



**Extensis™** **Managing**  
your creative  
**assets**

**Best Practices  
Guide**

# Contact

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# Defining an Efficient Workflow

An efficient workflow is imperative to keeping track of your assets. Portfolio is designed to help you organize, track and share assets. It is powerful and flexible enough so that you aren't pigeonholed into a limited workflow.

That flexibility of Portfolio is a bit of a double-edged sword. You can approach asset management from many different angles, yet deciding the best way for your situation can be challenging.

Since needs can vary wildly from user to user, this guide will help you understand some good approaches to asset management so you can create a workflow that is tailored to your specific needs.

Most workflows follow a fairly standard path:

1. Obtain files to catalog.
2. Catalog files.
3. Share files with other users.
4. Archive files.

It's in the details of those steps where each workflow varies. Whether you are using Portfolio in a workgroup environment, or as a standalone user your needs will differ.

## The single user and Portfolio

As a single user, you have the largest degree of flexibility when setting up Portfolio workflow.

### Define your needs

There are many questions that you should think about before you set up a workflow. This guide will help you answer some of the following questions, and develop standards that will keep your workflow tight and efficient. For more detailed information, please refer to the Portfolio User Guide.

### Cataloging

Will you create multiple catalogs for assets that are in different stages of the workflow?

### Keywording

What are the most commonly used words used to describe the assets you catalog?

### Progress tracking

What types of custom fields will you create? Perhaps create a custom field called "status" and use a predefined list of your stages of production.

### Sharing

How do you plan to share files with others? Will you publish web sites? Will you burn CDs or DVDs of your work to share?

## Portfolio in a workgroup setting

The questions to answer when setting up a workgroup workflow are similar to the single user. A small level of complexity is added with workgroups. In addition to answering the same questions as a single user, you should also consider the following:

### User access

Will users obtain files from a published web page or have direct access to the catalog through Portfolio? How many users will access your catalogs? What level of access will each user have?

### Sharing

How do you plan to share files with multiple users? Will you publish web sites for users to download files, or will they have direct access to the catalog through Portfolio? Will you email files to other users from within Portfolio?

### Routing files

How will files be routed between Portfolio users? Will you use a custom field and a predefined list to mark files routed to each user? Will you create smart galleries to display files tagged with specific metadata?

## Metadata recording

How will file metadata be captured, recorded and utilized? Will metadata be extracted when files are cataloged? Will information be recorded into custom fields?

## Consider Including a librarian

In a workgroup or corporate environment where there are many users of an asset management system, consistency is of the utmost importance. Someone who carelessly catalogs and keywords assets in a large shared system can wreak havoc on the system. Key information may be omitted or misspelled, thus preventing easy access to the information in the future.

Having one person, or a small number of people, consistently catalog and update information in the Portfolio database can help minimize file cataloging and keywording errors.

# Creating Catalogs

## Create catalog templates

When you create a catalog, Portfolio allows you the flexibility to customize that catalog for your specific needs. Custom fields can be created to track almost any data type, and saved views can be created to view that data however you wish. These and other settings are saved directly into the Portfolio catalog.

You can maximize your productivity by only customizing a catalog once, and then reusing that catalog as a template for all future catalogs.

## Sample catalog templates

Portfolio comes with a number of catalog templates on the CD. Each catalog has been configured with different settings and custom fields for tracking and displaying different file metadata. You can easily create a catalog template that tracks any kind of data, and caters to your specific needs. For more information about sample catalogs, see the **Portfolio Sample Catalogs** document on your product CD.

### To create a catalog template:

1. Open Portfolio.
2. Choose **File > New**.
3. Name the new catalog and click **Save**.  
Be sure to use a filename that helps easily identify the type of template you are creating.

4. When prompted, uncheck the **Enable Screen Previews** option and click **Done**. This allows you to copy and use the catalog multiple times without linking it to a specific screen preview folder.



Later, when you use the catalog template you can enable screen previews and specify a directory before adding files to the catalog.

5. Customize the catalog to best meet your needs. The following settings are stored directly in the catalog, and should be set at this time:
  - *Custom fields.*
  - *Saved views.*
  - *Master keywords.*
  - *User passwords.*
  - *Startup settings such as whether to display a splash screen or slide show.*
  - *Metadata extraction and embedding settings.*
6. Close the catalog.
7. Copy the catalog file (with the FDB extension) to a storage location where all users who create new catalogs will have access, such as a shared network folder.

### To use a catalog template to create a new catalog:

1. Choose any custom template you have created, or choose a catalog template from the Sample Catalogs folder on the Portfolio CD.
2. Copy the chosen catalog to a local or network location, and rename it to a name that you prefer.



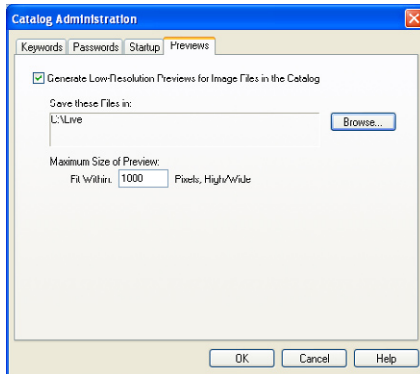
*To create a served catalog on Portfolio Server, copy the catalog into the served catalogs folder, restart Portfolio Server and then serve the catalog.*

3. Open the catalog with Portfolio — it should be an empty catalog.
4. To enable screen previews, choose **Catalog > Administration**.



*Your Access Level must be set to Administrator to access the Catalog Administration dialog box. Choose **Catalog > Access Level** to change your access level.*

5. In the **Catalog Administration** dialog box, choose the **Previews** tab.



6. Enable the **Generate Low-Resolution Previews** option.

7. Click the **Browse** button and choose a location to store the screen previews.
8. Click **OK** to close the **Catalog Administration** dialog box.

The new catalog is now ready to catalog new files. For more information about how to add files to the new catalog, see page 18 of the **Portfolio User Guide**.

### How many catalogs to use?

The number of catalogs that you create will vary depending upon your workflow and the types of data being stored.

Portfolio catalogs are designed to hold up to 250,000 files. It is possible that a single catalog can easily meet your needs. That being said, grouping files into separate catalogs creates a higher level of organization, and can help you have a higher degree of success quickly finding the appropriate asset.

Portfolio has the ability to search multiple catalogs at once, so when an item cannot be found in one catalog, if a broader search is required users can always search multiple catalogs.

There are many strategies for grouping items, but anything that is logical and fits well into your specific needs is acceptable. All of the following methods of organization have been used to help simplify the asset management in various situations.

For more information about creating catalogs, see page 13 of the **Portfolio User Guide**.

### Grouping items by subject

If you have logically definable subjects that aren't likely to overlap, that can be a good way to divide files into multiple catalogs.

For example, a publisher who prints many different magazines would likely have a unique Portfolio catalog for each magazine.

A professional photographer who shoots exclusively weddings and auto shows would likely choose to put images from these two distinct categories into separate catalogs.

### Grouping items by process

Sometimes there are clearly definable states for files in a workflow. Separating items by their state can help direct users to the asset that is in the correct form.

Let's use the professional photographer as an example. He shoots thousands of images and only a select few will be up to his high standards for sale. After images are sold, or no longer relevant, he wants to remove them from his system and archive them to CD, yet still know where to find the original files.

In the previous setting, the photographer could create three catalogs - Processing, Current and Archive. After he shoots all of his images they immediately go into the Processing catalog. When they are ready for sale/use he drags them over to the Current catalog. And after they are sold or irrelevant, he moves them to the Archive catalog from which he burns the original files to CD/DVD.

For more information about creating archive discs, see page 103 of the **Portfolio User Guide**.

### Grouping by file type

Some organizations may wish to group files into catalogs based on file type.

Portfolio has the ability to index and search the text of PDF files. This is a handy feature for many users who have large numbers of PDF files. When PDFs are mixed in with other files (images, presentations, etc.), including indexed PDFs can slow down searches for the other files. So a user that has many indexed PDFs could create a catalog to house the PDFs and another to house all other files.

### Grouping items for security

Protecting confidential information is critical to the livelihood of most businesses. Allowing only authorized users to access Portfolio catalogs can be an effective way to control the distribution of sensitive files.

For example, a marketing group may be rolling out a hot new campaign which will be used to undercut the competition. The campaign must be kept under wraps to keep the competition off guard. All of the partners must have the most current images, copy and web assets to roll out the campaign. The marketing group uses Portfolio Server to serve password-protected catalogs that gives access to those involved, and keeps out casual Portfolio users.

For more information about setting Access Level password-protection, see page 127 of the **Portfolio User Guide**.

# Organizing Files

## Organizing files on disk

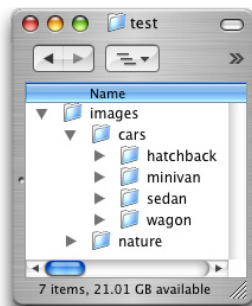
Portfolio provides an excellent visual window to your files. Many users are also very concerned about the physical organization of files on disk. Having files organized in a coherent and understandable way on disk can assist in an efficient workflow.

If you have already created a catalog, or know that your files aren't well organized, there's no need to be concerned. You can add all of your messy directories to Portfolio and then organize files and add new directories on disk using FolderSync within Portfolio.

## Creating folder hierarchies

Portfolio can automatically create keywords directly from a folder path as a file is cataloged. The name of each nested folder can be added as a keyword for each folder in the hierarchy. Turn on path and volume name keywords from the Properties tab of the Advanced Options dialog box (Choose **Catalog > Advanced Options**).

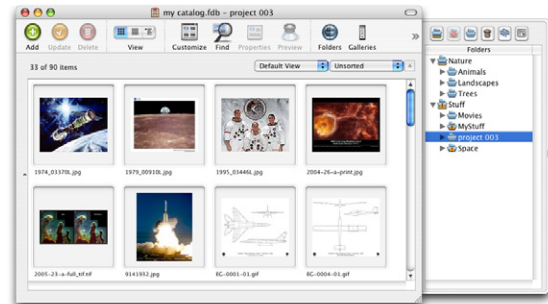
In this example, an image cataloged from the hatchback folder will automatically have the keywords "images," "cars," and "hatchback." With a workgroup, setting up an effective folder hierarchy is practically a necessity.



It is also recommended that files be organized into one root directory. In the example, the "images" directory is the root directory. As many subdirectories as desired can be created in this root directory. This can be an important organizational method, especially for catalogs used by workgroups.

If you have already spread your files across multiple directories, you can clean up your files with the FolderSync pane/drawer. Add your directories to FolderSync and then use Portfolio to create new directories, move and organize your files.

For more information about using FolderSync, see page 72 of the **Portfolio User Guide**.



## Creating and using a naming convention

When cataloging files in Portfolio, cataloging options allow you to easily move and change the name of files on disk. If you create a specific strategy for how your original files are named — and stick to it — you will be able to more easily identify, locate and share those files.

You may consider including pertinent file information such as client name, project, product number, and date into the file name.

The following are examples of easily replicated naming conventions:

Filename	Naming includes
<i>Jones_newsletter04_001.jpg</i>	<i>Company name, project and sequential numbering</i>
<i>axle_756452j_002.jpg</i>	<i>Part name, part number, sequential numbering</i>
<i>Smith_040623_066.pdf</i>	<i>Company name, date (YYMMDD) and sequential numbering</i>

For complete network compatibility across Mac, Windows and Unix, it is wise to use file names that are compatible with all platforms.

- *Limit file name length to 32 characters.*
- *Use underscores instead of spaces.*
- *Format dates in a simple manner. For example the date June 23, 2004 can be represented as 040623. This helps keep the files sorted in order in the Macintosh Finder, Windows Explorer as well as within Portfolio.*

## Keywords versus 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.

For more information about adding and utilizing keywords, see page 77 of the **Portfolio User Guide**. For more about setting up and using custom fields, see page 81.

## General keyword tips

When developing a list of master keywords, it is important to consider the end users who will be searching your catalog. Are they more likely to refer to an object as a “car” or an “automobile?” Each word can correctly describe an object, but one may be slightly better for your situation. Choose one keyword and stick to it.

Defining a master set of keywords and sticking to them will make the art of searching for files much easier. Also, as a Portfolio catalog becomes larger, the tendency is to include more and more keywords. Carefully following some guidelines and only using Master Keywords will help users more accurately catalog and retrieve files.

Consistency is also important with the use of plurals. You don't want your catalogs filled with multiple and potentially confusing keywords. For example: fly / flies, mouse / mice, or goose / geese.

# Sharing files with others

Portfolio gives you the flexibility to share your cataloged assets in many different ways.

## Distributing files via the web

Portfolio includes a built-in webpage generation utility. The **Create Webpages** basically takes a snapshot of selected items in your catalog and creates webpages of those items.

The web pages generated by Create Webpages are static. This means that the webpages are not updated unless you choose to export the pages again. Portfolio NetPublish creates dynamic webpages that are automatically updated. For more information about NetPublish, please visit <http://www.extensis.com/portfolio/>.

## What to do with those webpages?

After you generate webpages with Portfolio's **Create Webpages** tool, what is the best way to use those files?

Since the generated webpages contain relative links, you can place the entire directory almost anywhere for users to access files. Users need only open the `index.html` file in any web browser.

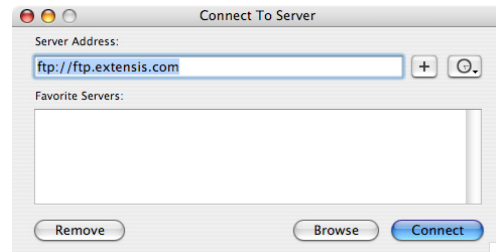
The following are a few ways that you may want to use your webpages:

## FTP the files to a web server

If you have a web server, you can upload the files to a web server. You can use any of the commercially available FTP tools, or even the operating system.

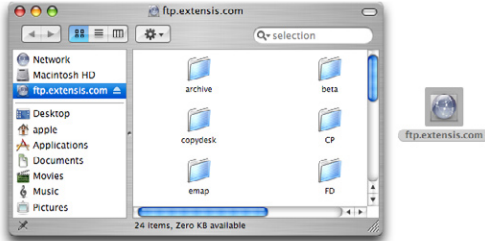
### To FTP files with the Mac OS X operating system:

1. In the Finder choose **Go > Connect to Server**
2. In the **Connect to Server** dialog box, enter your site's FTP location and click **Connect**.



2. Enter your user name and password and click **OK**.

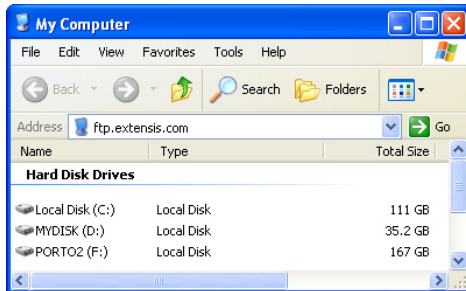




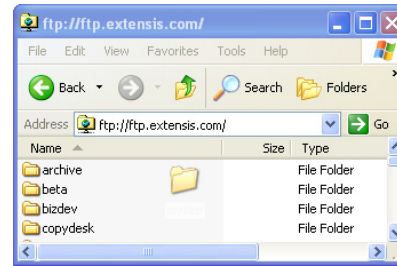
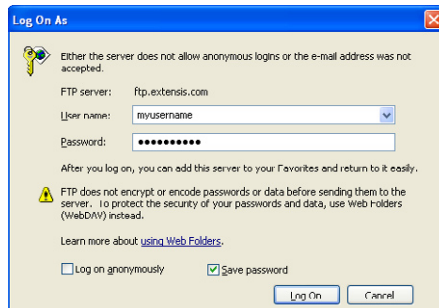
The FTP site is mounted just like any network volume. You can now drag and drop your site directly to the new location.

### To FTP files with the Windows XP operating system:

1. Open any **Windows Explorer** window.
2. Enter your site's FTP address into the address line.



3. Enter your user name and password and click **Log On**.



The FTP site is opened just like any other network location. You can now drag and drop or move files to the new location just like any other Explorer window.

### Burn the entire directory to a disc

Since the **Create Webpages** command creates an entirely encapsulated web site, you can burn the directory containing the HTML and associated files directly onto a CD, DVD or other removable media. Users can then directly open the `index.html` file with any web browser.

### Share the files over your network

With Mac OS X and Microsoft Windows XP Pro, you can create and serve a personal web site directly from your desktop. This site is easily shared with other users on internal networks. For detailed instructions about sharing files in this manner, please see the **Publishing Personal Webpages** technical brief on the **extensio** web site <http://www.extensio.com/portfolio/>

## Sharing files with Portfolio Server in a networked environment

Using Portfolio Server in a networked environment is a great way to share files. Each person accessing the catalog must have their own copy of the Portfolio Client installed, and Portfolio Server is required in order to simultaneously access a single catalog.

### The importance of heterogeneous paths

Extensis understands that you may not have only one operating system in house, therefore there are both Macintosh and Windows versions of Portfolio Server and Client.

The network path to the catalogs and associated files are critical and can affect the ability of users to access files from each system. Both Windows and Macintosh operating systems must have the same (heterogeneous) path to a network resource.

Portfolio relies on the file's path name to link to the original file, therefore, on Windows computers, do not use drive letter mappings when connecting to shared volumes containing Portfolio assets. Macintosh computers do not accept letter drive designations so path names will be inconsistent and will be "broken" when drive letters are used. File path consistency is essential in cross-platform environments. The most important paths are those to the original and preview files.

### To obtain the location of an original file:

1. Highlight the file thumbnail in Portfolio.
2. Choose **Item > Properties**
3. The location of the original file is displayed on the **General** tab of the **Properties** dialog box.

### To update paths to allow remote catalog access:

So, if you've already cataloged files with a path to the local machine, to allow remote access by other users, the path must be updated.

1. On Windows XP, open **My Network Places** and navigate through the **Entire Network** shortcut to the local machine.

On Mac OS X, open a Finder window and navigate through the **Network** volume to the local machine.



*If you are unable to navigate to your local machine with Mac OS X, try mounting either of the following locations:*

`smb://localhost`

`smb://127.0.0.1`

*These addresses can be used to mount share points from your local machine.*

2. Ctrl-drag the original files into Portfolio.
3. Portfolio prompts if you want to update the links to the original files. Click OK. The network paths are updated.

A correct network path should be similar to:

`\\computer name\share directory name\original files`

A local path that is not accessible to remote users contains local drive numbers, for example:

D:\share directory name\original files



*Windows can create share points that can be represented with a drive letter. This function also breaks the links to original files for external users.*

#### To obtain the location of the catalog preview files:

1. Choose **Catalog > Administration**.
2. The location of the original file is displayed on the **Previews** tab of the **Catalog Administration** dialog box.

#### To update the storage location of the preview files:

So, if you've already cataloged files, and the previews exist in a path only accessible by local machine, to allow remote access by other users, the path must be updated.

1. If necessary, use the Macintosh Finder or Windows Explorer to move the folder containing the preview images to a shared location.

Typically, the preview folder is in the same folder as your catalog and its name contains the catalog name: **catalogname\_previews**.

2. In Portfolio, choose **Catalog > Administration**.
3. On the **Previews** tab, click the Browse (Win) or Folder Icon (Mac) button.

4. On Windows XP, open **My Network Places** and navigate through the **Entire Network** shortcut to the local machine.

On Mac OS X, open a Finder window and navigate through the **Network** volume to the shared files on local machine.

5. Click **OK** to accept the new settings.

If your catalog contains items that are missing thumbnails, they can be easily regenerated.

1. In Portfolio, click to highlight the items with missing thumbnails.
2. Choose **Item > Regenerate Thumbnail**. The file thumbnails are regenerated and placed in the new network accessible location.

# Tracking Files Through a Workflow

One of Portfolio's greatest strengths is the flexibility with which it can be configured to meet your needs. An important need of many users and organizations is to track files through a process. Whether it's an approval process or simply tracking the progress of a file through production, Portfolio can handle it all.

The features of Portfolio that can be most useful with tracking files are **Custom Fields**, **Predefined Lists** and **Smart Galleries**.

**Custom fields** can be created to track almost any type of information in Portfolio. For example, we could create custom field named "Licensing Usage." Using a **predefined list**, we would give users specific states that can be entered into this new field.

Examples of custom fields and predefined lists:

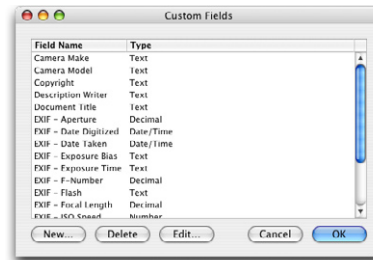
Custom Field	Licensing Usage	Routing
<b>Items in the predefined list</b>	<ul style="list-style-type: none"> <li>• <i>Royalty-free</i></li> <li>• <i>Restricted</i></li> <li>• <i>Print &amp; Web only</i></li> <li>• <i>Print only</i></li> <li>• <i>Web Only</i></li> <li>• <i>Licensing renewal required</i></li> <li>• <i>Internal use only</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Copywriter</i></li> <li>• <i>Art director</i></li> <li>• <i>Manager</i></li> <li>• <i>Web designer</i></li> <li>• <i>Testing</i></li> <li>• <i>Librarian</i></li> </ul>

After setting up the custom fields, users can easily create **smart galleries** that automatically search for and display pertinent files. Using the example above, the Copywriter could display all cataloged files that contain "copywriter" in the Routing custom field.

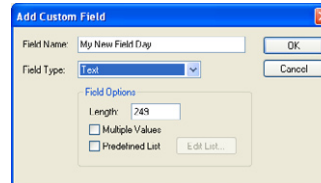
## Creating the items necessary for a tracking workflow

To create the custom field and predefined list:

1. Change your access level to **Administrator** mode. Choose **Catalog > Access Level**, change the Catalog Access level to Administrator and enter the password if necessary, then Click **OK**.
2. Choose **Catalog > Custom Fields**.



3. In the Custom Fields dialog box, click **New**. The **New Field** dialog box is displayed.



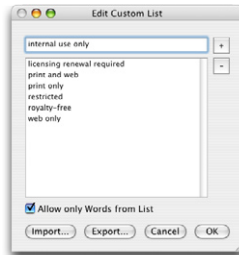
4. Enter a name for the field in the Name text box.
5. Choose a field type. Predefined lists can be used with Text, Date/Time, Decimal and Number field types. We recommend using a Text field for a status or routing custom field.



*Field types cannot be changed once they are defined.*

6. Enable the **Predefined List** option and click **Edit**.

7. In the Edit Custom List dialog box, enter each of the values and click **Add** to insert each item into the list.



8. Since our field is to be used to designate a specific state, we need to limit the entries to the predefined list.

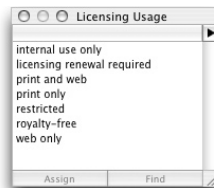
Check the **Allow only words from List** option.

9. Click **OK** to finish defining the field.

10. Click **OK** to accept the new custom field and close the Custom Fields dialog box.

Now, when users go to edit this field using any of Portfolio's standard field-editing tools (such as the Fields tab of the Properties dialog box, the Edit Field Values dialog box, or an item view in which the "Licensing Usage" field is displayed) the predefined choices will be available from a drop-down menu.

Custom fields can also be displayed as a palettes, which allows you to click and drag keywords onto any item in your catalog.

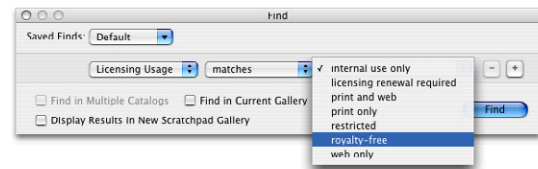


**To create a smart gallery:**

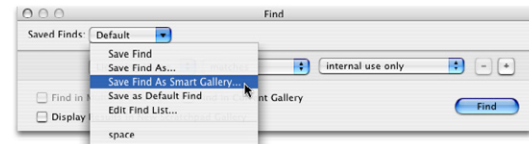
A smart gallery automatically executes a saved find each time it is opened. So, a saved find must be created before applying it to a gallery.

1. Choose **Edit > Find > Find** (Mac) or **Catalog > Find** (Win).

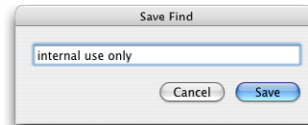
2. In the Find dialog box, enter search criteria for the new custom field.



3. Choose **Save Find As Smart Gallery** from the **Saved Finds** drop-down menu.



4. Enter a name for the saved find and click **Save**. This name will also be used for the new smart gallery.



Each time the Smart Gallery is opened, the entire catalog is searched and selected using the Find criteria in the Saved Find. This way you can quickly locate all of the files with a specific status.

# Archiving and Backing Up Files

Archiving and backing up files are similar concepts, but require entirely different procedures.

When you archive files, you are basically having Portfolio burn the original files to a CD/DVD. The Portfolio catalog is then automatically updated so that it looks for those files in the new location. Archiving files is done from within Portfolio.

When you backup files, you are making a backup copy of the entire Portfolio database and associated files. Backing up files is done outside of Portfolio through the operating system.

## Archiving files to disc

Portfolio burns archive CDs by burning an entire gallery to disc. Portfolio creates new links from the catalog to the new archive CD/DVD, but leaves the old original files in the source location.

The source files remain as a safeguard so you can remove them at a later date. But what happens is the files in your gallery are in many locations? Locating and removing the files could possibly be a challenging task.

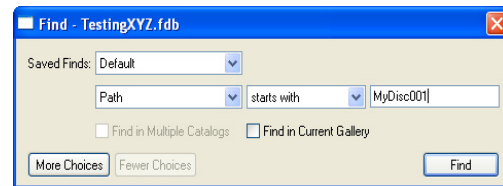
Use the following procedure to gather files for easy archival and subsequent removal/deletion.

1. Create a new gallery that will contain the files to be archived.
2. Add all of the files to be archived to the new gallery.

3. Move all of your original files into one location on your hard disk or network. To do so, select all of the thumbnails and choose **Item > Original > Move**. Choose a new temporary folder for the original files and click **OK**.
4. Use the **Burn to Disk** command to burn an archive CD/DVD of that gallery. For detailed instructions, see page **102** of the **Portfolio User Guide**.

Portfolio should now point to the archive disc as the location of the original files. You can easily confirm the new location by searching for all items in the new volume.

5. Choose **Catalog > Find**.
6. In the **Find** dialog box, choose the options - **Path**, **Starts With**, and then the volume name of the CD.



7. Click **Find** to search for the recently archived files. All of the found files should be linked to the new archive disc.
8. You can now safely delete the temporary folder where you collected all of the files to archive.

## Backing up files

Accidents happen. We all have had an occasion when a laptop is dropped, a hard drive fails, or a network connection goes down at the most inopportune moment. This is why many people regularly create backup copies of data.

The most important files to back up are the Portfolio FDB file, the original files and the preview images.

## The Portfolio catalog FDB file

The FDB file stores all of the information about your original and preview file locations.

For catalogs served by Portfolio Server, all users must be logged off, and the Portfolio Service must be stopped. You can use either of the following batch files to automatically log off users and stop the Portfolio service.

### Windows batch file:

Use **Notepad** or any similar text editor to create the following batch file. Be sure to save the file with a .BAT extension.

```
net stop "Portfolio Server"  
copy "C:\Program Files\Extensis\Portfolio Server\  
Catalogs\Demo1.fdb" "C:\backmeup\Demo1.fdb"  
net start "Portfolio Server"
```

Of course, you will need to insert the appropriate file and directory locations for this to work. Run this batch file by either double-clicking the icon in the Windows Explorer, or from the command line interface.

The Windows **Scheduled Tasks** feature can be used to schedule this batch file to automatically run at a convenient time. See the Microsoft Windows documentation for detailed instructions.

### Macintosh script

Use **TextEdit** or any other text editor to create the following shell script. Create your file as a plain text document and save your file with a **.SH** extension in **Unicode-8** format. If your editor gives you the option, choose **UNIX** line endings.

```
#!/bin/sh  
killall -HUP Portfolio\ Server  
ditto -rsrcFork -v "/Applications/Extensis\ Portfolio  
Server/Catalogs" "/Path/to/backup/files/to"  
/Applications/Extensis\ Portfolio Server/Portfolio\  
Server.app/Contents/MacOS/Portfolio\ Server &
```

After creating the script, launch the **Terminal** utility. Enter the following command to make the script executable:

```
chmod u+x /path/to/script
```

This script can be automated using the **cron** command. For more information about this command type **man cron** in the Terminal window. For a more detailed introduction to scripting Mac OS X, please visit the following website: [http://www.macdevcenter.com/pub/a/mac/2003/11/07/scripting\\_osx.html](http://www.macdevcenter.com/pub/a/mac/2003/11/07/scripting_osx.html)

## All original files

Back up all directories that include original files.

## The preview images directory

Include the directory that you designated for preview files. To find out which directory is currently being used to store preview images, choose **Catalog > Administration**. The directory path to the preview files is displayed on the **Previews** tab.



*Portfolio SQL catalogs must be backed up with very specific custom procedures. A real-time backup solution can be customized for your organization by Extensis Integration and Consulting Services. Call Extensis Corporate Sales for more information.*



