------------------------------|---|
| <b>A</b> Sort field      | Select the field to sort the main window view.           | <b>H</b> Search term           | The value to be matched against.  |
| <b>B</b> Sort order      | Click to sort the view in ascending or descending order. | <b>I</b> Search term           | Enter a value to match in the search field.   |
| <b>C</b> Show/Hide       | Click to show or hide the Find controls                  | <b>J</b> Remove criterion      | Click to remove the search criterion  |
| <b>D</b> QuickFind field |  | <b>K</b> Add criterion         | Click to add another search criterion   |
| <b>E</b> Find tab        | Shows the Find options.                                  | <b>L</b> Boolean               | Determines how criteria are used in searches: <b>and</b> means both must match, <b>or</b> means either must match |
| <b>F</b> Batch Find tab  | Shows the Batch Find options.                            | <b>M</b> Save as Smart Gallery | Click to create a Smart Gallery based on these search criteria  |
| <b>G</b> Search field    | Choose a field to search on.                             | <b>N</b> Search button         | Click to start the search with the specified criteria.  |

Find tool results can also be converted into Find Criteria for Smart Galleries on the fly. For more information on Smart Galleries, see **Galleries** on page 22.

The Find tool only searches the item selected in the Organizer pane.

**To search for items with the Find Tool:**

1. In the Organizer pane, select a catalog, folder or gallery.
2. Click the Find Tool icon  at the left end of the QuickFind field.
3. Select a field to search from the drop-down menu.
4. Select a search operator from the second drop-down menu.
5. Enter a search term into the text box. Depending upon the field type and search operator selected, a search term may not be required. For example, if you search using the `exists` search operator, a search term is not required since you only want to locate files that have data in the selected field.
6. If more detailed search parameters are required, click the Add button **[ + ]** to right of the first parameter to open an additional parameter. Repeat the above steps to add additional search parameters, up to a maximum of five parameters.
7. When you are ready to start your search, click the **Search** button or press the **ENTER** key.

If you tend to search your catalog using these search parameters frequently, click **Save as Smart Gallery** to save your search criteria. Every time you open a smart gallery, Portfolio automatically searches the catalog for files based on these search parameters.

# Find Criteria Options

Field Name	Finds this
Camera Make	Custom text field that can contain the camera make that created the image
Camera Model	Custom text field that can contain the model of camera that created the image
Cataloged	The date and time that the item was first cataloged in Portfolio
Cataloged By	The user name of the person who cataloged the item in Portfolio
Changed	The date and time that the item was recently changed
Changed By	The user name of the person who most recently changed the item
Color Mode	Color modes: Unknown, Black & White, Grayscale, RGB, CMYK, YUV, Lab, and YCCK
Copyright	Custom text field that can contain copyright information
Copyright Status	Custom text field that can contain copyright status information
Created	The date the original file was created
Creator Mac	The four-character file creator code for the item (empty if cataloged on Windows)
Description	The item's file description
Description Writer	Custom text field that can contain the User ID of who wrote the description
Directory Path	The full directory path for an item, not including the filename
Document Title	Custom text field that can contain a document title
Extension	The item's three-character file extension
File Size	The item's file size
Filename	The item's name
File Type Mac	The four-character file type code for the item (empty if cataloged on Windows)
Height	The item's height, in pixels (empty if thumbnails were extracted)
Horizontal Resolution	The item's horizontal resolution, in dpi
Keywords	Any keywords assigned to the item(s)
Modified	The date the original file was most recently modified
Number of Pages	Items matching a particular page count
Path	The file path (location) for the item., including the filename
Routed To	Custom text field that can contain the UserID of the person the item is routed to
Short Filename Win	16-bit DOS path and filename
Thumbnail Size	The item's thumbnail size, in pixels: 32 (icon), 64, 112, 256.
Vertical Resolution	The item's vertical resolution, in dpi
Volume	The physical drive or disk on which the item resides
Watermark URL	Items with the indicated watermark URL
Watermarked	Items with the indicated watermark
Website	Custom URL field that can contain a web address
Width	The item's width, in pixels (empty if thumbnails were extracted)
Zone Mac	AppleTalk Zone where item's file is located (empty if cataloged on Windows)
EXIF, IPTC or XMP fields	Specialized custom fields for this metadata
Movie fields	Specific movie-related properties
MS Fields	Metadata from Microsoft Office documents


Your catalogs may include custom fields. Your Find operations can include searching custom fields.

# Clearing Search Results


After searching, there are different ways to clear the search results, whether you used QuickFind or the Find feature.

By default, clearing the search results displays the first page of available items in the catalog, gallery or folder that is currently selected in the Organizer pane.

## To clear QuickFind results from the Main Window:

- Select an alternate entry in the **Organizer** pane.
- Click Clear Results  in the right end of the QuickFind field.

## To clear Advanced Find results from the Main Window:

- Select an alternate entry in the **Organizer** pane.
- Click Hide Find Tools  at the left end of the QuickFind field.

# Galleries

A gallery can display all of the items in your catalog, or a subset of them.

A gallery is a good way to organize and view only certain files within your catalog. For example, a photographer may create a catalog of his entire body of work, but have one gallery that displays only portrait photos, and another gallery that contains landscape photos.

## Public, private and read-only settings

By default, galleries are private: only the user that creates a gallery can access or modify it. Galleries also be designated *public* and made available to all users of a catalog. If you choose to make your gallery public, you can restrict changes to that gallery by making it *read-only* to other users.

To find out how to change the gallery access level, see ***Making a Gallery Public or Private*** on page 26.

## Smart galleries


When you open a smart gallery, Portfolio automatically searches the Portfolio catalog and selects the appropriate files to display. Smart galleries can be configured to search and select files for any metadata stored in your catalog. For more information about creating and using smart galleries, see ***Creating a Smart Gallery*** on page 25.

## Specialty Galleries

Each Portfolio catalog includes a **Flagged Items** gallery. This gallery shows the items in a catalog that you have flagged during your current browser session. For more information, see ***The Flagged Items Gallery*** on page 26.

The **Last Cataloged** gallery shows all the items that you have added to the current catalog.

## Gallery icon reference


 Private Gallery


 Public Gallery

 Public, Read-only Gallery

 Private Smart Gallery

 Public Smart Gallery

 Public, Read-only Smart Gallery

 Flagged Items Gallery

# Creating a New Gallery

To create a new gallery in a catalog, follow the steps below.

1. Select a catalog in the Organizer pane.
2. Click the **Add** button [ + ] at the bottom left of the Organizer pane and choose **New Gallery** from the menu.
3. Enter a gallery name into the text box.
4. Select privacy settings for the gallery:
  - **Public** galleries are available to all members of the catalog.
  - **Private** galleries are only available to you.
  - The **Read Only** option restricts the ability for other users to change your public gallery. You are still able to modify the contents of the gallery.
5. Click **Save**. The new gallery is displayed in the Organizer pane.

# Adding Items to a Gallery

You can add items to galleries for which you have the appropriate permission and access level to modify. See your Portfolio Administrator for access level details.


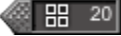

## **NOTE**

You cannot add items to a Read-Only gallery that you do not own.

### **To add items to a gallery:**

1. From the Organizer pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. Drag item thumbnails from the Main Window onto the gallery icon in the Organizer pane.

You can also add items to a gallery by dragging an item proxy to the gallery. Drag the Found Items proxy

 to add all items on all pages in the Main Window, drag the Displayed Items proxy  to add all items on the current page, or drag the Selected Items proxy  to add the selected items on the current page.

# Deleting Items from a Gallery

When you delete items from a gallery, they are removed only from the current gallery, not from the catalog. If you have created a gallery of a set of images and find 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.

## NOTE

You must have appropriate permissions to delete items from a gallery. See your Portfolio Administrator for access level details.

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


1. From the **Organizer** pane, select the gallery. (If you are not the gallery's owner, then make sure that the gallery is not marked Read Only.)
2. In the Main Window, select one or more items to remove from the gallery.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file. To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. Click the Delete button [ **–** ] at the lower left corner of the Main Window.
4. Click **Delete from Gallery** to remove the items from the gallery but leave them in the catalog, or **Delete from Disk** to remove them from the gallery, the catalog, and to permanently delete the items from disk.

## NOTE

Items cannot be removed from a Smart Gallery, except by choosing **Delete from Disk**. This is because Smart Galleries display search results. Each time you open a smart gallery, the results can be different because item metadata may have changed in your catalog.

# Sorting a Gallery

- To sort files in a gallery, choose a sort field from the **Sort By** drop-down menu in the toolbar.  
By default the fields available in the drop-down menu are limited to a basic set of fields: **Directory Path**, **File Size**, **Filename**, **Item ID**, and **Modified**.
- To show all available fields in the drop-down menu, choose **Show All** from the **Sort By** menu.
- To restore the basic set of fields, choose **Show Only Basic Sort Fields** from the **Sort By** menu. (This is the last item in the list.)

You can change the sort order by clicking the Ascending/Descending icon  to the right of the **Sort By** menu.

# Deleting a Gallery

When you no longer need a gallery, you can delete it from the catalog.

## **NOTE**

You must have a Publisher access level or higher to delete a gallery from the catalog. See your Portfolio Administrator for access level details.

To delete a gallery:

1. In the Organizer pane, select the gallery.
2. At the bottom right of the Organizer pane, click the **Delete** button [ **–** ].
3. Click **OK** to confirm.

# Renaming a Gallery

To rename a gallery:

1. In the **Organizer** pane, double-click the gallery name.
2. Enter a new name in the dialog and click **OK**.

# Creating a Smart Gallery

Smart Galleries are display the results of a the Find Tool in a gallery. Smart Galleries are similar to Smart Playlists in iTunes and are handy if you frequently search your catalog using the same parameters.

As new items are added to the catalog that fit your search parameters, they are automatically added to the Smart Gallery.

## **NOTE**

Depending upon your access level, you may not be able to create a new gallery. See your Portfolio Administrator for access level details.

To create a new Smart Gallery:

1. In the **Organizer** pane, select a catalog.
2. At the lower left of the **Organizer** pane, click the Add button [ **+** ] and choose **New Smart Gallery** from the menu. This displays the Find tool.
3. Enter search parameters. For more information, see *Using the Find Tool* on page 18.
4. Click **Save as Smart Gallery**.
5. Enter a Smart Gallery name in the text box.
6. Select privacy settings for the smart gallery:
  - **Public** smart galleries are available to all members of the catalog.
  - **Private** smart galleries are only available to you.
  - The **Read Only** option restricts the ability for other users to change your public smart gallery search settings.
7. Click **save**. The new smart gallery is displayed in the **Organizer** pane.

# Making a Gallery Public or Private

When many people have access to a single catalog, it can be beneficial to create galleries in a catalog to which a single user has access. With the Public and Private gallery feature in Portfolio, you can protect a gallery so that only you can see it, or even choose to make a gallery private but read-only so that only you can make changes.

## NOTE

You must have appropriate permissions to be able to create galleries.

When you create a gallery, you can choose to make it public or private. You can choose to make a public gallery Read Only so that other catalog members can view but not change your gallery.

To change the privacy settings of a gallery:

1. In the **Organizer** pane, double-click the name of the gallery.
2. Select privacy settings for the gallery:
  - **Public** galleries are available to all members of the catalog.
  - **Private** galleries are only available to you.
  - The **Read Only** option restricts the ability for other users to change your public gallery. You are still able to modify the contents of the gallery.
3. Click **Save**.

# The Flagged Items Gallery

The Flagged Items gallery is a special gallery that shows the items you have flagged during your current browser session. (This means that, if you log out from Portfolio then log back in without quitting your browser session, the flagged items will be retained.)




You can flag items in a variety of ways:

- Click the flag icon at the top right of the item thumbnail in Grid View
- Click the checkbox in the Flagged column for an item in List View
- Click the flag icon on a thumbnail in the filmstrip in Preview Mode
- Click the flag icon on an image in Preview mode
- Drag an Item Proxy to the Flagged Items gallery

You can work with items in the Flagged Items gallery just as you would any other gallery, keeping in mind that once you exit the Web Client and quit your browser, the flags will be cleared from those items.

The Flagged Items gallery is unique for each user in each catalog; if you and a coworker are logged in to the same catalog, you can each flag whatever items you desire without affecting the other user's Flagged Items.

## Flagging with an Item Proxy

The fastest way to flag a group of items is to drag an item proxy to the Flagged Items gallery. Drag the Found Items proxy  to flag all items in the current view, drag the Displayed Items proxy  to flag all the items on the current page, or select items on the page and drag the Selected Items proxy  to flag all the selected items.

See *Using item proxies* on page 11 for more information about item proxies.


# Managing Files with the Portfolio Web Client

The Portfolio Web Client can be used to move files from one folder location to another on disk, download files, convert files to another type and much more.

## Viewing Item Properties

Portfolio stores very detailed information about every file that you catalog. This information includes data that is collected during the cataloging process, such as each file's creation date, file size, image dimensions, file type, and so on. It also includes metadata information that you may add to a Portfolio item, such as a description, keywords, or other data that you may add using custom fields. All of this information is available in the **Item Properties** pane.

In the Portfolio Web Client, all data entry tasks such as populating keywords or metadata fields are accomplished in the **Item Properties** pane.

If the **Item Properties** pane is not visible, click the  button to show it.

### To view an item's properties:

1. From the Organizer pane, select a catalog, folder or gallery.
2. Select an item thumbnail in the Main Window. That item's properties are displayed in the Item Properties pane.

## Applying or Removing a Custom Preview

You may choose to replace an item's preview image with something different. For example, a PDF document's thumbnail and preview are generated from the first page in the document, but you may wish to provide a different image.

To apply a different image as a preview, select the catalog item, then right-click the item and choose **Apply Custom Preview** from the shortcut menu. You can then choose a supported image file for the new preview image.


To regenerate the original preview image, select the item, right-click it and choose **Regenerate Thumbnail**.

# Choosing Properties to View

The **Item Properties** pane displays all of the properties for a selected item. Often, you will find that you regularly use certain properties, and rarely or never use others.

You can determine which properties are displayed and the order they are displayed in by specifying the list of Filtered Fields.

## To filter the list of fields in the Item Properties pane:

1. Open the **Item Properties** pane if it isn't already displayed.  
Click the  icon at the top right, under **Logout**.
2. Choose **Edit Filtered Fields** from the drop-down menu at the top of the **Item Properties** pane.
3. Drag field names from the list of **All Fields** on the left into the list of **Filtered Fields** on the right.  
To remove a field name from the list of **Filtered Fields**, drag it off the list.  
You can reorder the list of **Filtered Fields** by dragging the field names up or down in the list.
4. Click **ok** to save the list of **Filtered Fields**.

You can switch between displaying All Fields and Filtered Fields using the drop-down menu at the top of the **Item Properties** pane.

### **NOTE**

The set of fields that is displayed in the **Item Properties** pane determines the set of fields available to be shown in Grid View and List View.

# Understanding Field Types

Information is stored in Portfolio catalogs in multiple fields. Field types vary depending upon the type of data that they can store. It's important to understand the different field types so that you can better add and edit item properties with the Portfolio Web Client.

## Date/Time

A Date/Time field allows you to enter date and/or time values into your items. The Catalog Administrator can elect to have Time values not displayed. Date/Time fields can include multiple values, and can be configured as a predefined list.

### **NOTE**

Times are always assumed when searching on Date/Time fields. That is, if a time value has been entered into the field (either by extraction from the source file when the item was cataloged, or by entering a time in the field) and then hidden by the Catalog Administrator, the time will still be noted by Portfolio when a search is generated. For example: Searching for "5/20/09" will not find an item which contains "5/20/09 3:00 PM" because the request is interpreted as "5/20/09 12:00:00." This is true even if the time is not being displayed.

## Decimal

In a Decimal field, you can enter numeric values with a precision up to 8 decimal places. Decimal fields can include multiple values, and be configured as a predefined list.

## Number

Number fields can include one or multiple values, and can be configured as a predefined list.

## Text

The Text field is designed for single line text values. The data in a Text Field can be from 1 to 249 characters long, can include multiple values, and be configured as a predefined list. Fields cannot contain multi-lined text; for multi-line text, use a Text Block field.

## Text Block

Text Blocks are multi-lined fields that can be any length up to 32,767 characters. This field type allows you to add multiple lines of text to items; 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. The Description field is an example of a Text Block field.

## Editing Item Properties

### NOTE

Depending on your access level, you may not be able to edit item properties. See your Portfolio Administrator for access level details.

Metadata and properties for items in the catalog can be edited with the Portfolio Web Client.

When editing field values, the Portfolio catalog record is updated. In addition, for file types that support the embedding of metadata, Portfolio Server simultaneously embeds the properties changes into the original file.

Fields that support the embedding of metadata are designated by the embeddable icon. 

Portfolio Server supports the embedding of metadata directly into many image and video file formats, as well as other files that have XMP metadata. Portfolio Server supports other types of metadata; see the file format support list for details.

### NOTE

Portfolio Server does not read or write to XMP sidecar files.

### To edit item properties for a single item:

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select one item thumbnail in the Main Window.
3. In the **Properties** pane, locate the item metadata to update. Fields are grouped together. To display items within a group, click the disclosure triangle to the left of the group name.
4. Update the field values for the field type using the information below.

To edit this field type	Do this	Example Field Type
Single-value field	Enter the new text into the field and press Enter.	Photoshop Label
Multi-valued field	Click the Add button [ + ] below the field, enter a new value and click <b>Update</b> .	Keyword
Text Block field	Edit the text block and click the <b>set</b> button below the field.	Description

### NOTE

Many fields can be configured to limit input to a predefined list of items. For example, your Portfolio Administrator may have set up a Master Keyword list to provide keyword consistency across all assets. In these cases, instead of manually entering the new value, choose one from the drop-down list.

### To edit properties for multiple items:

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. In the **Properties** pane, locate the item metadata to update. For convenience, fields are grouped. To display items within a group, click the disclosure triangle to the left of the group name.
4. Update field values using the instructions below. As you edit fields, a checked box indicates a field that contains updated information.
5. When all updates are complete, click the **Submit** button at the bottom of the **Properties** pane to commit your changes.

To edit this field type	Do this	Example Field Type
Single-value field	Enter the new text into the field and click the <b>Submit</b> button.	Photoshop Label
Multi-valued field	Click the <b>Add Values</b> link. Enter a new value into the text box and click the Add button [ + ] to the right of the text box. When finished entering values, click <b>Update</b> . In the Item Properties pane, click <b>Submit</b> .	Keyword
Text Block field	Edit the text block and click the <b>Append Or Replace</b> button below the field.	Description

#### **NOTE**

Many fields may be configured to limit input to a predefined list of items. For example, your Portfolio Administrator may have set up a Master Keyword list to provide keyword consistency across all assets. In these cases, instead of manually entering the new value, choose one from the drop-down list.

## Checking on the status of your update

Editing multiple items at once submits a “job” to Portfolio Server. To check on the status of your Item Properties changes, click **Show Jobs** in the Toolbar.

In addition, status updates of your job are listed in the navigation bar at the bottom of the Main Window.

# Moving and Deleting Files

You can move and delete your original files, all from within the Portfolio Web Client.

## **NOTE**

Depending upon your access level, you may not be able to move or delete files. See your Portfolio Administrator for access level details.

### **To move a file:**

1. From the **Organizer** pane, select a catalog, folder, or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. Drag the selected files to a new folder. The target folder must exist in the same catalog as the current location.

### **To delete a file:**

1. From the **Organizer** pane, select a folder.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. Click the Delete button [ **-** ] at the lower left corner of the Main Window.
4. Click **Delete from Disk** to delete the original file from disk, or click **Delete from Catalog** to remove the file from the catalog.

# Creating a New Subfolder

To help you organize files within folders that are watched by Portfolio Server, you are able to create new subfolders with the Portfolio Web Client. This is the same as creating a new folder with the Windows Explorer or Macintosh finder.

## **NOTE**

Depending upon your access level, you may not be able to create new subfolders. See your Portfolio Administrator for access level details.

### **To create a new subfolder:**

1. In the **Organizer** pane, select a current folder.
2. At the lower left corner of the **Organizer** pane, click the Add button [ **+** ] and choose **New Subfolder**.
3. Enter a folder name and click **Save**.

Subfolders can be moved in the **Organizer** pane. Click and drag a folder from one location to another. A folder can only be moved to another location within the same top-level watched folder.

# Automation and the Web Client

The Portfolio Web Client includes a number of automation features that can help speed your workflow. See:

- **Conversion Settings** on page 39 for details about converting files and using Convert presets.
- **Downloading Files** on page 37 for information about using a Convert preset for downloading files.
- **Batch Process** on page 37 for ideas about running a preset to edit originals.
- **Creating a Smart Gallery** on page 25 for an easy way to automatically locate files.

## The Automate Command

Portfolio Server implementations that include NetMediaMAX have access to advanced automation scripts. The Portfolio Server Administrator can make scripts available for use in the Portfolio Web client. The functionality of the scripts can vary considerably. Consult your Portfolio Server Administrator for details about available scripts.

### To run scripts with the Portfolio Web Client:

1. Select a file or files in the catalog.
2. Click the **Automate** drop-down menu in the toolbar.
3. Select a script from the list.

As the script runs, progress is displayed in the Navigation Toolbar at the bottom of the Main Window. For more detailed status, and for any script results, see the **Show Jobs** dialog.

# Keywords and Custom Fields

## 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 an item.

Your Administrator may have configured a Master Keyword list to help maintain keyword consistency. This can also help you keep from typing keywords over and over.

### **NOTE**

Depending upon your access level permissions, you may or may not be able to update keywords. For your permissions, see your Portfolio Administrator.

## 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 website related to the cataloged file, or a "Photographer" field to a catalog of digital photos, or a field to hold price information or stock numbers.

There are six types of custom fields, all of which can be edited in the Item Properties pane of the Portfolio Web Client.

- **Date/Time:** Enter a date or a date with 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.
- **Number:** 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.
- **Text:** 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.

For more information about entering custom field data, see *Editing Item Properties* on page 29.

# Adding Keywords

Keywords can be added to items using the Item Properties pane of the Portfolio Web Client.

Keywords can also be added to an item at the time it is cataloged. This depends upon the cataloging options assigned to the folder in Portfolio. Cataloging options are assigned to folders from the Portfolio Desktop Client.

## **NOTE**

Depending upon your access level, you may not be able to edit keywords. See your Portfolio Administrator for access level details.

The method to add keywords varies depending on whether you have a single item or multiple items selected.

### **To add keywords to a single item:**

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select a single item in the Main Window.
3. In the **Item Properties** pane, locate the **Keywords** field. Click the Add button **[ + ]** below the field.
4. Enter the new keyword in the **Property Value** field. If your Administrator has defined a Master Keyword List, select a keyword from the drop-down menu.
5. Click **Update**.

### **To add keywords to multiple items:**

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. In the **Item Properties** pane, locate the **Keywords** field.
4. Click **Add Values** below the **Keywords** field.
5. Enter a new value into the text box. If your Administrator has defined a Master Keyword List, select a keyword from the drop-down menu.
6. Click the Add button **[ + ]** to the right of the text box.
7. When finished entering values, click **Update**.
8. In the **Item Properties** pane, click **Submit**.
9. Click **Show Jobs** in the toolbar to check on the status of your update.

# Removing Keywords

## **NOTE**

Depending upon your access level, you may not be able to edit keywords. See your Portfolio Administrator for access level details.

### **To remove a keyword from a single item:**

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select a single item in the Main Window.
3. In the **Item Properties** pane, locate the **Keywords** field.
4. Select a keyword in the list and click the Delete button [ **–** ] below the field.

### **To remove keywords from multiple items:**

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. In the **Item Properties** pane, locate the **Keywords** field.
4. Click **Remove Values** below the **Keywords** field.
5. Enter a new value into the text box. If your Administrator has defined a Master Keyword List, select a keyword from the drop-down menu.
6. Click the Add button [ **+** ] to the right of the text box.
7. When finished entering values, click **Update**.
8. In the **Item Properties** pane, click **Submit**.
9. Click **Show Jobs** in the toolbar to check on the status of your update.

### **To remove all keywords from multiple items:**

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. In the **Item Properties** pane, locate the **Keywords** field.
4. Click **Remove Values** below the **Keywords** field.
5. Click **Remove All Values**.
6. In the Item Properties pane, click **Submit**.
7. Click the **Show Jobs** link in the toolbar to check on the status of your update.

# Replacing Keywords

If you have a keyword that you want to change from one keyword to another, the Portfolio Web Client can search through multiple items for a keyword and replace it with a new one.

For example, if you want to consistently use the keyword `automobile` to designate sedans, station wagons, and so forth, you can use the **Replace Keywords** command to update any misused keywords.

**Replace Keywords** is only available when updating more than one item.

## NOTE

Depending upon your access level, you may not be able to edit keywords. See your Portfolio Administrator for access level details.

### To replace keywords in multiple items:

1. From the **Organizer** pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. In the **Item Properties** pane, locate the **Keywords** field.
4. Click **Replace Values** below the **Keywords** field.
5. Enter the keyword to replace in the **Replace Value** text box.  
If your Administrator has defined a Master Keyword List, select a keyword from the drop-down menu.
6. Enter the new keyword in the **With Value** text box. If your Administrator has defined a Master Keyword List, select a keyword from the drop-down menu.
7. Click **Update**.
8. In the **Item Properties** pane, click **Submit**.
9. Click **Show Jobs** in the toolbar to check on the status of your update.

# Keywords vs. Custom Fields

Portfolio users often wonder when to store information in a custom field, and when keywords are more appropriate. In general, keywords should be used to describe the *content* of a file, and custom fields for specific *properties* of the file.

Custom fields are particularly useful for tracking any information about the file that is pertinent to the business model. It would be best to use a custom field to track the following information types: job number, part number, SKU, pricing, any information with a Yes/No option, or any data where predefined variables are possible.

For example, a graphic designer has recently completed a project for a frozen foods packager. The project contains an Adobe Illustrator file and a number of related images. She catalogs the files and uses custom fields to track the client name and job number. Because the project is a pizza box design, she also adds the keywords “pizza,” “pepperoni,” and “frozen.”

While custom fields take a few extra steps to configure, they have a definite search speed advantage over keywords. Custom fields are indexed to provide the fastest information retrieval from the Portfolio catalog.

# Downloading and Editing Originals

The Portfolio Web Client can be used to collect files in your catalog for download, as well as converting files from one format to another. All media processing and .ZIP file compression is handled by Portfolio Server.

## NOTE

Depending upon your access level, you may not be able to download files or perform a Batch Process. See your Portfolio Administrator for access level details.

## Downloading Files

The Portfolio Web Client includes two methods of downloading items from catalogs: Download and Batch Process.

Use the **Download** command to download original files to your local workstation. Use the **Batch Process** command to convert files from one format to another, or rename files before downloading them.

## NOTE

Depending upon your access level, you may not be able to download files. See your Portfolio Administrator for access level details.

### To download original files:

1. From the Organizer pane, select a catalog, folder or gallery.
2. Select one or more thumbnails in the Main Window.  
To select a range of files, click the first file in the range, then hold down the Shift key and click the last file.  
To select multiple scattered files, hold down the Command key (Mac) or Control key (Windows) and click each file.
3. Click **Download**. Portfolio Server compresses multiple files into a .ZIP archive for speed and convenience. The progress is displayed in the Navigation Toolbar at the bottom of the Main Window.
4. When the server work is complete, you will be prompted to download the files. If you want to download the files later, click **Cancel**. The archived original files can be retrieved later from the **Jobs** dialog. For large archives, the download progress is displayed at the right end of the Navigation Toolbar, at the bottom of the Main Window.

The **Batch Process** command opens the conversion settings dialog before downloading the selected files. See the conversion settings section for more information.

## Batch Process

The Batch Process command allows Portfolio Web Client users to modify files directly on the network share where the original files reside. The Batch Process dialog is separated into three main sections: **Convert**, **Rename**, and **Destination**. The **Convert** and **Rename** sections are optional and only need to be addressed if enabled whereas the **Destination** section must have a selection made before a Batch Process operation can proceed.

See **Conversion Settings** on page 39 for more information on specifying settings in the Batch Process dialog.

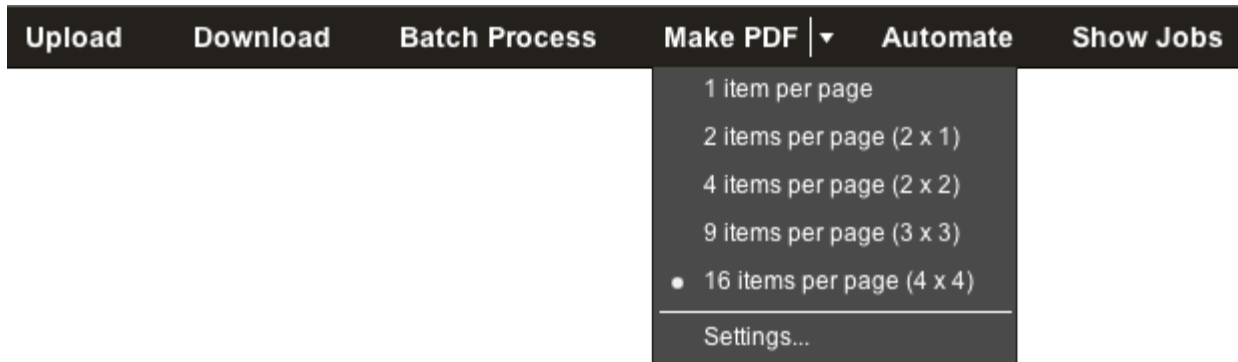
Once all parameters have been decided for the Batch Process command, click **Batch Process** to proceed with the edit. As the server works on the request, status is reported in the Navigation toolbar at the bottom of the Main Window. For more specific information on the process, click on **Show Jobs** in the toolbar.

# Contact Sheets

You can quickly produce and download a simple PDF contact sheet. The contact sheet can show selected items or all items in a container.

## Contact Sheet Settings

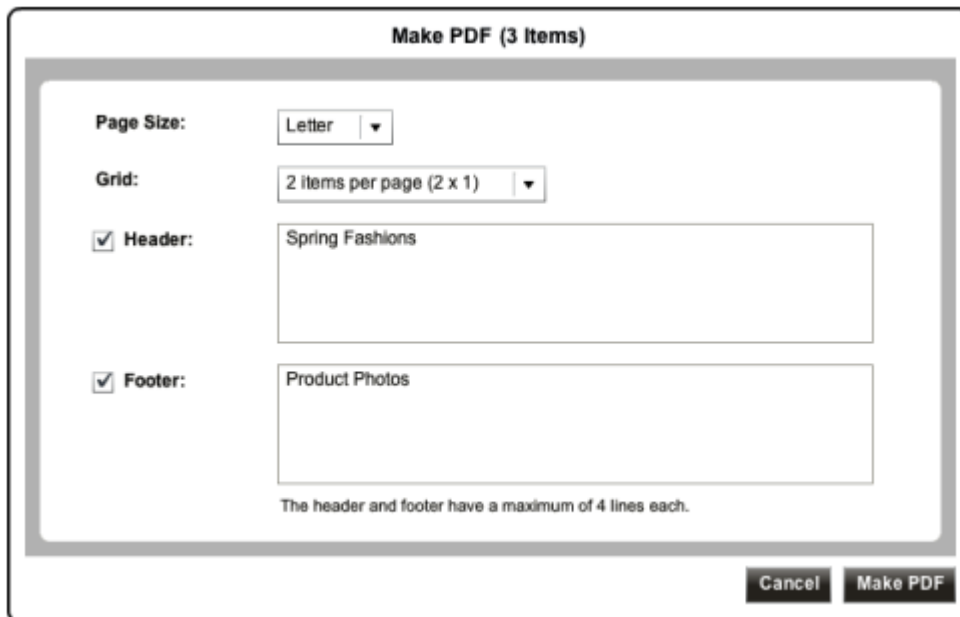
There are five contact sheet presets. To choose a preset, click the drop-down menu icon ▼ next to **Make PDF** in the Portfolio Web Client menu.



Choose a preset to create a PDF with the specified number of images per page, using the selected images. Once the contact sheet is prepared, you will have the option to download it immediately or add it to the **Jobs** panel.

The PDF will use the page size, header, and footer options specified in the Settings window.

Choose **Settings** from the presets menu to change the page size, number of items per page, and add a header and footer to your contact sheet.



## Make PDF

Click **Make PDF** in the Portfolio Web Client menu to create a PDF using the same settings you used for the last contact sheet you created.

# Conversion Settings

The Batch Process command displays a dialog that allows you to specify file conversion settings.

## Convert

The Convert section contains several areas: Presets, Format, Color Mode, Change Resolution and Resize. If you intend to convert files using the Batch Process command, you need to specify the Format and Color Mode for the converted files. Change Resolution and Resize are optional parameters within the Batch Process option.

### Convert Presets

You can select pre-configured conversions from the **Presets** drop-down menu. Your Server Administrator may also grant you permission to create and save Convert Presets.

#### To add a Preset:

1. Make the required selections for **Format** and **Color Mode**.
2. Click the Add button **[ + ]** to the right of the **Preset** drop-down menu.
3. In the resulting Save Preset dialog, give your preset a name and click **Save**.

You can create a preset for a specific need such as “Save in web format.” When users convert cataloged files for use on the web, they can choose the “Save in web format” preset to have the required conversion settings applied to the file.

Once a preset has been saved for a catalog, it will be available to all users from the Presets drop-down menu, as well as who have access to the Batch Process command.

#### To edit an existing Preset:

1. Select the desired preset from the **Presets** drop-down menu.
2. Make settings changes to the displayed values.
3. Click **Update** to the right of the **Preset** drop-down menu.
4. Confirm the name for the preset and click the **save** button.

#### To remove a Preset:

1. Select the desired preset from the **Presets** drop-down menu.
2. Click the Remove button **[ - ]** to the right of the **Preset** drop-down menu.

#### **NOTE**

The default preset setting of Custom Settings cannot be removed.

## Format

The Format drop-down menu shows available file formats for file conversion. By default, the file formats available are JPEG, TIFF, and DNG.

The format options available for each file format selection change depending on the selected format. For example, if the TIFF format is selected, Compression Type and Byte Order become available parameters; whereas selecting JPEG for format will show only the Quality parameter.

Users of the NetMediaMAX module for Portfolio Server will see a greatly expanded list of available file formats to convert to: JPEG, TIFF, BMP, EPS, GIF, PDF, PNG, PSD, and TGA.

## Color Mode

The three available color modes are: RGB, CMYK and Grayscale.

## Change Resolution

When enabled, allows the file conversion to change the resolution of the output files. Resolution can be specified as dots per inch or dots per centimeter depending on which size is selected in the drop-down menu.

## Resize

There are three options to choose from when using the Resize parameter: Percent, Fit Within and Expand/Crop.

**Percent:** The percent value is based on the original image, so 100% is the exact image size of the original.

**Fit Within:** Designates height and width values that the resized image needs to “fit within.” In cases where the image cannot meet the requested height and width values without changing its aspect ratio, the image will be resized to fit the longest side to the requested size and set the shortest side to an appropriate value while retaining the original image’s aspect ratio. The unit of measure can be pixels, inches, centimeters or millimeters as determined by the drop-down menu.

**Expand/Crop:** Designates height and width values that the resized image to be expanded or cropped to meet. As with Fit Within, if the requested height and width values cannot be met without changing the aspect ratio of the file, it will be expanded or cropped to fit the longest side of the image to the requested size and set the shortest side to an appropriate value while retaining the original image aspect ratio. The unit of measure can be pixels, inches, centimeters or millimeters as determined by the drop-down menu.

## Rename

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.jpg, Bermuda Holiday 02.jpg, etc...

The rename parameter works based on three portions of the filename: Front, Middle and End. For each part, you can select a style for renaming: **Text**, **Number from**, **Filename**, or **None**.

### To rename files:

1. Enable **Rename** in the Batch Process dialog
2. Choose a naming scheme using the three drop-down menus. The naming options available are:
  - Text:** Type a descriptive text string up to 31 characters long.
  - Number from:** Enter any number. If you rename 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.
  - Filename:** 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.
3. Once you’ve entered the naming scheme you want, click **Batch Process** to apply the renaming scheme.

## Destination

Once the desired settings are made, the destination for the output file or files must be determined. Choose either: **Replace the original files with the new files** or **Place the new files in the same folder as the original files**, and modify filenames if they conflict. The latter option has the additional option to also add the new images to the catalog.

# Jobs

The Jobs dialog displays the status of all server tasks for your user account, including **Upload**, **Download**, **Batch Process**, and **Automate** commands.

As the server processes a command, an entry for the command is added to the Jobs dialog with a timestamp for the process start and finish, and status to the right of the command entry. Completed jobs are listed in the Jobs dialog until you clear them.

The **Show Jobs** button on the toolbar shows a badge indicating the number of jobs that have completed since you last opened the Jobs dialog.

## To download the results of a command:

1. Initiate the command: **Download**, **Batch Process** or **Automate**.
2. Click **Show Jobs** to reveal the status of the current task.
3. Once a task is complete, a **Download** button becomes available for the task.

### **NOTE**

If a job runs into an issue while attempting to complete, the status will update to Complete and a new entry is displayed under the status stating “# of # items was not processed.” Click this entry to reveal more information about any errors. Give this information to your Portfolio Server Administrator for troubleshooting purposes.

# Glossary

## -A-

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### **access level**

An access level determines the amount of control you have over particular items in a catalog. Access levels can be set on a per-user basis, or by grouping access into levels. Gallery access levels can be set to limit the visibility of a gallery to other users.

### **AutoSync**

AutoSync creates a link between specific folders on your network and items in a Portfolio catalog. The files in your catalog can be dynamically updated by Portfolio Server to exactly match those in folders on disk.

## -B-

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### **batch convert**

The batch conversion utility allows you to change a number of catalogs items at the same time. The Batch Convert feature of Portfolio allows you to change the file type, resolution, color mode and size.

## -C-

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### **catalog**

Portfolio organizes your collection of images, graphics, digital photos and other media files in a document called a catalog. A catalog stores thumbnail images of your files, embedded metadata, any custom information you require, as well as pointers to your original files – not the files themselves.

## -F-

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### **field**

A field is where Portfolio stores pieces of data in the catalog. Each Portfolio catalog automatically contains the most common fields, but can create custom fields to track virtually anything about your files.

## -G-

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### **gallery**

A gallery is a subset of the files in your catalog.

## -I-

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### **item**

A cataloged file is represented as one single item in the catalog. Each item contains all of the specifically cataloged information about that file on disk.

## **-K-**

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### **keyword**

Keywords are descriptive words and phrases that you can assign to your cataloged files in order to categorize and classify them.

## **-M-**

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### **master keyword**

A master keyword is a keyword that is predefined by the catalog administrator. Master keywords help you keep consistency in keyword naming across a catalog.

### **metadata**

Metadata is specific information that is embedded into an original file. Portfolio can extract this information, as well as embed any modified data back into the original file.

## **-P-**

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### **placeholder**

A placeholder is a spot in a Portfolio catalog that is reserved for a file that will be added at a later date.

### **properties**

Each item in a Portfolio catalog contains many properties about that file, including a description, keywords as well as any custom fields. All of these items are considered properties.

## **-S-**

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### **screen preview**

A screen preview is a low-resolution file that Portfolio automatically creates of a file when it is cataloged. Due to their small size, screen preview files often open much more quickly than the original full-resolution files.

## **-T-**

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### **thumbnail**

A thumbnail is a small visual representation of a cataloged item.

# Contacting Extensis

## Extensis

1800 SW First Avenue, Suite 500  
Portland, OR 97201  
**Toll Free:** (800) 796-9798  
**Phone:** (503) 274-2020  
**Fax:** (503) 274-0530  
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**Email:** [sales\\_ap@celartem.com](mailto:sales_ap@celartem.com)  
**Web:** <http://en.celartem.com>

## Documentation Feedback

**Web:** <http://www.extensis.com/helpfeedback/>

## Corporate Sales

**Web:** <http://www.extensis.com/corporatesales/>  
**Phone:** (800) 796-9798, ask for Corporate Sales

## Technical Support

Technical Support is available directly through the Extensis website or by telephone.

**Web:** Fill out the form at <http://www.extensis.com/support/>.

A support representative will respond by phone or email, usually within 24 hours on weekdays.

**Phone:** Please call (503) 274-7030 in North America, or +44 (0) 1604 654 270 in Europe.

When contacting technical support, please include the following information:

- Your product name and serial number(s);
- Your computer configuration, including operating system, memory, and hard drive configuration;
- Your question, or a description of the difficulty you're experiencing: what specifically occurs and when;
- Your phone number if you want to have a representative call you.

Take note of any error numbers or messages that display and any other information you think may be relevant.

For answers to frequently asked questions and troubleshooting tips, you can also visit the Extensis website at <http://www.extensis.com/>.

### Priority Support

If you have an Annual Service Agreement, you are entitled to priority support. Please call the telephone number listed on your agreement to receive support 24 hours a day.

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