Quick Start Guide

Portfolio™

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Welcome to Portfolio 9.5

Portfolio is a powerful, easy to implement *digital asset management* and *media delivery* solution. As an open and centralized platform, Portfolio gives you control over all aspects of management and delivery of digital assets. Portfolio catalogs let you easily deploy to content to marketing, image management, and web-based on demand solutions.

About this Guide

This guide covers the very basic installation and configuration of Portfolio components on a server and a client system. These instructions only cover a common setup. Your needs may vary based on your users, hardware configuration and other options.

Before deploying Portfolio Server, we highly recommend examining how you want digital asset management to fit into your workflow. For sample configurations and detailed server options, please see the Portfolio Administration Guide.

Details about installing and using NetPublish and NetMediaMAX can be found in the Portfolio Administration Guide.

Setup Overview

Here are the steps you will need to complete to successfully set up Portfolio components on a server and a desktop (client) computer.

1. **Verify the System Requirements.**
   Make sure your server and desktop systems meet or exceed the specifications in the System Requirements.
2. **Install prerequisite software on your server.**
   You need to have QuickTime installed on your server. You should also install the OpenOffice.org office suite and Adobe's DNG Converter software for certain features of Portfolio to work. Portfolio relies on OpenOffice.org to index and preview Microsoft Word, Excel, and PowerPoint documents and RTF and HTML files, and can use the DNG Converter to export Camera Raw images in Adobe's Digital Negative (DNG) format.
   Macintosh users: When installing prerequisite software, you must log in to the computer using the same account that you intend to use to install and run Portfolio Server.
3. **Configure your firewall.**
   If there is a firewall between your server and users that need to connect to it, you must open some ports on the firewall to allow Portfolio Server to communicate with its client software. If your firewall is on your server, open these ports to allow others on your network to access the server; if your firewall is between your network and the Internet, open these ports to allow users outside your network to access your server.
   You should make sure these ports are open before installing Portfolio Server.
4. **Install Portfolio Server.**
   Windows users: Determine in advance whether you need to use the Domain User account option or the Local System account option.
   Macintosh users: When you install Portfolio Server, be sure to log in to the computer using the same account you used to install OpenOffice.org and the Adobe DNG Converter software.
5. **Enter your Portfolio Server serial number.**
6. **Create a catalog.**
7. **Add users.**
   Create Portfolio user accounts and grant users access to the catalog.
8. **Install any prerequisite client software.**
   Client access using a web browser requires Adobe's Flash Player and a modern browser (a recent version of Firefox, Safari, or Internet Explorer). Desktop Clients need QuickTime installed to support audio and video playback.
9. **Install the Portfolio Desktop Client.**
   While your server has a limit to how many users can be connected at one time, you can install the client software on as many desktop computers as you want.
10. **Connect to the server from the client.**
    Make sure your connection is working and client accounts have the appropriate access.

Set Up Portfolio Server

Upgrading Portfolio from a Previous Version

There are many things to keep in mind when upgrading from a previous version of Portfolio. This section describes the most prominent issues to consider when upgrading. Follow all installation instructions in this guide, as well as the Portfolio Administration Guide to properly install and configure Portfolio Server and other components.

If you have specific questions about upgrading, please visit the Extensis support page (http://www.extensis.com/support/). Here you can search the Portfolio Knowledgebase, visit the user forums, and contact technical support.

NOTE: If you require assistance upgrading, and have an Annual Service Agreement, please contact Priority Technical Support using the number on your contract.

Back up

It is very important to back up all of your existing catalogs and any NetPublish sites before upgrading. Stop Portfolio Server, then back up the folders listed below.

NOTE: Back up all SQL-based catalogs using the applications provided with your chosen SQL database.

Backing up Portfolio 9 data

Back up these folders if your Portfolio Server is running on Windows:

- **Catalogs:**`C:\Program Files\Extensis\Portfolio Server\applications\native-server\Catalogs\`
- **NetPublish Sites:**`C:\Program Files\Extensis\Portfolio NetPublish Server\WebRoot\sites\`

Back up these folders if your Portfolio Server is running on Mac OS X:

- **Catalogs:**`/Applications/Extensis/Portfolio Server/applications/native-server/Catalogs/`
- **NetPublish Sites:**`/Applications/Extensis/Portfolio NetPublish Server/WebRoot/sites/`

Backing up Portfolio 8.5 data

Back up these folders if your Portfolio Server is running on Windows:

- **Catalogs:**`C:\Program Files\Extensis\Portfolio Server 8.5\Catalogs\`
- **NetPublish Sites:**`C:\Program Files\Extensis\Portfolio NetPublish\WebRoot\sites\`

Back up these folders if your Portfolio Server is running on Mac OS X:

- **Catalogs:**`/Applications/Extensis Portfolio Server 8.5/Catalogs/`
- **NetPublish Sites:**`/Applications/Portfolio NetPublish Server/WebRoot/sites/`

Upgrading from Portfolio Server 8.5 or Earlier

Portfolio Server 9 and later only supports “user-based” catalog access. When upgrading a “level-based” catalog from Portfolio 8.5 or earlier, you will need to create user accounts and grant each user catalog membership using the Portfolio Server Admin web interface.

Upgrading from Single User (standalone) to Portfolio Server

When upgrading from the single user version of Portfolio, you can use your previous catalogs with Portfolio Server. After installing Portfolio Server, copy your previous catalog FDB file into the folder listed below.

For a Microsoft Windows server:

```
C:\Program Files\Extensis\Portfolio Server 9.5\applications\native-
   server\Catalogs\
```

For a Mac OS X server:

```
/Applications/Extensis/Portfolio Server 9.5/applications/native-
   server/Catalogs/
```

If the FDB file was moved to a location that is different from the FDB file's previous network location (onto a new server for example) then you will need to update the path to the original files using the Portfolio Desktop Client. To update the network file paths:

1. Using the Portfolio Desktop Client, connect to the catalog that is now served by Portfolio Server.
2. Browse to the network location of the original files.
3. Hold down the Option key (Mac) or Control key (Windows) and drag the top level folder into the main window of the Desktop Client. This tells Portfolio to confirm and update the location of all of the files in that folder. Repeat this step for all top-level original file folders in your catalog.

Update any FolderSync folders, original and preview file locations

Portfolio Server 9 and later only supports the use of AutoSync folders in catalogs. If your Portfolio 8.5 (or older) installation made use of FolderSync folders, you will need to re-create these folders as AutoSync folders on a network-accessible volume. All your original assets as well as Portfolio preview files must be moved to the new locations.

System Requirements and Release Notes

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

Install Me First

QuickTime

To support many video file types, as well as some other functions, Portfolio Server requires QuickTime. This is particularly important for Windows, since it's not installed by default. On Mac OS X, use Software Update to make sure that the most current version is installed.

Download QuickTime from: http://www.apple.com/quicktime/download/

Even if you don't think you will be cataloging video files, it is highly recommended that you install QuickTime so that Portfolio Server will appropriately respond to these file types.

NOTE: QuickTime Pro is not required. The basic version of QuickTime provides the necessary functionality.

OpenOffice.org

In order to catalog some document formats (Microsoft Word, Excel, and PowerPoint, HTML, and RTF) you must install and run OpenOffice.org before you install Portfolio.

Download OpenOffice.org from: http://download.openoffice.org/index.html

OpenOffice.org is not required to use Portfolio Server to catalog other file types, but must be installed to support Microsoft Office documents.

Adobe DNG Converter

Portfolio can catalog Camera Raw files from most digital cameras. Since these files are not standardized, Adobe developed the Digital Negative (DNG) file format to provide compatibility among a wide range of devices and applications.

If you have the free DNG Converter application installed on the Portfolio Server computer, Portfolio can batch convert Camera Raw files to this popular format.

Download the latest DNG Converter from one of these locations:

Macintosh:http://www.adobe.com/support/downloads/product.jsp?product=106&platform=Macintosh

Windows:http://www.adobe.com/support/downloads/product.jsp?product=106&platform=Windows

The DNG Converter is not required to use Portfolio Server but, if present, provides an additional conversion option.

Note for Macintosh Users

Be sure to log in to the computer using a single account to install OpenOffice.org, DNG Converter, and Portfolio Server.

Opening the Firewall Ports

If there is a firewall between your server and users that need to connect to it, you will need to open several ports to allow communication between Portfolio Server and the Client applications.

- If your firewall is on the server itself, you will need to open these ports to allow access to other users on your network.
- If your firewall is between your local network and the Internet, you will need to open these ports to allow access to users outside your network.

Port	Description
2903, 2904	Desktop Client
8090	Web Client (JBoss HTTP/Web Service)
8091	Server Administration (Jetty Web App)

Additional ports must be reserved for internal Portfolio Server communication. See the *Portfolio Administration Guide* for complete details about all required ports and port conflict resolution.

Install Portfolio Server

For best performance and simplicity, you should install Portfolio Server on your file server.

You can download the current Portfolio Server installer from the Extensis website at http://www.extensis.com/downloads/. Copy the installer onto the server's hard disk, double-click to launch the installer and follow the instructions.

When the server software has been installed, your Web browser will open Portfolio Server Admin to allow you to configure your server, add users, and create catalogs.

Installing on Windows

Installing Portfolio Server is quick and easy. Download the installer to the server, double-click the installer and allow it to guide you.

During the installation process on Windows, you are prompted to optionally enter a Domain User account or install as a Local System account.

Domain User account option

If the assets you intend to catalog reside on network volumes, you must use the Domain User account option. To take advantage of this option, you will need to create the Domain User account (ideally, specifically for the Portfolio Server services) and configure it's access before running the Portfolio Server installer. The account must have full read/write access to all network locations that contain your files to catalog, as well as the location of preview files generated by Portfolio. This domain account is also used to run the Portfolio Server services (Portfolio Server, Portfolio Server Admin). The account must be a member of the local Administrators group, so that it has full control over the Portfolio Server program directory and system files.

In addition, the domain user account must be granted the "Log on as service" privilege in the Local Security Policy console. For more information, see http://technet.microsoft.com/en-us/library/cc739424(WS.10).aspx.

Local System account option

If Portfolio Server is installed on a Windows system that holds all of the files you intend to catalog and make available to users of Portfolio Server, there is no need to configure a Domain User account for network access. You may simply select the Local System option.

Installing on Macintosh

Installing Portfolio Server is quick and easy. Download the installer to the server, double-click the installer and allow it to guide you.

When installing on a Macintosh, the Portfolio Server runs as the user that is logged in to the system at the time of installation. It is important to note the account must have full read/write access to all local and network locations that contain files (including Previews) you intend to catalog and make available to users of Portfolio Server. Don't log out if you have remote shares mounted.

In order to allow Portfolio Server access to network locations for files and previews, the shares need to be mounted on the system where Portfolio Server is installed. Portfolio Server will then have access to these network locations. For best performance, you may choose to install Portfolio Server on the same machine as your file server.

NOTE: If you use the Portfolio Desktop Client on a Macintosh to connect to Portfolio Server on another Macintosh, the computer running the Desktop Client software needs to have the same network volumes mounted that are mounted on the server. This ensures that both the client and server have the same path to assets and previews.

Xsan users

Portfolio Server can catalog files on Xsan volumes whether they are accessible to the server or not, but cataloging and file access performance will be dramatically improved if the server is directly connected to the Xsan volumes.

Continue configuration

At the end of installation, Portfolio Server Admin opens in your Web browser so that you can configure your server.

The server administrator user name is **administrator** and the default password is **password**. User names and passwords are case sensitive.

Portfolio Server Admin

You can use Portfolio Server Admin to configure or change your Portfolio Server from any computer on your network.

To open Portfolio Server Admin:

1. Open your web browser.
2. In the address field, enter your server IP address followed by a colon and then the port number. The default server administration port is 8091.
   For example: `http://192.168.0.1:8091` or `http://localhost:8091`.
3. Enter the administration user name and password.
   The administrator user name is **administrator** and the default password is **password**. User names and passwords are case sensitive.

NOTE: At your earliest convenience, you should change the **administrator** password. In the Web Admin interface, click **Users** in the panel on the left, click **administrator**, then enter and confirm the new password and click **Apply**.

Enter Your Serial Number

In order to use Portfolio Server, you need to enter your serial number in the Portfolio Server Admin web interface.

To license Portfolio Server:

1. Open Portfolio Server Admin and log in as **administrator**.
2. If the **Licenses** panel is not open, then click **Licenses** in the panel on the left.
3. Click the **[+]** button at the bottom right of the window to add a license.
4. Enter your Portfolio Server serial number and click **Add License**.
   The **Licenses** panel shows the version number of Portfolio Server and how many seats your license includes.

After you have entered your serial number, a button labeled Configure is displayed. Click this button for a checklist of details that you may want to configure for your server.

Use the same process to add licenses for add-on services or upgrades such as NetMediaMAX.

NOTE: You use this same process to add licenses for add-on services or upgrades such as NetMediaMAX. (You enter the serial number for NetPublish Server from within the Portfolio Desktop Client application.)

Create a Catalog

A Portfolio catalog stores all of the information about your assets. Catalogs do not store the physical assets, but include each asset's location on disk.

To create a Portfolio catalog:

1. Open Portfolio Server Admin.
2. Click **Catalogs** in the left hand panel.
3. In the Catalog list, click **Add New Catalog**.
4. Specify a catalog type.
   Typically, the **General Use** catalog type fits most needs.
5. Choose a database type:
   Native FDB - this is the default Portfolio Server database type.
   SQL database - if you are using Portfolio Server Enterprise, you can choose to use an SQL database. See the Portfolio Server Administration Guide for complete details about installing and configuring an SQL database for Portfolio Server.
6. Enter a catalog name.
   If your users will catalog files using the Web Client, you should consider creating an AutoSync folder to immediately create a location they can upload files to.
   You can also specify options for Collation language and Previews at this point or at any time after you have created your catalog.
7. Click **Create**.

Catalog Defaults

You can specify default settings (such as user access level) for new catalogs; see Portfolio Server Help or the Portfolio Server Administration Guide.

Add Users

To access a Portfolio catalog, users must have an account. The server administrator creates user accounts and grants users membership to catalogs in Portfolio Server Admin.

To add a new user:

1. Open Portfolio Server Admin and log in as **administrator**.
2. Click **Users** in the panel on the left.
3. Click **Add New User**.
4. Enter New User Details:
   Account Name - The name the user will log in to Portfolio with. *(Required)*
   Password - The password for this account. *(Required)*
   Confirm Password - Re-type the password. *(Required)*
   Full Name - The user's real name. *(Optional)*
   Email address - An email address where the user can be contacted. *(Optional)*
   Notes - Any additional information about the user or their account. *(Optional)*
   Access - To specify a user's default access to catalogs, check the box labeled **Add user to all catalogs as** and choose an access level. If you uncheck this box, you will need to add the user to individual catalogs manually.
5. Click **Create**.

Set Up the Desktop Client

Install the Desktop Client

The Portfolio Desktop Client can be used by any Portfolio user to browse, search, and update catalogs. The Desktop Client can also be used by a Catalog Administrator to create AutoSync folders, custom fields, and the Master Keyword list.

Before you install the Portfolio Desktop Client, make sure that the computer you are installing on meets the minimum system requirements, and that the latest version of QuickTime is installed.

Download the current Portfolio Server from the Extensis website at http://www.extensis.com/downloads/. (The download includes Portfolio Server, Desktop Client, and NetPublish Server.) Copy the Desktop Client installer onto the computer, double-click to launch the installer and follow the on-screen instructions.

NOTE: On Mac OS X, you will need to quit any other programs you are running. Some installed components need you to log off your computer then log back on in order to complete installation. The installer will prompt to log you off when installation is complete.

Accessing a Catalog from the Desktop Client

To open a catalog from the Desktop Client, you need to connect to the server.

NOTE: In order for the Desktop Client to connect to the Portfolio Server, certain ports in the server's firewall must be open to external traffic. See Opening the Server's Firewall Ports and the *Portfolio Server Admin Guide* for more information.

1. Start the Portfolio Desktop Client.
2. Choose **File > Connect to Server**.
3. Click **Add Server**.
4. Enter a name to identify your server and the IP address or network name of the Portfolio Server, then click **Add**.
   The server name can be anything and does not have to be related to its network name or computer name.
5. In the Connect to Server window, click the **[+]** icon next to the server name to see the catalogs on that server.
6. Select a catalog and click **Open Catalog**.
7. Enter your user name and password and click **OK**. (To use administration features, enter a Catalog Administrator user name and password.)
   If you check the box labeled **Open this catalog on startup**, the next time you start the Desktop Client you will be prompted for your password and this catalog will open.

The Desktop Client Interface

There are four main areas in the Desktop Client:

- **Toolbar** - The Toolbar is at the top of the Desktop Client window. It provides access to common functions, including QuickFind, and you can customize it to include the buttons you want.
- **Galleries** - The Galleries list is on the left side of the window. Galleries are containers you can create for organizing and displaying items from your catalogs. The Galleries pane shows the galleries for your open catalogs. See the Desktop Client help system or the *Portfolio Desktop Client User Guide* for details on galleries.
- **Folder View** - Use Folder View for instant access to folders on your computer or network. You can also configure folders here for AutoSync. See the Desktop Client help system or the *Portfolio Desktop Client User Guide* for more information.

  NOTE: On Mac OS X, Folder View is available on a window drawer. On Windows, Folder View is a pane below the Galleries pane.

- **Main Window** - The Main Window shows items from the currently selected gallery or folder. Double-click an item to preview it.

For details on using the Desktop Client, see the help system or the *Portfolio Desktop Client User Guide*.

Administration Functions in the Desktop Client

The Portfolio Desktop Client allows users with Publisher or Catalog Administrator access to perform some administration functions.

When you open a catalog using a Publisher account, you can perform the following administration tasks:

- Add and remove keywords in the catalog;
- Specify actions for Portfolio to perform whenever the catalog is opened;
- Save the current catalog as a custom catalog type;
- Set advanced cataloging options (such as thumbnail size and metadata field mapping);
- Specify default values for certain fields that are automatically applied when items are added to the catalog.

When you open a catalog using a Catalog Administrator account, you can:

- Create, delete, and manage AutoSync folders;
- Create, delete, and manage Custom Fields and predefined lists;
- Manage the Master Keywords list;
- Edit additional settings such as Field Defaults, Metadata Settings, and Advanced Cataloging Options.

For more information on these and other Catalog Administrator tasks, see the Catalog Administrator section of the Desktop Client help system or the *Portfolio Desktop Client User Guide*.

Extras

When you install the Portfolio Desktop Client, you also install an operating system level shortcut menu plug-in, as well as Portfolio Express.

Shortcut menu plug-in

When you right-click on a selection in Windows Explorer or the Mac OS X v10.5 Finder, the shortcut menu shows a submenu to **Add to Portfolio**. From this submenu, you can choose a catalog you have previously opened or choose **Other Catalog**. Choosing one of these will open the Portfolio Desktop Client and allow you to add the selected files to a Portfolio catalog.

NOTE: You will still need to enter your user name and password, and if you choose **Other Catalog**, you will first need to connect to a server and open a catalog.

Portfolio Express

Portfolio Express is a lightweight application that you can launch and leave running. It shows you the contents of a catalog and lets you search for, preview, and open any files in the catalog. You can also drag a file from the Portfolio Express window into a document that supports that file's content to insert the file into the document. For example, you can drag a graphic into your word processing document.

You can have Portfolio Express start automatically when you log in to your computer, then show or hide its window by pressing a user-configurable hotkey combination.

See the section on Portfolio Express in the Desktop Client help system or the *Portfolio Desktop Client User Guide*.

Set Up the Web Client

Configure the Web Client

The Portfolio Web Client consists of a supported web browser with Flash Player installed. Recent versions of Firefox, Internet Explorer, and Safari are supported; for the full list of supported browsers see the System Requirements.

To download the latest version of Flash Player for your system, visit http://www.adobe.com/flashplayer/.

Of course, in order for a Web Client to connect to the Portfolio Server, the appropriate ports in the server's firewall must be opened for external traffic. See Opening the Server's Firewall Ports and the *Portfolio Server Admin Guide* for more information.

Finally, potential Web Client users must have a user account and access to a catalog. See Add Users and the *Portfolio Server Admin Guide*.

Accessing a Catalog from the Web Client

To connect to Portfolio Server, you must fist 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 then the port number. (The default port for connecting to Portfolio Server is 8090.)
   For example: `http://192.168.0.1:8090` or `http://servername:8090`
3. Select your preferred language from the drop-down menu.
4. Enter your user name and password and click **Login**.

The Web Client Interface

The main interface of the Portfolio Web Client has four areas:

- **Toolbar** - located across the top of the Web Client. The Toolbar provides access to common functions such as uploading and downloading files and changing the look of the Main Window.
- **Organizer** - located on the left side. This displays the catalogs available to you.
- **Main Window** - located in the center of the Web Client. This area displays item thumbnails and other information for the selection in the Organizer, or the results of a catalog search.
- **Item Properties** - located on the right side. This displays system file and metadata for items selected in the Main Window. Many of these fields can be edited directly in this pane.

When you preview an individual item, the entire interface is replaced with the preview itself, a filmstrip for choosing other items to preview, and other navigational controls.

For details on using the Web Client, click **Help** in the Web Client toolbar or see the *Portfolio Web Client User Guide*.

Using Portfolio

Cataloging Assets

There are two components to cataloging assets: adding them to a catalog, and adding information about them.

Adding assets to a catalog

You can add asset files to a catalog in one of three ways:

- Manually, using the Desktop or Web Client. You can select single or multiple items to catalog, and with the Desktop Client, you can catalog entire folders or disks.
- Automatically, using AutoSync folders. Even people who don't use Portfolio can add items to a catalog by placing them in an AutoSync folder.
- Instantly, from the Mac OS X Finder or Windows Explorer. Right-click on a selected group of files or folders and choose **Add to Portfolio** from the shortcut menu, then choose the catalog to add the items to. (This option is only available to computers that have the Portfolio Desktop Client installed.)

A Catalog Administrator can specify Catalog Option presets for Desktop Client users that will automatically add or prompt for certain information when items are cataloged.

Adding information to assets

While its all well and good to have all your assets cataloged, when it comes time to locate a specific image or other file you will find that a key to locating the right asset quickly is to have them tagged with useful information.

Information that can be used to locate items in a catalog includes:

- **Item thumbnails and previews** - Sometimes a visual search is easiest, or can be used to locate a desired asset from the results of another search. Including high-resolution previews can make this simple.
- **Text index** - By indexing the contents of text files, PDFs, Word documents, and PowerPoint presentations, you can search your catalog for files that contain specific words or phrases.
- **Keywords** - Adding keywords that describe the content of an image or document makes it easy to locate files. Use the keyword "contract" to identify all Word documents that are contracts, or "woman in hat" to identify specific fashion photos.
- **Custom fields** - Add data that has specific meaning to your workflow, such as a creator's name or an event date.
- **File metadata** - Digital photographs often include information about the camera model and settings, date and time the photo was taken, and sometimes the geographical location. Many applications allow you to embed information in a file, such as the creator name or copyright. Portfolio can import all of this information automatically when you catalog assets. Make sure in advance that your applications and devices are set up to embed the information you need.

Catalog users with Editor access can enter and edit information for assets that have been cataloged, using the Desktop or Web Clients.

Catalog Administrators can create custom fields and add master keywords to catalogs using the Desktop Client.

You can specify Catalog Options to include some asset information automatically, or to prompt the user adding items to include certain information. See the Desktop Client online help or the *Portfolio Desktop Client User Guide* for more information about Catalog Options and Presets.

Accessing Assets

Once you have cataloged your digital assets, you will want to access them for a variety of reasons: you may need to make changes to a document or use an image in a presentation, for example.

You can access cataloged assets through the Desktop or Web Client. The Desktop Client gives you more options for working with files directly; with the Web Client, you must download an asset to your computer to use it.

Downloading assets with the Web Client

When you download multiple assets with the Portfolio Web Client, they are first added to a compressed (ZIP) file. ZIP files are used to reduce download time. You can open these files directly in Windows Explorer and Mac OS X Finder.

To download files:

1. Select the files you want to download.
2. Click **Download** in the Toolbar.
3. Portfolio Server will prepare the files and create a ZIP archive, then you will be prompted to download the file now or later. Click **OK** to download the files.
   If you click **Cancel**, the download file is saved as a "job" that you can complete later.
   NOTE: If you download just one file, Portfolio does not compress it in a ZIP archive.
4. Your Web browser will prompt you to save the file prepared by Portfolio Server. Choose the location where you want to save it, give the file a different name if you want to, and click **Save**.
   NOTE: Be sure not to change the file's .ZIP extension or you may not be able to open it.

Once the file has downloaded, you can extract the assets from it and use them in your project.

For more information, click **Help** in the Web Client window, or see the *Portfolio Web Client User Guide*.

Retrieving assets with the Desktop Client

From the Portfolio Desktop Client, you can do many things with asset files, including:

- Edit original files
- Copy asset files
- Convert an image to a different format
- Drag an item into another program

To edit a file:

1. In any gallery, select the item you want to edit.
2. Press **Command-E** (Mac) or **Control-E** (Windows).

Portfolio starts the editing application then opens the selected file in that application. If necessary, Portfolio will first prompt you to locate the application to use.

To copy a file:

1. In any gallery, select one or more items to copy.
2. Choose **Item > Original > Copy**.
3. Navigate to the location where you want to copy the files and click **Choose** (Mac) or **OK** (Windows).

Portfolio copies the files you selected to the folder specified, leaving the original items untouched.

To convert image files:

1. In any gallery, select the items you want to convert.
2. Choose **Item > Batch Convert Images**.
3. Choose the format you want to convert the files to.
4. Specify other conversion settings:
   - For JPEG files, click Settings and specify the compression level.
   - Choose a color mode.
   - Specify the resolution of the converted images.
   - Specify resizing and cropping options.
5. Specify where to save the new images:
   - **Prompt for location** - When you click **Convert** Portfolio will prompt you for a directory.
   - **Replace originals** - Portfolio will replace the original files with the converted versions. ***NOTE:*** Your originals will be lost if you use this option.
   - **In the same folder as originals** - If converted file names conflict with originals they will have a number appended to the end; "karate.tif" will be converted to "karate1.tif."
6. Specify whether you want the new images added to the catalog.
7. Click **Convert**.

The conversion is done by the Portfolio Server.

Dragging files to other programs

While Portfolio is perfect for managing and organizing your digital assets, you will often need to work with them in other applications. Besides editing the original files as described above, you can drag items from any Portfolio gallery into an open document in another application. Some examples of this are:

- Drag an image thumbnail from a Portfolio gallery into a Word document to place a copy of the image.
- Drag an item into an email to mail a copy of the item as an attachment.
- Drag a thumbnail to an application icon to open the original file with that application.
- Drag a thumbnail to a folder to copy the file to that folder.

Organizing Assets

There are several techniques and structures you can use for organizing your digital assets. For a detailed discussion of the topic, please download the *Digital Asset Management Best Practices Guide* from Extensis at http://www.extensis.com/en/downloads/document_download.jsp?docId=4000037.

Here are some basic tips for organizing your assets:

- **Use multiple catalogs.** Catalog assets according to who needs to access them. This means only users who need to access specific assets need to be granted access to each catalog. ***NOTE:*** Your license for Portfolio Server may limit the number of catalogs that can be online at the same time. To bring another catalog online, you may need to take a catalog offline first.
- **Create galleries intelligently.** Galleries can give quick access to a subset of assets in a catalog, but will only be useful if they are created based on the way users access assets. A gallery of files with the digit "1" in the filename will probably not be useful, but a gallery of photos that are royalty-free probably would.
- **Use private galleries.** Private galleries are only accessible to the user that creates them. This can allow users to organize assets in a way that is meaningful to them but may not be useful to others.
- **Keep assets on a file server.** Although users can catalog assets on their local computers or any network location, it is much more difficult to manage multiple locations and to make them accessible to other users. Since digital assets have a distinct value and are often irreplaceable, you should also back them up regularly. Keeping them on a file server makes this easier to do, also.

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Documentation Feedback

Web: http://www.extensis.com/helpfeedback/

Technical Support

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

When contacting technical support, include the following information:

- Your license number(s)
- Your computer configuration, including operating system, memory, hard drive configuration, etc.
- Your question or a description of the difficulty you're experiencing - what specifically occurs and when.
- Your phone number if you want to have our representatives 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: 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.

Online Support

To obtain support online, please fill out the online support form at

http://www.extensis.com/support/.

Our tech support representatives will respond by phone or e-mail, usually within 24 hours on weekdays.

Telephone Support

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