Web Client User Guide

Portfolio™

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Extensis Portfolio Web Client

Welcome to the Portfolio Web Client!

The Portfolio Web Client gives you instant, remote access to Portfolio Server with the convenience of a web browser. With its modern, easy to use interface, you can access centralized, shared catalogs of your digital media that give you the consistency and collaboration you need to streamline your workflow. The Portfolio Web Client gives you the tools to automate and save time working with many different media types to help you find, organize and download what you need in the format you want.

- Uploading Files – Get started!
- Downloading Files – Viewing Jobs and downloading
- Conversion Settings – Automate file conversion
- Finding Files – Get what you need
- Working with Galleries – Gather and share
- Get Item Properties – View and edit information about your files
- Adding Keywords – Make things easy to find
- Working with Folders – Get organized

What's new in this release

The Portfolio 9.5 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 watched folders
- Organize files on disk within watched folders
- Batch convert files
- Enter and embed metadata

The Portfolio Web Client brings these new features to the web:

- Flagged items: You can mark assets to work on without first creating a gallery or moving items around.
- "Cataloged By" 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 ("zip") 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: For single-catalog users, the catalog is automatically opened and the first page is displayed.
- Remember last user: The browser remembers the last user's setting: username, language, 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.

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

The NetMediaMAX add-on module for Portfolio Server offers additional benefits, including expanded file format output and scripting functionality for Web Client users.

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 for faster conversions, metadata and cataloging operations.
- **Run Media Scripts**: Unlock advanced media-processing and automation that allows access to the full power of Equilibrium's MediaRich Server.

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.

- Uploading items to a catalog

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

- Creating a new gallery
- Main Window View Options

ACCESS: Preview, download and convert files from Portfolio Server.

- Previewing items
- Downloading Files
- Batch Processing

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

- Keywords
- Editing Item Properties

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.

- Finding files
- QuickFind
- Using the Find Tool

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 the 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: http://www.extensis.com/en/support/documentation/?fs=/en/support/documentation/portfolio/.

Connecting to Portfolio Server

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

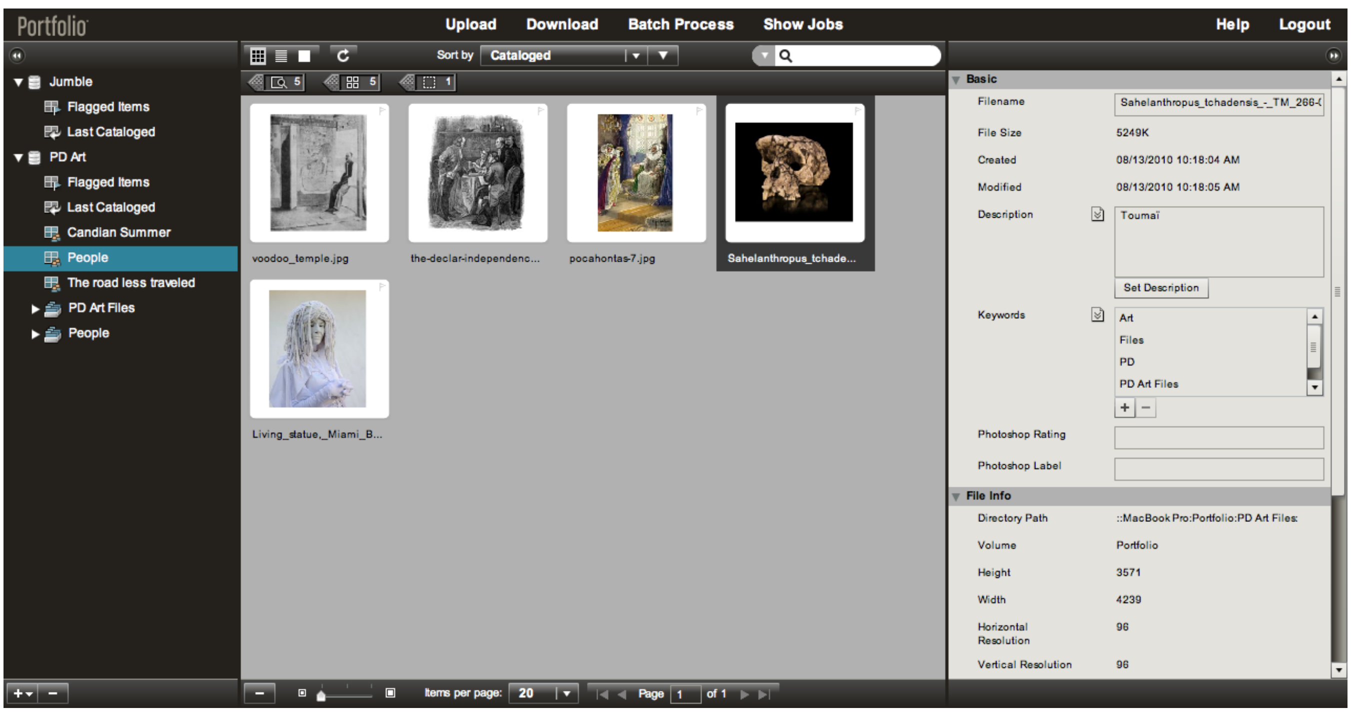
- The Portfolio Server IP Address or server name
- The Portfolio Server's port number
- Your user name
- Your password

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 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**.

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 Portfolio Web Client is divided into four main areas: the Toolbars, Organizer pane, Main Window pane and the Item Properties pane.



Toolbars

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, changing the display of the Main Window, searching for files and so forth.

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.

Organizer pane

The Organizer pane at the left side of the window shows all catalogs that are available to you.

To view the contents of a catalog, click the triangle to the left of the catalog name. This displays any available galleries as well as the folders that contain the assets in the catalog.

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

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.

Item Properties pane

The Item Properties pane displays filesystem 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.

Main Window View Options

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.

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 112x112, 256x256, 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 image (or one of a group of selected images) in either Grid or List view.

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.

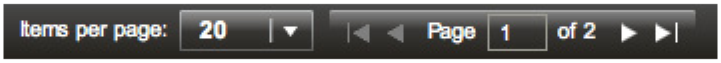
Previews

Previews are automatically generated as needed. The maximum preview image size can be specified for each catalog by the Portfolio Administrator in the Portfolio Server Web Admin console.

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 the Main Window: 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 manually jump 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 our keyboard shortcuts to access these features.

A Close — Exits Preview mode and returns to your previous view.
Shortcut: Esc

B Zoom — Zooms the preview in or out. 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 image preview.

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 Player — 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. Connect to Portfolio Server with the Web Client.
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 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 the Show Jobs dialog.

NOTE: You must select an upload folder before the Upload button is activated.

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 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**.

Catalogs

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 Read 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 to 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. Editors are not able to enter metadata for fields that are mapped for embedding into files.

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:

- **Download Originals** – Allows you to download original files from catalogs using the Portfolio Web Client.
- **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.
- **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.
- Run Media Scripts - Reserved for users of NetMediaMAX, this allows you to run a script for servers enabled with this feature.

Placeholders

Normally, Portfolio creates an entry (also called a record or item) for each file that you catalog. But, in some cases, a record may be created for a file that doesn't exist—perhaps one that you haven't yet received or created. This is called a Placeholder. Think of a Placeholder as a stand-in for a file that you know you'll be including in your catalog, but that you don't have yet.

Placeholders can only be created with the Portfolio Desktop Client, but you may still view and edit the records using the Portfolio Web Client.

Placeholders behave just like other items in a Portfolio catalog. You can assign them keywords, add descriptions to them, perform searches for them, and so on. The only difference is that the Placeholder doesn't yet have a specific media file associated with it, so you are unable to move it between folders.

At any point in the future, using the Portfolio Desktop Client, you can link a Placeholder to an actual file on disk, turning it into a regular Portfolio catalog item.

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.

A standard 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, the update the displayed results.

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.

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.

A	Sort field	Select the field to sort the main window view.	**G**	Search term	Enter a value to match in the search field.
B	Sort order	Click to sort the view in ascending or descending order.	**H**	Add criterion	Click to add another search criterion
C	Show/Hide	Click to show or hide the Find controls	**I**	Remove criterion	Click to remove the search criterion
D	QuickFind field		**J**	Boolean	Determines how criteria are used in searches: **and** means both must match, **or** means either must match
E	Search field	Choose a field to search on	**K**	Save as Smart Gallery	Click to create a Smart Gallery based on these search criteria
F	Search term	The value to be matched against.	**L**	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. See "Galleries" on page 19 for more information on Smart Galleries.

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

To searching 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 ready to search, press click the **Search** button or press the **Enter/Return** key.

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

Search 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 UserID of the person who cataloged the item in Portfolio
Changed	The date and time that the item was recently changed
Changed By	The UserID 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 UserID 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)
Custom Fields	Any custom fields that have been created for the current catalog
EXIF, IPTC or XMP fields	Any of the specialized custom fields for this metadata
MS Fields	Metadata from Microsoft Office documents

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 the **Clear Results** button  in the right end of the QuickFind field.

To clearing Find results from the Main Window:

- Select an alternate entry in the Organizer pane.
- Click the **Hide Find Tools** button  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

When created, galleries can be designated **public** and available to all users of a catalog, or **private** so that only you can see it. 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 22.

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 21.

Gallery icon reference

Private Gallery

Public Gallery

Public, Read-only Gallery

Private Smart Gallery

Public Smart Gallery

Public, Read-only Smart Gallery

Creating a new gallery

NOTE: You must have a Publisher access level or higher to create new galleries. See your Portfolio Administrator for access level details.

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.

NOTE: The target gallery must exist in the same catalog as the items you are adding.

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 a Publisher access level or higher 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**.

NOTE: Items cannot be removed from a Smart Gallery. 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 expand the list of fields in the drop-down menu, choose **Show All** from the **Sort By** menu.

  This displays all fields available in the catalog.

- To restore only the basic set of fields, choose **Show Only Basic Sort Fields** from the **Sort By** menu. (This is the last item in the list.)

The sort order can be further modified 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 box 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.
4. Click the **Save as Smart Gallery** button.
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 a Publisher access level or higher 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**.

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.

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.

Understanding Field Types

Data is recorded in Portfolio Catalogs into 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

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 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 JPG, TIFF and PSD files, as well as other files that have XMP metadata containers. See the file format support list for details.

NOTE: Portfolio does not read or write to Photoshop XMP sidecar files.

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

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. for convenience, fields are grouped. 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 instructions 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 **Update**.	Keyword
Text Block field	Edit the text block and click the **Set** 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 Item 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 **Submit** button.	Photoshop Label
Multi-valued field	1. Click the **Add Values** link. 2. Enter a new value into the text box and click the **Add** button **[+]** to the right of the text box. 3. When finished entering values, click **Update**. 4. In the Item Properties pane, click **Submit**.	Keyword
Text Block field	Edit the text block and click the **Append** or **Replace** 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 organized in the Organizer pane. Click and drag a folder from one location to another to move the folder. The folder must 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.

- Creating and using presets
- Running a preset for download
- Running a preset for editing originals
- Creating Smart Galleries to automatically locate files
- Running Scripts

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.

NOTE: 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 24.

Adding keywords

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

NOTE: Keyword 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 can be assigned to folders with 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 the **Add Values** link 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 the **Show Jobs** link 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 the **Remove Values** link 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 the **Show Jobs** link 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 the **Remove Values** link 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 Values command to update any misused keywords.

NOTE: The Replace Keywords command 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 the **Replace Values** link 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 the Show Jobs link 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 in displayed in the Navigation Toolbar at the bottom of the Main Window.
4. When the server work is complete, a dialog box prompts you to download the files. If you want to download the files later, click **Cancel**. The archived original files can be retrieved later from the **Show Jobs** dialog.

The **Batch Process** command opens the conversion settings dialog box 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 for more information on specifying settings in the Batch Processdialog.

Once all parameters have been decided for the Batch Process command, click the **Bath Process** button 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 the **Show Jobs** button in the Toolbar.

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.

Presets

The Presets drop-down menu will allow you to select pre-configured conversion settings. Some users will have the ability to configure and save presets. Whether this option is available to your user account or not is dependant on if the setting was enabled for it. See the Portfolio Server Administration Guide for more information.

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 the **Save** button.

Once a preset has been saved for a catalog, it will be available to all users who access the Batch Process command. For example, a preset may be created for specific needs such as ‘web format’. When users go to save files in the catalog for the web, they can choose the ‘web format’ preset and rest assured the required conversion settings are being applied to the file.

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 the **Update** button 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 it’s 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 a 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 the **Batch Process** button 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.

Running Scripts

Portfolio Server implementations that include the NetMediaMAX module have access to advanced scripting solutions. The Portfolio Server Administrator can make these scripts available for use in the Portfolio Web client. The functionality and scope 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 **Run Scripts** command in the Toolbar.
3. Select the 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.

Showing Jobs

The Jobs dialog displays the status of all server tasks, including the creation of ZIP files, file conversions and the running of scripts. The results of the Download, Batch Process and Run Scripts commands are available from the Show Jobs dialog.

As commands are run on the server, the entry for the command appears in the Jobs dialog with a timestamp for the process start and finish, and status to the right of the command entry. Completed tasks are displayed until cleared. If there are jobs listed in the dialog, the Show Jobs button on the toolbar shows a badge indicating the number of jobs.

To download the results of a command:

1. Initiate the command: Download, Batch Process or Run Scripts.
2. Click the **Show Jobs** link in the Toolbar 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.

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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 serial 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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