Extensis™

PORTFOLIO™

User Guide

Version 5.0 for Macintosh® and Windows®

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Introducing Portfolio

Welcome to Extensis™ Portfolio™! Portfolio is an easy-to-use and efficient cataloging tool that allows you to organize all your creative work into on-line libraries that can be browsed. Whether your creative content is created on Macintosh or Windows, shared over a network, or accessed from remote locations using TCP/IP or over the web—Portfolio will forever change the way you view, organize, manage, select, share and use digital content.

Portfolio allows you to build visual catalogs from digital media including images, sounds, movies, and documents automatically, with detailed reference information and thumbnail images. You can catalog any media regardless of application, then effortlessly retrieve them by visually searching or by searching using keywords or other criteria. You can view your media files as thumbnails, as a list, or as individual records, and customize the views to suit your needs.

Portfolio also lets you stay in sync with other users by sharing your catalogs over networks and across platforms. You can import databases of information into your catalog, and even export catalogs or specified items as Web pages.

System and Software Requirements

To install and use Portfolio, you will need the following:

Macintosh:

- Apple® Power Macintosh® or PowerPC compatibles
- Mac OS® System 8.1 or later
- 6MB application RAM, minimum
- 20MB free hard disk space
- Open Transport 1.1 or higher (only if you will be connecting to catalogs being served by Portfolio Server software)

  Note: If you commonly work with large files or large catalogs, you may need to increase the amount of RAM allocated to Portfolio.

Windows:

- 486/33MHz or faster PC (Pentium 133MHz or faster recommended)
- Microsoft® Windows 95®, Windows 98® or Windows NT® 4.0
- 6MB application RAM, minimum
- 20MB free hard disk space
- TCP/IP Services (only if you will be connecting to catalogs being served by Portfolio Server software)

Note

For additional installation instructions and system requirements see:

Server Administration, *page 221*.
PorWeb, *page 236*.

SQL Connect Administration, *page 266*.

Installation

You can find instructions for quick and easy installation on the CD-ROM that is included with your product or, if you downloaded an Extensis product installer from our web site, running the installer will place an informational Read Me on your hard drive.

Registration

It is important to register your copy of Portfolio so we can provide you with the best possible service. Registered users of Portfolio are eligible for technical support, information regarding new versions and products, discounts and special offers on new products.

Your registration number is located on the back cover of this manual or was sent to you via email if you purchased through our website. You will need to enter that number to personalize your copy of Portfolio. If you choose not to personalize your copy, Portfolio will run in a demonstration mode that allows you to use the product for 30 days. You can purchase additional registration numbers in the US at 1-800-796-9798 or 1-503-274-2020. In Europe call 31 (0) 30 247 50 50.

Tip

Extensis Customer Service contact information for the US and Europe is shown on *page 2.*

Technical Support

For questions regarding Portfolio, please first refer to this manual, which describes the features and basic operations. We invite you to visit our Portfolio page on the Extensis website (*http://www.extensis.com*) for frequently asked questions and troubleshooting tips.

If you have a question which is not addressed in this manual or on the Extensis website, Technical Support is available by phone at (503) 274-7030, Monday through Friday, 8:00 a.m. to 5:00 p.m. Pacific time. When calling for technical support, please be at your computer and have the following information available: your Portfolio registration number, your computer configuration, and your question or a description of the difficulty you're experiencing—what specifically occurs and when. Take note of any displayed error numbers or messages and any other information you think may be relevant.

Tip

Extensis now offers **support forums** for all products. These forums allow you to share issues with other users, get help from Tech Support, read what other users are doing with the product, and more. Visit *http://www.extensis.com/support* and locate the appropriate product support forum.

Tip

We can also be reached by:

Fax: (503) 274-0530

E-mail: support@extensis.com

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

What is Portfolio?

Portfolio is a digital image cataloging application. Using Portfolio you can take images—including graphics, presentations, movies, sounds and other digital media files, even documents—that you or members of your workgroup create and put them into common catalogs. You can then view, edit, copy, and retrieve items from the catalog and transfer them to other documents, regardless of file format, location, platform, or applications that created the files.

It's quick and easy to view and retrieve images in Portfolio catalogs because the catalog stores only thumbnail images of the file (along with whatever additional information you require), rather than the full document or image. Portfolio creates pointers to the original files, so the originals are always available for copying to applications, previewing, editing, etc., while allowing the catalog itself to be fast and efficient.

There is no limit to the number of items a single catalog can contain (bearing in mind that the more items in a catalog, the more memory and time are required for common operations). To each item in a catalog, you can add:

- An unlimited number of keywords that will help you easily search for and select catalog items.
- A description (up to 32,000 characters long) that lets you store important or useful information about the file.
- Unlimited custom fields, including special field types such as Date/Time, Strings with multiple values and predefined lists, URLs, and more.

In a workgroup setting, you can allow all users full access to all catalog functions, or you can designate catalog administrators to create, maintain, and control access to catalogs for the entire workgroup. With Portfolio installed on their computers, members of your workgroup on both Macintosh and Windows can simultaneously search, view, and use items from catalogs whose source files are located on one or many network servers, shared volumes, CD-ROMs or removable drives. Users can access the Portfolio Server remotely using TCP/IP, and you can even create Web pages of cataloged items.

With the PortWeb plug-in and appropriate web server setup, even web browser users to can browse Portfolio catalogs. See *page 236* for details.

What's New in Portfolio 5.0?

Portfolio version 5.0 is a major upgrade to this popular cataloging program, adding a number of exciting new features and enhancements. Major new features and enhancements are listed below.

New to Portfolio in version 5.0 are:

- **Palette Interface**—Palettes provide easier access to information that was previously available only from submenus or dialogs. The new palette interface allows you to execute finds, load galleries, and sort record sets faster than ever before.
- **Dockable Palettes**—Helps you keep your workspace uncluttered by allowing you to dock and undock palettes as you need them.
- **Edit in place**—Edit fields directly in Record view.
- **Watermarking**—Read and embed Digimarc™ watermarks.
- **Disk Previews**—Lets you capture a full-sized screen resolution image when items are cataloged, and access it even if the original image is on a disk that is not currently mounted.
- **Multi-page file format**—Allows you to preview each page of a multi-page document, and search the text inside it.
- **Create Placeholder Records**—Allows you to create a blank record for any item whose source file is not yet available.
- **Search across multiple catalogs***—Expand searches to include both intranet (local network) and Internet based catalogs.
- **SQL Database Support*—**Allows corporate Portfolio users to interface with a pre-existing SQL database. Sold separately.
- **PortWeb*—**A Portfolio plug-in (part of the Portfolio Client/Server package) that allows Portfolio databases to be published to HTML web servers and dynamically searched by viewers with web browsers is now included with Portfolio.

Note

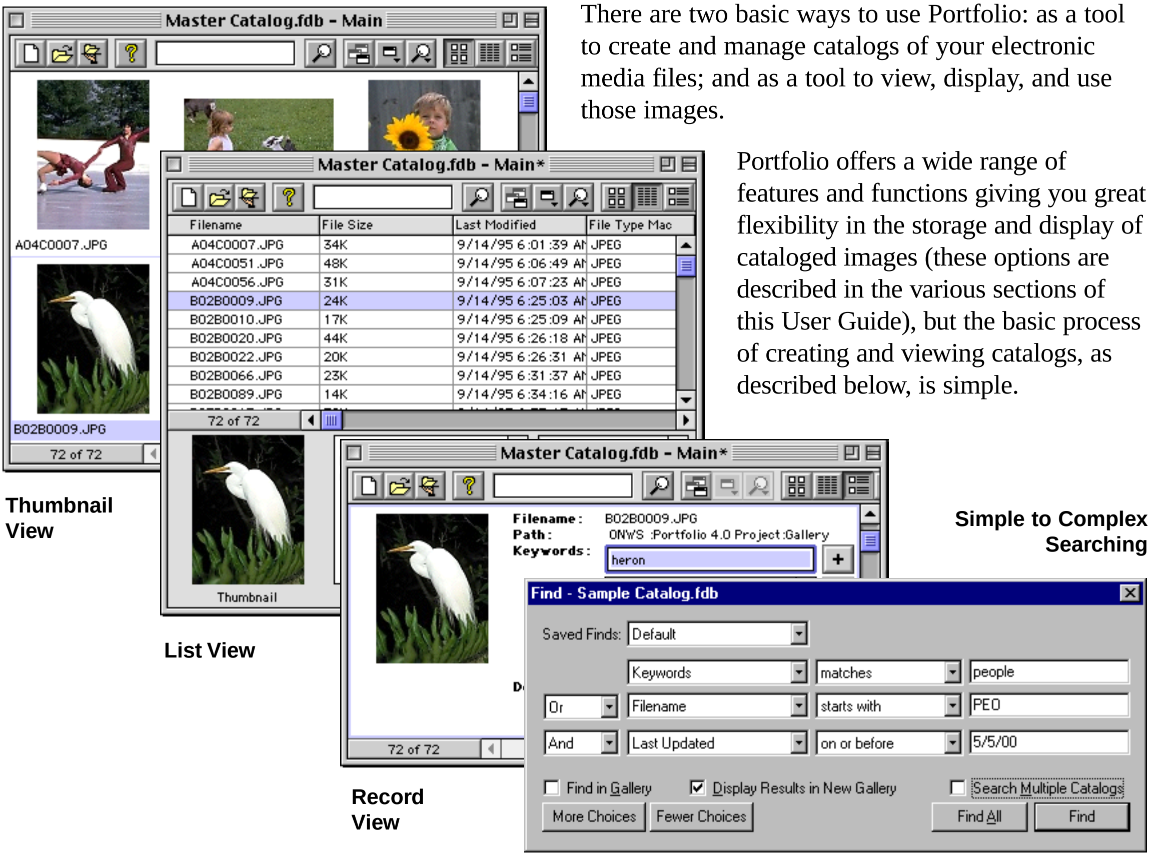
Features with an asterisk (*) apply to Portfolio Network and Portfolio Server Editions only.

Enhancements include:

- **Translators**—Improved item translation and functionality.
- **Saved Galleries and Finding**—Improvements to Galleries and Finding prompt you to save Galleries, and lets you link a saved find and predefined sort order to specific Galleries.
- **Slideshow**—Adds optional data fields displayed with the image, enhanced proofing controls, and the ability to export slideshows as QuickTime™ movies (Mac OS only).
- **Background Cataloging**—Improvements include multiple folder watch and easier task monitoring.
- **Preview**—Adds a host of new features and improved preview controls.
- **Server Administration***—Multiple improvements, including allowing catalogs to be managed without closing them on the server.

There are two basic ways to use Portfolio: as a tool to create and manage catalogs of your electronic media files; and as a tool to view, display, and use those images.

Portfolio offers a wide range of features and functions giving you great flexibility in the storage and display of cataloged images (these options are described in the various sections of this User Guide), but the basic process of creating and viewing catalogs, as described below, is simple.



Thumbnail View

List View

Record View

Simple to Complex Searching

Cataloging Steps Summarized

1. Open Portfolio, create a new catalog, then drag and drop images or folders of images into the open Gallery window.
2. When prompted for Cataloging Options, select the desired options, or simply accept common default options.
3. After Portfolio has finished adding the new images to the catalog, you can view the items in different ways using commands from the View menu, add information about the items using commands from the Item menu, or change catalog parameters using commands from the Catalog menu.
4. You can add keywords, descriptions, and custom fields, then search on these entries, or search using a number of other criteria.
5. If your catalog is shared over a network or on a Portfolio Server, you can access and use catalog images at the same time as other users.

Portfolio Basics

When you create a new Portfolio catalog or add items to an existing catalog, Portfolio gathers information about the item and creates a record for it in the Portfolio database. If the source file being cataloged includes a thumbnail and/or icon, the thumbnail and/or icon can be added to the item's record.

Portfolio does not import the item itself, but creates a link to the file that contains the cataloged item. This allows you to view, search, and retrieve cataloged items quickly, and to view and search for items even when the original file is not available (such as on a hard disk, CD, or network volume that is not mounted). The only time you need to access the original file is when you want to Preview the image, Edit the image, or copy it to another application.

If a cataloged item is moved to another location, renamed, or if other information about the original file changes, you will want to make Portfolio aware of the change by "updating" the record.

You view cataloged items in a window called the "Gallery." Portfolio provides several different Gallery views, and each of these views can be customized to meet your needs. You can add additional information to item records such as keywords, description, and Custom Fields, and then search for cataloged items using keywords, or use Portfolio's powerful Find function to locate items using any of the information fields assigned to them.

If your catalogs are being used in a workgroup and/or network environment, you can use Portfolio's standard **Level-based Access** options *(page 194)* or the new **User-based Access** options *(page 199)* to limit access to the different cataloging functions.

See pages 13 through 20 for a General Overview of Portfolio's major functions and features.

The Sample Catalog

If you have not yet cataloged your own files, you can use the Portfolio Sample Catalog. The Sample Catalog is located on the Extensis CD, or you can download it from our web site (http://www.extensis.com).

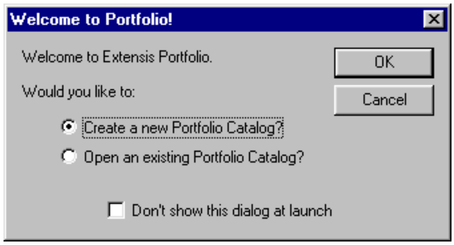
Note: You can copy the Sample Catalog to your hard drive and work with it there if you prefer.

Tip

If you'd like to learn about Portfolio but don't want to create a catalog yet, you can use the Sample Catalog located on the Extensis CD. You can read through steps 1 through 5 and examine the examples, or go straight to "Gallery Views" (step 6) on *page 16.*

To create and view a catalog:

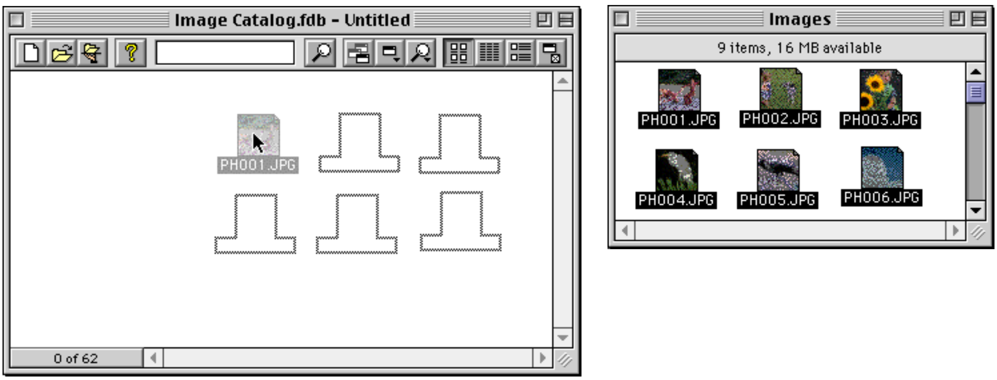
1. **Open the Portfolio application by double-clicking its icon, or by selecting it from the Start Menu (Windows). When the Welcome dialog appears, choose "Create a new Portfolio catalog," then click "OK."**



2. **Choose a name and location for your new catalog.**

   Portfolio creates a blank catalog, then opens the catalog and displays the Gallery window.

3. **Drag and drop selected files or folders into the open Gallery window.**



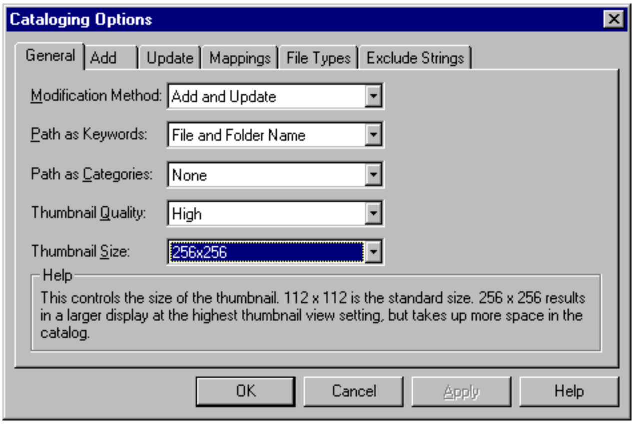
You can also add items to a catalog by choosing "Add Items" from the Catalog menu.

When you add items to a catalog, the Cataloging Options dialog is displayed, allowing you to choose a variety of options for the cataloged files. You can keep the Cataloging Options dialog from opening automatically by selecting the appropriate option under Edit > Preferences. *See page 93.*

Tip

If you have a catalog that you use frequently, you can specify it as the Default catalog and have Portfolio automatically open this catalog when you start Portfolio. Open the desired catalog, then choose “Set Default Catalog” from the FIle menu.

4. Select the desired settings from the Cataloging Options dialog—or simply allow Portfolio to use the typical default settings—then click “OK.”

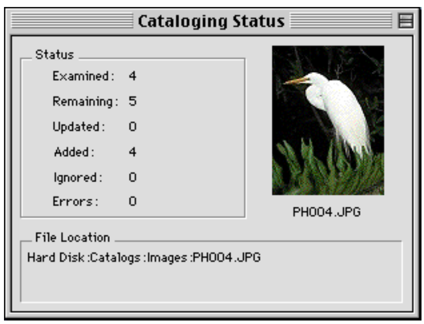


The Cataloging Options dialog allows you to determine what information will be cataloged with the image, how the thumbnails will be created, and whether the records should be updated. You can access and set these options at any time by choosing Catalog > Cataloging Options (or press **Command+J** (Mac OS) or **Ctrl+J** (Windows)).

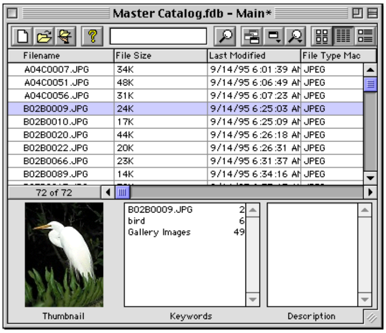
Since Portfolio creates catalogs using the image thumbnails rather than by importing the entire image, updating is required when any of the images have been relocated; updating allows Portfolio to update the pointers to the image files.

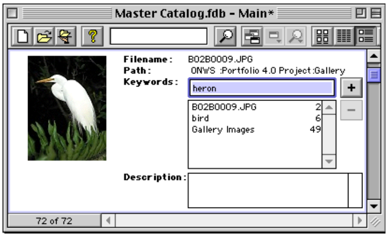
Note: Even if an image has been moved and the link to it lost, you can continue to view and work with the record in the catalog. It is a simple matter to update links to images using the Update Items option from the Catalog menu.

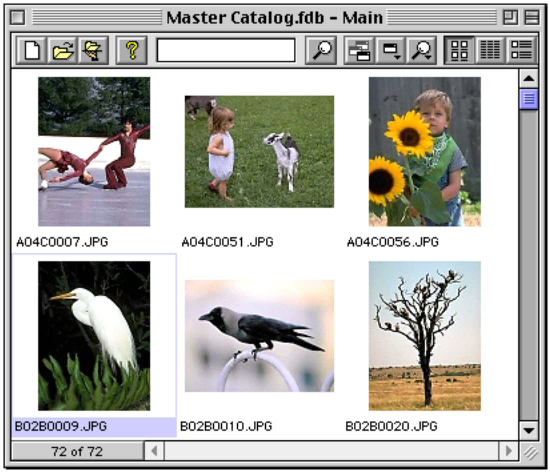
5. Portfolio will begin cataloging the items, keeping you informed of its progress.



6. *Gallery Views:* **When cataloging is complete, the catalog items will be displayed in the Gallery window, using whatever view was last displayed.**

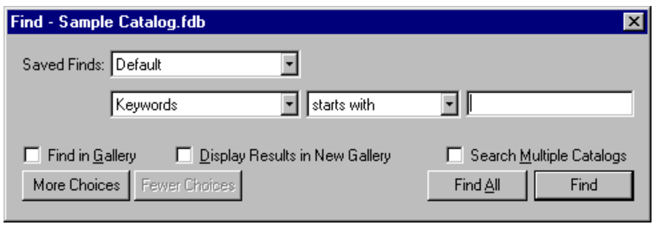






Portfolio provides three different catalog views: Thumbnail view, List view, and Record view. You can change views at any time by selecting a new view from the View menu, or by clicking the appropriate icon  on the Toolbar, or by using keyboard shortcuts: **Command+T, L, or R** (Mac OS) or **Ctrl+T, L, or R** (Windows).

7. *Find:* **You can search for items in the catalog, or across multiple catalogs, using a number of different options.**



To do so, choose “Find” from the Catalog menu, or press **Command+F** (Mac OS) or **Ctrl+F** (Windows), or click the Find  icon on the button bar, or enter a keyword to search for in the search field in the button bar.

You can use multiple search parameters at one time, display the found items in a new Gallery window, then search those Gallery items using different search parameters to narrow the search even more.

Tip

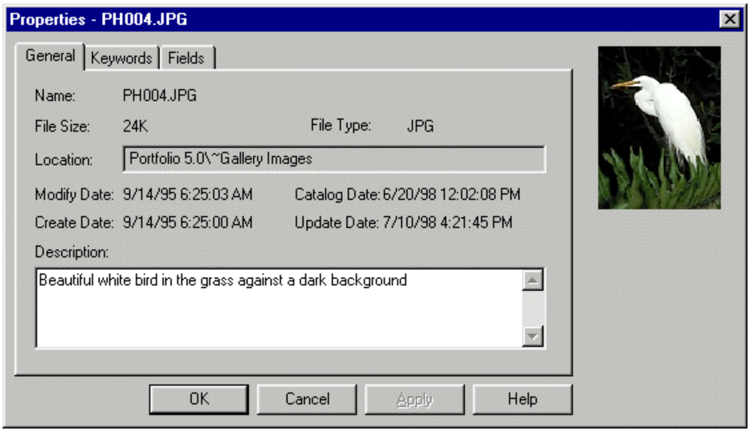
With Portfolio Network and Portfolio Server Edition, you can easily search across multiple catalogs *(see page 53).*

Tip

To eliminate having to recreate detailed Find parameters, save commonly searched-for parameters as a Saved Find *(page 48).*

8. *Keywords and Descriptions*: **You can add additional information to the items in the catalog, such as keywords, descriptions, and Custom Fields.**

   To do so, choose “Item Properties” from the Item menu.

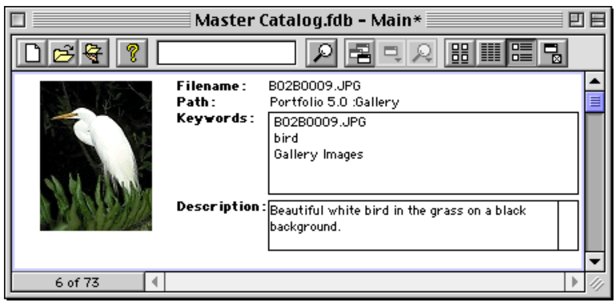


Tip

If you prefer, you can edit fields directly, without the need to first open Item Properties. For information on editing directly into fields in Record view, see *page 146.*

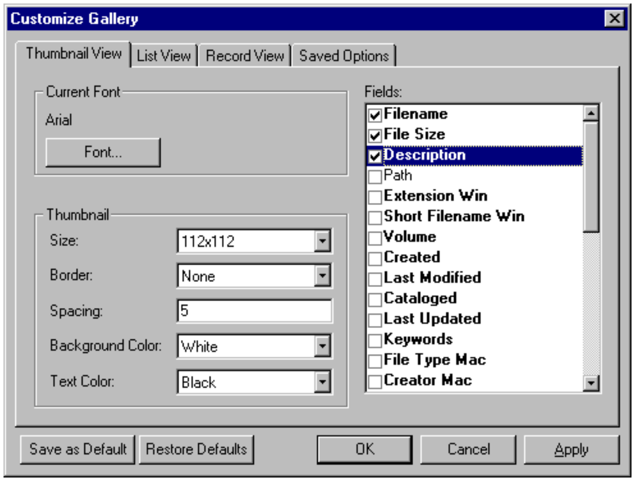
You can also edit the fields, if any, that were included with the item when it was cataloged. Use Item > Edit Keywords to assign keywords to multiple items at the same time.

When you close the Properties dialog, the changes are applied and can be viewed along with the item thumbnail in any Gallery view that has the keywords, descriptions, or Custom Fields displayed (this is set in View > Customize).



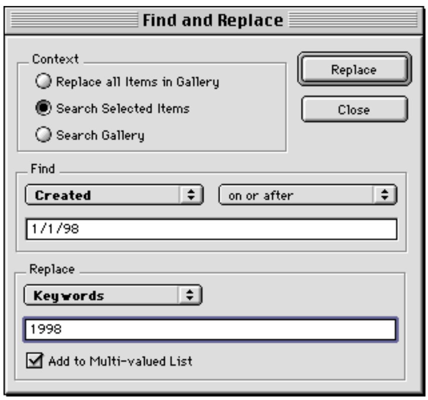
Note: You can import keywords into catalog records using Import > Field Values... from the File menu. And you can add consistency to your keywords by creating a Master Keywords list that users can choose from when assigning keywords to catalog items. Master Keywords can only be added and edited when in Administrator mode.

9. *Customize Layouts:* **You can customize the layout of the different Gallery views.**



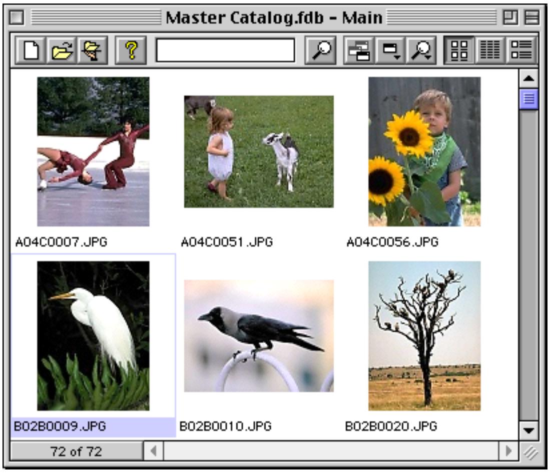
Customizing views allows you to include just the information you want to see, and determine how that information is presented. You can change the font size and style of text, add different background colors and custom borders to the thumbnails, and more. To customize a Gallery view, choose View > Customize, or press **Command+D** (Mac OS) or **Ctrl+D** (Windows).

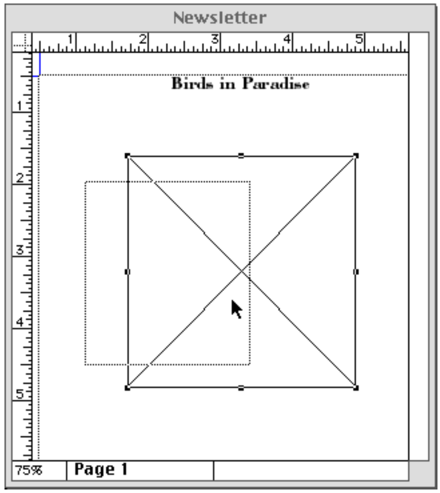
10. *Replace:* **You can add and replace keywords, descriptions, and Custom Field data for multiple items using the Replace function.**



This allows you to select a number of items and replace key information for them all at once. Choose "Replace" from the Catalog menu, or press **Command+Option+R** (Mac OS) or **Ctrl+Shift+R** (Windows).

11. *Using Catalog Items:* **You can work with catalog items in a number of different ways, such as previewing the original image, copying the image to a document, editing the image (in the parent application), rotating the thumbnail if appropriate, relocating the original image, and more.**



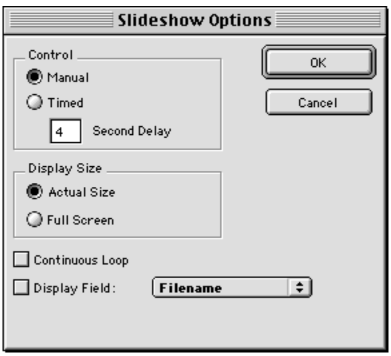


Tip for Macintosh QuarkXPress Users

To drag and drop catalog items to QuarkXPress documents you will need to install QX-Drag&Drop, a free XTension from Extensis that is included on the Extensis CD. *See page 59.*

To use a catalog image in a document: If the application allows drag and drop, simply drag the image to the open document window and drop it there. If the application does not allow drag and drop, open the item Preview window. Macintosh: Choose “Select All” [**Command+A**]. Windows: The item is selected automatically. Copy the image to the Clipboard [**Command+C** (Mac OS) or **Ctrl+C** (Windows)], then Paste it into the document [**Command+V** (Mac OS) or **Ctrl+V** (Windows)].

To access other item options, choose them from the Item menu.



12. *Slideshow:* **You can view catalog images at their original size using the Slideshow feature.**

The Slideshow displays only the images in the active Gallery window, so you can limit the Slideshow to just the items you wish to show by creating a new Gallery and adding the desired images to it. You can even export slideshows as QuickTime movies.

To start a Slideshow and access Slideshow Options, choose them from the Catalog menu.

13. *Multiple Catalogs/Multiple Galleries:* **You can organize, view, and search your catalogs in whatever way works best for you, including opening multiple Catalogs and creating multiple Galleries.**

For example, you might want to create different catalogs for different types of items, or you might want to put all your items in one catalog, and create different Galleries to display them. Or you might want to locate (using keywords or the "Find" command) items meeting specific criteria and display them in a new Gallery—you can even save Galleries for future viewing of only those items.

For information on the differences between Catalogs and Galleries, see *page 28.* For information on multiple Catalogs, see *pages 53 and 74;* for multiple Galleries, see *page 64.*

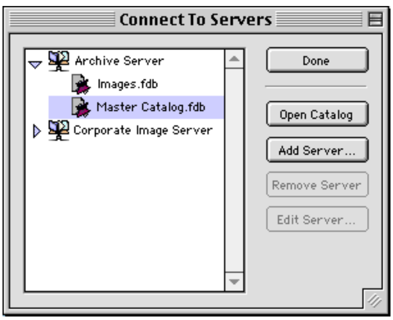
14. *Importing and Exporting:*

You can import field values, such as keywords and data from other databases. With Portfolio Network Edition, you can convert entire Cumulus catalogs (Macintosh) to Portfolio.

Export options include the ability to: export catalogs as text files for input into a database; export "pnot" data (Macintosh); export an entire catalog or selected items as HTML Web pages; and export Slideshows as QuickTime movies.

15. *Multiple Drives/Image Networking*

Portfolio catalogs can contain images on multiple hard disks, network servers, CD-ROM drives, removable drives, etc., whether or not these drives are mounted. When you want to work with the original image of an item located on an unmounted drive, you will be prompted to insert or mount it.



16. *Multiple Users/Catalog Networking:* **Using standard system filesharing, you can share Portfolio Catalogs between users. For even greater multi-user capability, use Portfolio Server software.**

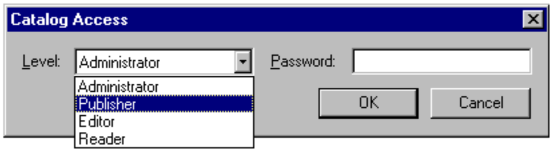
In a network environment, a shared catalog can be on a network file server or on any user's Macintosh or PC, as long as the Macintosh or PC is properly networked.

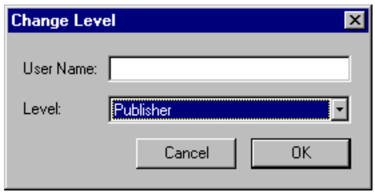
For better performance when sharing catalogs, and to allow more simultaneous users, Portfolio Server software is recommended. You create and access Portfolio Server catalogs using the standard Portfolio 5.0 application.

15. ***Catalog Security/Access Levels:***

Portfolio gives you control over who can make changes to catalog information using four levels of access: Administrator, Publisher, Editor, and Reader. You can assign security using either of two methods: Level-based access or the new User-based access. You can change the current level or user by choosing “Access” from the Catalog menu, or press **Command+Option+B** (Mac OS) or **Ctrl+Shift+B** (Windows).

For more information on catalog access levels, see *page 192*.





Tip

To convert a Cumulus catalog (Mac OS), see *page 182*.

To convert a Fetch 1.2 or 1.5 catalog to Portfolio 5.0, contact Technical Support (see *page 8*).

Converting Portfolio 3.0 and 4.0 Catalogs

To access the rich new features added to Portfolio 5.0, catalogs created in Portfolio 3.0 and 4.0 must be converted to version 5 catalogs. Portfolio 5.0 can open version 3.0 and 4.0 catalogs without conversion, in a limited browsing mode.

Opening a version 3.0 or 4.0 catalog with Portfolio version 5.0 in Administrator mode allows the catalog to be converted.

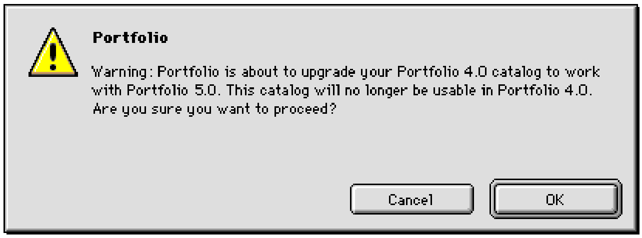
To convert a Portfolio 3.0 or 4.0 Catalog:

1. **Set the Portfolio default access mode (Edit > Preferences) to “Administrator.”**

   This will automatically open the catalog in Administrator mode. If the catalog requires a password for Administrator level access, you will be prompted to provide it. If you open the catalog in any other mode, the catalog will automatically be opened in a limited browsing mode.

2. **Open the catalog to be updated.**

   You will be asked to confirm the conversion.



3. **Click “OK.”**

   The catalog is converted and all options (Catalog options, saved Galleries, etc., are preserved) and saved as a new catalog file.

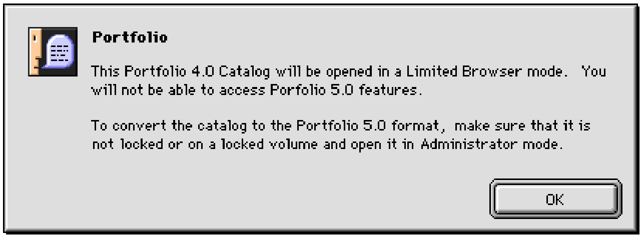
   Choose “Cancel” to open the catalog in limited browsing mode, leaving it set as a version 3.0 or 4.0 catalog.

Note: Custom Fields are not indexed when converting Portfolio version 3.x or 4.x catalogs to Portfolio 5.0.

To open a Portfolio 3.0 or 4.0 Catalog without converting it:

- **Open the catalog in any mode *except* Administrator mode.**

  You will be informed that the catalog will be opened in a limited browsing mode.



— or —

- **Open the catalog in Administrator mode and click "Cancel" when asked to confirm the conversion.**

  The catalog will be automatically be opened in a limited browsing mode.

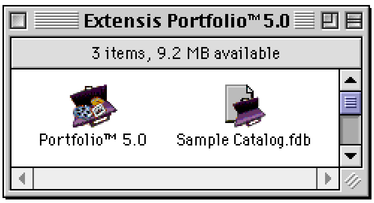
  When the catalog is closed it will still be a Portfolio version 4.0 (or 3.0) catalog.

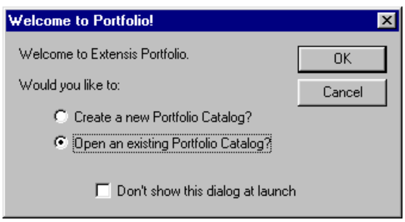
This chapter describes how to open Portfolio catalogs, how to view catalog items, and how to search for, select, preview, and use those items in a variety of ways. You'll also learn some techniques for getting the most from Portfolio.

This chapter assumes that you have an existing catalog with which to work. If you do not, you can use the Sample Catalog located on the Extensis CD. For information on creating a catalog, refer to "Creating and Managing Catalogs" on *page 113*.

Opening Catalogs

You can open a Portfolio catalog in a number of ways, and you can have multiple catalogs open at the same time. If you will be accessing shared catalogs on a Portfolio Server, see *page 24*.





To open a Portfolio catalog:

- **Drag and drop a catalog icon onto the Portfolio application icon, or double-click a catalog icon.**

— or —

- **Windows: Choose Extensis Portfolio from the Start menu.**
- **Double-click the Portfolio icon.**

  When prompted to open a new or existing catalog, click "Open an existing Portfolio catalog," then locate the catalog.

  To open Portfolio without a catalog, click "Cancel."

— or —

- **With Portfolio already open, click the Open Catalog icon  on the Toolbar, or choose "Open…" from the File menu, or press Command+O (Mac OS) or Ctrl+O (Windows).**

The catalog opens to the Gallery window. From the Toolbar you can access most of the major functions and options in Portfolio. You can change views, open new Catalogs, open additional Gallery windows, search the catalog, and more.

Note: If you open a protected catalog, you must enter the appropriate access password to view and modify catalog items. If the catalog won't open, another user may have it open in Administrator mode or with the Portfolio browser. See "Catalog Access Levels" on page 192.

Tip

If you have one or more catalogs that you use frequently, you can have these catalogs opened automatically whenever you start Portfolio. Open each catalog that you wish to have opened automatically, then choose File > Open Catalog at Startup, or select this option from the fly-out menu on the Catalogs palette.

Note

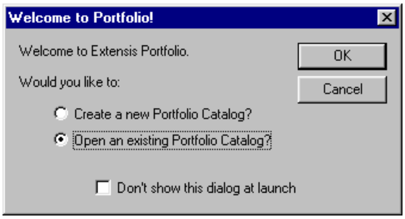
This section applies to Portfolio Network and Portfolio Server Editions only.

Connecting to a Server

If the catalog you want to open is on a Portfolio Server, you will need to connect to the Server and then select the appropriate catalog. When accessing a served catalog, the Portfolio 5.0 application software is referred to as the “client.”

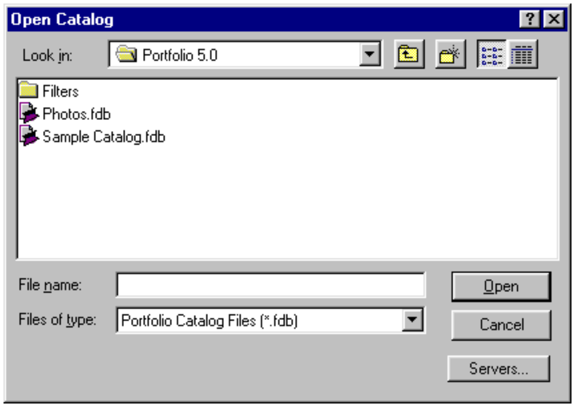
Note: The Portfolio Server is special software that allows you to share catalogs with more simultaneous users than is possible using standard system networking. If you need to access a catalog that has been shared using conventional networking, simply access the catalog the same way you access other network files. See your System Administrator for help.

To Open a catalog on a Portfolio Server:



1. Double-click the Portfolio icon and click “Open existing catalog.”

1a. Click the “Connect to Servers” button (Mac OS) or the “Servers...” button (Windows).



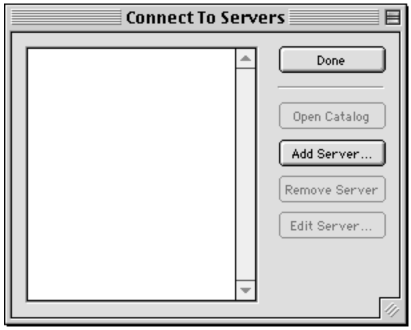
The “Connect to Servers” dialog will be displayed.

— or —

1. With Portfolio open, choose “Connect to Server...” from the File menu, or click the “Connect to Servers”  **button on the Toolbar, or press Command+Option+O (Mac OS) or Ctrl+Shift+O (Windows).**

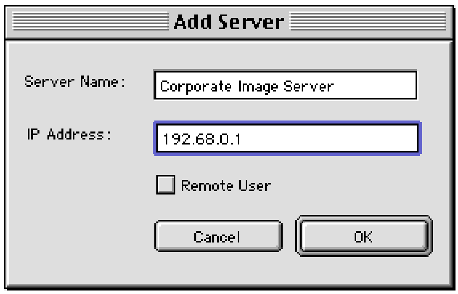
The “Connect to Servers” dialog will be displayed.

2. If a list of servers and catalogs appears, skip to step 4 on the following page. If the list is blank (as shown below) or if the server you want to access does not appear: Click “Add Server...”



The “Add Server” dialog will be displayed.

3. Enter the Name or IP address of the server that you want to connect to.

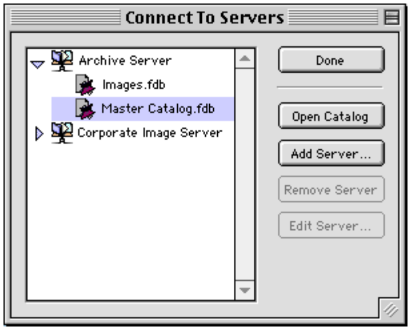


Portfolio will connect to the Server and display a list of catalogs available on that Server.

Tip

Server connection files are stored in the “Servers” folder located in the Portfolio application folder for each client. Once a server has been added to one client, its connection file can be distributed throughout a workgroup by simply copying the file to each client’s “Servers” folder, making server access set up a snap for the entire group.

4. **Select the desired catalog from the list, then click "Open Catalog," or double-click the selected catalog to open it.**



   You will be asked to enter a password if the catalog requires it.

   The next time you "Connect to Servers," all the servers you added—and all available catalogs on those servers—will be displayed on the list, ready to open.

Tip

To administer a served catalog without unserving it, change access to Administrator level *(page 194)* after the catalog has been opened.

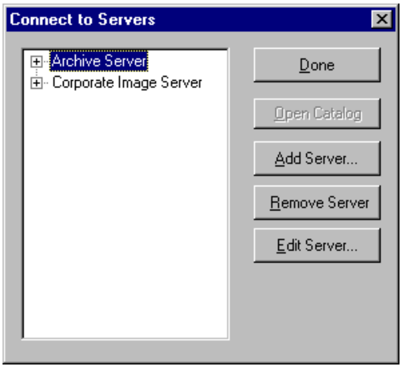
Notes on accessing Served Catalogs:

- Windows clients must have TCP services active to access the Server. For Macintosh clients, the machine must be using Open Transport TCP; classic networking is not supported when accessing catalogs on the Portfolio Server.
- The client application will attempt to open the catalog in the mode set in the user's Preferences.

  Note: The user will be asked to enter a password if the catalog requires it.
- For more information on installing and using the client, administering Catalogs, and administering Servers, refer to the other sections of this Portfolio User Guide.

To remove a Portfolio Server from the list:

1. **Open the Connect to Servers dialog (File > Connect to Servers).**
2. **From the list of available Portfolio Servers, select the Server that you wish to remove.**



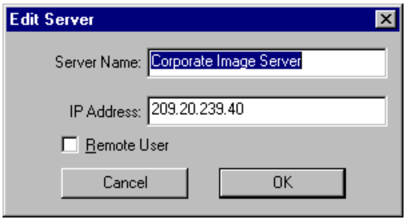
3. **Click "Remove Server."**

   The server will be removed from your list.

4. **Click "Done" to return to Portfolio.**

To change the Name and/or IP Address of a Portfolio Server:

1. **Open the Connect to Servers dialog (File > Connect to Servers).**
2. **From the list of available Portfolio Servers, select the Server that you wish to edit.**
3. **Click "Edit Server..."**
4. **Make the appropriate changes, then click "OK."**



5. **Click "Close" to return to Portfolio.**

Viewing Catalog Items in the Gallery

When items are cataloged in Portfolio, a record is created for each one, and information about the item is stored in this record. Item information can include keywords, descriptions, and custom fields that you create, as well as the item thumbnail, source file name, creator, creation date, source file location, and other information gathered automatically when the item is cataloged. A ***Catalog*** is therefore a collection of records that provides information about the items contained in it.

When you view catalog items in Portfolio you are actually viewing the information contained in each item's record, such as the item thumbnail, description, and keywords. Your window to these records is called the ***Gallery***.

The Gallery: The Gallery is the main window into a Portfolio catalog. A Gallery represents a layout and a specific set of records in a catalog. A Gallery window is opened automatically each time you open a catalog, unless you choose otherwise.

You can create and open multiple numbers of galleries. You can even name your Galleries and save them for future use.

A special type of Gallery, called a *Find Gallery*, allows you to open a Gallery window using a "Saved Find." For example, you might want to use this feature to automatically capture any new images added since the last time the Gallery was viewed. Standard Galleries are discussed on *page 60*; Find Galleries on *page 65*.

Gallery Views: There are three different Gallery views: Thumbnail, Record, and List views. The different views allow you to display and view catalog records in a variety of ways. Each of these views are shown on *page 11, and pages 30-32*; customizing the different views starts on *page 99.*

Toolbar: A Toolbar at the top of the Gallery window 

gives you quick and easy access to some of the more commonly used functions and options in Portfolio. To learn more about the Toolbar, see *page 35.*

Find: You can specify which catalog items you want to view in the Gallery by using the Find  function *(page 41)*. You can view all the catalog items at once, or locate items matching specified criteria. You can save find criteria for future use, and easily access these finds from the Finds palette.

Tip

To hide the Toolbar:

Mac OS: From the View menu, select Toolbars > None. **Windows:** From the View menu, deselect (uncheck) Toolbars.

Switch Views: You can easily switch between Gallery views using buttons on the Toolbar. The three Gallery views are: Thumbnail view, List view, and Record view, or by selecting the desired item from the View menu.

Customize Views: Each Gallery view can be customized to show as much or as little information as you require. You can even customize the way that thumbnails are displayed—changing the display size, adding background colors, and even thumbnail borders. *See page 99.*

Tip

Saved Galleries (except Saved Find Galleries, which are updated) do not change even when items are added to the catalog. This feature allows you to create snapshots of specific catalog items in specific views, and easily access them at any time. You must have Publisher or higher level access to save Galleries.

Multiple Galleries: You can create new Galleries to display as many or as few cataloged items as you wish, drag and drop items between Galleries, and save Galleries by name for viewing at any time. This allows you to have a large number of items in a catalog, yet be able to limit the view to a small number of specific items. You can customize the view in each gallery, and save galleries for viewing at a later time. When you make changes to a Saved Gallery, an asterisk (*) appears beside the Gallery name in the title bar. Saved Galleries can be easily accessed from the Galleries palette *(page 61)* or from the Saved Galleries menu in the toolbar.

There are a number of other things you can do with cataloged items in the Gallery window. These procedures are summarized on *page 33*, and described in detail throughout this User Guide.

Gallery—Thumbnail View

Thumbnail view displays catalog items as thumbnails, with item information displayed below the thumbnail. The Toolbar is shown at the top of the Gallery window (Mac OS) or Portfolio window (Windows).

A Title bar: Displays the Catalog name followed by the Gallery name. Multiple unnamed Galleries are displayed with “Untitled” followed by a number (representing the order in which the Gallery was opened). For example: Untitled 1, Untitled 2, etc.

B Number of Items: Shows how many items are displayed in the current Gallery window out of how many total items in the Catalog. (On the Mac OS, this number is at the bottom of the window.)

C Thumbnail: Displays a thumbnail of each item selected for display in the Gallery. You can change the size of the displayed thumbnail from the Customize dialog (Click Customize).

D Item Fields: Lists information about the item. You determine what fields are displayed here by selecting them in the Thumbnails tab of the View > Customize dialog.

Gallery—List View

List view displays catalog items as a list, allowing you to search quickly by name and/or location. You can specify what information will appear in the columns; thumbnail, keywords, and description for the selected item are always displayed at the bottom of the window.

A Title bar: Displays the Catalog name followed by the Gallery name. Multiple unnamed Galleries are displayed with “Untitled” followed by a number (representing the order in which the Gallery was opened). For example: Untitled 1, Untitled 2, etc. An asterisk (*) after the Gallery name indicates that the Gallery has changed since it was last saved.

B Toolbar: Gives quick and easy access to major catalog commands.

C Column Names: Click a column name to sort by that attribute. Drag a column divider to widen or narrow a column.

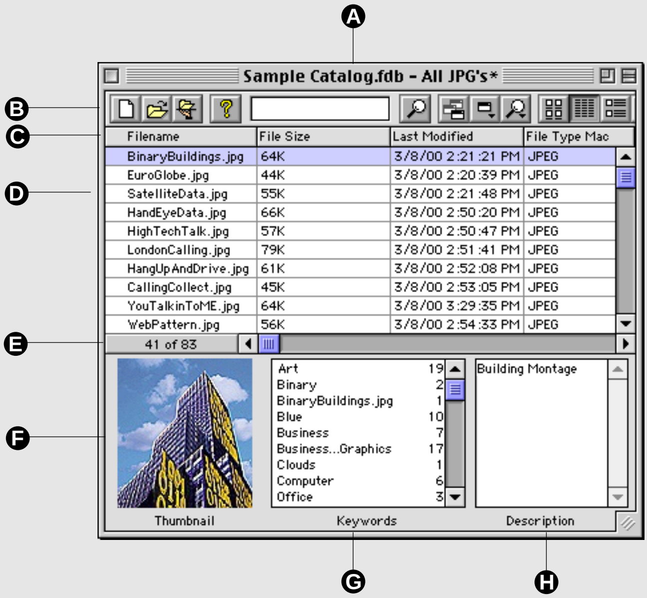
D Item List: Displays columns of information as specified in View > Customize.

E Number of Items: Shows how many items are displayed in the current Gallery window out of how many total items in the Catalog.

F Thumbnail: Displays a thumbnail of the currently selected item.

G Keywords: Displays keywords for the selected item, and indicates how many other items in the catalog have the same keyword assigned. Double-click a keyword to locate all the items with that keyword and display them in the current Gallery window.

H Description: Displays description text for the selected item.



Gallery—Record View

Record view gives you the ability to see more information about a catalog item than you can easily see in any other view. You can scroll the Record list to see additional items.

A Title bar: Displays the Catalog name followed by the Gallery name. Multiple unnamed Galleries are displayed with “Untitled” followed by a number (representing the order in which the Gallery was opened). For example: Untitled 1, Untitled 2, etc.

B Toolbar: Gives quick and easy access to major catalog commands.

C Thumbnail: Displays a thumbnail view of the selected catalog item.

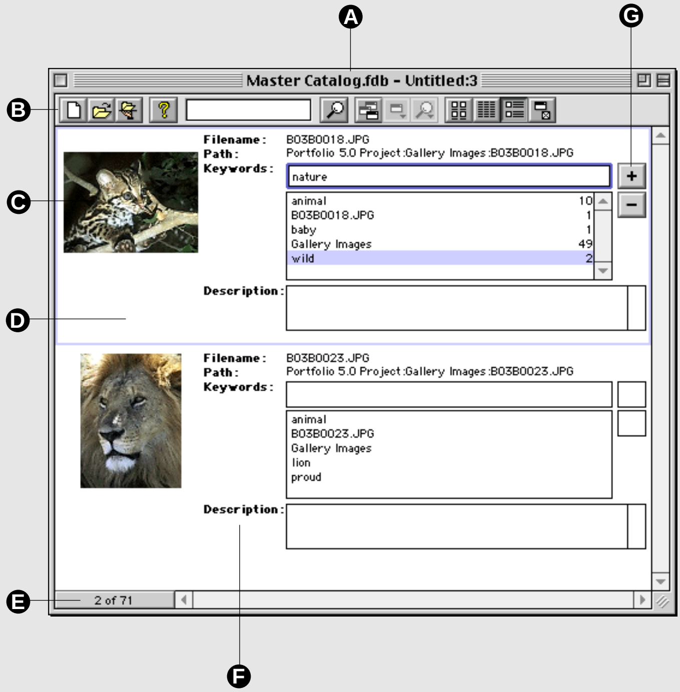
D Record with Information Fields: Lists information about the item. You determine what information is displayed here by selecting it in the Record tab of the View > Customize dialog.

E Number of Items: Shows how many items are displayed in the current Gallery window out of how many total items in the Catalog. (On Windows, this number is at the top of the window.)

F Field Name: Specify show or hide Field Names from the Record tab of the View > Customize dialog.

G Edit in Place enabled: Edit in place allows you to change field information (add keywords, change description, etc.) right in the field. Choose View > Customize. From the Record tab, click “Edit.” See *page 146* for more information on this feature.

This example also shows list view enabled. This allows you to view multiple records in Record View. To enable listing in Record View, choose View > Customize. From the Record tab, click “Display as List.”



Working with Items in the Gallery

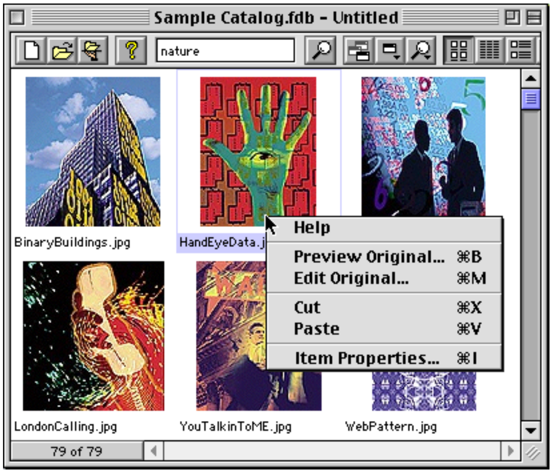
To do this...	Follow this procedure...
Sort the items in a Gallery window	Click a column heading (List View) or choose one of the “by” commands from the View menu. Default is the order in which the items were added to the catalog. You can also use options on the sorting palette *(page 57)*. “Keep Sorted” option *(page 57)* allows you to maintain a selected sort.
Reorder items in a Gallery window	Drag the item(s) and drop where you want them to appear. Galleries revert to the order cataloged after each search.
Select items	Click the item row (List view) or thumbnail (Thumbnail view). To add another item to the selection, press Command (Mac OS) or Ctrl (Windows) while clicking the item. To select a contiguous range of items, press Shift (Mac OS) or Shift (Windows) while clicking on the first and last item.
Preview an item	Double-click the item’s thumbnail. Or select the item, then select “Preview Original…” from the Item menu.
Display an item’s properties	Select the item, then choose “Item Properties…” from the Item menu. Or press Command+I (Mac OS) or Alt+Enter (Windows).
Edit an item’s source file	Select the item, then choose “Edit Original” from the Item menu.
Edit an item’s keyword list	Select the item, then choose “Item Properties…” from the Item menu. Edit keywords in the Keywords tab. Or enable editing in Record View *(page 147)*.
Edit multiple items’ keyword list	Select the items, then choose “Edit Keywords…” from the Item menu.
Add items to a Catalog*	From the Finder (Mac OS) or Explorer (Windows), select the item(s) to be added, then drag and drop them into an open Gallery window in the desired catalog. Or choose “Add Items” from the Catalog menu *(see page 119).*
Copy items to another Gallery in the same Catalog	Drag the item thumbnail(s) (or rows) and drop in the other Gallery window. Or use the standard system copy and paste functions to copy items from one Gallery to another.
Copy items to a Gallery in a different Catalog*	Drag the item thumbnail(s) (or rows) and drop in the other Catalog. The item is copied to the catalog unless it already exists. Or use the standard system copy and paste functions to copy items to another catalog.
Move items to another Gallery	Select the item(s) to be moved, then use the standard system Cut and Paste functions [Command+X and Command+V (Mac OS) or Ctrl+X and Ctrl+V (Windows)] to cut cataloged items from one Gallery and paste them into another. If the Gallery belongs to another Catalog, the items are copied to the Catalog*.
Delete items from a Gallery	Select the item(s) to be deleted, then press the Delete key. Or use the standard system Cut function [Command+X (Mac OS) or Control+X (Windows)] to remove the item(s). This deletes items from the Gallery without deleting them from the Catalog.
Delete items from a Catalog*	Select the item(s) to be deleted, then choose “Delete Items” from the Catalog menu. From the Delete Items dialog, choose “Delete from Catalog.” Or select the item(s) and press Option+Delete (Mac OS) or Ctrl+Backspace (Windows).
Copy items to another application	Drag and drop the selected items into an open document in the receiving application. The application must be drag and drop aware. For more information see *page 59*.

* Requires Publisher or higher level access to the open catalog.

Contextual Menus

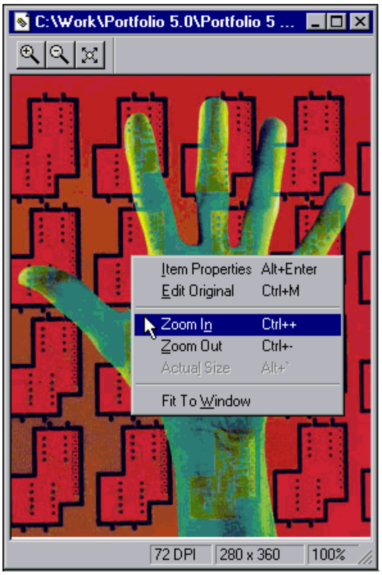
Portfolio displays menu commands on contextual menus for three separate features: Items (individual records), Gallery windows, and item Previews. A contextual menu is a menu that pops up when you press the Control key while clicking the mouse (Mac OS, if the Contextual Menus Extension is enabled) or Right-click the mouse (Windows), in the appropriate area of a window.

Item contextual menu: To access the contextual menu for an item, select the item, then **Control-click** (Mac OS) or **right-click** (Windows).



Gallery contextual menu: To access the contextual menu for a Gallery, **Control-click** (Mac OS) or **right-click** (Windows) anywhere in the unused area of a Gallery window (Mac OS: You can even click in the scroll bars and Toolbar)—but be sure that you do not accidentally select a cataloged item or a button when you click.

Preview contextual menu: To access the contextual menu for an item when the Preview window is active, **Control-click** (Mac OS) or **right-click** (Windows) anywhere in the Preview window.



The Toolbar

The Toolbar at the top of the Gallery window (Mac OS) or Portfolio application window (Windows) allows you to easily access many of Portfolio’s commonly used features, including QuickFind, a fast way to find items in the catalog without opening the Find window. As you place the mouse over each button, the button Tool Tip is displayed, indicating the button’s function.

Windows only: The last ten QuickFinds performed are listed on the QuickFind drop-down menu.

The Toolbar

A New Catalog: Create and save a new catalog.

B Open: Click to locate and open an existing catalog.

C Connect to Servers: Click to select a Portfolio Server.

D Always on Top: (Windows only) Click to keep the Portfolio application window frontmost, even when another application is active.

E Help: Click to open the Portfolio online Help index.

F QuickFind Text Box: Type a keyword to match in a search. (Windows only: Choose a previously entered word from the pop-up list.) Press Return or Enter to initiate the search. QuickFind uses the "starts with" search criteria and searches only keywords; the results are displayed in the current Gallery. *You can choose to open a new Gallery for QuickFind results from the Edit > Preferences dialog.*

G QuickFind - Find Now: (Windows only) Click to perform a search using the word displayed in the QuickFind text box (see (**F**)).

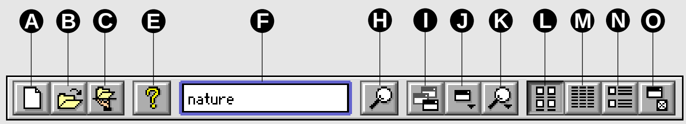
H Find: Click to open the Find dialog.

I New Gallery: Click to create a new Gallery window for the active catalog.

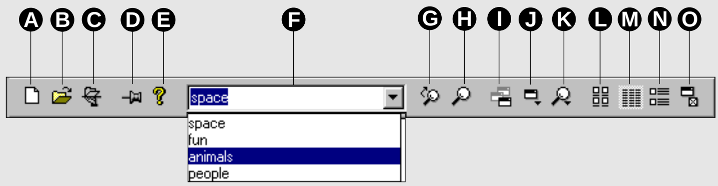
J Saved Galleries Pop-up: Allows you to choose from a list of saved Galleries for the active catalog.

K Saved Finds Pop-up: Allows you to choose from a list of saved finds for the active catalog.

Macintosh Toolbar



Windows Toolbar

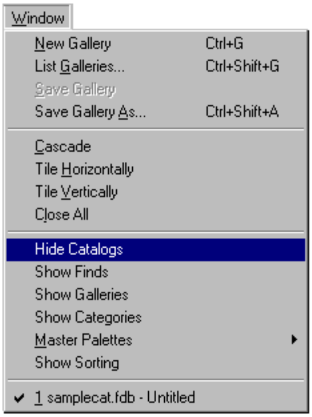


L Thumbnail View: Click to change to Thumbnail view.

M List View: Click to change to List view.

N Record View: Click to change to Record view.

O Customize Gallery: Click to open the Customize Gallery dialog, allowing you to change the type and the look of information displayed in any Gallery view.



Palettes

Palettes provide easy, visual access to many Portfolio features and options. All the features available from palettes are also available from pull-down menus in the menubar. Having these features available on palettes allows you easy access and will make using Portfolio quicker and easier than ever.

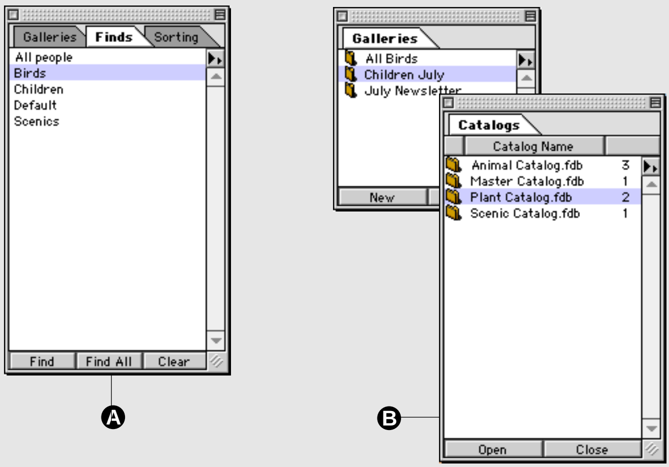
There are six palettes: Galleries, Finds, Sorting, Catalogs, Categories and Master Palettes (predefined lists of words for a field, including Master Keywords). Each of these palettes is described in detail later in this manual. Palettes are catalog specific. That is, when you change catalogs, palette information changes to reflect the current catalog.

Portfolio Dockable Palettes

Dock and undock as often as you like to keep your workspace organized the way you like it.

A Docked palettes: Dock as many or as few palettes as you like by simply dragging a palette by its tab and dropping it over another palette.

B Undocked palettes: Undock a palette by dragging it by its tab and dropping away from where it was docked.



To show or hide a palette:

- **Select the desired palette or function from the Window menu. If the palette is visible on the desktop, click its tab to activate it.**

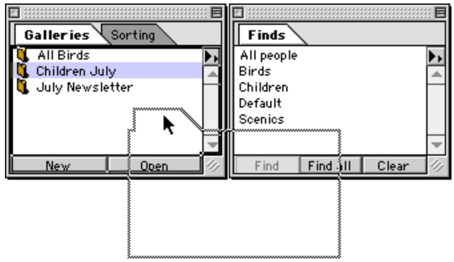
  The selected palette will appear on the desktop. If the palette is docked on another palette, it will be moved to the front of the palette. Hiding a palette also hides all the palettes docked on that palette.

Tip

Portfolio dockable palettes work just like the palettes in popular graphics programs.

To dock a palette:

- **Click on the palette tab of the palette you wish to dock, then drag it over the destination palette. When the palette you are moving is positioned over the destination palette, drop the palette.**

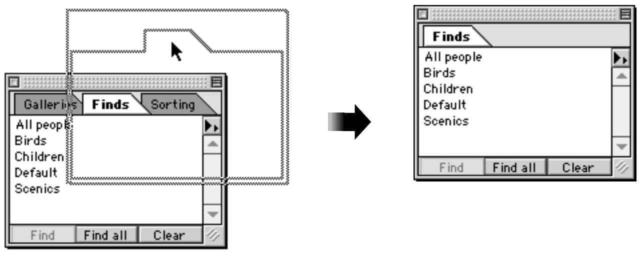


The newly docked palette will assume the right-most position on the palette. Click a palette tab to activate it.

Mac OS: A black outline inside a palette indicates that the palette is ready to receive the palette being moved.

To undock a palette:

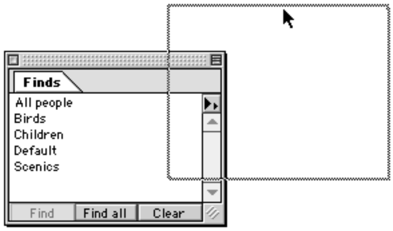
- **Click on the palette tab of the palette you wish to move, then drag it away from the grouped palette. When the grouped palette loses its outline, drop the palette you are undocking.**



The palette will appear by itself.

To move a palette without docking it:

- **Click in the Title bar or palette tab of an individual palette, or in the Title bar only of a docked group, then drag and drop at the new location.**



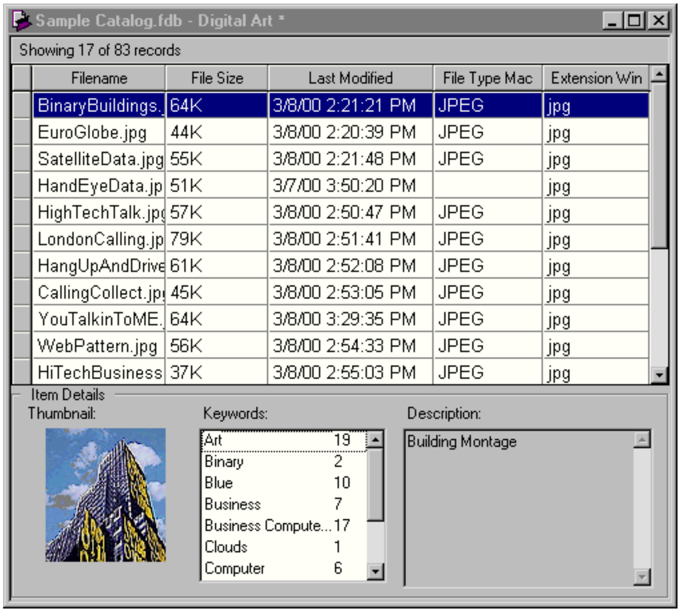
You can move palettes anywhere you like.

When moved close to another palette, Portfolio palettes will automatically be aligned beside each other neatly.

Searching the Catalog Using Keywords

A ***keyword*** is a word or phrase that you associate with a particular item, and a good keyword list can be a valuable tool for finding the material you need in a catalog. Each catalog item can have an unlimited number of keywords associated with it.

Item keywords are available for display in every Gallery view (see "Customizing Gallery Views," *page 99*) so that you can easily see which keywords are assigned to an item, and have easy access to other items with the same keyword.



The number to the right of the keyword indicates how many other items in the catalog have that keyword assigned.

From List view and Record view you can have Portfolio locate and display all the items with a particular keyword by double-clicking the desired keyword in the Keywords list. All items with the selected keyword will be displayed in the active Gallery window.

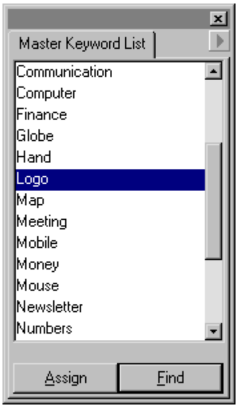
Quick Find: You can also search for keywords using the QuickFind field on the Toolbar at the top of the Gallery window (Mac OS) or Portfolio window (Windows) *(see page 35).*

Tip

In a network environment, a catalog administrator (using catalog access levels), can control who is allowed to edit item keyword lists for each catalog. In addition, a catalog can include a preset list of Master Keywords. Master Keywords can help maintain consistent keywords among the items in a catalog, or across catalogs; see "Catalog Administration," *page 202,* for information on maintaining the list of Master Keywords.

Tip

To find all the items with a particular keyword when you aren't sure what the keyword is (and no Master Keywords list exists), choose Catalog > Catalog Properties. Select the Statistics tab, then click the "Calculate" button. This builds a list of all keywords in the catalog. *Note: This can be slow in catalogs with a large number of records.* Look through the keywords listed, then double-click on a word that looks like it might fit your search. This locates all the items matching that keyword and displays them in the current Gallery window.



Searching from the Master Keywords List
If you create a list of Master Keywords for your catalog *(page 202)* you can find multiple items with specific keyword(s) assigned to them using the Master Keywords Palette.

To use the Master Keywords palette, choose Window > Master Palettes > Master Keywords or press **Command+K** (Mac OS) or **Ctrl+K** (Windows). Locate the desired keyword on the list, then click "Find" or double-click the keyword. All items with the selected keyword will be displayed in the active Gallery window.
Windows: Select an item and type the letter of the keyword that you want to find to scroll the list to entries starting with that letter.
Mac OS: Type a letter in the text entry field of the Master Keywords palette to move the cursor to the entries starting with that letter.

Searching from other Master Palette Lists
As well as the Master Keywords list, Portfolio allows you to create pre-defined lists of words associated with any custom field. For more information, see *page 156*.

Searching the Catalog Using Find Options

You can search for catalog items by examining the items in any of the Gallery views, or you can speed your search using Portfolio’s Find function. You can search any field, including Custom fields and keywords. Creating and adding keywords and custom lists is discussed in detail on *pages 202 through 212*.

You will probably find that you will use different search strategies at different times. For example:

- If your catalog is small or you’re looking for ideas, you might start by looking through everything the catalog contains.
- If your catalog is very large or you have a general idea of what you’re looking for, you might want to look only at items related to a particular subject or concept, or of a particular file type.
- If you’re in the final stages of a job, you probably know exactly what items you need.

Portfolio can display the results of the search in the current Gallery window (completely replacing the previous contents, if any), or in a new Gallery window.

To open the Find window:

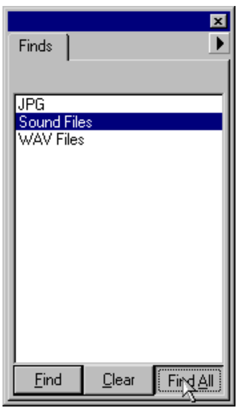
- **Click the Find button on the toolbar.**

— or —

- **Choose “Find” from the Catalog menu.**

— or —

- **Press Command+F (Mac OS) or Ctrl+F (Windows).**



To display the entire contents of a catalog:

- **Choose “Find All” from the Catalog menu.**

— or —

- **Open the Find window and click the “Find All” button.**

— or —

- **Open the Finds palette and click the “Find All” button.**

— or —

- **Press Command+' (Mac OS) or Ctrl+' (Windows).**

Criteria Tab

Enter a single search description for a simple search, or choose “More Choices” to perform a complex search *(see following page)*.

A Criteria tab

B Saved Finds Pop-up: Specify and select search criteria for later use. See “Saving Finds” on *page 48*.

C Catalog name: Displays the catalog to be searched, or displays “Multiple Catalogs” during a multiple catalog search.

D Search Field: Select the search criteria.

E Search Options: Select an option to focus the search criteria.

F Search Word or Phrase: Type a value to search for.

G Find in gallery: Searches the items in the current Gallery only. Allows you to perform multiple searches to narrow the field.

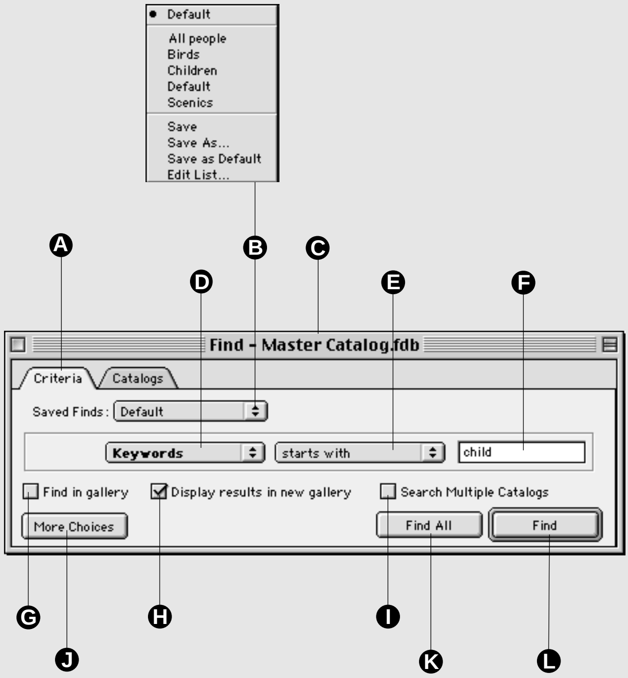
H New Gallery: Click to display found items in a new Gallery window.

I Search Multiple Catalogs: Click to extend the search to catalogs indicated in the Catalogs tab (Mac OS) or Catalogs palette.

J More Choices: Click "More Choices…" to display the expanded window (see *following page*).

K Find All: Click to find and display all items in the Catalog.

L Find: Click to start the search.



Mac OS: Catalogs Tab

Use this tab to select catalogs to be searched. Catalogs must be open and available to appear on the list. *Note: This tab provides the same functionality as the Catalogs palette; changing an option on one also changes the other.*

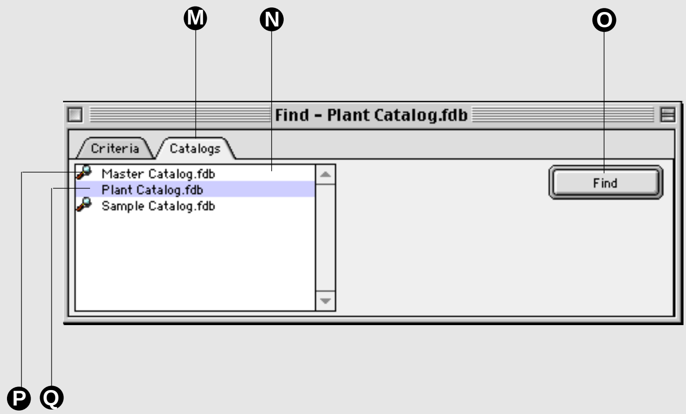
M Catalogs tab

N List of currently open catalogs

O Find: Click to start the search.

P Search: Icon indicates that this catalog will be included in the search.

Q Do not search: No icon indicates that this catalog will not be searched.



Complex Finds

Click “More Choices” to expand the Find window so you can perform a complex search. Click “Fewer Choices” to contract the window for simple searches (see *previous page*).

A Saved Finds Pop-up: Specify and select search criteria for later use. To save a find, select Save As from the Saved Finds pop-up menu.

See “Saving Finds” on *page 48*.

B And/Or: Select "and" to narrow the search; "or" to broaden it.

C Search Field: Select the search criteria. Any field can be searched.

Options are: Filename, Path, Extension Win, Short Filename Win, Description, Volume, Created, Last Modified, Cataloged, Last Updated, File Size, Keywords, File Type Mac, Creator Mac, Zone Mac, Thumbnail Size, Color Mode, Horizontal Resolution, Vertical Resolution, Width, Height, Category, Multipage Count, PlaceHolder, Watermarked, Watermark URL, and any Custom Fields.

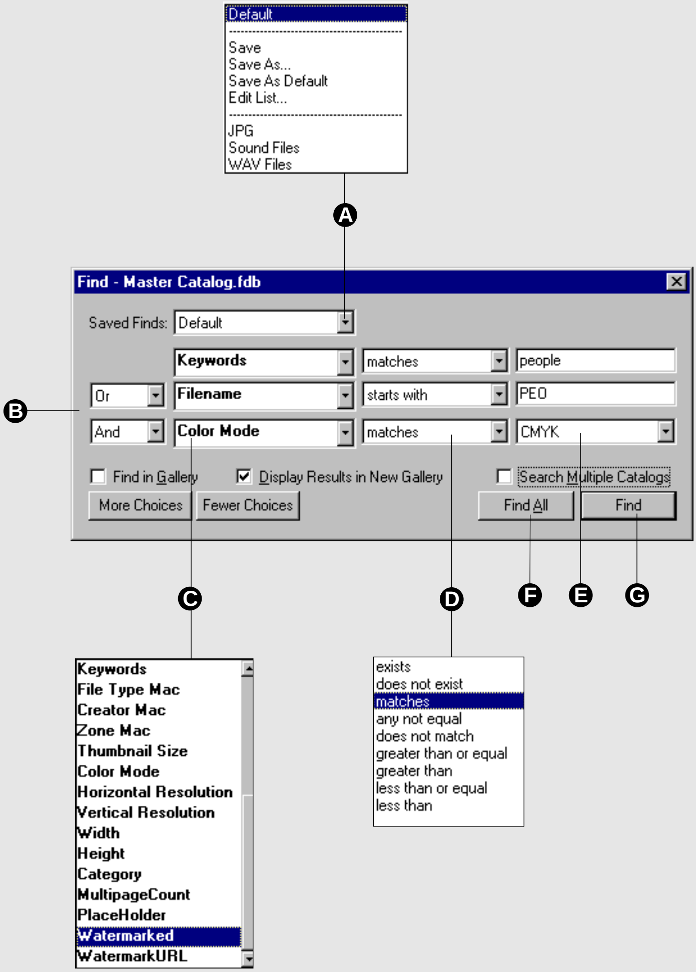
D Search Options: Select an option to focus the search criteria.

E Search Word or Phrase: Type a value to search for.

F Find All: Click to find and display all items in the Catalog.

G Find: Click to start the search.

Notes: 1) Find searches both fields (Title and URL) of a URL Custom Field. 2) Portfolio searches for values in the Height and Width fields in pixels; convert other units of measure to pixels prior to entering values in these fields.



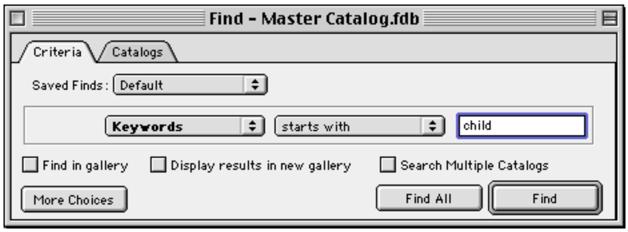
To find specific items in a catalog:

1. **Open the Find window.**

   Portfolio opens the Find window and displays the default saved Find, if any exists.

2. **Use the Criteria tab in the Find window to describe what you are looking for, then click “Find.”**

   Portfolio lets you search for various attributes of an item, including filename, keyword, file size and so on. See the table on *page 43* for a description of the attributes you can use in your search. Find searches both fields (Title and URL) of a URL Custom Field.



   Found items are displayed in the Gallery window, replacing the items there. You can elect to have the found items displayed in a new Gallery window by clicking “Display results in new gallery” option before you initiate the Find.

Tip

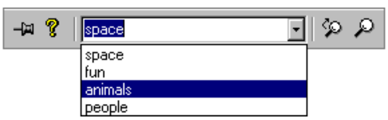
Since Portfolio stores all the information about an item (including its thumbnail) you do not need to mount volumes referenced in the catalog in order to search for and view them.

When you attempt to Preview or work with the original item in any way (such as dragging and dropping it into another application), Portfolio will prompt you to mount the volume where the original item is stored, if it is not already mounted.

Using QuickFind

You can quickly locate catalog items in the currently active Gallery by keyword using the QuickFind field on the Toolbar.

To find items in a catalog using QuickFind:



1. **Type in the keyword that you want to search for in the QuickFind text box located on the Toolbar at the top of the window.**

   Windows: You can select previously searched for items by selecting the word or phrase from the QuickFind pop-down menu.

2. **Press Return or Enter.**

   This initiates the search.

   QuickFind uses the “starts with” search criteria and searches only keywords; the results are displayed in the current Gallery unless you indicate otherwise in Edit > Preferences.

Search Criteria Options

This option...	Finds...
Cataloged	The date and time that an item was first cataloged in Portfolio
Color Mode	Color modes: Unknown, Black & White, Grayscale, RGB, CMYK, YUV, Lab, and YCCK
Created	The date the source file was created
Extension Win	The item's three-character file extension
Description	The item's file description
File Size	The item's file size
Filename	The item's name
Height	The item's height, in pixels
Width	The item's width, in pixels
Horizontal Resolution	The item's horizontal resolution, in dpi
Vertical Resolution	The item's vertical resolution, in dpi
Keywords	Any keywords assigned to the item(s)
Last Modified	The date the source file was last modified
Last Updated	The date the item was last updated in the catalog
Creator Mac	The four-character file creator code for the item (empty if cataloged on Windows)
File Type Mac	The four-character file type code for the item (empty if cataloged on Windows)
Zone Mac	AppleTalk Zone where item's file is located (empty if cataloged on Windows)
Path	The file path (location) for the item
Short Filename Win	16-bit DOS path and filename
Thumbnail Size	The item's thumbnail size, in pixels: 32 (icon), 112, 256. (This field will be empty in catalogs converted from Portfolio 3.0, until the thumbnails are regenerated.)
Volume	The physical drive or disk on which the item resides

All fields are indexed for faster searching.

List is continued on following page

Search Criteria Options

This option...	Finds...
Category	Items matching the indicated category (from Categories palette)
Multipage Count	Items matching a particular page count
PlaceHolder	Items created as PlaceHolder Records
Watermarked	Items with the indicated watermark
WatermarkURL	Items with the indicated watermarkURL
Custom Fields	Any custom fields that have been created for the current catalog

All fields are indexed for faster searching.

Streamlining Searches

Portfolio has several options that can help you search through a catalog quickly and effectively. For example, you can:

- Select the most efficient searches for Portfolio to carry out.
- Name and save frequently used searches (to save yourself from having to re-enter the criteria each time).
- Customize the default search displayed when you open the Find window.

Indexing

Portfolio 5.0 indexes all fields to speed searching. Fields, including the Text Block Custom Field *(page 212)* are indexed at the word level, which means that you can search these fields quickly by individual words but not by phrases.

When you search on indexed fields, choose “matches” or “starts with” from the modifier pop-up menu for the fastest searches. Other types of searches may be somewhat slower because Portfolio must examine every entry in the catalog:

- Searching is slower when there is a large number of items that match your search criteria.
- Searching using “contains” or “ends with” is slower when the catalog is large.

You can also sort the Gallery window on any indexed field (such as Catalog order, File Name, File Type, Creation date, Custom Fields, etc.), except Text Blocks. See *page 57*.

Date/Time Fields

Times are always assumed when searching fields of the type “Date/Time,” even if a time is not entered, and when the “Display Time” option for the field is disabled. That is, if a time value was 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 turning off “Display Time,” the time will still be noted by Portfolio when a search is requested. For example: Searching for “9/15/99” will not find a record which contains “9/15/99 3:00 pm” because the request is interpreted as “9/15/99 12:00:00 am.” This is true even if the time is not being displayed.

Note: Portfolio stores dates following the computer’s Date and Time settings. If Short Dates are used, Portfolio only records the last two digits of the year, possibly resulting in erroneous find results. To avoid this potential problem, use the operating system’s Long Dates format.

Tip

Saving Finds requires Publisher or higher level access to the open catalog. See *page 194.*

Saving Finds

If you routinely need to locate particular types of items in a catalog, you can name and save a Find that will retrieve those items.

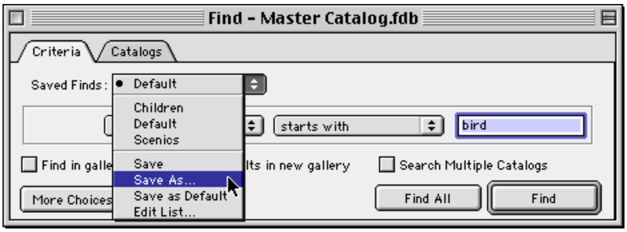
Your saved finds appear in the Saved Finds pop-up menu in the Find window. Whenever you want to use a Saved Find, choose its name from the menu or select the Find from the pop-down menu using the Saved Finds button on the Toolbar.

To Save a Find:

1. **Set up your search in the Find > Criteria tab.**

   You might want to execute the search to verify that your specified search criteria is correct.

2. **Choose "Save As…" from the Saved Finds pop-up menu.**



3. **Type a name for the new find in the Save Find dialog box that appears.**

4. **Click "OK" to return to the Find window.**

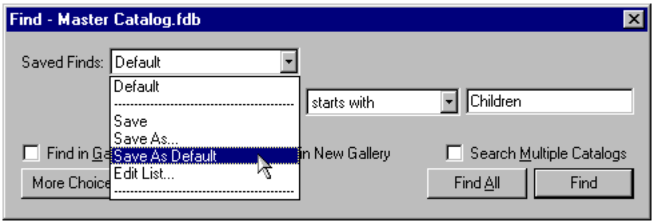
   Portfolio stores the search definition you just created in the catalog.

The Default Find

Each time you open the Find window (or choose “Default” from the Saved Finds pop-up menu) Portfolio populates the search fields and pop-ups with the attributes specified in the Default Saved Find. You can edit the Default Find so that it will retrieve the items you use most often.

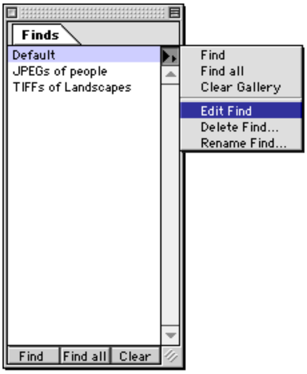
To change the Default Find:

1. **Open the Find window and set up the search fields as you want them to be by default.**
2. **Choose “Save as Default” from the Saved Finds pop-up.**



— or —

1. **Select “Default” on the Finds palette, choose Edit Find from the fly-out menu, then choose “Save as Default” or “Save” from the Edit dialog.**



2. **Set up the search fields as you want them to be in the default find.**

   You can change the Default Find as often as you want.

Tip

You will need to specify a Default find before you can access it from the Finds palette.

Finds Palette

The Finds palette allows you to easily select and work with Saved Finds.

To show the Finds palette, choose "Show Finds" from the Window menu.

A Finds palette tab

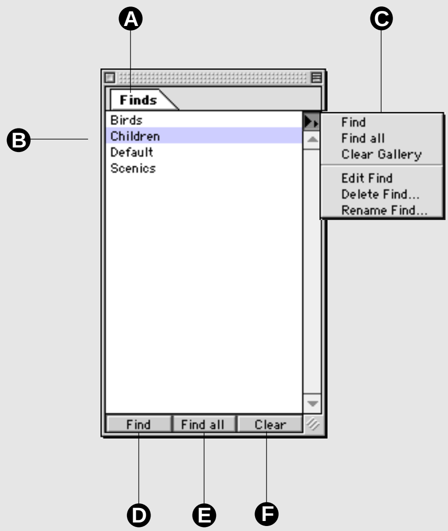
B Saved Finds: All previously Saved finds, including the Default find, are listed here. Double-click an entry to perform that find and display the results in the active gallery.

C Finds pop-up menu: Allows you to easily work with Saved Finds. Options include Find, Find all, Clear Gallery, Edit Find, Delete Find, Rename Find

D Find: Select a Saved Find on the list, then click this button to perform the selected Find.

E Find all: Click to locate and display all the records in the catalog.

F Clear: Click to clear the active gallery.



Tips

You can have Portfolio automatically perform a Saved Find when a Saved Gallery is opened. This allows you to also display any new records added (matching the Find criteria) since the last time the Saved Gallery was viewed. See *page 65*.

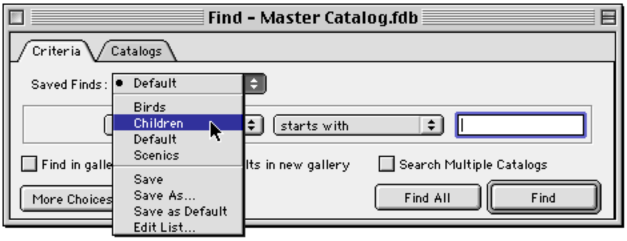
Executing Saved Finds

You can view and select Saved Finds in several ways:

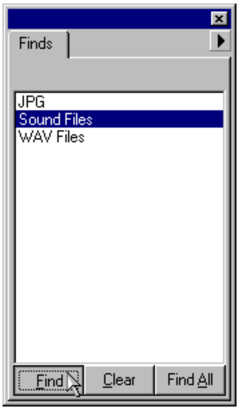
- From the pop-up menu in the Find > Criteria tab
- From the Finds palette

To execute a Saved Find:

1. **Open the Find window to the Criteria tab.**
2. **Choose the desired Saved Find from the Saved Finds pop-up menu.**



3. **Click "Find."**



Tip

You can quickly execute a Saved Find by double-clicking the desired name on the Finds palette.

— *or* —

1. **Activate the Finds palette.**
2. **Select the desired Saved Find from the Saved Finds list.**
3. **Click the "Find" button.**

   You can also double-click any entry on the list to execute the find.

Editing Saved Finds

You can change the search parameters of your Saved Finds, rename them, duplicate, or delete them.

Note: To create a Default find, open the Find dialog, then set the find criteria. Select "Save as Default" from the pop-up menu (see page 49).

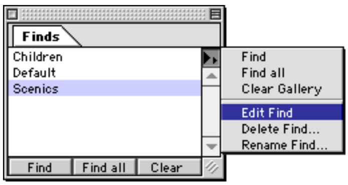
To change the attributes of a Saved Find:

1. **From the Find > Criteria tab, choose the Find you want to change from the Saved Finds pop-up menu.**

   The criteria for the selected Saved Find will be displayed in the Find > Criteria tab.

— *or* —

1. **From the Finds palette, choose the Find you want to change.**
2. **Choose "Edit Find" from the fly-out menu.**



   The Find > Criteria tab will be opened with criteria for the selected Saved Find displayed.

3. **Modify the search criteria and choose "Save" from the Saved Finds pop-up menu.**

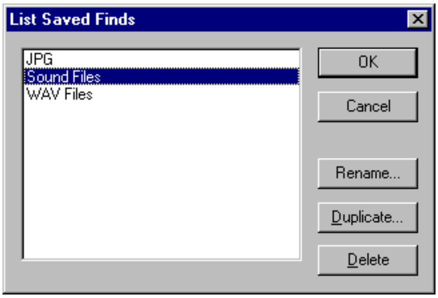
   The new search criteria are applied to the Saved Find.

To Rename, Duplicate, or Delete a Saved Find:

1. **From the Find > Criteria tab, choose "Edit List…" from the Saved Finds pop-up menu.**

The "Saved Finds" dialog box appears.

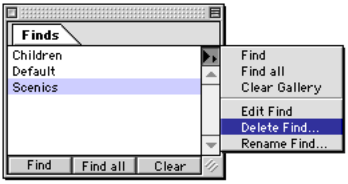
2. **From the list, select the Saved Find that you want to edit.**



3. **Click the appropriate button to Rename, Duplicate or Delete the Find.**
4. **Click "OK" to return to the Find window.**

   The changes are made to the Saved Find.

— *or* —



1. **From the Finds palette, select the Find that you want to rename or delete.**
2. **From the fly-out menu, choose Delete Find... or Rename Find... depending on what which task you want to perform.**

Note

Searching Across Multiple Catalogs applies to Portfolio Network and Portfolio Server Editions only.

Searching Across Multiple Catalogs

Portfolio 5.0 allows you to access multiple open catalogs, and to find items by searching multiple open catalogs.

Note: You can keep track of open catalogs, and perform many catalog functions from the Catalogs palette (Windows > Show Catalogs). The Catalogs palette is discussed in detail starting on page 115.

To Search multiple catalogs:

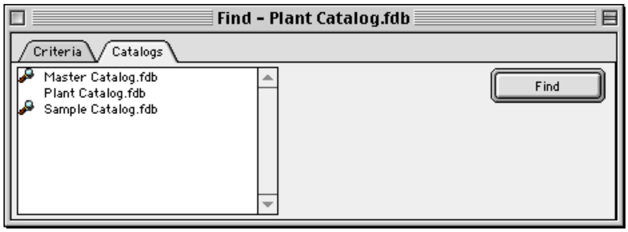
1. **Open all catalogs that you wish to include in the search.**

   Open catalogs will be displayed on the Catalogs palette (Mac OS: also on the Catalogs tab of the Find window (Catalog > Find).

   You do not need to include a catalog in a search just because it is open, but you cannot search through closed catalogs.

2. **Open the Catalogs palette (Window > Show Catalogs) (or, Mac OS: Open the Find window [Catalog > Find, or Command+F] and select the Catalogs tab).**

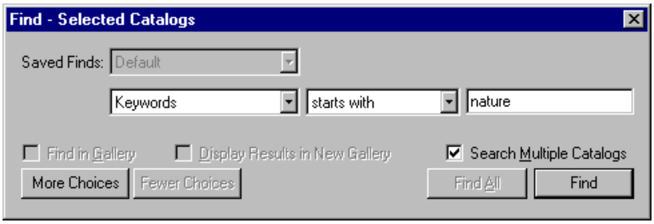
3. **Optional: De-select any catalogs that you do not wish to include in the search by clicking to the left of the name so that the icon disappears.**



An icon to the left of the Catalog name indicates that this catalog will be included in the search. No icon indicates that the catalog will be excluded from the search.

Mac OS: The catalog list on the Catalogs tab of the Find window matches exactly the catalog list on the Catalogs palette. Changes to the list on one palette affect the catalog list on the other.

5. ***Important!* In the Find dialog (Mac OS: choose Criteria tab) enable “Search Multiple Catalogs.”**



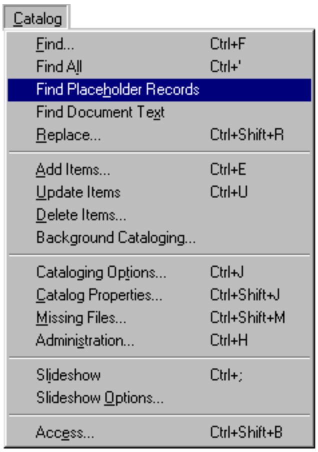
A checkmark in the Search Multiple Catalogs checkbox indicates that the catalogs specified in the Catalogs tab will be searched.

Note: Enabling multiple catalog searching forces the found results to be displayed in a new gallery.

6. **If the criteria for your Find has already been specified (on the Criteria tab of the Find window), click “Find.” Otherwise, enter desired search parameters on the Criteria tab and then perform the Find.**

The set of fields displayed in the Fields pop-up on the Criteria tab is the set of fields common across all selected catalogs. The field name and type (including precision, indexing, etc.) must match for the field to be included.

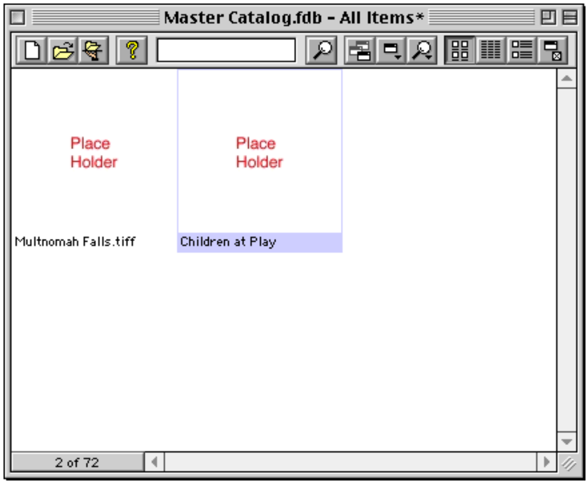
You can easily locate all of the placeholders that you created so that you can keep track of which placeholders you have created, update one or more placeholders from the source file, or delete them if they are no longer needed.



To find all Placeholder records:

1. **From the Catalog menu, choose "Find Placeholder Records."**

   A new Gallery will be opened, and all the Placeholder records will be displayed.



For information on updating a Placeholder when the source file is available, see *page 91*.

Finding Document Text

The Find Document Text command allows you to find words or phrases within the text of cataloged documents, as opposed to in the item's record, as with other Portfolio word searches.

To find text in a cataloged document:

1. **From the Catalog menu, choose "Find Document Text..." (Catalog > Find Document Text)**
2. **Enter the words or phrases that you wish to search for.**
3. **Choose the desired search criteria from the pop-up menus.**
4. **Select the display options from the Options section of the dialog.**
5. **Click "Find" to initiate the search.**

   Documents meeting the search criteria will be displayed.

Find Document Text

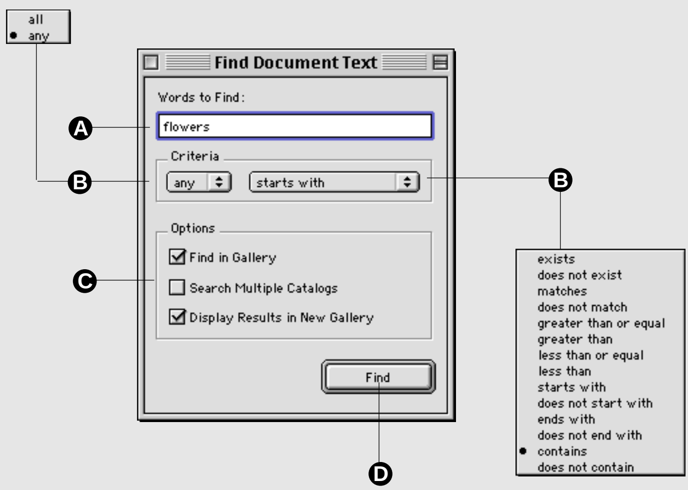
The Find Document Text dialog allows you to search for words or phrases within the text of cataloged documents, rather than in the item's record as with all other word searches.

A Words to Find: Enter the word or phrase you wish to search for.

B Criteria: From the pop-up menus, choose the search criteria. "all" finds all documents meeting the criteria; "any" finds any document meeting the criteria. Other criteria allows you to indicate different matches for the word or phrase.

C Options: Select any combination of: Find in Gallery, Search Multiple Catalogs, and/or Display Results in New Gallery.

D Find: Click to initiate the find.



Sorting and Reordering Gallery Items

You can sort on any field in the catalog, including Custom Fields. You can use the "View by" options from the View menu to quickly sort items in the active Gallery, or simply select sort orders from the Sorting palette.

To Sort the active Gallery:

1. **From the Sorting palette, click a field name to sort the active gallery by that field. Click the name to toggle the sort between Ascending and Descending sort, or choose Ascending or Descending from the palette fly-out menu.**

— or —

1. **Choose a sort "by" option from the View menu.**

   Sort options on this menu include: by Cataloged, by Filename, by File Type Mac, by Extension Win.

Sorting Palette

The Sorting palette allows you to easily change the sort order of a Gallery.

To show the Sorting palette, choose "Show Sorting" from the Window menu.

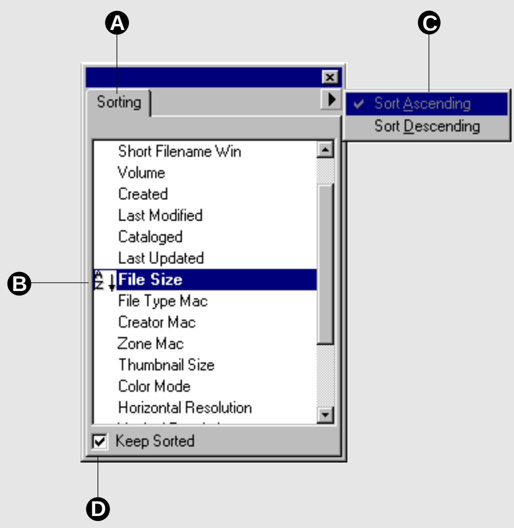
A Sorting palette tab

B Sort Order: Current sort field is displayed in bold. Click a field on the list to sort by that field. Custom fields can also be used for sorting.

Arrow indicates Ascending or Descending sort. Click to toggle between the two.

C Sorting fly-out menu: Allows you to select Ascending or Descending sorts. See also (**B**).

D Keep Sorted: Click to maintain current sort order even when new records are added. With this option enabled, attempting to rearrange records in a gallery by dragging them simply causes the records to snap back to their sorted location.



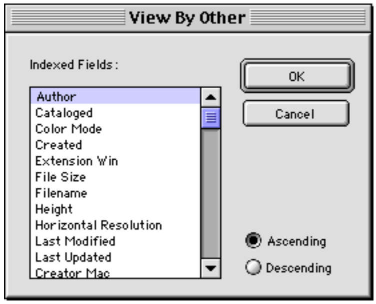
Tip

To maintain the new sort order, enable “Keep Sorted” on the Sorting palette, or save the Gallery.

— or —

1. **Choose “by Other...” from the View menu, or press Command+Option+D (Mac OS) or Ctrl+Shift+D (Windows).**

   The View by Other dialog box is displayed.



2. **From the list, choose the type of sort, and choose “Ascending” or “Descending” order.**
3. **Click “OK” to sort the list and return to the Gallery window.**

To manually Reorder items in the active Gallery:

1. **Select the item thumbnail(s) that you wish to relocate, then drag them to the new location.**

   Note: Changes to the Gallery view, such as adding items to the Gallery, may undo these changes (see sidebar Tip).

   Note: If “Keep Sorted” has been selected on the Sorting palette, attempts to manually reorder the records by dragging will simply result in them snapping back to their sort location.

Dragging and Dropping Catalog Items into Other Applications

Mac OS: On the Macintosh, you can drag items from Gallery windows into any application that supports drag and drop. Extensis provides drag and drop support for QuarkXPress with the “Extensis QX-Drag&Drop” XTension located on the Extensis CD. Run the Extensis QX-Drag&Drop Installer to add this XTension to the QuarkXPress XTensions folder.

Windows: On Windows PCs, you can drag and drop items from Gallery windows into any application that supports OLE drag-and-drop. Check your application’s documentation for information on OLE drag-and-drop support.

To place one or more Catalog items into a Drag and Drop aware application:

1. **In the Catalog Gallery window, select the item(s) you wish to place into a drag-and-drop capable document.**
2. **Drag and drop the item(s) into an open document in the receiving application.**

   If the receiving application can accept the item’s file type, the item will be placed in the application.

— or —

1. **Double-click the item to open the Item Preview window** ***(page 76)*****.**
2. **Mac OS: Use the crosshair cursor to select an area to copy, or choose “Select All” from the Edit menu (Command+A) to select the entire image.**

   Windows: The item is automatically selected.
3. **Choose “Copy” from the Edit menu, or press Command+C (Mac OS) or Ctrl+C (Windows).**
4. **Open a document in the receiving application, then choose “Paste” from the Edit menu, or press Command+V (Mac OS) or Ctrl+V (Windows).**

Note: You should not use the “Copy” command (which places items on the clipboard) to place items in other documents, unless you do so from the Item Preview window (shown on page 77) as indicated above. When you use the Copy command from a Gallery window, Portfolio expects you to be copying item records between Galleries (within or between Catalogs).

Opening a New Gallery

As you work with your catalog you may want to create additional Galleries to display the items in it. You can add, rearrange, and delete items from Galleries without affecting the items stored in the catalog.

Note: You can have items from a "Find" request displayed in a new Gallery by clicking the "Display results in new Gallery" checkbox on the Find window (Windows) or Find Criteria tab (Mac OS). See pages 42 and 43.

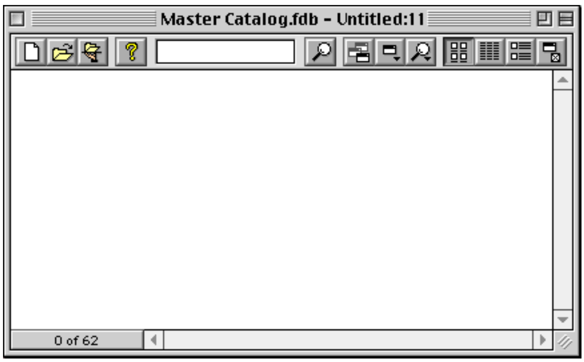
To move and copy items between Galleries, and to delete items from them, see *below and page 71*. To copy or move items between Catalogs, see *page 74.*

To open a New Gallery window:

> **Tip**
>
> You can easily create new galleries and save them for future use. See *page 61*.

1. **Choose Window > New Gallery, or click the New Gallery button  on the Toolbar, or click the New button on the Galleries palette, or press Command+G (Mac OS) or Ctrl+G (Windows).**

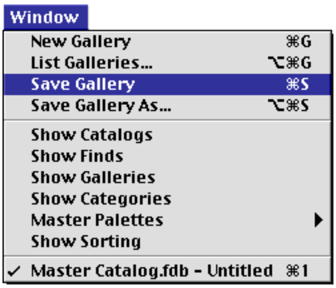
   An empty Gallery will open in Thumbnail view. The name "Untitled"(followed by a number representing the current gallery) will appear in the title bar of the Gallery window.



   You can use options on the Find > Criteria tab  to populate the gallery with records, or click the Find All button on the Find > Criteria tab to display all the records in the catalog.

> **Tip**
>
> Saving Galleries requires Publisher or higher level access to the open catalog. See *page 194.*

> **Tip**
>
> You can quickly save the currently active gallery using the standard system Save command [**Command+S** (Mac OS) or **Ctrl+S** (Windows)].



Saving a Gallery

Portfolio 5.0 makes it easier than ever to save galleries and view them later.

To Save a Gallery:

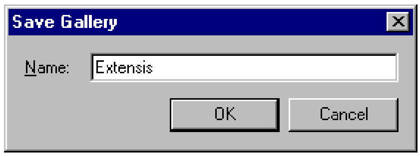
1. **Make sure the Gallery window contains all the items you want (to also customize the view, see *page 99*).**

   You can use the Find function to change the contents of the current Gallery window, or to create a new window (see *page 44*), or you can copy or drag and drop items from other catalogs *(page 74)*, other Galleries *(page 71)*, or even add new items.

2. **Sort or manually reorder the Gallery items exactly as you want them to appear.**

3. **Choose "Save Gallery" from the Window menu, or press Command+S (Mac OS) or Ctrl+S (Windows).**

   The "Save Gallery" dialog box is displayed.



4. **Enter a name for the Saved Gallery, then click "OK."**

   Your Saved Gallery will appear on the Saved Gallery list on the Window menu, and on the Galleries palette.

Galleries Palette

The Galleries palette allows you to view and work with previously Saved Galleries. Double-click any Gallery on the list to open it.

To show the Galleries palette, choose “Show Galleries” from the Window menu.

Note: Until you save a gallery (page 61) the Saved Galleries list is blank.

A Galleries palette tab

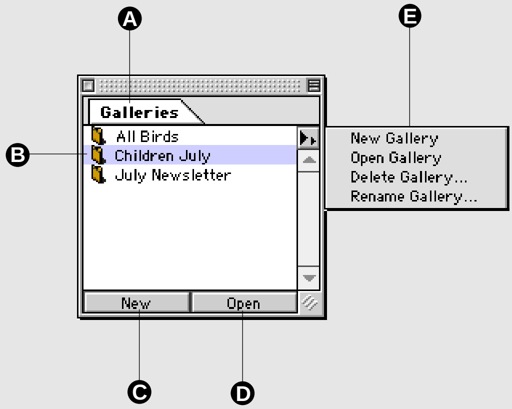
B Saved Galleries list: Lists all the previously Saved Galleries in the current catalog.

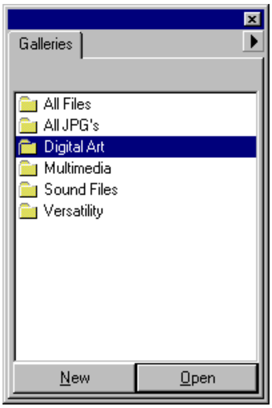
Icon indicates whether the gallery is a standard Saved Gallery or Find Gallery. Find Galleries, when opened, automatically perform the Saved Find associated with them. See *page 65*.

C New: Click to create a new, empty Gallery.

D Open: Click to open the Gallery selected from the list.

E Fly-out menu: Allows you perform any of the following operations on the selected Saved Gallery: Open, Delete, Rename.





Viewing a Saved Gallery

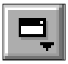
Once you’ve saved your gallery, it’s easy to open it for viewing using the new Galleries palette.

To View a Saved Gallery:

1. **Open the Galleries palette (Window > Show Galleries).**
2. **Double-click the gallery that you want to open. Or select the gallery name and click “Open.”**

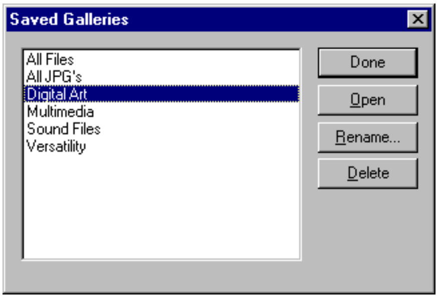
   The Saved Gallery will be opened in a new gallery window. The name of the Saved Gallery appears in the title bar of the Gallery window.

— *or* —



1. **From the Toolbar, choose the gallery you want to open from the Galleries List pop-up menu.**

— *or* —



1. **From the Window menu, choose List Galleries to open the Saved Galleries list.**

   Select the gallery that you want to open, then click "Open."

— *or* —

1. **Press Command+Option+G (Mac OS) or Ctrl+Shift+G (Windows) to open the Saved Galleries list.**

   Select the gallery that you want to open, then click "Open."

More about Galleries in Portfolio 5.0

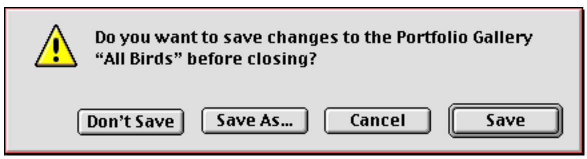
Portfolio 5.0 represents an exciting new approach to galleries. Previously, Portfolio galleries were considered static, or unchanging. Galleries are now treated as dynamic documents that can be changed over time. The result is that Galleries are easier than ever to create, modify, rearrange, update, and customize.

When a new gallery window is opened, or when a Find is performed that displays the found records in a new gallery, the name "Untitled" is displayed in the title bar of the Gallery window. "Untitled" gallery windows are numbered in the order in which they are created. For example, after doing multiple different searches with each result displayed in a different window, you might have a number of galleries named "Untitled 1," "Untitled 2," etc. Only unsaved galleries will have the term "Untitled" in the window's title bar.

As shown on *page 61*, you can save these galleries for future viewing. You can add to them if you like, and customize the way the records are presented *(page 99)*. You can even create slideshows of your records for presentation or as a quick way to preview catalog items *(page 109)*.

Once a gallery is saved, the window title bar changes to display the name of the Saved Gallery. If any changes are made to the gallery after it has been saved, an asterisk (*) is appended to the name. This gives you a visual clue that the Saved Gallery has been modified, either by a change in the record set or the layout.

If you make changes to a Saved Gallery, when the Gallery is closed you are prompted with options about saving those changes.



Save: Overwrites the current Saved Gallery.

Cancel: Returns to the Gallery.

Save As...: Allows you to save the changes to a new Gallery name, preserving the previously saved gallery intact.

Don't Save: Discards the changes and closes the Gallery.

Standard Saved Galleries versus Find Galleries

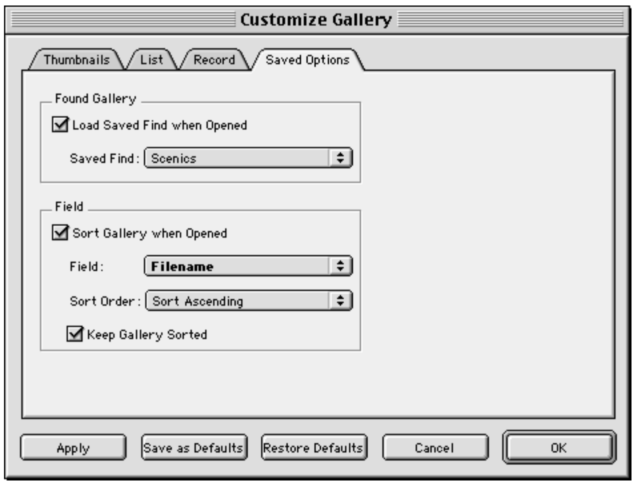
A special type of Saved Gallery, called a Find Gallery, allows you to automatically open a Saved Gallery using preselected Find criteria. A Find Gallery does not contain a specific record set, but rather has a Saved Find attached to it which is executed when the gallery is opened. The options for creating a Find Gallery are accessed on the Saved Options tab of the Customize Gallery dialog.

This powerful feature lets you automatically search for and select records (matching the specified Find criteria) that have been added since the last time the Saved Gallery was opened, while preserving any customized layouts for the gallery. Since a Find Gallery changes each time records are changed, you may want to save particular finds as a standard Saved Gallery to preserve their contents.

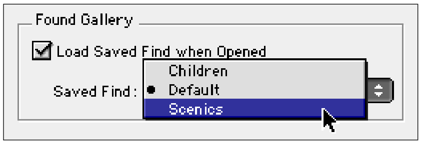
To set up a Find Gallery:

1. **Open a Gallery window.**
2. **Create a Saved Find *(page 48)* using the criteria that you wish to search on each time the Find Gallery is opened.**
3. **From the View menu, choose "Customize...". Or click the Customize button on the Toolbar.**

   The Customize Gallery dialog will be displayed.



3. **Select the "Saved Options" tab.**
4. **In the Found Gallery section, select "Load Saved Find when Opened."**
5. **From the pop-up menu, select the Saved Find that you wish to use.**



6. **(Optional) Using other options available in the Customize Gallery dialog, set up the Gallery just as you want it be.**
7. **When you have completed customizing the Gallery, click "OK."**

   You will be returned to the active gallery.
8. **Save the Gallery to the name of your choice.**

   Each time your Find Gallery is opened, the records will be searched and selected using the Find criteria in the Saved Find that you designated in step 5.

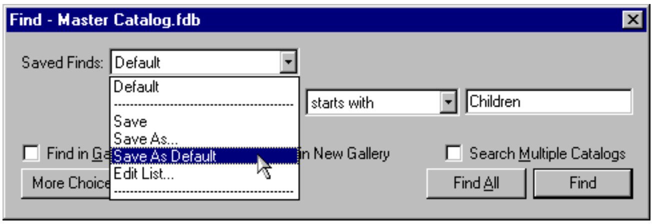
To open a Find Gallery: Once a Find Gallery has been set up and saved, select and open it for viewing just as you would any Saved Gallery *(see page 62)*.

Making changes to a saved Find Gallery

Any changes that you make to a saved Find Gallery (such as manually adding records) can have a serious impact on future uses of this gallery. Since Find Galleries will most commonly be used over and over "as is" to find records matching certain criteria, you will want to be careful not to accidentally overwrite a Saved Find Gallery. Portfolio provides specific warnings to prevent a saved Find Gallery from being inadvertently overwritten as a standard Saved Gallery.

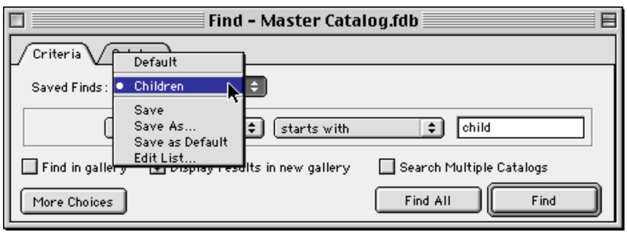
For Example:

1. **We created and saved a Find as shown on *page 48*.**



In this example, we created a Find to search for items with the keyword "child." We created a Saved Find with this criteria and named it "Children."

2. **Next, we set up a Find Gallery using this Saved Find, as shown on *page 65*, starting with *step 3*.**
3. **Then we executed the Saved Find by choosing it from the Saved Finds list in the Find dialog (or from the Toolbar  or on the Finds palette).**



In this example, three items matching the Saved Find search criteria were found and displayed.

Note: When a Find Gallery is saved, the next time you open the Gallery the Saved Find will automatically be executed.

If you elect to add items to the Gallery, delete items from the Gallery, or change it in any way, the Gallery is no longer a Saved Find Gallery, and an alert is given when the Gallery is closed.

3. **In our example, we manually added an item to the Find Gallery from another catalog.**

   The forth item does not belong to the found set, and the Gallery name ("Children") now has an asterisk (*) after it, to indicate that the contents of the Gallery has changed.

4. **If you attempt to Save a changed Find Gallery, you will be presented with an alert.**

   This is to prevent a Find Gallery from being inadvertently overwritten as a standard Saved Gallery.

   Cancel: Returns to the Gallery.

   Save As...: Allows you to create a new Saved Gallery that represents the specific record set rather than only items searched for and displayed using the Saved Find.

   Don't Save: Discards the changes and closes the Gallery.

Deleted Items in Saved Galleries

If items that are in a Saved Gallery are deleted from the Catalog (from any Gallery other than the Saved Gallery), the items will still be displayed when the Saved Gallery is opened. The thumbnail will be indicated as "Item Deleted." To eliminate the missing items from the Gallery, choose Refresh from the View menu [**Command+Option+U** (Mac OS) or **Ctrl+Shift+U** (Windows)] then resave the Gallery.

To Delete or Rename a Saved Gallery:

1. **Open the Galleries palette (Window > Show Galleries).**
2. **Select the gallery that you want to delete or rename.**
3. **From the palette fly-out menu, select either Delete Gallery or Rename Gallery.**

— or —

1. **From the Window menu choose List Galleries… , or press Command+Option+G (Mac OS) or Ctrl+Shift+G (Windows).**

   The "Saved Galleries" dialog box appears.

2. **Select the Gallery you want to edit.**
3. **Click "Rename…" to rename the selected Gallery, or click "Delete" to remove the Saved Gallery from the catalog.**
4. **Click "Done" to close the Saved Galleries dialog box.**

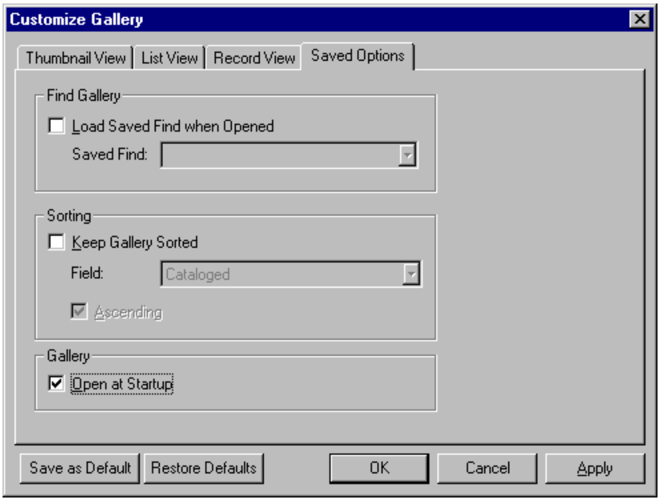
> **Tip**
>
> To open large catalogs more quickly, you can disable the "Open Gallery at Startup" option from the fly-out menu on the Catalogs palette.
>
> Saving your default Gallery with just a few records will also allow the catalog to open more quickly even with "Open Gallery on Startup" enabled.

Open Gallery at Startup (Default Gallery)

You can set up your catalog so that a specific gallery is displayed when the catalog is initially opened. In earlier versions of Portfolio, this was called the "Default" Gallery.

To specify a Gallery to be opened automatically at startup:

1. **Open a Saved Gallery (select it from the list of Saved Galleries on the Toolbar, on the Galleries palette, or from Window > List Galleries), and verify that is the active Gallery.**
2. **From the View menu, choose "Customize..." (or click the Customize button on the Toolbar), then click the Saved Options tab.**



3. **In the Gallery area, click "Open at Startup."**

— or —

2. **Activate the Catalogs palette.**
3. **From the palette fly-out menu, choose "Open Gallery at Startup" (this may also read "Display Gallery on Open").**

   The specified Gallery will open automatically whenever this catalog is open.

Moving and Copying Items Between Galleries in the Same Catalog

When you move or copy items between Galleries in the same catalog, nothing about the individual item records in the database changes—you are merely creating different ways to isolate and view cataloged items.

To copy items to another Catalog, see *page 74.* For information on creating new catalogs or adding items to catalogs, see *pages 113 and 118.*

To Copy items between Galleries in the same Catalog:

1. **Open a Saved Gallery, or create a new Gallery [choose Window > New Gallery, or click the New Gallery button  on the Toolbar, or click the New button on the Galleries palette, or press Command+G (Mac OS) or Ctrl+G (Windows)].**

2. **From the originating Gallery, select the item(s) that you want to copy. To select all the items in the Gallery, choose "Select All" from the Edit menu, or press Command+A (Mac OS) or Control+A (Windows).**

   Mac OS: To drag more than 50 records at one time, hold down the Option key when initiating the drag.

3. **Drag and drop the items into the target Gallery window.**

— or —

3. **With the items in the originating Gallery selected, choose "Copy" from the Edit menu [or press Command+C (Mac OS) or Ctrl+C (Windows)].**

4. **Activate the receiving Gallery window by clicking it, then choose "Paste" from the Edit menu [Command+V (Mac OS) or Ctrl+V (Windows)].**

   The items will be copied to the new Gallery.

To Move items from one Gallery to another:

1. **Open a Saved Gallery, or create a new Gallery [choose Window > New Gallery, or click the New Gallery button  on the Toolbar, or press Command+G (Mac OS) or Ctrl+G (Windows)].**
2. **In the originating Gallery, select the items that you want to move. To select all the items in the Gallery, choose “Select All” from the Edit menu, or press Command+A (Mac OS) or Control+A (Windows).**
3. **Choose “Cut” from the Edit menu [Command+X (Mac OS) or Ctrl+X (Windows)].**
4. **Activate the receiving Gallery window by clicking it, then choose “Paste” from the Edit menu [Command+V (Mac OS) or Ctrl+V (Windows)].**

   The items will be removed from the originating Gallery and added to the receiving Gallery.

   Note: Even if you do not Paste the items into another Gallery, they are not deleted from the Catalog (see page 73).

Tip

When you delete items from a Gallery, you can verify that the images have not been removed from the catalog by examining the numbers in the lower-left corner (Mac OS) or upper-right corner (Windows) of the Gallery window. Only the number representing how many items are currently being displayed will have changed; the number representing the total number of items in the catalog remains the same.

Deleting Items from a Gallery

When items are deleted from a Gallery, they are merely deleted from the current view, not from the catalog. This allows you to create Galleries that display just the images you want to see. For example, you can use the Delete from Gallery feature after you've searched for a set of images and found 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.

For information on deleting items from a Catalog, see *page 75*.

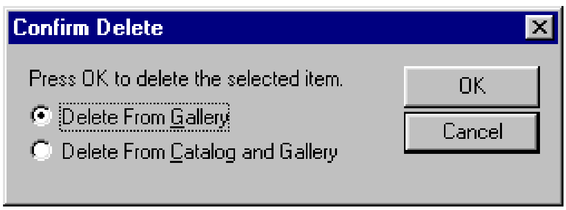
To Delete items from a Gallery:

1. **From the Gallery window, select the item(s) that you want to delete.**
2. **Press the Delete (Mac OS) or Backspace (Windows) key, or choose "Cut" from the Edit menu, or press Command+X (Mac OS) or Ctrl+X (Windows).**

   The selected item(s) will be deleted from the Gallery window, but not from the catalog.

— or —

2. **Choose "Delete Items" from the Catalog menu.**
3. **Choose "Delete from Gallery," then click "OK."**



The selected item(s) will be deleted from the Gallery window, but not from the catalog.

Moving and Copying Items Between Catalogs

When you copy items between catalogs, you are actually copying the item record (all of the information associated with the item, including the thumbnail, the link to the original file, and any Custom field data—if those Custom fields have been defined in the receiving catalog).

To Copy items between Catalogs:

1. **If you have not created Custom fields, proceed to step 2.**

   If you have created Custom fields in the originating catalog, open the destination catalog and add those Custom fields to it.

   If you do not recreate the Custom fields in the destination catalog, Custom field information will be lost when the records are copied.

2. **In the Gallery window of the originating catalog, select the item(s) that you wish to copy.**

3. **Drag and drop the items into an open Gallery window in the receiving catalog.**

— or —

3. **Choose "Copy" from the Edit menu [or press Command+C (Mac OS) or Ctrl+C (Windows)].**

4. **Activate the receiving Gallery window by clicking it, then choose Edit > Paste [Command+V (Mac OS) or Ctrl+V (Windows)].**

   The items and all information in the records will be copied to the new Gallery.

To Move items from one Catalog to another: To move items from one catalog to another you will need to add them to the destination catalog and then delete them from the originating catalog. You could do this by making a copy of the catalog and deleting the appropriate items from each, or by copying the items to the destination catalog and then deleting them from the originating one (using this method you would have to recreate any Custom fields in the destination catalog—see above). Or you could create a new catalog and add the desired items to it, then delete the appropriate items from the old catalog (using this method you would have to re-enter any information that had been manually added to the record after it had been cataloged).

Tip

Mac OS: To drag more than 50 records at one time, hold down the Option key when initiating the drag.

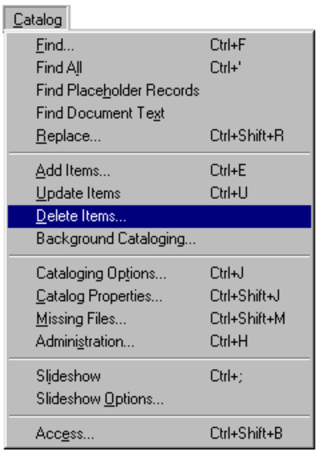
Tip

When moving and deleting catalog items, remember that you are working with references to image files, not the actual image source files. Deleting catalog items deletes the reference from the catalog, it does not delete the item file. If you accidentally delete items from a catalog, you can restore them by re-adding them to the catalog (you may have to re-enter keywords or other custom information).

You can use Portfolio to delete an item's source file, see *page 83.*

Tip

If you have deleted an item's source file (and you did not do so using Portfolio's Delete Original command), you will probably also want to delete the item record from the catalog. You can do this using the Delete Items command discussed here, but if a number of items are involved it may be easier to use the Missing Items command *(see page 125).*



Deleting Items from a Catalog

Since item records contain so much information that might be difficult to replace if an item is accidentally deleted, Portfolio provides some protection from accidentally deleting items from catalogs. First, you must have Publisher or higher level access to the catalog *(see page 194)* to delete items. Second, you will be given an opportunity to verify that you really want to delete an item before the item is deleted (this notification can be disabled in Edit > Preferences).

To Delete items from a Catalog:

1. **From a Gallery window, select the item(s) that you want to delete.**
2. **Choose "Delete Items" from the Catalog menu.**
3. **Choose "Delete from Catalog," then click "OK."**

The selected item(s) will be deleted from the Catalog.

— or —

2. **Press Option+Delete (Mac OS) or Ctrl+ Backspace (Windows).**

You will be asked to verify the deletion.

3. **Click "OK."**

The selected item(s) will be deleted from the Catalog.

Tip

To avoid being warned each time you delete items, deselect the "Confirm Delete from Catalog" option in Edit > Preferences.

When you want to look more closely at any image or play sound or movie items, you can open a Preview window for an item in Portfolio. This saves you from having to launch the application that the item's source file was created in.

The Preview window lets you display and manipulate an item in various ways depending on the item's type (image, sound or movie), as described on *pages 76 through 81*.

Note: Some file types cannot be previewed. If Portfolio is unable to preview a file type, you are prompted to view the file in the application that created it. See "Working with an Item's Source File" later in this chapter for details.

To Preview an item:

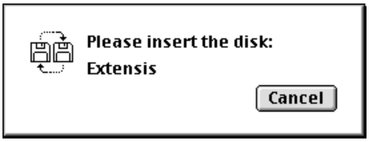
- **Double-click its thumbnail in the Gallery window.**

— or —

- **Select the item, then press Command+B (Mac OS) or Ctrl+B (Windows).**

— or —

- **Select the item, then choose "Preview Original…" from the Item menu.**



Unless items were cataloged using the Disk Previews option *(page 214)*, before displaying an item in the Preview window Portfolio must be able to locate the item's source file—that is, the original file from which the catalog entry was made. If the source file cannot be found (because the disk is not mounted or the file has been moved or renamed), Portfolio will prompt you to insert the missing disk. If the file is no longer on the requested disk, click "Cancel" and Portfolio will allow you to manually locate the missing file.

Portfolio 5.0 takes advantage of Apple's QuickTime 4.0 capabilities for previewing many multimedia formats, if QuickTime 4.0 is installed. QuickTime 4.0 installers for both Mac OS and Windows are available on the Extensis CD.

Item Preview—Still Images (Pictures)

A still image initially appears in a Preview window at actual size (100% magnification) or scaled to fit a window appropriate to your screen size, depending on your preferences settings.

A File Name: Displays the file name of the original image file. When a disk preview (see *page 214*) is being displayed, the words "Screen Preview of" precede the image name.

B Original Image: Scaled to 100% or to Fit to Window.

C Zoom In: Click to zoom in, so that you can see more image detail.

D Zoom Out: Click to zoom out, so you can see more of the image.

E Fit to Window: Click to fit the image to the window.

F Switch to Original: This button is dimmed when the Preview is created from the original image (from the source file) If a Disk Preview was created when the image was cataloged, this icon is enabled. Clicking it replaces the disk preview image with one created from the source file.

G Current Magnification: Displays current magnification. Use the Zoom tools and key commands from the View menu to examine the image.

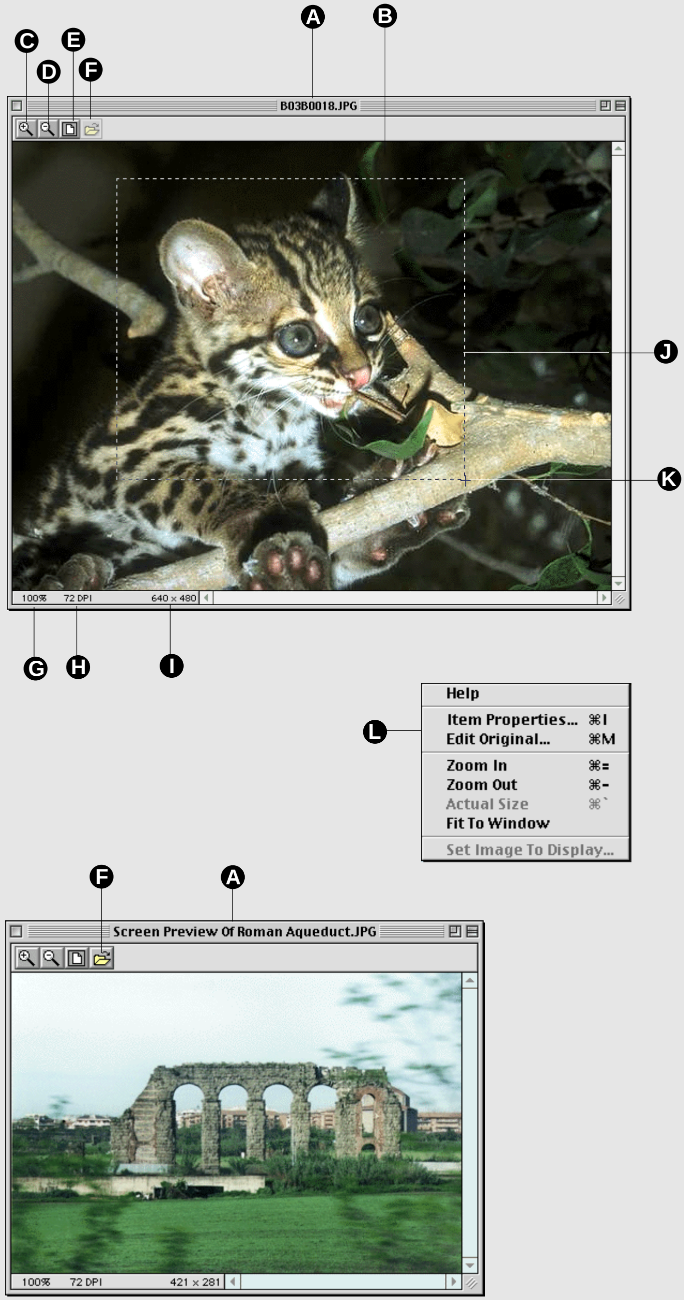
H Image resolution: Displays image resolution in dpi. (Not available for all file types.)

I Image size (not available for all file types): Size is displayed in measurement type indicated in Edit > Preferences. Options are: inches, centimeters, millimeters, pixels.

J Partial image selection area: Select an area of the image to examine or copy.

K Preview window cursor: Crosshair cursor helps you select an area.

L Contextual Menu: **Control+click** (Mac OS) **right-click** (Windows) in the Preview window to access this pop-up.



To...	Procedure
Select a portion of the image	Drag a box around the area (Mac OS only).
Select the whole image	Choose Edit > Select All [Command+A (Mac OS) Ctrl+A (Windows)].
Increase magnification	Click the Zoom In button at the top of the window (shown on *page 77*) or choose Item > Zoom In [Command+"+" (Mac OS) Ctrl+"+" (Windows)]
Decrease magnification	Click the Zoom Out button at the top of the window (shown on *page 77*) or choose Item > Zoom Out [Command+"-" (Mac OS) Ctrl+"-" (Windows)]
Fit the image to the window	Click the Fit to Window button at the top of the window (shown on *page 77*) or choose Item > Fit to window [Command+0 (Mac OS) Ctrl+0 (Windows)]
Return image to actual size (100%) and adjust window size to fit	Choose Item > Actual Size [Command+' (Mac OS) or Alt+' (Windows)].
Switch from disk preview to original image	Click the Switch to Original button at the top of the window (shown on *page 77)* or choose Item > Switch to Original
Edit the image's source file	Select the item, then choose Item > Edit Original…
Create a copy of the image file	Choose "Copy Original…" from the Item menu.
Copy the image to the Clipboard	Select an area to copy, or choose Edit > Select All (Command-A [Ctrl+A]), then choose Edit > Copy (Command-C [Ctrl+C]).
Regenerate the thumbnail of a modified image without performing a standard Update	Choose Item > Regenerate Thumbnail (Mac OS only) *(available in Publisher mode or higher only)*
View the item's properties	Choose Item > Item Properties… [Command+I (Mac OS) or Alt+Enter (Windows)]

Item Preview—Multi-page documents

Multi-page documents are a similar to still images, with the ability to flip through the pages in the preview. You can select which page is to be used for the preview and thumbnail image (see *chart below*).

A First Page: Go to first page.

B Previous Page: Go to previous page.

C Next Page: Go to next page.

D Last Page: Go to last page.

E Zoom In: See more image detail.

F Zoom Out: See more of the image.

G Fit to Window: Fits image to current window. Scale is shown in (**I**).

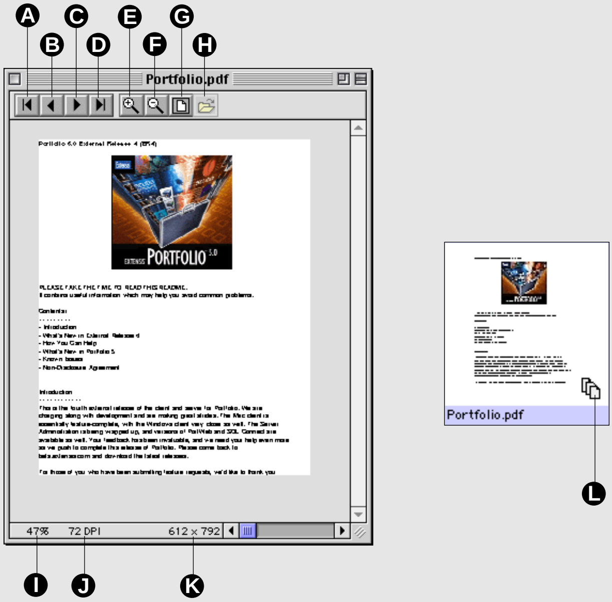
H Switch Original: Open the document in the creating application. *(See below)*

I Current Magnification: Shows current magnification.

J Image Resolution: Resolution in dpi.

K Size: Size is displayed in measurment type selected in Edit > Preferences.

L Multi-page Thumbnail Icon: Enable or disable in Edit > Preferences.



To...	Procedure
Perform standard select and zoom options	See “Still Images” procedures chart on *page 78*.
Go to the first page in the document	Click First Page
Go to the last page in the document	Click Last Page
Go to the next page	Click Next Page
Got to the previous page	Click Previous Page
Switch from disk preview to original image	Click the Switch to Original button at the top of the window or choose Item > Switch to Original. Only available if “Disk Previews” was enabled during cataloging, turning off view multiple pages.
Edit the image’s source file	Select the item, then choose Item > Edit Original…
Create a copy of the image file	Choose “Copy Original…” from the Item menu.
Set the preview and/or thumbnail image to any page other than the first page	Select the desired page, then choose Item > Regenerate Thumbnail *(available in Publisher mode or higher only)*
View the item’s properties	Choose Item > Item Properties… [Command+I (Mac OS) or Alt+Enter (Windows)]

Viewing Multiple Pages in the Preview: To view multiple pages in the preview, Disk Previews must be disabled when the item is cataloged. Doing so disables the “Switch to Original” command.

Item Preview—Movies

A movie item appears in the Preview window at its actual size with a standard QuickTime control bar that lets you start, stop, and step through the movie; select frames; and control the volume. You cannot resize a movie preview.

A File Name: Movie file name.

B Movie window: Displays the movie.

C Play/Stop button: Press to start or stop the movie.

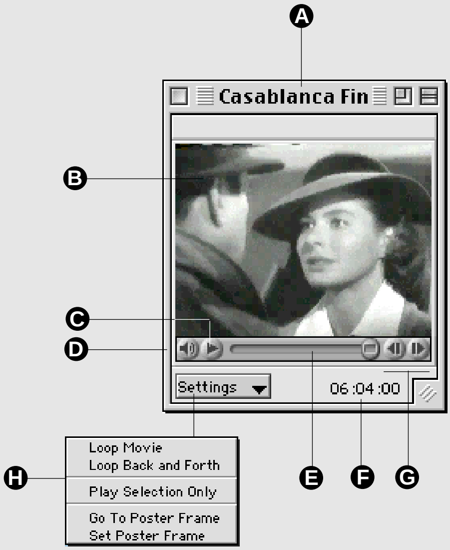
D Volume control (if movie has sound): Increase or decrease volume.

E Control bar: Shows movie progression. Drag to start movie at specified location.

F Duration: Displays movie duration.

G Step buttons: Allows you to step through the movie frame by frame.

H Options menu: Select Looping, Playback, and Poster Frame options.



To...	Procedure
Select part of the movie	Press **Shift and drag the control bar** (selected frames appear highlighted).
Play or pause the movie	Click the play button or press the spacebar. You can also double-click the movie to play and click it to pause.
Step forward or backward one frame	Click the forward or backward step button.
Increase or decrease volume	Click the volume control and adjust the slider.
Set the Poster Frame	From the Settings pop-up menu, choose “Set Poster Frame”
Go to the Poster Frame	From the Settings pop-up menu, choose “Go To Poster Frame”
Edit the movie’s source file	Choose "Edit Original" from the Item menu.
Create a copy of the movie file	Choose "Copy Original…" from the Item menu.
View the movie’s properties	Choose "Item Properties…" from the Item menu.

Poster Frame: You can determine which frame of a movie is used as the “poster frame” for the catalog thumbnail. To do so, locate the frame that you want to use, then from the movies Settings pop-up menu, choose “Set Poster Frame.” (Sets the poster frame in the file itself.) *The Poster Frame can be set only in Publisher mode or higher.*

Item Preview—Sounds

A sound item in the Preview window appears and works much the same as a movie item, except that there is no visual component. The control bar lets you start, stop and step through a sound item; select part of the sound item; and control the volume.

A File Name: Sound file name.

B Duration: Displays sound duration.

C Volume control: Increase or decrease volume.

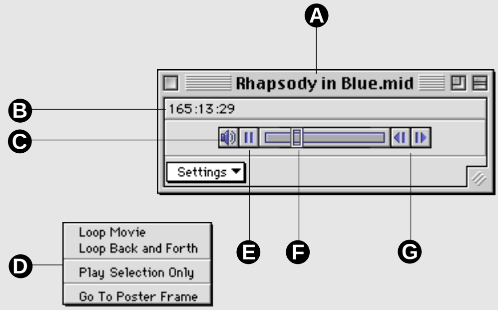
D Options menu: Select Looping and playback options.

E Play/Stop: Press to start or stop the movie.

F Control bar: Shows sound progression. Drag to start sound at specified location.

G Step buttons: Allows you to step through the sound frame by frame.

All of the procedures in the table on *page 80* apply to both movies and sounds.



Item Preview—QuickDraw 3D Images (Mac OS)

A QuickDraw 3D image is a three-dimensional drawing that can be cataloged with Portfolio.

A File Name: 3D image file name.

B Views pop-up menu: Click to select a particular view from the pop-up menu.

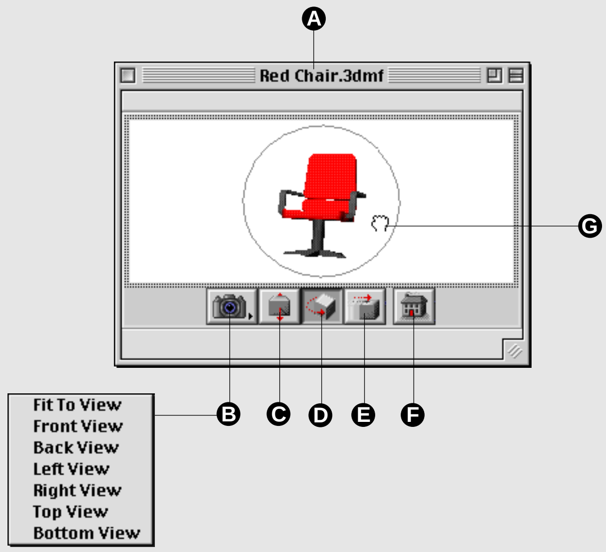
C Magnification: Click to enlarge (magnify) or reduce the image in the window.

D Rotate: Click to spin the model in 3D space.

E Move: Click to move the object around inside the window.

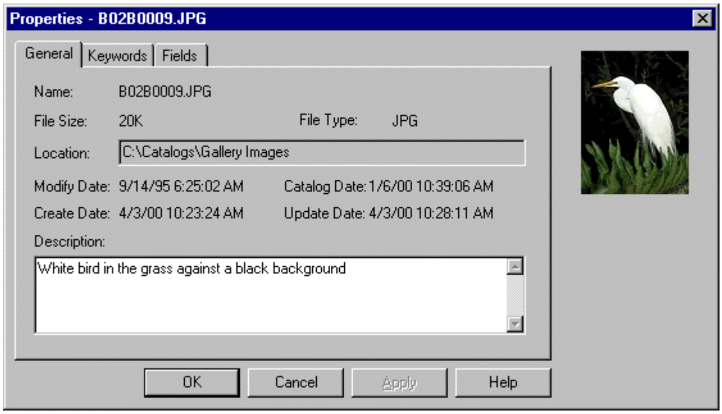
F Home: Click to return the object to its original view.

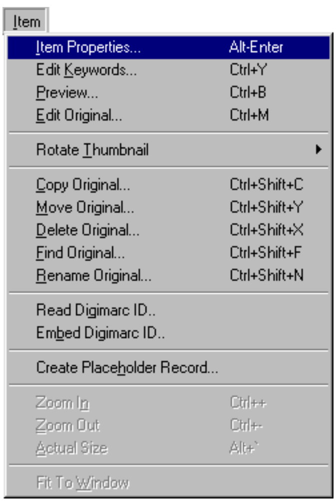
G Grabber: Click in the window and drag to rotate the item in real time. The cursor will change to the grabber hand and a rotation circle will outline the image.



Viewing Item Properties

You can view all the information available about an individual item from the Item Properties dialog. This view is helpful when you want additional information, but don't want to include it in any of the Gallery views. You can also edit the item's keywords, description, and Custom Fields from the Item Properties dialog.





To view Item Properties:

- **Select the item, then choose "Item Properties..." from the Item menu.**

— *or* —

- **Select the item, then press Command+I (Mac OS) or Alt+Enter (Windows).**

You can have up to ten "Item Properties" dialog boxes open at one time.

Working with an Item's Source File

Once you have identified a catalog item you want, you can work with it from within the open catalog. For example, you can:

- Switch to another program to edit the source file (the original file to which the catalog entry points).
- Move, Copy, Delete, Find, or Rename the source file.
- Find out more information about the item.
- Print thumbnails or the item itself.

To Edit an item's source file:

1. **Select the item in the Gallery window, or open a Preview window for the item.**
2. **Choose "Edit Original…" from the Item menu [Command+M (Mac OS) or Ctrl+M (Windows)].**

   Portfolio remembers the name and location of the application last used to edit the source file for any item of the same type and creator. If necessary (such as the first time you attempt to edit a file of a particular type) you will be prompted to choose an application and to specify where the application is located.

   Portfolio launches the application, and opens the source file for editing.
3. **Make the changes you want, save the file, and quit the application.**

   After quitting the editing application, you are returned to Portfolio.

Tip

To change the application that will be used to edit the item's source file, hold down the **Option** (Mac OS) or **Shift** (Windows) key while choosing Edit Original... from the Item menu. Locate the application that you want to open the item with. The selected application becomes the one that Portfolio associates with the file until you change it.

To Copy a source file:

1. **In the Gallery window, select the item(s) whose source file you want to copy.**
2. **Choose Item > Copy Original… [Command+Option+C (Mac OS) or Ctrl+Shift+C (Windows)].**
3. **In the file directory dialog box, locate and select the folder you want the original file copied to.**
4. **Click the “Select” button at the bottom of the directory dialog box.**

   Portfolio copies the source file into the folder you specified.

   Note: You can also copy source files by dragging items from Gallery windows onto the desktop or into folders.

To Move a source file:

> **Important**
>
> In a multi-user setting, be careful about moving or deleting source files unless you are sure that your entire workgroup wants the files moved or deleted.

1. **In the Gallery window, select the item(s) whose source file you want to move.**
2. **Choose Choose Item > Move Original… [Command+ Option+Y (Mac OS) or Ctrl+Shift+Y (Windows)].**
3. **In the file directory dialog box, locate and select the folder you want the original file moved to.**
4. **Click the “Select” button at the bottom of the directory dialog box.**

   Portfolio moves the source file into the folder you specified.

   Important: “Move Original…” moves the source file from its current location to the one you specify. If the source file is locked, “Move Original…” does not move the file, but makes a copy of it in the new location.

   Portfolio automatically updates the catalog after you move a file.

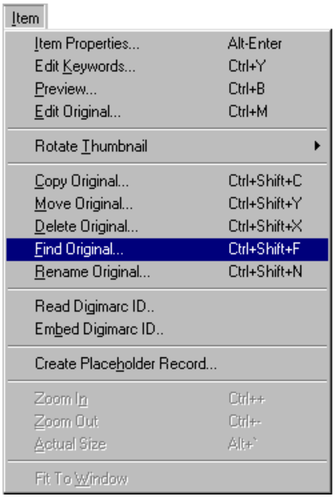
> **Warning!**
>
> Be very careful when using the “Delete Original” command to delete source files. Once you confirm the deletion the files are deleted immediately and cannot be recovered.

To Delete a source file:

> **Important**
>
> **Mac OS:** If you drag an item to the trash, the original item, not a copy, is placed in the trash.

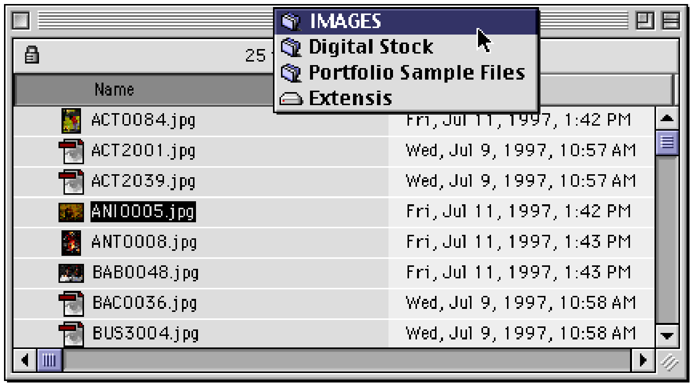
1. **Select the item in the Gallery window.**
2. **Choose Item > Delete Original… [Command+ Option+X (Mac OS) or Ctrl+Shift+X (Windows)].**
3. **Click “Cancel” if you change your mind or “OK” to confirm that you want to delete the file.**

To Find a source file:



1. **In the Gallery window, select the item(s) whose source file you want to find.**
2. **Choose Choose Item > Find Original… [Command+Option+F (Mac OS) or Ctrl+Shift+F (Windows)].**

   The source file will be located and highlighted. **Mac OS:** If you select more than one item, Portfolio will open a window for each folder containing found items, and highlight all the found source files.



   If any of the requested source files cannot be found, Portfolio will locate the files that it can, and present a dialog indicating that one or more source files could not be found.

To Rename a source file:

1. **Select the item in the Gallery window.**
2. **Choose Item > Rename Original… [Command+Option+N (Mac OS) or Ctrl+Shift+N (Windows)].**
3. **Click "Cancel" if you change your mind or "OK" to confirm that you want to rename the file.**

Detecting and Reading Digimarc (Watermarks)

Note

To detect or display Digimarc watermarks, the item source file must be JPEG or TIFF without channels. Portfolio does not detect watermarks in other file formats.

Tip

You must have Editor access or higher to embed watermarks, and to have the watermark information that is gathered during a “Read Digimarc ID” command written to the item record.

A Digimarc watermark is special information that may be embedded in an item’s source file. Digimarc watermarks can be detected, displayed, and embedded directly by Portfolio.

You can have Portfolio detect Digimarc data automatically when items are cataloged by selecting this option from the Add and/or Update tabs of the Cataloging Options dialog (Catalog > Cataloging Options > Add or Update tab) *(pages 134 and 147)*. You can display the presence of a watermark and/or the watermark Creator ID (in the form of a link to the Digimarc website where you can find out more about the Creator) on items in the Gallery window by selecting these options in the Customize dialog (View > Customize).

Using the Read Digimarc command you can have Portfolio examine an item’s source file for a Digimarc watermark, then display information about the watermark. When Portfolio displays the Digimarc information you can click a button to go directly to the Digimarc website to obtain more information about the watermark’s creator. To have Portfolio embed a Digimarc watermark in the source file, see *page 89*.

Reading Digimarc Data (Watermarks)

When a single gallery item is selected, embedded watermark data is added to the item record in the catalog and that information is displayed in a dialog box, as shown here. When multiple items are selected, the data is added to the item record in the catalog and a summary report is displayed indicating how many watermarks were read.

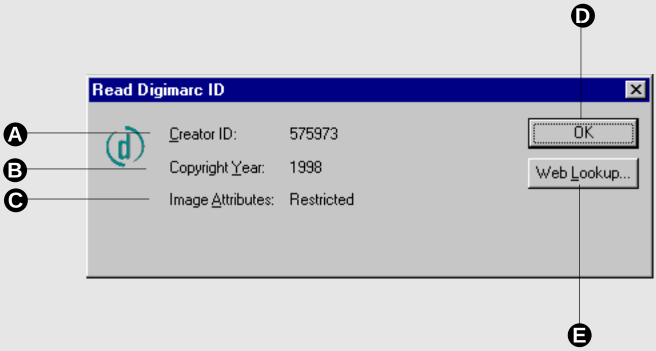
A Creator ID: Displays the watermark creator name.

B Copyright Year: Displays the year the item was copyrighted.

C Image Attributes: Displays information about the item.

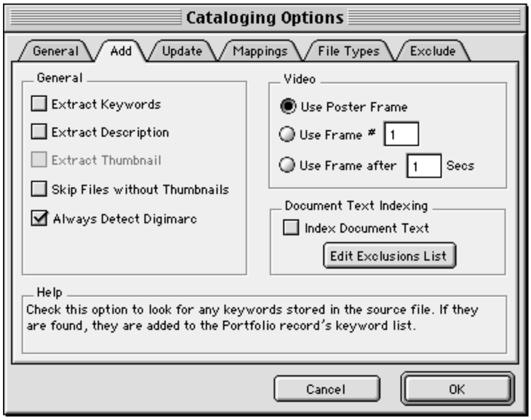
D OK: Click to close the dialog after examining the displayed data.

E Web Lookup: Click to go to the Digimarc website to display additional information about the creator ID (**A**). Uses the system’s default web browser.

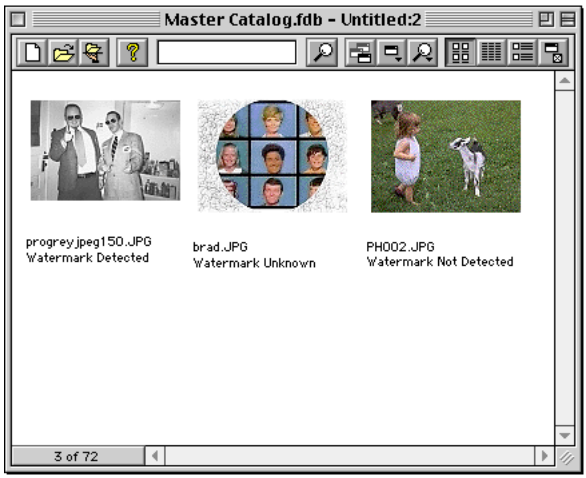


To have Digimarc watermark data detected when items are cataloged:

1. **From the Catalog menu, choose Catalog Options.**
2. **From the Add and/or Update tabs, click "Always Detect Digimarc."**



When items are cataloged, any existing watermarks will be detected.

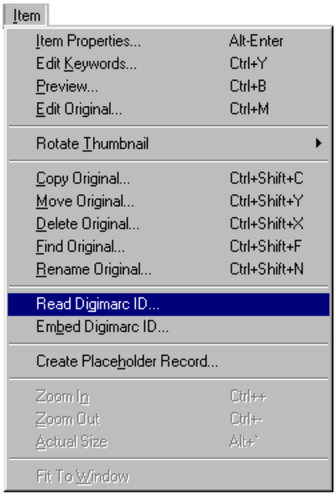


Tip

To display the watermark detected field (and/or add a hot link to the Creator ID that will take you to the Digimarc website), choose "Watermarked" and/or "Watermarked URL" from the fields list in the View > Customize tab for the selected Gallery view.

After watermark detection (if the Watermark display option is selected in View > Customize), each item will display one of three states: Watermark Detected, when the creator code is known; Watermark Unknown, when the watermark has not been detected or read; or Watermark Not Detected.

To read Digimarc watermark data from selected items:

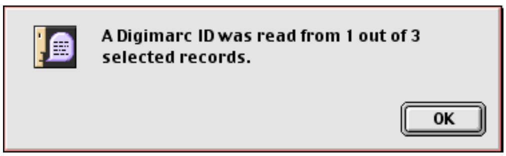


1. **In the active Gallery, select the item(s) that you want to display watermark information for.**
2. **From the Item menu, choose "Read Digimarc ID."**

   Reading the Digimarc ID is the process of obtaining and displaying information contained in the watermark.

   If a single Gallery item is selected when the Read Digimarc ID command is invoked, Portfolio will display the watermark information as well as record it in the item record (see *Note* below).

   If more than one item is selected, Portfolio will record the data in each item's record (see *Note* below), and display a summary of the results that includes how many source files were scanned and how many items were found to have watermark data embedded in them.



   Note: The Read Digimarc command can be used to detect watermark data in any catalog access mode, however watermark data will only be written to the database in Editor, Publisher, or Administrator mode.

Displaying the Digimarc Watermark URL: You can display an active link to the Digimarc web site that will give you more information about the watermark creator. To do so, choose "Watermark URL" from the fields list in View > Customize, then select the desired catalog item and choose Item > Read Digimarc ID.

Tip

Digimarc is a proprietary system for adding watermarks to image files. To embed Digimarc watermarks using Portfolio, you will need to have a Digimarc Creator ID. For more information or to obtain a Creator ID, visit the Digimarc website at **http://www.digimarc.com**.

Important

Watermark data is permanent and cannot be removed. If you are concerned about embedding watermarks in your files, we suggest making a backup copy of the source file prior to watermarking**.**

Embedding Digimarc (Watermarks)

Portfolio allows you to embed a Digmarc watermark directly into an item’s source file using the Embed Digimarc ID command. You must be registered with Digimarc to be able to embed watermarks (see sidebar Tip). Watermarks are permanent data stored in the item source file.

Portfolio can only embed watermarks in JPEG and certain kind of TIFF files. Portfolio does not embed watermarks in other file formats, in 16-bit or multichannel TIFF files, including CMYK images and grayscale images with alpha channels.

To embed a Digimarc watermark: In the active Gallery, select the item(s) that you wish to have watermarked. From the Item menu, choose “Embed Digimarc ID” (Item > Embed Digimarc ID). Enter your Creator ID and choose the data that you want to embed in the file. Click “Embed” to complete the process. Portfolio will add the specified data to the selected item(s) source file.

Embedding Digimarc (Watermarks)

A Creator ID: Enter your Digimarc PIN number and Creator ID

B Copyright Year: Allows you to enter copyright year for the material. You may leave this field blank.

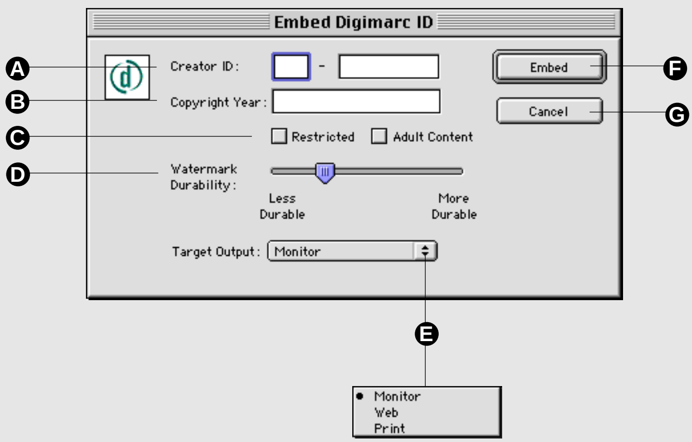
C Content: Choose Restricted, Adult Content, or none.

D Watermark Durability: Allows you to choose a strength for your watermark. For more information about choosing strengths, please refer to the file watermarking_guide.pdf located inside the Portfolio folder on the Extensis CD.

E Target Output: From the pop-up menu, choose the target for watermark display: Monitor, Web, or Print.

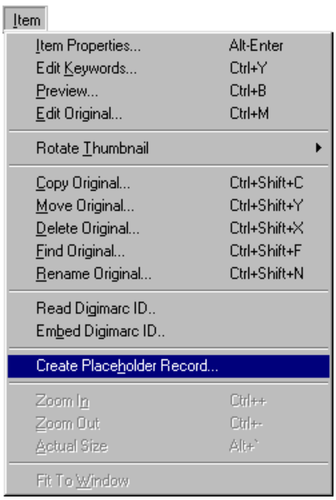
F Embed: Directs Portfolio to embed the specified information in the selected item(s) source file.

G Cancel: Close the dialog without making any changes to the selected item(s) source file.



Tip

Placeholder Records can be created in Editor, Publisher, or Administrator modes only.



Placeholder Records

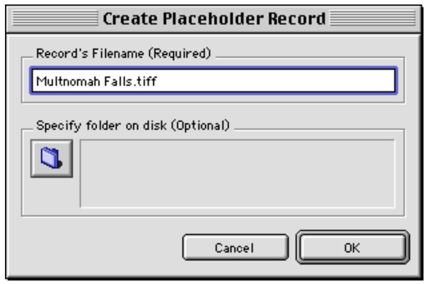
If you need to create a record for an item, but for whatever reason the item is not yet ready to be cataloged, you can add a blank record using the “Create Placeholder Record” command from the Item menu.

When the catalog is updated, Portfolio will look for the source file in the location given when the Placeholder Record is created.

To create a Placeholder Record:

1. **Choose Item > Create Placeholder Record…**

   The Create Placeholder Record dialog is displayed.



2. **Enter the exact name of the item’s source file.**

   When the catalog is updated, Portfolio will search for a record by this name, so the name must be entered with the exact source file name.

3. ***Optional:* Click the “Specify folder on disk” button to locate and select the folder where the new item’s source file will be located.**

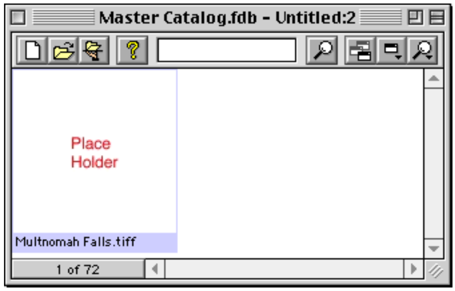
   This tells Portfolio where to look for the new item during updating, so that you do not have to locate the source file by hand.

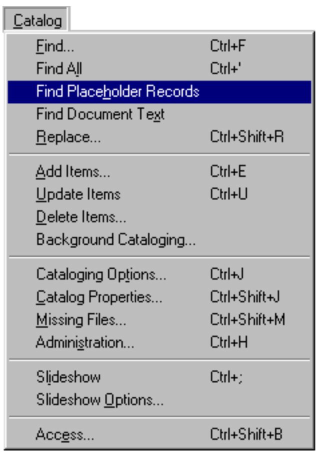
   If the folder (where the source file will eventually be located) does not exist, omit this step. When the catalog is updated you will be asked to locate the item’s source file.

   Note for Windows: If you do not use an extension for the file, Windows will not be able to find the file when the catalog is updated, and you will be asked to locate the file.

4. **Click "OK."**

   A blank record will be created for the item, and displayed in the gallery with a special "Place Holder" thumbnail.





To replace a Placeholder Record information from with the source file:

1. **In the Gallery, select the Placeholder Records that you want to replace with an actual item.**

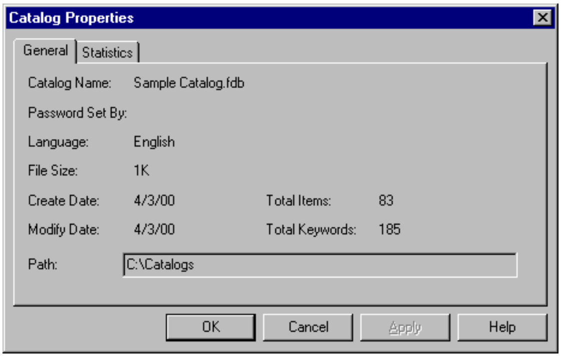
   To locate all of the Placeholder Records in the Catalog, choose Catalog > Find Placeholder Records.

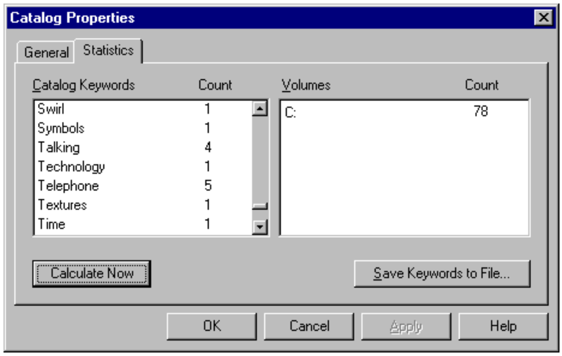
2. **Choose "Update Items" from the Catalog menu, or press Command+U (Mac OS) or Ctrl+U (Windows).**

   When the catalog is updated, Portfolio will search for the source file in the location specified when the Placeholder Record was created. If no location was specified, you will be asked to locate the source file.

Viewing Catalog Properties

You can view general information and statistics about any catalog from the Catalog Properties dialog. Statistics include Keywords used in the catalog and volumes linked to catalog items. You can also export the keywords list from this dialog *(see page 204)*.





To view Catalog Properties:

- **Choose Catalog > Catalog Properties...**

— or —

- **Press Command+Option+J (Mac OS) or Ctrl+Shift+J (Windows).**

  The Catalog Properties for the active catalog will be displayed. To view information for another catalog, open it and make it the active window. You can have up to ten "Catalog Properties" dialog boxes open at one time.

To view all the Keywords in the Catalog: Open the Catalog Properties dialog (Catalog > Catalog Properties), select the "Statistics tab, then click the "Calculate" (Mac OS) or "Calculate Now" (Windows) button. Portfolio will list each keyword and indicate how many cataloged items have each keyword assigned. Calculating the number of keyworded items may take some time to complete.

Setting Preferences

You can customize Portfolio to suit your working style and work more productively by setting preferences using the “Preferences…” command in the Edit menu. Refer to the table at the top of *page 95* for descriptions of each User Preference.

Where Preferences are Stored

There are two types of Preferences in Portfolio, User preferences and Catalog preferences.

User preferences are “user based” and are stored on the user’s (client’s) machine. These settings apply to any and all catalogs opened on that machine (such as the Default Catalog to open when Portfolio is launched).

Catalog preferences are “catalog based” and are stored directly in the catalog. Catalog preferences apply to only the catalog where they are set. Catalog preferences (such as the Default Gallery to open when the Catalog is opened) are shared by everyone who opens that catalog.

The table below shows each Preference setting and whether it is a User Preference or a Catalog Preference.

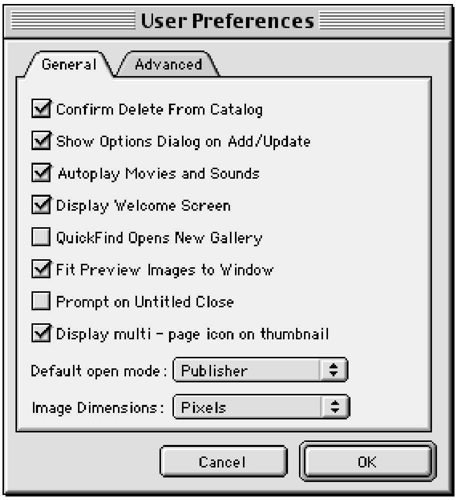
For more information on preferences and settings, refer to the section of this User Guide dealing with the listed topic.

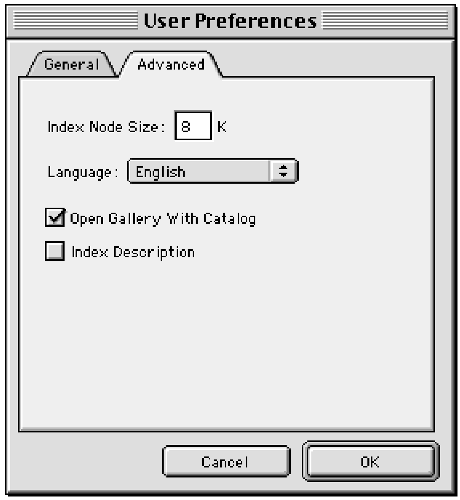
These settings	Accessed in this location	Are stored in
View Defaults	View > Customize: Save Defaults	User’s system
Default Catalog	File > Save as Default	User’s system
Editing Application List	Item > Edit Original	User’s system
File Types List	Catalog > Cataloging Options: File Types tab	User’s system
User Preferences	Edit > Preferences	User’s system; Catalog
Default Gallery	Windows > Save Gallery	Catalog
Default Find	Catalog > Find	Catalog

To set or change User Preferences:

1. **Choose “Preferences…” from the Edit menu, or press Command+Option+E (Mac OS) or Ctrl+Shift+E (Windows).**

   The “User Preferences” dialog box is displayed.





2. **Select the desired options (see *page 95*) from the General and Advanced tabs.**
3. **Click “OK.”**

Preferences-General tab	Result
Confirm Delete from Catalog	When selected, the “Confirm Delete” dialog box appears when you delete an item from the catalog.
Show Options Dialog on Add/Update	When selected, the Cataloging Options dialog box appears when you add items to or update items in a catalog.
Autoplay Movies and Sounds	When selected, movie and sound files are played automatically in Preview windows; you don’t need to click the Play button.
Display Welcome Screen	When selected, a dialog box prompting you to create a new catalog or open an existing one appears when you launch Portfolio.
QuickFind Opens New Gallery	When selected, QuickFind *(page 35)* will display found items in a new Gallery window.
Fit Preview Images to Window	When selected, images are automatically scaled to fit Preview windows. When unchecked, images appear at 100% and scroll bars appear in the window to allow you to view the entire image.
Prompt on Untitled Close	When selected, always prompts you to save untitled (unsaved) Galleries.
Default Open Mode	Select the access level with which Portfolio will open the catalog: Reader, Editor, Publisher, or Administrator *(see pages 192–201).*
Image Dimensions	Select the unit of measure for displaying image dimensions. Applies to displays in the Gallery and Preview windows. *Note: Pixels are the only unit measure used in height and width fields.*
Display Multipage Icon on Thumbnail	When selected, a multiple page icon is added to the item thumbnail in the lower right-hand corner.

Preferences-Advanced tab	Result
Index Node Size <specify>	Controls block size written to the Portfolio database. Generally, increasing the node size to 4K or 8K will increase the performance of Finds and Sorts, but may slightly decrease the speed of cataloging. IMPORTANT: Portfolio 4.0 is only capable of reading catalogs created with a 1K node size. For this reason the default has been left at 1K. If you are working in an environment that contains Portfolio 4.0 and 4.0.1 users, do not change the node size. If all users in your environment have upgraded to 4.0.1 or 5.0, it is recommended that you create new catalogs with a node size of 4K or 8K to achieve better performance. If you are using the Portfolio Server version 4.0.1 or later, you can safely change the node size for served clients, even if some of the clients are using Portfolio 4.0.
Language <specify>	Sets what sort of tables are used for a catalog. If you are about to create a catalog for a language other than English, change the language here so that values will sort properly in that language.
Open Gallery with Catalog	Determines whether a gallery will be opened whenever a catalog is opened. If you have large numbers of records in your galleries, turning this option off will allow the catalog to open more quickly.

Printing Catalog Items

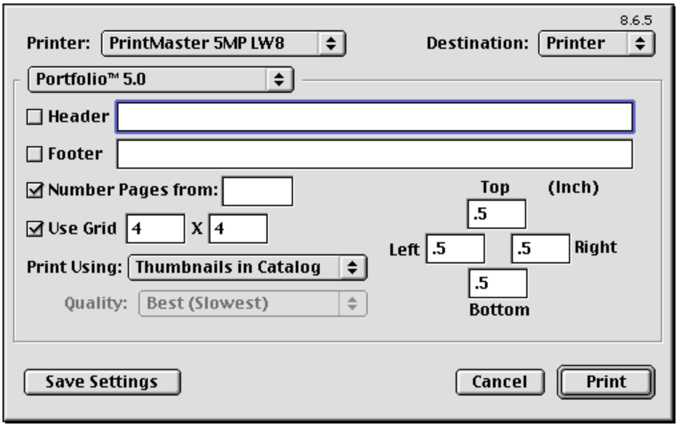
Although you will typically find and select a catalog item either to edit the source file, view it, or use it in another document, you might want to print from the catalog itself—to show to a client, for example, or to evaluate items for possible use in a document. You can specify margin size, and how many items to print per page (grid).

Choosing “Print…” from the File menu prints the contents of the active window. To print thumbnails or a list of catalog items, select the items you want to include and place them into a Gallery window. Select the appropriate Gallery view (Thumbnail, List, Record). Customize the Gallery view just the way you want it to appear, including sorting, manually reordering items, borders, background colors, and the like.When the Gallery is set up just the way you want it, select “Print.”

Tip

If the active window is a Pre-view window when the Print command is selected, you will see a standard “Print” dialog box that contains no special options for Portfolio.

If the active window is a Gallery window when the Print command is selected, the print dialog box includes the options described in the table on *page 98.*



Printing Grids: When you specify a grid size for printing, Portfolio will generate pages with the indicated number of images. That is, 4x4 indicates a page with 16 image cells, 4 across and 4 down. Images will be scaled (enlarged or reduced) to fit. Text is not scaled, only the image and border (if any).

Note: If the grid is set smaller than the thumbnail size (such as 2x2), the thumbnails will be enlarged, potentially causing pixelated images. However, such a setting can be used to advantage to create high-quality, large thumbnails if you print “Actual Images” instead of “Thumbnails in Catalog.”

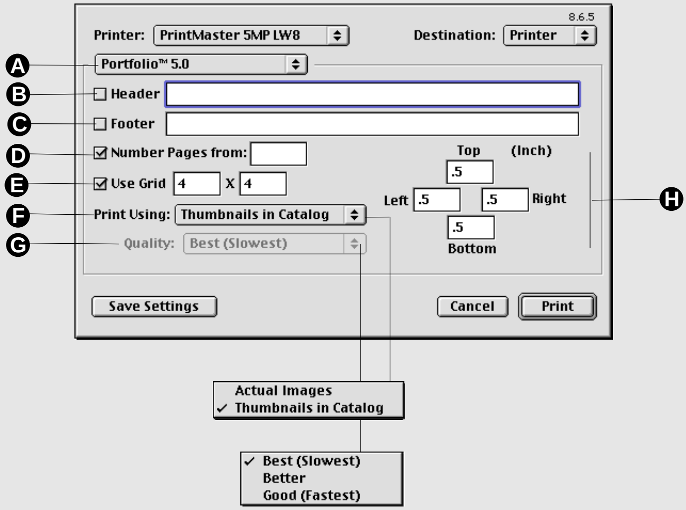
Printing Single Images: To print a single full-size image, print from a Preview window.

Printing Options

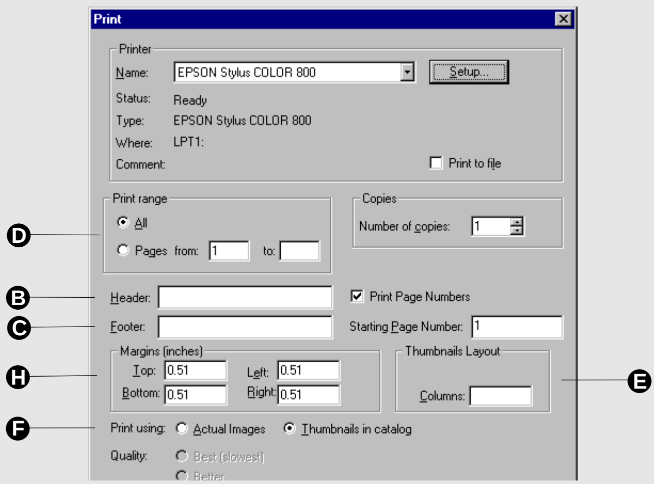
You can print selected images in the catalog either as the actual images or as thumbnails. You can specify the number of thumbnails to display on the page and margin space.

- **A** Portfolio options: Select the Portfolio application from the pop-up menu
- **B** Header: Enter text for page header.
- **C** Footer: Enter text for page footer.
- **D** Number Pages from (Mac OS), Print Range (Windows): Begins printing from the page indicated.
- **E** Use Grid (Mac OS), Thumbnails Layout (Windows): Allows you to enter number of Rows and Columns. If checked, Portfolio will scale the images to fit the grid indicated. If unchecked, Portfolio will fill the page with actual-sized thumbnails.
- **F** Print Using: Choose from Thumbnails or Actual Images.
- **G** Quality: Available only when Actual Images has been selected in (**F**). Options are: Best, Better, Good
- **H** Margins: Set page margins: Top, Bottom, Left, Right

Mac OS



Windows



Gallery Window Printing Options

Print Option		Result
Header		Prints a text header centered at the top of the page.
Footer		Prints a text footer centered at the bottom of the page.
Number Pages		Page numbers on each printed page. Enter a starting page number in the “Number Pages From” text box if you want the start page numbering at a number other than “1”.
Use Grid		Enter grid size for the layout. For example, to print 16 images per page, enter a grid of 4 x 4.
Print Using…	Actual Images	Prints thumbnails using the original source files if available. This option generally yields a higher-quality output, but can be time intensive because Portfolio must open and process each item’s source file when creating its thumbnail. Thumbnails in the catalog are substituted for any actual images that are not found.
	Thumbnails in Catalog	Always prints from the thumbnail images available in the catalog.
Quality	Best	Provides the highest-quality output but the slowest print times.
	Better	Provides medium-quality output at moderate print times.
	Good	Provides the lowest-quality output but the fastest print times.
Margin		Specify margin (white space at edges of page) for Top, Bottom, Left, and Right

Technical Notes

“Print Using Actual Images” with Quality set to “Best” is a printer-intensive task. Some printers are not equipped with enough memory to support the amount of data being downloaded to the printer. If you experience problems, try switching to the “Better” or “Good” setting. It’s a good idea to run the “Missing Items” command before printing actual images.

Thumbnails rotated in the catalog are printed with their original orientation when using “Print Using Actual Images.”

Customizing Gallery Views

You can change the layout of any Catalog Gallery view. This allows you to display precisely the information you want to see, including the information in any custom fields that you have created.

To customize Gallery views:

1. **Choose “Customize…” from the View menu, or press Command+D (Mac OS) or Ctrl+D (Windows), or click the Customize  button on the Toolbar.**

   The Customize Gallery dialog *(page 101)* will open to the tab associated with the current Gallery view.

2. **Select the options you want.**

   The view options are described in the table on *page 100*.

3. **If you are going to modify any of the other Gallery views, click “Apply” to apply the selections to the Gallery window without closing the Customize Gallery dialog box.**

4. **When you have finished selecting options, click “OK” to apply the changes and close the dialog box.**

   Note: Click “Save Defaults” to save the current settings as the default layout for each Gallery view. The layout will then be used for all new Gallery windows displayed in each view.

Option	Choices	Description
Type	Font	Sets the display font for the view.
	Size	Sets the font size for the view.
	Style	Sets the font style for the view.
Thumbnail	Size	Sets the size of thumbnails in Thumbnail and Record view.
	Borders	Sets the type of border (or none) for thumbnails.
	Space Between	Sets the number of pixels between thumbnails in Thumbnail view.
	Text Color	Sets the color of text in Thumbnail, List, and Record view.
	Background Color	Sets the window background color on which the records are displayed.
List	Text Color	Sets the color of the text in List view.
	Background Color	Sets the window background color in List view.
Fields List		A scrolling list of all available fields in the catalog. Select a field name to have it displayed in the current view. Drag field names to rearrange list order, representing the order in which the fields will be displayed. In Thumbnail view, the Filename field is selected by default. In List view, the Filename, File Size, Last Modified, Volume and File Type fields are selected by default. In Record view, the Filename field is selected by default. In List view, the Filename, Path, Keywords, and Description fields are selected by default. In Record view, the number of lines in the display for Description, Keyword, and Custom Fields of type “String” that have “Display Multi-line” enabled or are Multi-valued fields can be edited (item (O) on page 101). Click the number displayed to the right of these fields to access a pop-up menu (Mac OS) or click in this area to open an edit dialog (Windows).
Display as List		Record view only. Sets window to display records as a continuous list.
Show Field Names		Record view only. Sets window to display Field Names in front of information fields. Field Names are displayed in bold.
Edit		Allows editing of fields in Record View (System fields cannot be edited).

Customize Gallery—Thumbnail, List, and Record Views

You can customize each of the three Gallery views (Thumbnail, List, and Record) using the following options.

A Thumbnails tab: Selections apply to Gallery window Thumbnail view.

B Type: Select how the text will be displayed in the window. Options include Font Type, Size, and Style.

C Thumbnail: Select Thumbnail Size, Background Color, Text Color, and Space Between image thumbnails (in pixels). From the Border pop-up menu create and select thumbnail Borders.

D Apply: Click to apply the selections on the selected tab to the Gallery without closing the dialog.

E Save as Defaults: Click to save the settings on all tabs as the Default settings for that Gallery .

F Restore Defaults: Click to revert settings to the factory set defaults.

G Cancel: Click to close the dialog box without making any changes.

H OK: Click to accept the changes and close the dialog box.

I Information Fields Item: Click an item to select it for viewing (check indicates selected for viewing). Drag items up or down to position them in relation to other fields.

J Information Fields: Displays the full list of information fields that can be added to the Gallery view.

K List tab: Similar selections as Thumbnails tab but without thumbnail options. Adds List Background and Text Color. Selections apply to Gallery window List view.

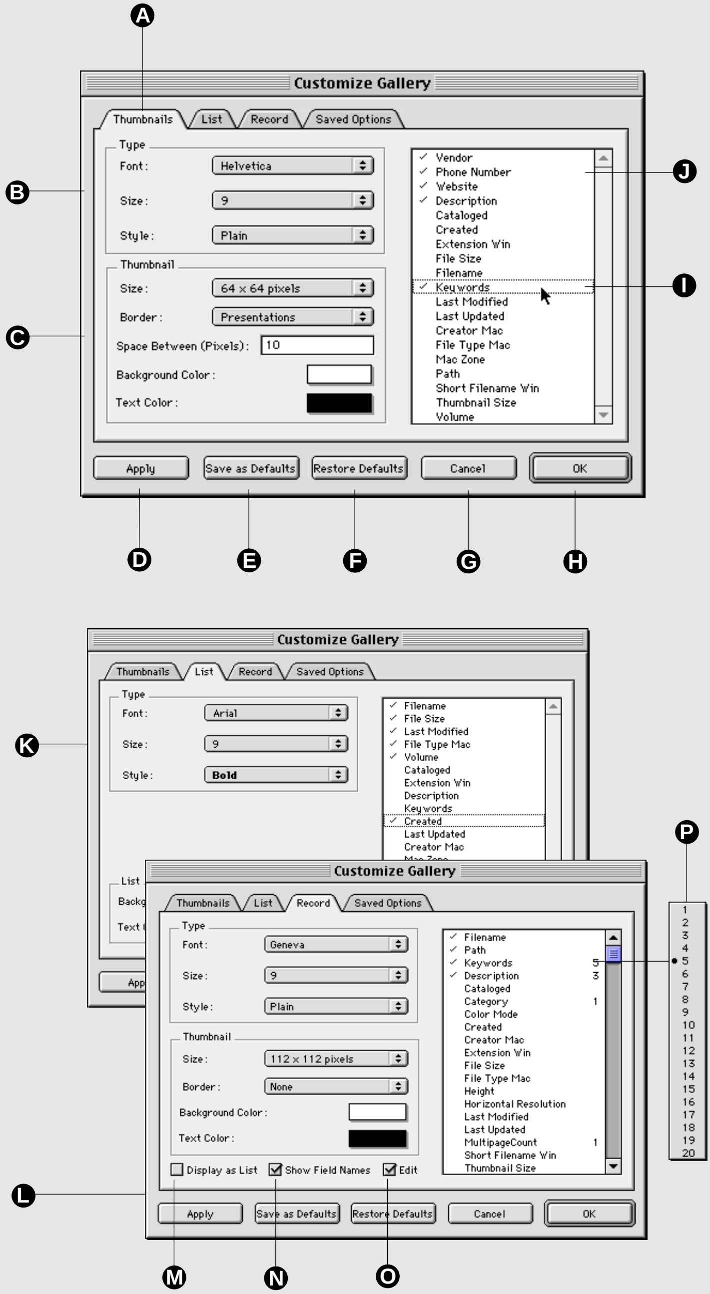
L Record tab: Similar selections as Thumbnails tab, except that records are listed in a scrolling vertical window.

M Display as List: Allows you to show records as a continuous list.

N Show Field Names: Allows you to add Field Names to the information fields. Field Names are shown in bold.

O Edit: Click to allow editing in place in Record View *(page 146)*.

P Fields List pop-up menu (Mac OS) or Edit Dialog (Windows): Allows you to specify the number of lines to be used for displayed information in Keywords, Description, and Custom Fields that allow multiple lines *(see page 209)*.



Customize Gallery—Saved Options

Allows you to set up Find Galleries *(page 65)* and provides Sorting options for Saved Galleries opened automatically when the Catalog is opened.

A Saved Options tab

B Find Gallery: Allows you to create a Find Gallery from the currently active gallery.

Load Saved Find when Opened: When selected creates a Find Gallery by attaching the indicated Saved Find to the current gallery.

Saved Find: Select from the list of Saved Finds.

C Sorting: Keeps the Gallery sorted.

Field: Specify the sort field for the gallery.

Sort Order: Specify Ascending or Descending.

Keep Gallery Sorted: When enabled, keeps the gallery sort order intact.

D Gallery: Click to open the current Saved Gallery when the Catalog is opened.

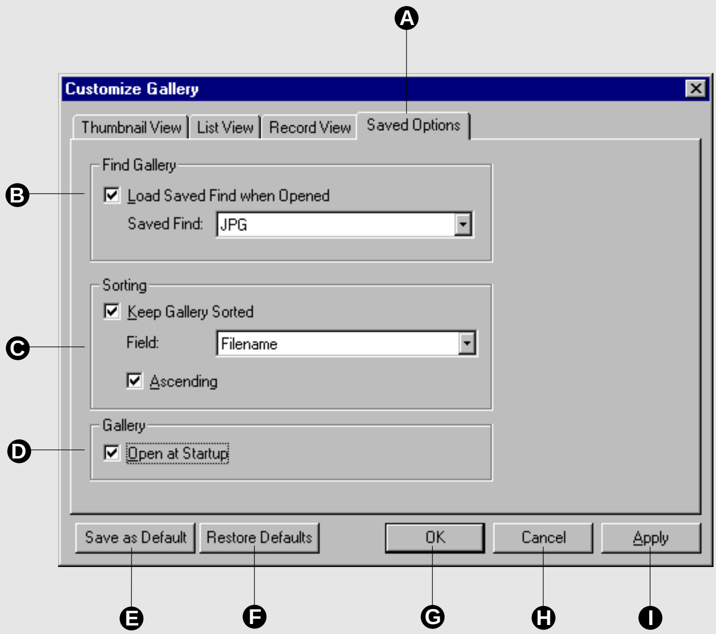
E Save as Defaults: Click to save the settings on all tabs as the Default settings for that Gallery.

F Restore Defaults: Click to revert settings to the factory set defaults.

G OK: Click to accept the changes and close the dialog box.

H Cancel: Click to close the dialog box without making any changes.

I Apply: Click to apply the selections on the selected tab to the Gallery without closing the dialog.



Adding Borders to Thumbnails

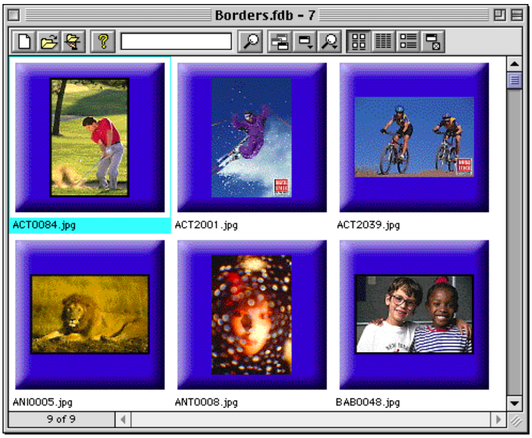
Tip

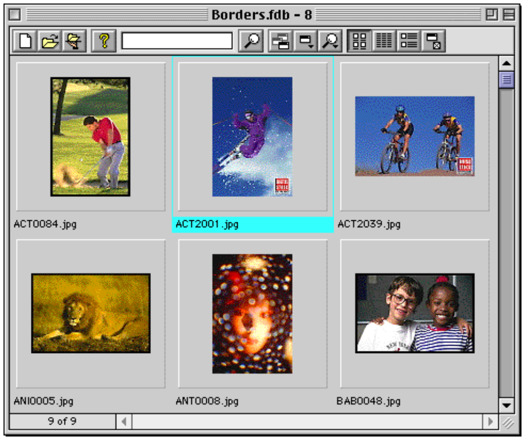
You can create stunning borders almost effortlessly with Extensis PhotoTools, an exciting collection of Photoshop plug-ins that allows you to create custom bevels, drop shadows, embosses, glows, and more! A Demo version of PhotoTools is available on the Extensis CD.

You can highlight your catalog thumbnails by displaying them in the Gallery window with Thumbnail Borders. Portfolio provides a few sample borders for you to use, and you can create unlimited effects using your own border designs.

Any bitmapped image (PICT, BMP) can be used—all you need to do is create your border design, copy it to the system clipboard, paste it into the Edit Borders dialog, then select it in the Thumbnail or Record tab of the Customize Gallery dialog.

All thumbnails in the Gallery window will be displayed with the selected border. Using the Save Galleries feature *(page 61)* you can set up special Galleries of items with borders, and others without, or specify different borders for different Galleries.





When adding borders, you specify which thumbnail size you want your border to apply to. The Border Box that Portfolio provides for each thumbnail size is 25% larger than the thumbnail, so your borders should be 25% larger than the thumbnail size you intend to use them with *(see sidebar table on page 106)*. If your border is larger than the Border Box, it will be scaled down to the proper size. If it is too small it will be hidden by the thumbnail; it may be visible if the item displays as an icon.

Edit Thumbnail Borders

The Borders dialogs allow you to add thumbnail borders to the catalog, and change the options of currently installed borders. Before a border can be displayed you must select it from the Borders List in the Customize Galleries dialog (View > Customize: Thumbnail tab or Record tab).

A Borders List: Displays a list of Borders available in the catalog.

B New: Opens the Edit Borders dialog to create and name a new border.

C Edit: Opens the Edit Borders dialog allowing you to edit the currently selected border (**A**).

D Delete: Deletes the currently selected border.

E OK: Close the dialog box and save any new or modified Borders.

F Cancel: Close the dialog box without saving any changes.

G Border Name: Displays name of border being edited. Enter name for new border here.

H Thumbnail Size: Select size of thumbnail border is being created for.

I Dimensions: Displays border size and actual size.

J Border Box: Represents the area allowed for the border. Box size changes based on the selected thumbnail size *(see table on page 106)*. The border that you paste is displayed here.

K Transparency Pixel: Sets the color map for the transparency (see *page 108)*.

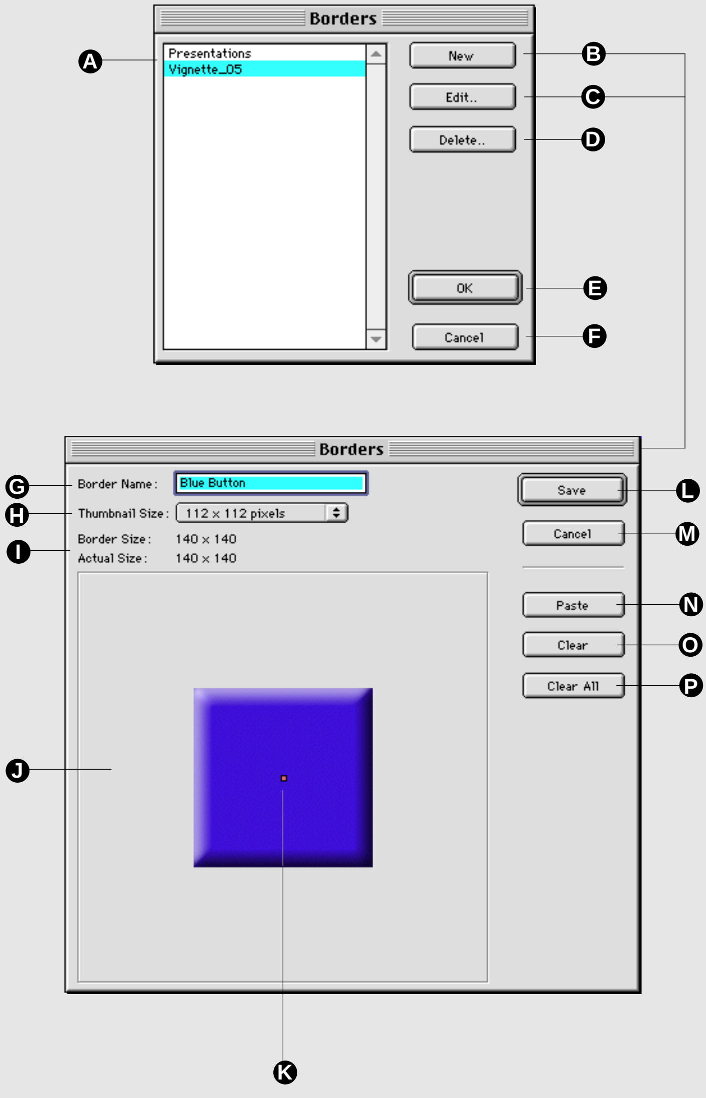
L Save: Close the dialog and save the Border box(es).

M Cancel: Close the dialog box without making any changes.

N Paste: Copy the border to the system clipboard, then click this button to paste it into the Border box (**J**).

O Clear: Clears the Border box for the currently selected thumbnail size.

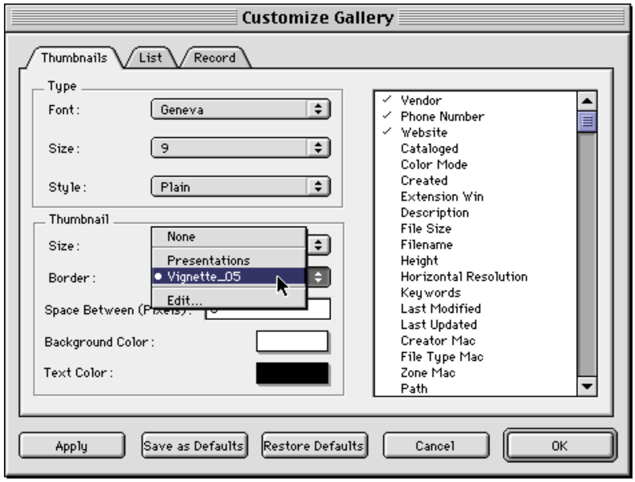
P Clear All: Clears all Border boxes.



To select a thumbnail border:

1. **Choose View > Customize, or press Command+D (Mac OS) or Ctrl+D (Windows), or click the Customize  button.**
2. **Click the Thumbnails tab or Record tab to select it.**

   Borders are not available in List view.
3. **Choose the desired thumbnail Border from the Border pop-up menu.**



4. **Click “OK” to close the dialog and apply the border to the items in the active Gallery.**

To add a thumbnail border to the catalog:

1. **From your image editing application, copy your border to the system clipboard.**
2. **From Portfolio, choose View > Customize, or press Command+D (Mac OS) or Ctrl+D (Windows), or click the Customize button.**
3. **Click the Thumbnails tab or Record tab to select it.**

   Borders are not available in List view.
4. **Choose “Edit” from the Border pop-up menu.**

   The Edit Borders dialog will be displayed.
5. **Click “New,” then enter a name for the border.**
6. **Select the thumbnail size to which you wish to add the border.**
7. **Paste the border—it will be pasted into the selected size Border Box. When you have finished in the Edit Borders dialog, click “Save.”**

   You can paste the same or a different border for each thumbnail size.
8. **When you have finished in the Customize dialog, click “OK.”**

Thumbnail Size	Border Size
32 x 32	40 x 40
64 x 64	80 x 80
112 x 112	140 x 140
256 x 256	320 x 320

How Borders Work / Border Transparency

Border images are displayed behind the thumbnails. This means that thumbnails and icons will always be displayed in their entirety, at whatever size and orientation they are, “overlapping” the border image.

Portfolio looks at the center pixel of the selected border image and sets that as the designated transparency color. This allows you to create borders that behave like a transparency mask, allowing the background to show through certain areas of the border design *(see the Slide Border example on page 106)*. Wherever the transparency color appears in the border image, the background is allowed to show through. So you can designate areas of the border image as transparent by coloring them the same color as the center pixels of the border image.

Portfolio always sets a transparency color using the center pixel of the border image, whether you intend to create transparency in your border or not. For example: Suppose you have a border image that is a white box with a black border, and your Gallery background color is blue. Portfolio will set the transparency color to white because the center pixel of the border image is white. If the thumbnails completely cover the white area of the border

Border Transparency

The center pixel of the Border image (**E**) sets the transparency (mask) color. Everywhere on the Border image that that color appears becomes a masked area, allowing the Gallery background to show through.

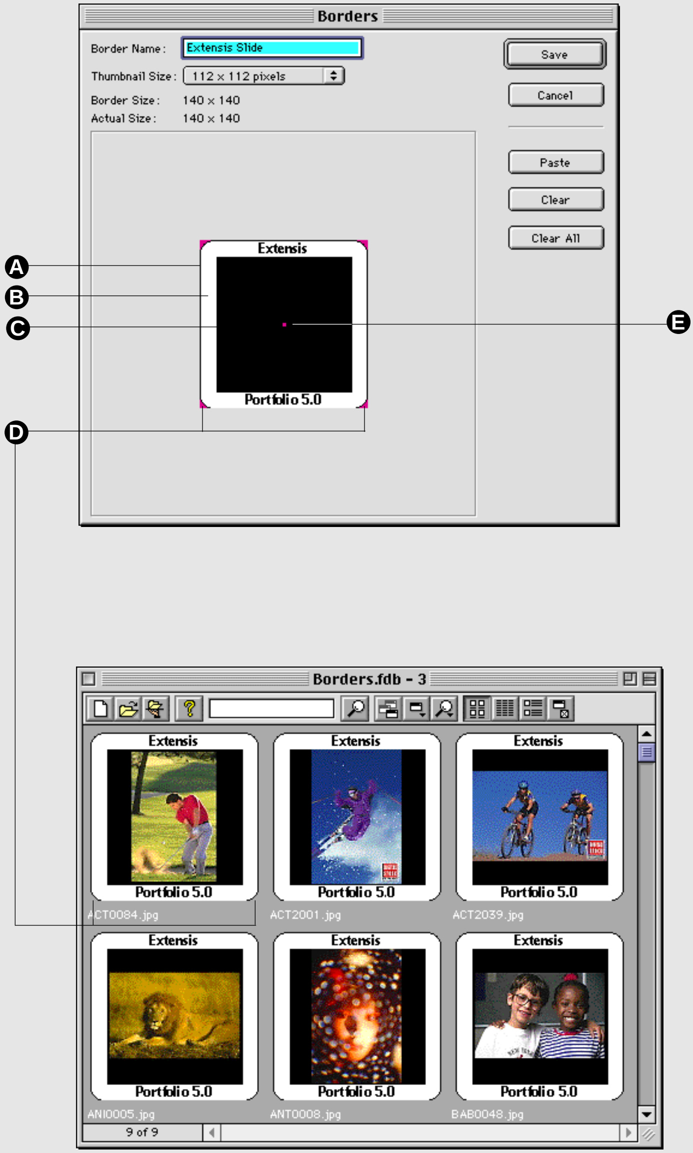
A Border Box Outside Edge: The outside edge defines the largest area that the border will occupy. In this example, the border image is 140 x 140 pixels.

B Border outer box: In this Border image we created two boxes. Notice, in the Gallery example, how the thumbnails overlay the Border. Compare the Border image and its effect on the thumbnails to get an idea of what you need to do to create the border effect you want.

C Border inside box: This is the inside box of our image. Notice the effect on the thumbnails in the Gallery view below.

D Masked areas: In this example, all four corners of the Border image were painted the same color as the center pixels. This allows the gray background in the Gallery to show through at the corners of the Border, creating a “slide” effect.

E Transparency Pixels: Portfolio always sets the color of the center pixel as the transparency color. By creating a 4 x 4 pixel box and coloring it pink, then coloring the four corners with the same pink color, we created a mask along the corners that allows the background to show through.

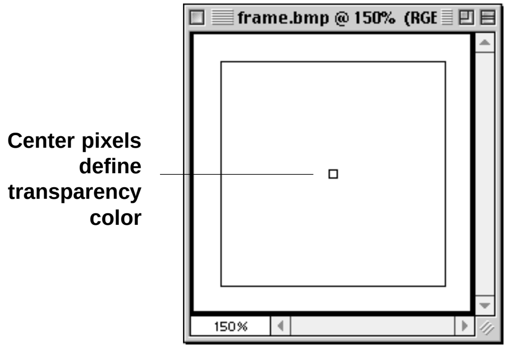


image, you will not see the blue background. If the thumbnails do not completely cover the white area of the border design, some blue will show through. This may or may not be what you want. To eliminate potential problems and ensure that you can change backgrounds without being concerned about transparency, it's good practice to add a color in the center of your border image (using a 4 x 4 pixel square works well) that does not appear anywhere else in the border image.

To set the transparency color of a Border image:

1. **Choose a color that is not used anywhere in the Border design.**

   This will be your designated transparency color.

2. **Color a 4 x 4 pixel area in the center of the image with the transparency color you selected in step 1.**

   You could color a larger area with the transparency (mask) color, but a 4 x 4 pixel area is large enough to see, yet small enough to be completely covered by the item thumbnail or icon.

3. **Using the transparency color, color in the areas that you want to mask.**

   Everywhere on the Border image that the transparency color appears will become transparent, allowing the Gallery background to show through.

   Note: Thumbnails (and icons) cannot be made transparent. Thumbnails and icons are displayed on top of the Border image and will cover the Border design in that area whether the Border is transparent or not.

4. **Copy and paste the Border image into the Border Edit dialog as outlined on** ***page 106.***

> **Tip**
>
> You can close the Slideshow controller and use the following keyboard shortcuts to run your Slideshow. This allows you to run the show with nothing on the screen but the images.
>
> | | |
> |---|---|
> | Quit Slideshow | **Esc** |
> | Previous Item | **Page Up** |
> | Next Item | **Page Down** |
> | Last Item | **End** |
> | First Item | **Home** |

The Portfolio Slideshow feature lets you create slide shows from your catalog images (not thumbnails) that can run automatically—with the images being advanced in specified intervals —or that can be manually advanced.

Portfolio uses the images in the active Gallery for the slide show. The screen is blanked and the images are displayed against the background color of the current Gallery view. You can elect to show images at their actual image size, or to have them scaled up to fit as much of the display screen as possible. (If an item is too big for the screen, it is automatically scaled down.)

When locating items for a Slideshow, if a disk preview is available, it will be displayed. If no disk preview is found and the source file cannot be found, the item thumbnail is displayed.

You can also have the slide show run automatically (Catalog > Administration... > Startup tab) when Portfolio is launched; in this case the last-saved Slideshow Options are used.

Display Field

Portfolio 5.0 allows you to specify a field to be displayed along with the image in slideshows. This option is available on the Slideshow Options dialog *(page 110)*.

Transition Effects on Export (Mac OS)

When you export a Slideshow as a QuickTime movie (Mac OS), you can add from QuickTime's built-in transition capabilities to enhance your movie. To use transitions, QuickTime must be installed and the Transitions option selected on the Export QuickTime Movies dialog *(page 191)*.

Transition settings can be changed using the Edit button on the Export QuickTime Movies dialog. Edit options rely on and use QuickTime internal technology. That is, they are controlled by QuickTime, not Portfolio.

Slideshow Options

A Control: Select Manual, for manually run slide shows, or Timed, for auto-running slide shows. You can enter a delay from zero to 99 seconds.

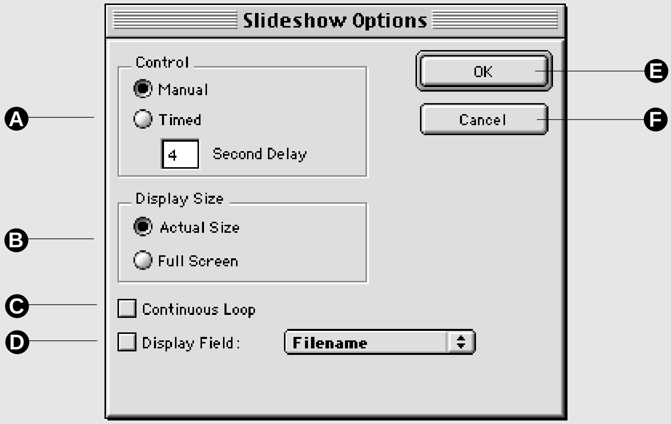
B Display Size: Actual Size displays the images at the actual size of the source file image. Full screen allows Portfolio to scale the image up to fit the display screen. In all cases, if the image is too large, it will be scaled down to fit.

C Continuous Loop: Allows you to set auto-running slide shows to loop continuously.

D Display Field: Allows you to specify a field to be displayed with the records in the slideshow. Select field from the Display Field pop-up menu.

E OK: Close the dialog box and save the changes.

F Cancel: Close the dialog box without making any changes.



Slideshow Controls

Slideshow controls are displayed on-screen during the slideshow, unless this option is disabled.

Manual Preview Controls

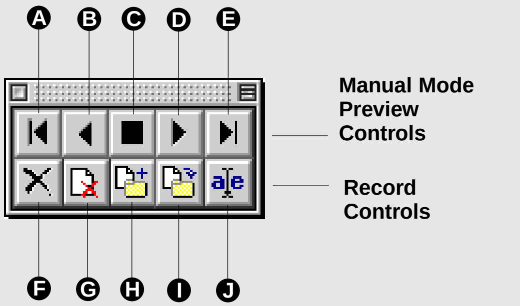
- **A** Beginning: Click to go to first slide.
- **B** Back: Click to go back one slide.
- **C** Stop: Click to end the slide show and return to Gallery view.
- **D** Forward: Click to go forward one slide.
- **E** End: Click to go to the last slide.

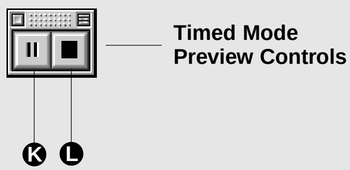
Record Controls

- **F** Delete Record: Click to delete the current record from the Gallery.
- **G** Delete Original: Click to remove the original item from the disk.
- **H** Copy Original: Click to copy to original item to a new location.
- **I** Move Original: Click to move the original item to a new location.
- **J** Rename Original: Click to provide a new name for the original item.

Timed Preview Controls

- **K** Pause/Continue: Click to pause and continue a Timed slideshow
- **L** Stop: Ends an AutoRun slideshow and returns to Gallery view.





Tip

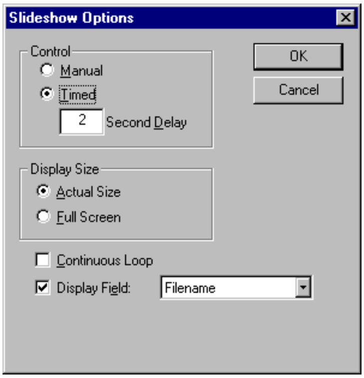
To start your Slideshow quickly, press **Command+; (Mac OS)** or **Ctrl+; (Windows)**.

Slideshow Controls

Manual Preview Controls: Allow you to move from slide to slide in manually run slideshows. *Available to all access levels.*

Record Controls: Allow you to manipulate records and their original items without leaving the slideshow. Helpful for proofing records quickly without returning to the Gallery. *Requires Publisher or higher level access.*

Timed Preview Controls: Allow you to pause a timed slide show, for example to illustrate a point, and then resume play. *Available to all access levels.*



To set up a Slideshow:

1. **From the Catalog menu, choose Slideshow Options…**
2. **Select the desired settings *(page 110)*, then click "OK."**

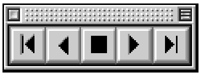
To run a Slideshow:

1. **Configure a Gallery window with the items you would like to be displayed in the slideshow, and arrange the items in the order in which you want them to be shown.**

   You can show still images, 3D images, movies, and sounds. Anything that can be previewed in Portfolio can be displayed in the slide show.

2. **Choose Slideshow from the Catalog menu, press Command+; (Mac OS) or Ctrl+; (Windows).**

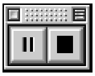
Controller
Manual Mode



3. **For manually run slide shows, click the arrows on the controller to move to the next or previous item.**

   Click the first/last arrows to move to the beginning or the end of the show.

Mini-controller
Timed Mode



4. **Timed slideshows begin automatically, but you can stop and start the presentation (perhaps to elaborate or answer questions) and restart using the pause button on the mini-controller.**

   If the Slideshow is not on "Continuous Loop" it will end when the last item has been displayed.

5. **To stop the slideshow and return to the Gallery window, press the Stop button.**

   Note: When using a timed delay, images do not start loading until after the delay period. This means that (depending upon system parameters) with a delay of 4 seconds, a small image might show up in 4 to 4-1/2 seconds, while a large image might take longer.

Hiding the controller: You can hide the controller in both automatic and manual mode by clicking its Close Box, then use the keyboard commands *(page 109)* to run the Slideshow.

Display Field: You can display information about each item in your slide show by enabling the "Display Field" option (Catalog > Slideshow Options) and selecting the field that you would like to display.

Creating and Managing Catalogs

This chapter describes how to create and modify Portfolio catalogs, including: adding items to a catalog; selecting cataloging options; adding information to items such as keywords, descriptions and custom fields; updating cataloged items; and creating and using Master Keyword lists. Also covered are catalog Access Levels and networking without a Server.

For information on managing a Portfolio Catalog Server see “Server Administration” starting on *page 221*. For information on using Portfolio to find and retrieve cataloged items, see “Viewing and Searching Catalogs,” starting on *page 23*.

Tip

Most of the procedures in this chapter require Editor or higher level access to the open catalog *(see pages 193 and 194).*

Creating a New Catalog

To catalog items in Portfolio you “add” them to an open catalog—Portfolio then handles the cataloging automatically. You can add items to a new catalog or to an existing one. New catalogs created in Portfolio are initially empty.

This section shows you how to create a new, empty catalog; to add items to the catalog, see “Adding Items to a Catalog” on *page 118*.

Note: You'll notice that the Portfolio catalogs you create are automatically given a “.fdb” filename extension, even on the Macintosh. This is to ensure cross-platform access to your catalogs. Macintosh users who do not work in a cross-platform environment can delete the “.fdb" extension in the Save dialog when the file is named and saved.

Important

When a new catalog is created, Portfolio also creates a supporting file with a “.adm" extension; this file is placed in the same folder as the catalog. The “.adm” file is used to control file access in a multi-user environment. If you delete the file Portfolio will recreate it. Deleting the file in a multi-user environment can cause unexpected problems for catalog users.

To create a New catalog:

1. **Open the Portfolio application by double-clicking its icon, or by selecting it from the Start menu (Windows). When the Welcome dialog appears, select “Create a New Portfolio catalog,” then click “OK.”**

   To prevent the Welcome dialog from being displayed each time you open a catalog, deselect this option in Edit > Preferences.

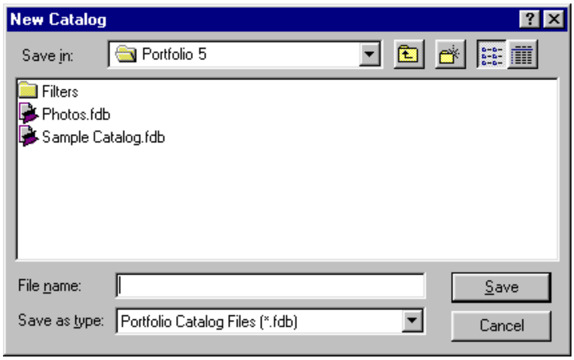
Tip

Portfolio automatically opens new catalogs in Administrator mode. Administrator mode gives you the necessary permissions for modifying catalog structure.

You cannot share a catalog when it is in Administrator mode. Before sharing the catalog, switch to Publishing mode or lower (Catalog > Access). *(See page 194)*

— or —

1. **Click “Cancel” at the Welcome dialog. When Portfolio opens, select “New...” from the File menu, or click the “New Catalog” button on the button bar, or press Command+N (Mac OS) or Ctrl+N (Windows).**
2. **Specify a name and location for the new catalog, then click “Save.”**



Portfolio creates the catalog and opens a blank Gallery window.

3. **Add items to the catalog as described in “Adding Items to a Catalog” on *page 118.***

Catalogs Palette

The Catalogs palette allows you to easily work with all open catalogs, whether or not any Galleries are opened for them.

To show the Catalogs palette, choose “Show Catalogs” from the Window menu.

A Catalogs palette tab

B Catalog Names: Lists all the currently open catalogs.

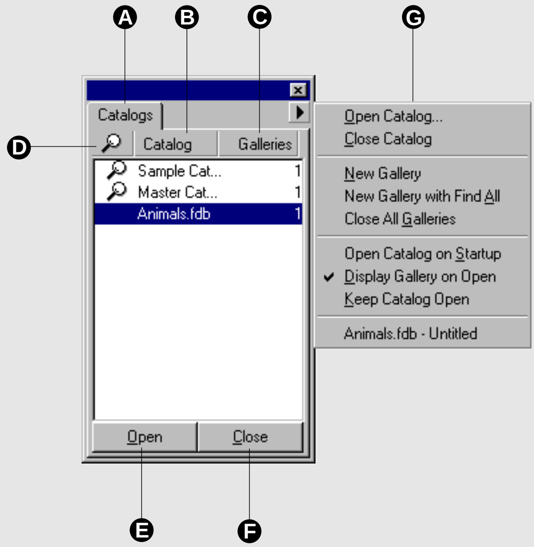
C Open Galleries: Indicates how many galleries are currently open for each listed catalog. You can open catalogs without opening any galleries.

D Search Indicator: An icon in the far left column indicates that the catalog is selected for cross-catalog searching. No icon indicates that the catalog will not be included in cross catalog searches.

E Open: Click to access the Open Files dialog to locate a new catalog to open.

F Close: Click to close the highlighted catalog.

G Catalogs palette fly-out menu: Select a Catalog on the list, then select a function to perform from the fly-out menu. See *page 116.*



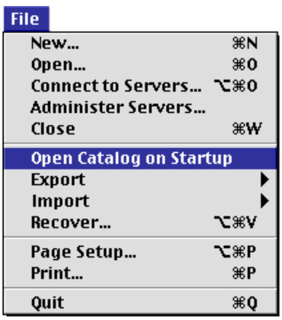
Working with Catalogs

The new Catalogs palette in Portfolio 5.0 makes working with multiple catalogs easier than ever before. With the “Keep Open” option enabled in your catalogs, you can search across multiple catalogs *(page 53)* without needing to have a gallery open in any of them.

You can open catalogs and galleries, set default catalog(s) to open when Portfolio is launched from the user’s machine, open new catalogs to a default gallery or with all records displayed, instantly close all galleries in a catalog, and more—all from the handy Catalogs palette. All the options available on the Catalogs palette are shown in the figure above and in the table on the following page.

Catalogs Palette Menu Option	Function Performed*
Open Catalog	Allows you to locate and open a catalog.
Close Catalog	Closes the selected (highlighted) catalog.
New Gallery	Open a new, empty gallery for the highlighted catalog.
New Gallery with Find All	Open a new gallery, find and display all records in the catalog.
Close All Galleries	Close all galleries in the highlighted catalog.
Open Catalog on Startup	Set the selected (highlighted) catalog to open when Portfolio is launched.
Display Gallery on Open	When enabled, causes a gallery to be opened automatically when the highlighted catalog is opened. The catalog's Default Gallery is opened; if none is assigned, a gallery with all records selected is opened.
Keep Catalog Open	Allows a catalog to remain open with zero galleries open. Helpful for having multiple catalogs open for searching, but with no galleries opened.
Open Galleries List	Select an open gallery from the list to bring it to the front.

** Options on the Catalog palette fly-out menu apply only to the selected (highlighted) catalog.*



Open Catalog on Startup

You can select one or more Catalogs that will be opened automatically each time you start Portfolio.

To specify a Catalog to open on startup:

1. **Open or create the catalog that you want to use as the Default.**
2. **From the File menu, choose "Open Catalog on Startup."**

   A checkmark appears beside the menu command indicating that this catalog will be opened automatically when Portfolio is launched.

   To deselect the catalog, select "Open Catalog on Startup" again to remove the checkmark.

— *or* —

2. **Open the Catalogs palette (Windows > Show Catalogs). Highlight the catalog on the list, then choose "Open Catalog on Startup" from the palette fly-out menu.**

To open specified Catalog(s) at Startup:

1. **Open or create the desired catalog.**

   This could be a local catalog, or one on a remote network or internet.

2. **Specify that the catalog should be opened on startup, as shown on *page 116*.**

3. **Repeat step 2 for all the catalogs that you wish to launch at startup.**

To open a Gallery(s) at Startup:

1. **Create and save the desired Gallery. Verify that the desired Gallery is open and is the active Gallery by clicking in it.**

2. **From the View menu, choose "Customize."**

3. **Select the Saved Options tab.**

4. **At the bottom of the Saved Options tab in the "Gallery" section, click the "Open at Startup."**

   Each time the catalog is opened, the selected Gallery will automatically be opened.

To keep Catalog(s) open after all galleries are closed:

1. **Open or create the desired catalog.**

   This could be a local catalog, or one on a remote network or internet.

2. **Open the Catalogs palette (Windows > Show Catalogs).**

3. **Highlight the desired catalog.**

4. **From the Catalog palette fly-out menu, choose "Keep Open."**

   This feature allows you to search across multiple catalogs without needing to open any gallery windows.

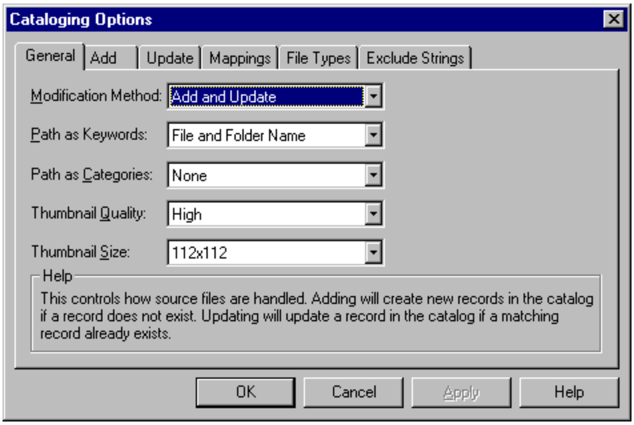
   You cannot choose both "Open Gallery at Startup" and "Keep Open" for the same catalog; these commands are mutually exclusive.

Adding Items to the Catalog

You can easily add items (including whole folders and volumes of items) to a catalog from within Portfolio, or by dragging and dropping them into an open Gallery window.

If you add items to a catalog from disks or network volumes, you can dismount the drives or volumes and continue to use the catalog—viewing, searching, and organizing cataloged items—without re-mounting the source file volumes. The only time you need to access the source file is when copying the item to another application, when printing from the original, or when using the source file functions available in Portfolio such as previewing, editing, copying, renaming, or deleting a source file. And even then, Portfolio automatically prompts you to insert the necessary volume.

When you add items to a catalog, Portfolio displays the Cataloging Options dialog so that you can select or change cataloging options before cataloging begins. *(See page 130.)*



Portfolio provides default Cataloging Options that will serve most needs, so you can quickly catalog items without spending time learning about these options. (To select the default options, click “OK” on the Cataloging Options dialog.) You can bypass this dialog altogether by disabling this option in Portfolio’s Edit > Preferences dialog. With “Show Cataloging Options” disabled, Portfolio automatically applies the default cataloging options (or the last-saved options if any were specified in Catalog > Cataloging Options) each time you add items to the catalog.

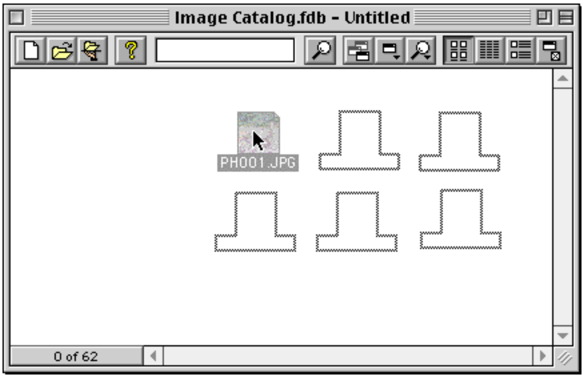
When the Cataloging Options have been set, Portfolio begins cataloging the items and displays a progress window so you can track its progress.

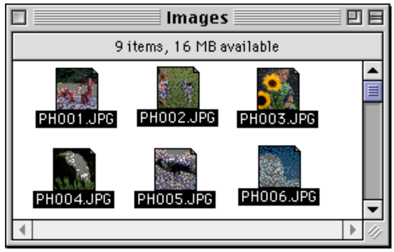
Note: Since Portfolio works with thumbnails and references to item source files rather than the actual file content, if you move or rename files and then wish to access the source file contents, (such as when copying items to a document in another application, Previewing the item, or editing the source file) you will need to “update” the catalog records. See “Updating Cataloged Items” starting on page 121.

To Add items to an open catalog:

Note: You must have a catalog open, either a new, empty catalog or an existing catalog, before you can add items.

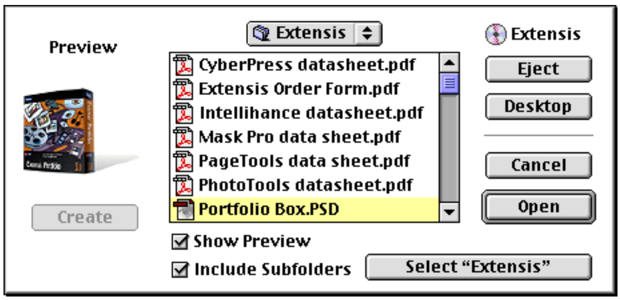
1. **Drag and drop selected files, folders, or volumes into the open Gallery window.**





— or —

1. **Choose "Add Items..." from the Catalog menu, then locate the files, folders, or volumes of items that you want to add to the catalog.**



To add...	Follow this procedure...
A single file	Locate and select the file you want to add to the catalog, then click "Open."
All files in a folder or a volume	Locate and select the folder or volume you want to add. Click the select Folder button.
All files and subfolders within a folder or volume	Locate and select the folder or volume that you want to add, check the "Include Subfolders" option. Click the select Folder button.

Tip

You can select multiple files from the Open dialog by pressing **Shift** (Macintosh) or **Ctrl** (Windows) as you select additional items. **Mac OS:** You must have Navigation Services enabled.

Tip

Windows: System limitations prohibit selecting more than approximately 40 individual files at the same time (more files can be selected if they are in folders).

Tip

Portfolio's default Cataloging Options settings are adequate for cataloging under most circumstances. You can change these options at any time either when the dialog box is displayed during an add or update, or by choosing Catalog > Cataloging Options....

Tip

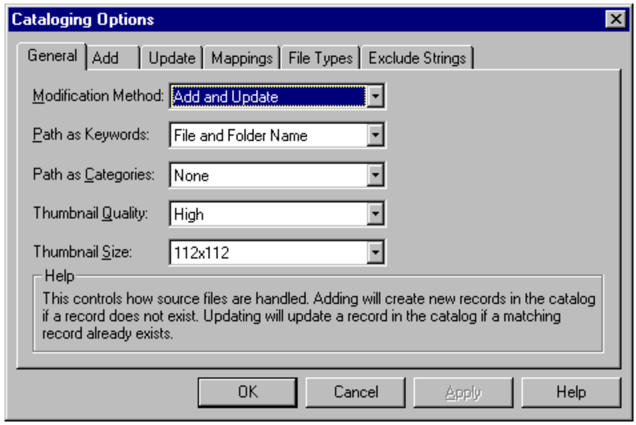
You can elect to have Portfolio automatically apply the default Cataloging Options when adding or updating. To do so, deselect the "Show Cataloging Options on Add/Update" option in Edit > Preferences.

Tip

Once the first process has started you can drag additional files, folders, or volumes to a Portfolio Gallery to initiate more cataloging processes while the first completes. Portfolio allows up to three cataloging processes to be active simultaneously.

The Cataloging Options dialog will be displayed, allowing you to choose a variety of options for the cataloged files.

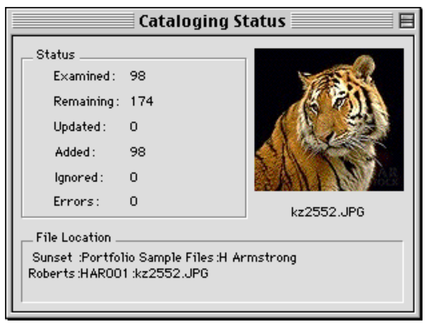
5. **From the Cataloging Options dialog, select either "Add" or "Add & Update" from the Modify Method option of the General tab. You can review or change the other options, or simply allow Portfolio to use the default options presented.**



Cataloging Options are discussed on starting on *page 130.*

6. **Click "OK."**

   Portfolio scans the volume(s) containing the source files, examines each file before adding it to the catalog, extracts the data as specified in Cataloging Options, and displays the "Cataloging Status" dialog to keep you posted on its progress.



When cataloging is complete, the items just added to the catalog will be displayed in the Gallery window.

Updating Cataloged Items

When information associated with an item's source file changes, you will want to "update" the catalog to reflect the changed information. You can update items individually, or update whole folders and volumes at the same time. You can even have Portfolio track changes and update automatically (see sidebar Tip).

The process of updating changes the pointers to each item's source file (if these have changed). Updating can also be used to regenerate item thumbnails (such as when the source file has been edited); to read in any new or modified information such as file modification date; and to update any keywords, descriptions, custom field data, etc. that is embedded in the file. You can control which types of fields are updated using the options in the Cataloging Options dialog that is displayed when you update items. You can also set default cataloging options (Catalog > Cataloging Options).

Tip

When you work with item source files from within Portfolio (such as moving, renaming, or deleting them), Portfolio is aware of source file changes. This allows Portfolio to update those records automatically, reducing or eliminating the amount of manual updating that you need to do. See "Working with an Item's Source File" starting on *page 83.*

You will want to update cataloged items when you:

- Move, rename, or delete files, folders, or volumes that have been cataloged.
- Edit source file(s) and want the catalog records to reflect those changes.
- Want to change the thumbnail size displayed in the catalog.

Two Ways to Update

There are two ways to initiate an update:

1. Using the "Add Items..." command (or by dragging and dropping files into an open catalog). Using this method you provide Portfolio with the path to the source files (you tell Portfolio where to find them.) Portfolio will scan the files and update the information. *For example:* If you know which files, folders, or volumes contain source files that need to be updated and you have easy access to those files, or if you have a large number of items to update, you can drag and drop them into the catalog's open Gallery window, or alternately select Catalog > Add Items, then locate the files or folders using the system folder hierarchy.
2. Using the "Update Items..." command. When you update using this method you are asking Portfolio to locate the source files. Portfolio will attempt to locate the files using the pathname in the catalog. If the files are found, the records will be updated. If the files are not found, you will be asked to locate them. *For example:* If you don't know which links have changed, or you

Tip

You can add and update items at the same time by dragging and dropping source file folders into an open catalog, then selecting "Add & Update" from the Cataloging Options dialog. If Portfolio finds a catalog item with the same name as any of the source files, the existing record is updated. If Portfolio doesn't find a catalog item for a particular source file name, a new record is created.

have just a few items to update and you don't have easy access to the source files (such as when they are spread across a number of folders or volumes), you would select those items in the Gallery window, then choose Catalog > Update Items to initiate the update.

After you initiate the update, Portfolio displays the Cataloging Options dialog so that you can select or change options before updating begins. Portfolio provides default Cataloging Options that will serve most needs, so you can quickly update without spending time learning about these options. (To select the default options, click "OK" on the Cataloging Options dialog.) You can bypass this dialog altogether by disabling this option in Portfolio's Edit > Preferences dialog. With "Show Cataloging Options" disabled, Portfolio automatically applies the default cataloging options (or the last-saved options if any were specified in Catalog > Cataloging Options) each time you add or update catalog items.

To Update using the Drag and Drop/Add Items method:

1. **Open the catalog that you want to update.**
2. **Locate the files, folders, or volumes to be updated, then drag and drop them into the open Gallery window.**

— or —

2. **Choose "Add Items..." from the Catalog menu, or press Command+E (Mac OS) or Ctrl+E (Windows), then locate the files, folders, or volumes that you want to have updated.**

   Refer to the chart on *page 119* for instructions on specifying folders, sub-folders and volumes.

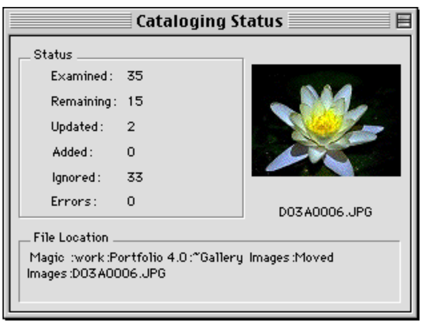
   The Cataloging Options dialog will be displayed, allowing you to choose a variety of options for updating the files.

3. **From the Cataloging Options dialog, select "Update," "Add & Update," or "Update Unconditionally" from the Modify Method option of the General tab.**

   Cataloging Options are discussed on *page 130.*

4. **You can review or change the other options, or simply allow Portfolio to use the default options presented. Click "OK."**

   Portfolio scans the volume(s) containing the source files and updates item records based on the Cataloging Options settings.



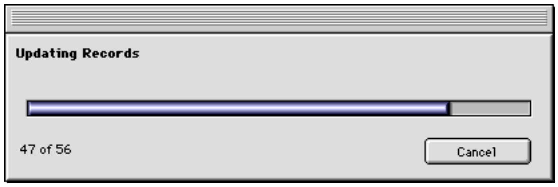
To Update using the Update Items method:

1. **Open the catalog that you want to update.**
2. **In the Gallery window, select the items that you want updated. To update all the items, choose Edit > Select All [Command+A (Mac OS) Ctrl+A (Windows)].**
3. **Choose Catalog > Update Items... [Command+U (Mac OS) Ctrl+U (Windows)].**
4. **Review or change Cataloging Options (to change Modification method see sidebar Tip), or simply allow Portfolio to use the options presented, then click "OK."**

   Portfolio searches for each item's source file using the pathname stored in the item record.

Tip

The Update Items command (Catalog > Update Items...) automatically defaults to the "Update" Modification Method. You can set it to "Update Unconditionally" from the Cataloging Options dialog.

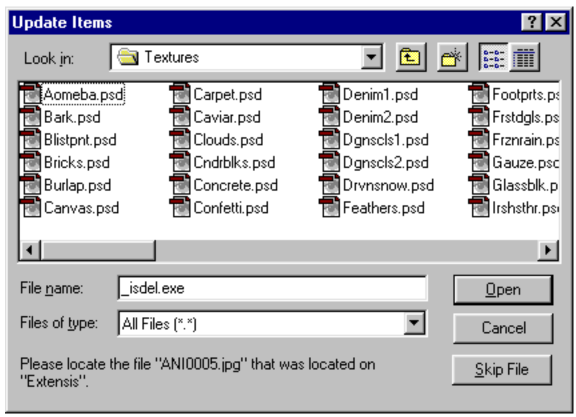


If the source file is found, the record is updated based on the Cataloging Options settings.

If the source file cannot be found, you are prompted to locate it. If you select a new file for the selected item, the record is updated with information from the new file, based on the Cataloging Options settings.

Tip

Portfolio automatically updates all selected items located in the same folder (after you locate the first file, others in the same folder will be updated automatically).



If the source file cannot be found and you click "Skip File" when prompted to locate the file, the selected record is left untouched.

Updating to Regenerate Thumbnails

You can elect to regenerate thumbnails when you update catalog items by choosing this option in the Cataloging Options dialog (Catalog > Cataloging Options: Update tab). Regenerating during an update offers the same options: by extracting the thumbnail from the source file or by building a thumbnail. See *page 136* for more information on generated and extracted thumbnails.

You may want to regenerate the thumbnail for an item when you have edited the file and the thumbnail has changed. In this case, choose Regenerate Thumbnails from the Update tab, then choose "Update Items." The Cataloging Options dialog opens with the default update method "Update" selected. Update checks the modification date; since this has changed, the item will be updated.

You might also want to regenerate thumbnails in order to switch between using a 112 x 112 pixel thumbnails and the larger 256 x 256 pixel thumbnails. In this case, choose Regenerate Thumbnails from the Rules tab, then select "Update Items." This will open the Cataloging Options dialog where you can switch the update type to Update Unconditionally; Update Unconditionally does not check to see if modification date has changed. A standard Update would check for a modification date change and skip the update because the source file has not been modified.

Note: When you change the Modify Method setting during an update, it only changes the modification method for that session. That is, if "Add" was set as the Modify Method previously, it will still be set to "Add" after the "Update Items" command is executed.

Tip

You can edit and update your images and media files right from the catalog—without ever having to search for the source files: Use the Edit Original command (Item > Edit Original) to open the item for editing. Modify and save the file as usual, then return to Portfolio and choose "Update Items." Because the source file has not moved, Portfolio will update the record without asking you to locate it.

Tip

You can manually update an item's thumbnail by previewing the item, then choosing Item > Regenerate Thumbnail.

Identifying Missing Files

Portfolio's Missing Files command locates cataloged items whose source file has been moved, renamed, or deleted, and the catalog link has not been updated to reflect this change.

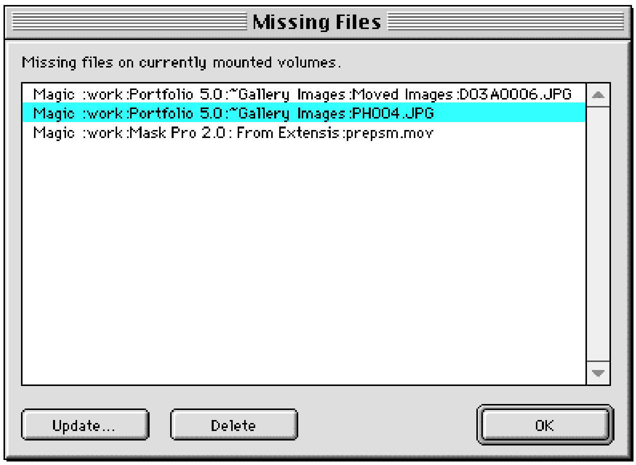
Note: Portfolio searches for missing files on mounted volumes only. If a volume containing cataloged item source files is not mounted, Portfolio will not report on those files.

To check for Missing Files:

1. **Choose "Missing Files..." from the Catalog menu (or press Command+Option+M (Mac OS) or Ctrl+Shift+M (Windows).**

   Portfolio compares each item's pathname as stored in the catalog record against all mounted volumes to see if the source file can be found at that location. The results are reported in the Missing Files dialog.

2. **If Missing Files were located, select each item, then click either the Update or the Delete button at the bottom of the dialog to update the catalog.**



Tip

You can select and update or delete multiple items on the list. Pressing **Shift** while choosing items from the list to select contiguously. Press **Command** (Mac OS) or **Control** (Windows) to select non-contiguously.

Update: Initiates a catalog Update *(see page 121)*. Allows you to manually locate the missing source file.

Delete: Deletes the item from the catalog *(see page 75)*. Allows you remove items from the catalog if the source file cannot be located.

Background Cataloging

You can automate the cataloging process by designating “watch” folders or directories that Portfolio will check at designated intervals. New files dropped in these folders will automatically be added to the catalog, and modified files will be updated.

Tip

Portfolio will not automatically delete items from the catalog that are no longer found in the folder being monitored.

Overview of Background Cataloging

When items are added to the designated “watch” folder, they are cataloged automatically, using the current settings in Cataloging Options (Catalog > Cataloging Options). Only new or modified items are cataloged. You can create as many different automations as you like, and specify a check frequency that the folders are checked in increments that range from 5 seconds to 1 day.

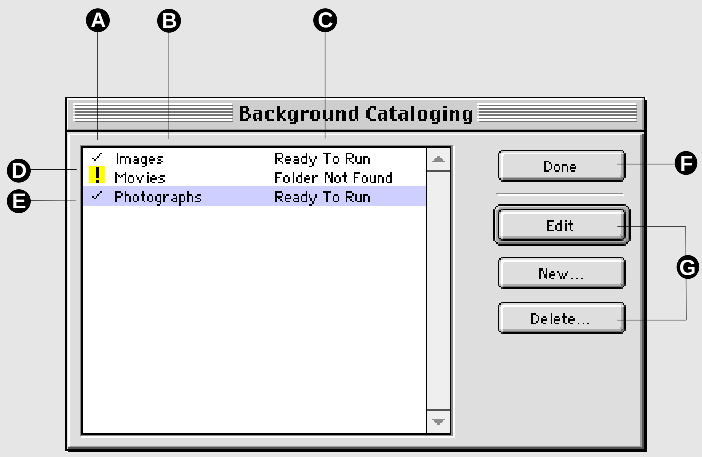
Background cataloging automations are catalog specific and must be enabled each time the catalog is opened. This prevents automations from being enabled on multiple workstations in a multi-user environment.

When the Background Cataloging dialog (Catalog > Background Cataloging) is opened, Portfolio verifies the path to the Watch folder. If a problem is encountered, an alert icon is displayed next

Background Cataloging

Background Cataloging allows you to create, modify, and delete catalog automations.

- **A** Activate/Deactivate: Click here to deactivate an automation without deleting it from the list. To avoid problems with multiple users, automations must be activated each time the catalog is opened.
- **B** Automations: Lists all the background automations available.
- **C** Status: Lists the current status of the automation.
- **D** Alert Icon: Indicates the Watch folder was not found in the specified path.
- **E** Checkmark: Indicates that the automation is active and running.
- **F** Done: Click here when you have finished editing or activating automations.
- **G** Edit Buttons: Use these buttons to create, edit, and delete automations.



Automation Settings

The Automation Settings dialog (Catalog > Background Cataloging > New or Edit) allows you to specify a Watch folder and other parameters for the automation.

A Automation Name: Enter a name for the automation.

B Scan Frequency: Indicate how long to wait between scans of the Watch folder for new items. Intervals are from 5 seconds to 1 day.

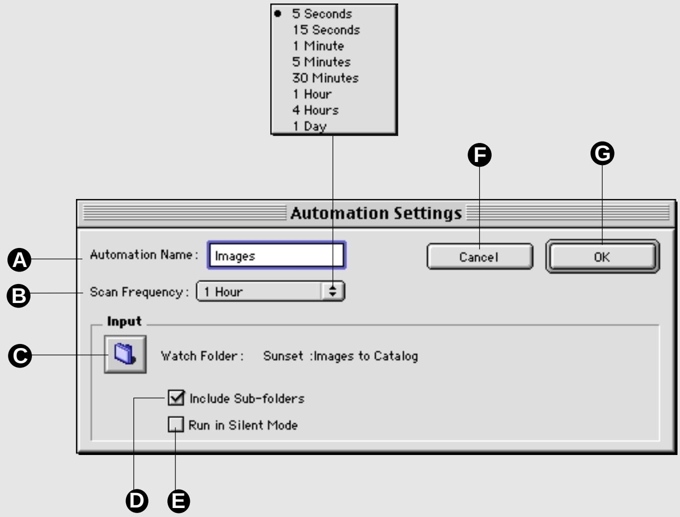
C Watch Folder: Click the folder icon, then locate the folder to be watched for incoming items.

D Include Sub-folders: Monitors files in sub-folders of the specified directory as well as the top level folder.

E Run in Silent Mode: Causes Portfolio to not display the Cataloging Status window during background cataloging, and not add newly cataloged records to the active Gallery.

F Cancel: Close the dialog box without making any changes to the automation.

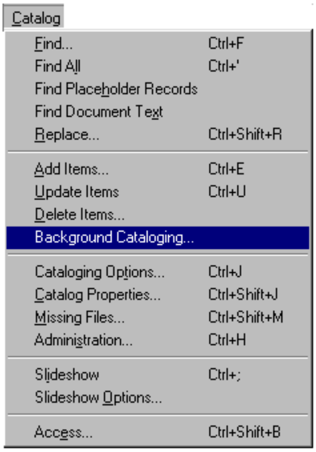
G OK: Apply the indicated settings to the automation and close the dialog.



to the automation. The automation cannot be enabled until the path is corrected or changed.

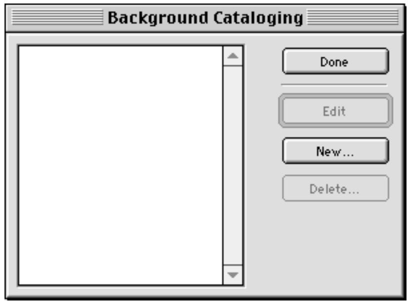
From the Background Cataloging dialog you can enable specific automations. Automations will continue to operate until the catalog is closed. If the Run in Silent Mode feature is disabled, the Cataloging Status window will be displayed on the workstation when items are being cataloged.

Enable Run in Silent mode if you want cataloging to proceed without displaying progress status. When running in Silent Mode, newly cataloged records will not be added to the active Gallery. This allows you to perform other work in Portfolio without being interrupted by the background cataloging.



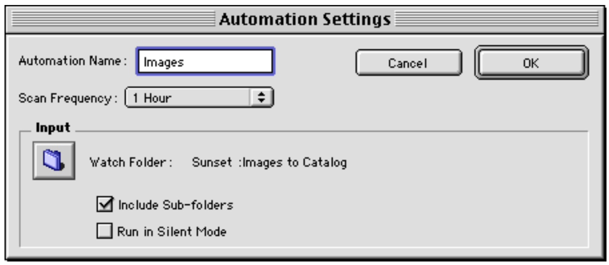
To set up a Background Cataloging automation:

1. **From the Catalog menu, choose "Background Cataloging..."**



   The Background Cataloging dialog is displayed.

2. **Click "New."**



   The Automations Settings dialog is displayed.

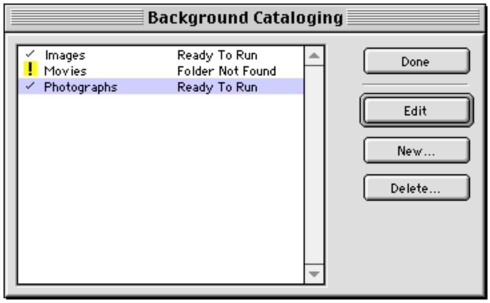
3. **Enter a name for the automation.**
4. **Click the Folder button and locate the folder to monitor (the Watch folder).**

   Note: Do not select the same folder for Background Cataloging and Disk Previews (page 214). Doing so will disable Background Cataloging.

5. **Select other options as appropriate.**
6. **When you have completed setting up the automation, click "OK."**
7. **Enable the automation by selecting it from the list *(page 126)*.**
8. **Click "Done."**

To enable existing Background Cataloging automation(s):

1. **Open the catalog that you want to enable Background Cataloging for.**
2. **From the Catalog menu, choose "Background Cataloging..."**



Portfolio will check the pathnames for existing automations and display an alert icon if any problems were encountered.

2. **Place a checkmark in front of each automation that you want to enable.**
3. **Click "Done."**

Portfolio will begin checking the Watch folder at the interval specified for the automation.

To clear an alert icon associated with an automation:

1. **Select the automation on the list, then click "Edit."**
2. **Click the Folder icon and relocate the appropriate Watch folder.**
3. **Click "Done" to close the Automation Settings dialog.**
4. **Reopen the Background Cataloging dialog (Catalog > Background Cataloging) and verify that the alert icon is no longer present.**

Reopening the Background Cataloging dialog forces Portfolio to recheck the path. If the dialog is not reopened, Portfolio will have no way of knowing that a correction has been made.

Tip

The important Cataloging Options when updating are: Thumbnail Quality, Thumbnail Size, and the Update tab and Mappings tab options. Other Cataloging Options settings have no effect on the updating process.

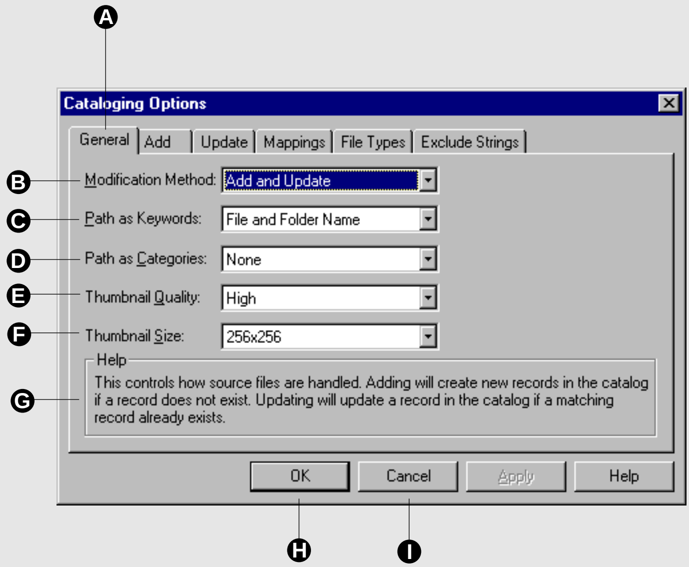
Cataloging Options

Unless you indicate otherwise in Edit > Preferences, Portfolio displays the “Cataloging Options” dialog box whenever you drag and drop files or folders into an open catalog. Whether or not the Cataloging Options dialog is displayed, the current Cataloging Options settings are checked any time that you add items to a catalog or update the items in a catalog.

Refer to the Cataloging Options dialog boxes and Options lists on *pages 130 through 145* for descriptions of the available options.

Cataloging Options—General tab

- **A** General tab
- **B** Modification Method: Controls how source file information affects the catalog. “Add” creates new records for items, if a record does not exist. Update updates the item record, if a matching record exists.
- **C** Path as Keywords: Determines whether or not the source file path name will be included as keywords, and if so, how much of the path name is used.
- **D** Path as Categories: Determines whether files are categorized on the Categories palette *(page 169)*.
- **E** Thumbnail Quality: Sets thumbnail compression. A higher quality thumbnail uses less compression, but takes up more space in the catalog.
- **F** Thumbnail Size: Controls thumbnail size. 112x112 takes up less space in the catalog, but may appear pixelated when displayed at 256x256.
- **G** Help: Displays information about an option when the mouse is placed over it.
- **H** OK: Closes the dialog and accepts the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.
- **I** Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.



Cataloging Options—General

Option	Choices	Description
Modification Method	Add	Adds a record to the catalog for each item being added, if a record does not currently exist. Ignores items if a catalog record already exists for the item.
	Update	Updates items only if there have been changes. Ignores changes in pathname if a copy of the source file exists at the previously cataloged location.
	Add & Update	Adds items if a record does not already exist, and updates records if the items exist but have changed.
	Add Unconditionally	Adds a record for the item even if a record already exists.
	Update Uncond.	Updates records even if the item source file exists in the previously cataloged location. Allows you to copy source files to a new location and have the catalog updated to the new location.
Path as Keywords	None	Filenames and pathnames are not added to the keyword list.
	File Name	Adds the item's filename to the keyword list.
	File & Folder Name	Adds the item's filename and immediate folder name to the keyword list.
	Path Name	Adds the item's filename and all of its folder names, but ignores the volume name.
	Path and Volume	Adds the item's full path, including volume name.
Path as Categories*	None	No folder hierarchy is created on the Categories palette.
	Selected Folders	Creates a hierarchy on the Categories palette based on the directories of files added. For example, if a cataloged folder contains 3 items, a folder would be created on the Categories palette with those 3 items associated with it. If only the files are cataloged, their immediate parent folder is used.
Thumbnail Quality	High	Creates a high resolution thumbnail using minimum compression.
	Medium	Creates a medium resolution thumbnail using medium compression.
	Low	Creates a low resolution thumbnail using a higher level of compression.
Thumbnail Size	112x112	Generates a 112 x 112 pixel Thumbnail.
	256x256	Always generates a 256 x 256 pixel Thumbnail, even if a smaller thumbnail exists.

* The Categories palette is discussed in detail starting on *page 169*.

Modification Method

When you add items to the catalog, or update existing items (using either the Add Items/Drag and Drop method or the Update Items method as described on *pages 122 and 123*), you can select from the following options:

- Add
- Add Unconditionally
- Add & Update
- Update
- Update Unconditionally

Which method you select will depend on what you are trying to accomplish. If you are *only* adding items, choose “Add” or “Add Unconditionally.” If you are *only* updating items, choose “Update” or “Update Unconditionally.” If you know that you are both adding and updating, or if you want Portfolio to intelligently add or update as necessary, select “Add & Update.” “Add & Update” provides the most flexibility, and is a good choice if you want to automate the process as much as possible (in this case you might also want to prevent the Cataloging Options dialog from being displayed each time items are added or updated—you can disable this option in Edit > Preferences).

Add: Adds item files to the catalog as new records if Portfolio determines that the files do not already exist in the catalog. If a matching record already exists, the file is skipped.

Add Unconditionally: Adds files to the catalog as new records, regardless of whether a record for the file already exists in the catalog.

Add & Update: Performs both the Add process and the Update process. Portfolio adds a new record to the catalog if it determines that the file does not exist in the catalog. If a matching record is found, Portfolio updates the record.

Update: Updates existing records in the catalog if Portfolio determines that the files match existing records. If no matching record is found in the catalog, the file is skipped.

Update Unconditionally: Updates existing records in the catalog looking only at the filename and ignoring record criteria used in the normal Update logic. Specifically, Portfolio does not examine file dates and paths when determining whether the file matches an existing record.

More About Update Unconditionally

Update Unconditionally determines a source file match based on filename only, not pathname. This can be useful when updating the catalog record from a copy of the source file.

Update Unconditionally is also useful when you want to update the catalog record but the file has not changed, such as to change catalog thumbnail size. (In this case, if you select Update rather than Update Unconditionally nothing will happen, since the file has not changed).

Note: Exercise caution when using Update Unconditionally. This is a powerful and useful tool, but it has the potential to effect unwanted changes: When you catalog two files by the same name located in different directories, Portfolio differentiates between the two records using their different pathnames. When you Update Unconditionally, Portfolio discards the pathname in its record search and updates the first record with the selected filename that it comes to. For example, assume that C:\Artwork\Box.jpg and C:\Photos\Box.jpg are both cataloged in the same catalog. You select Update Unconditionally in order to enlarge the catalog thumbnail for C:\Photos\Box.jpg. Portfolio searches the catalog records for "Box.jpg" and finds the record for C:\Artwork\Box.jpg, which it updates. This replaces the thumbnail in the record for C:\Artwork\Box.jpg with the thumbnail for C:\Photos\Box.jpg.

Cataloging Options—Add tab

A Add tab

B General: Controls which, if any, embedded information is extracted when items are added to the catalog. Also indicates how the extracted information should be handled. Also controls whether Thumbnails are regenerated, and whether Digimarc data is detected.

Options are: Extract Keywords, Extract Descriptions, Extract Thumbnail, Skip Files without Thumbnails, and Always Detect Digimarc. These options are described in the table on *page 135*.

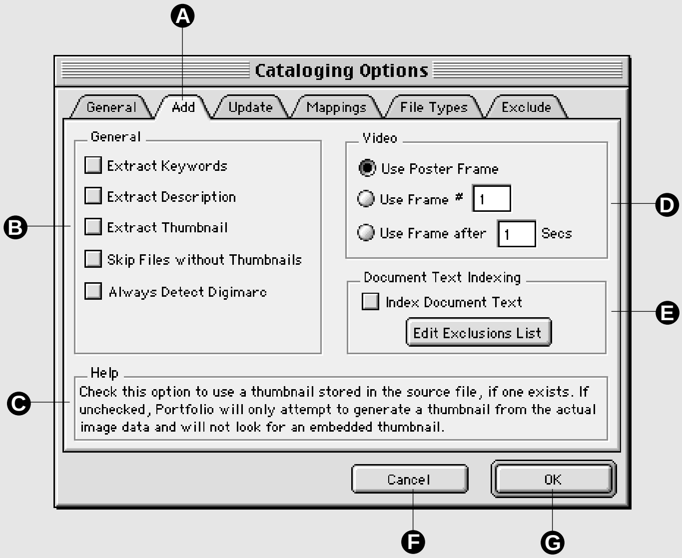
C Help: Displays information about an option when the mouse is placed over it.

D Video: Controls how video is handled through QuickTime. Options are: Use Poster Frame (default) as the thumbnail; Use Frame #; and Use Frame after xx seconds.

E Document Text Indexing: Controls whether the text in documents (Acrobat or PowerPoint) is indexed.

F Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.

G OK: Closes the dialog and accepts the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.



Cataloging rules from the Cataloging Options: Add tab is used when any of the following Modification Methods *(page 132)* are selected: Add, Add Unconditionally, Add & Update.

Cataloging Options—Add Tab

Option	Choices	When items are Added to catalog:
General	Extract Keywords	Looks for and extracts any keywords saved with the source file.
	Extract Description	Looks for and extracts any description saved with the source file.
	Extract Thumbnail	Looks for and extracts any preview image saved with the source file. Note: If you are adding QuickTime movies, we recommend that you do not use this option. You will get a larger thumbnail for the movie if you let Portfolio create it, rather than having it extracted.
	Skip Files without Thumbnails	Does not catalog the file if a thumbnail cannot be extracted or generated.
	Always Detect Digimarc	When disabled, Portfolio will only look for a Digimarc watermark when it attempts to generate a thumbnail, not when thumbnails are extracted. When enabled, Portfolio attempts to generate a thumbnail for every item and checks for Digimarc data; the Extract Thumbnail option is disabled.
Document Text Indexing		Indexes the text of Adobe Acrobat and Microsoft PowerPoint files by adding each word to the catalog index. Preview the original file to read document document text.
Video*	Use Poster Frame	Use Poster Frame for thumbnail (by default, the first frame). If the first frame of a group of movies is black, for example, one of the other options can be used for the thumbnail.
	Use Frame #	Allows you to choose a particular frame for the thumbnail (for example, Frame #2).
	Use Frame After	Allows you to select the frame occurring after a specific time interval *(specify number of seconds)*.

* *QuickTime movies (.mov) only; not compatible with m1v, mpeg, swfl, and animated gifs.*

Thumbnails: Extracted vs Generated

An **Extracted Thumbnail** is one that already exists in the source file. If “Extract Thumbnail” is enabled (Catalog > Cataloging Options: Add or Update tab), Portfolio will look for and extract Thumbnails from various file types, such as:

- Photoshop files
- EPS files
- Adobe Illustrator files
- Any Macintosh file with a thumbnail in the "pnot" resource

If the source file does not contain a thumbnail, Portfolio will attempt to generate one.

A **Generated Thumbnail** is one that is created by Portfolio by reading the source file with an appropriate translator. If “Extract Thumbnail” is disabled (Catalog > Cataloging Options > Add tab or Update tab), Portfolio will always attempt to generate a thumbnail, even if a thumbnail exists in the source file. Depending on the type of embedded thumbnail, Portfolio may be able to render a better thumbnail than that supplied in the source file.

Note: Extracting thumbnails is faster than generating them.

Thumbnail Size

Portfolio allows you to store thumbnails at either of two different sizes: 112 x 112 pixels, or 256 x 256 pixels.

The advantage in having the larger size thumbnails is as you might expect—improved resolution when viewed at the larger size. The disadvantage is that the larger thumbnails occupy about four times as much catalog space (typically 20K vs 5K).

Thumbnails that are embedded in the source file typically range in size from 80 x 80 pixels to 128 x 128 pixels. Portfolio will scale these extracted thumbnails to the closest size, typically 112 x 112 pixels. If you elect to save thumbnails at 256 x 256, Portfolio will automatically disable the Extracting Thumbnails option and will generate the larger thumbnails from the original image.

Cataloging Options—Update tab

A Update tab

B General: Controls which, if any, embedded information is extracted when items are updated. Also indicates how the extracted information should be handled, whether Thumbnails are regenerated, and whether Digimarc data is detected.

Options: Extract Keywords, Extract Descriptions, Extract Thumbnail, Skip Files without Thumbnails, and Always Detect Digimarc. These options are described in the table on *page 138*.

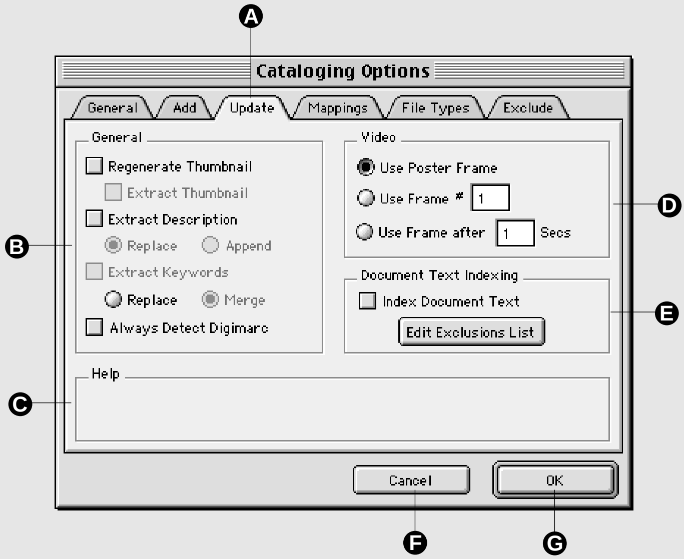
C Help: Displays information about an option when the mouse is placed over it.

D Video: Controls how video is handled through QuickTime. Options are: Use Poster Frame (default) as the thumbnail; Use Frame #; and Use Frame after xx seconds.

E Document Text Indexing: Controls whether the text in documents (Acrobat, PowerPoint) is indexed.

F Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an update items request.

G OK: Closes the dialog and accepts the settings. Starts the cataloging or updating process if displayed in response to an update items request.



Cataloging rules from the Cataloging Options: Update tab options are used when any of the following Modification Methods *(page 132)* are selected: Update, Update Unconditionally, Add & Update.

Cataloging Options—Update Tab

Option	Choices	When catalog items are Updated:
General	Regenerate Thumbnail	If disabled (not checked), the Thumbnail in the catalog record will not be changed. If enabled (checked) the thumbnail will be updated if the source file has changed, or if Update Unconditionally is selected.
	Extract Thumbnail	Controls whether Portfolio looks for an embedded Thumbnail or creates its own. This option is ignored if Regenerate is disabled.
	Extract Description	Replace: Replaces the existing description with the new one.
		Append: Adds the new description to the end of the old one.
	Extract Keywords	Replace: Replaces existing keywords with the new ones.
		Append: Adds the new keywords to the existing keywords.
	Always Detect Digimarc	When disabled, Portfolio will only look for a Digimarc watermark when it attempts to generate a thumbnail, not when thumbnails are extracted. When enabled, Portfolio attempts to generate a thumbnail for every item and checks for Digimarc data; the Extract Thumbnail option is disabled.
Document Text Indexing		Indexes the text of Adobe Acrobat and Microsoft PowerPoint files by adding each word to the catalog index. Preview the original file to read document document text.
Video	Use Poster Frame	Use Poster Frame for thumbnail (by default, the first frame). If the first frame of a group of movies is black, for example, one of the other options can be used for the thumbnail.
	Use Frame #	Allows you to choose a particular frame for the thumbnail (for example, frame #2).
	Use Frame After	Allows you to select the frame occurring after a specific time interval *(specify number of seconds)*.

* *QuickTime movies (.mov) only; not compatible with m1v, mpeg, swfl, and animated gifs.*

Mappings

Portfolio Mappings give you the ability to extract text data that is embedded in source files fields other than the standard Description and Keywords fields.

Typically, software that allows you to add information to a file (Photoshop's File Info is a good example) assigns a numeric ID, or Tag, to each field of embedded data. Using Portfolio's Mappings feature you can map this field ID to a Custom Field in your catalog, and have Portfolio copy the source file data into the Custom Field.

Portfolio provides currently known Tag Codes for popular formats (Photoshop, IPTC, TIFF). These are displayed in the Mappings tab (Catalog > Mappings), and listed in *Appendix C (page 297)*. But you are not limited to the pre-installed codes—you can add Tag codes from any software that supports this convention, and also add new codes as they become available.

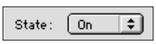
To use Mapping, you must create a Custom Field (Catalog > Administration > Custom Fields tab) for each tagged field that you want to extract from item source files. If the ID Code for the source file Tag is already listed in the Mappings table, all you need to do is Edit the entry and add the Custom Field name that you want to map it to. If the necessary code is not listed in the table, you can add it to the list and then map it to your Custom Field.

To Enable or Disable an existing Mapping:

> **Tip**
>
> **Mac OS:** To quickly enable or disable mappings, click and drag in the checkmark column. This also works in the Action column.

Note: Mappings must be created before they can be used. Refer to the following pages for instructions on creating catalog Mappings.

1. **From the Mappings list (Catalog > Cataloging Options: Mappings), select the Mapping that you want to enable.**
2. **Click the "Edit" button or double-click the selection to open the Edit dialog or (Macintosh only) click in the first column of the Mapping that you want to change.**
3. **From the Edit dialog, select "On" from the "State" pop-up menu, then click "OK."**



   A check indicates that the Mapping is enabled: Portfolio will extract data from the source file field and place it in the indicated catalog Custom Field. No check indicates that the Mapping will be ignored.

4. **Click "OK" to close the Cataloging Options dialog and save the settings.**

Cataloging Options—Mappings tab (Macintosh)

A Mappings tab

B List Headers: On/Off, Title, Code, Field, Action (see item descriptions (**H**) through (**L**)).

C Add: Opens the Mapping dialog to add a mapping.

D Edit: Opens the Mapping dialog to edit the selected mapping.

E Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.

F OK: Closes the dialog and accepts the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.

G Delete: Deletes the selected mapping.

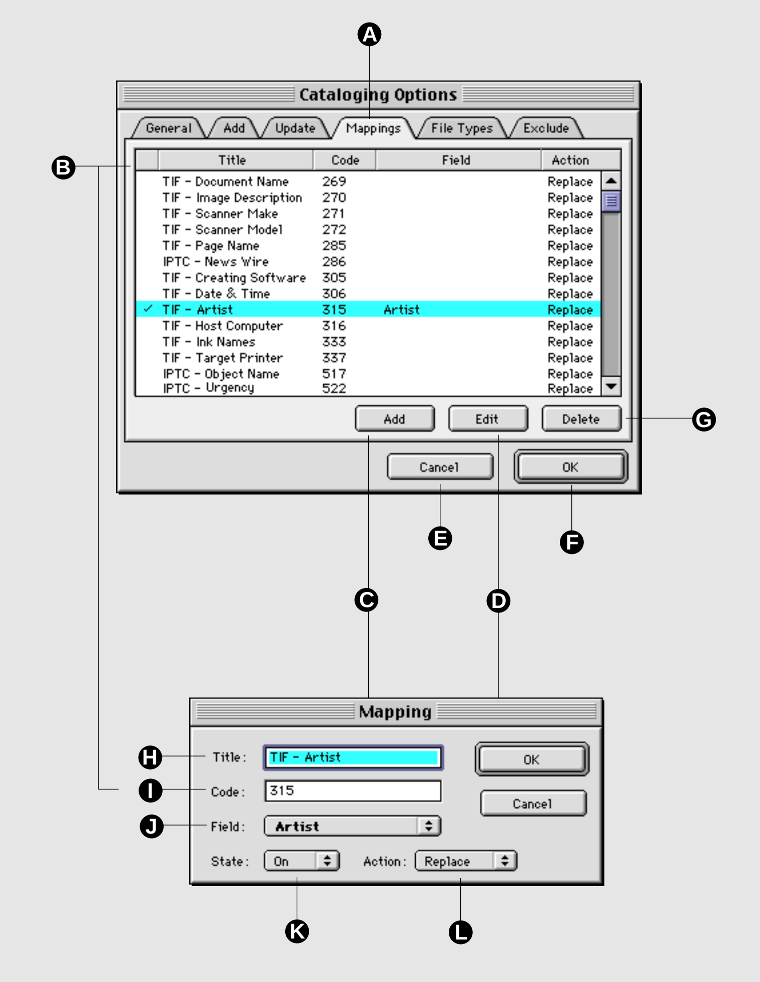
H Title: Enter a title for the mapping.

I Code: Enter the ID code for the source file field to be mapped.

J Field: Select an existing Portfolio catalog Custom Field from the pop-up.

K State: On enables the mapping; Off disables it. Mac OS: You can enable and disable mappings from the checkmark column in the Mappings tab.

L Action: “Replace” replaces any existing data in the catalog Custom Field with the data from the source file field. “Append” adds data from the source file field to any existing data in the catalog Custom Field. Mac OS: You can toggle Actions (Replace or Append) by clicking in the Action column.



Notes about Mappings:

1. Mappings (that are enabled) are used during both Add and Update operations.
2. You cannot map to keywords or descriptions.
3. Some tags are automatically mapped to keywords or descriptions. These tag codes cannot also be used to map to a Custom Field.
4. You cannot map one tag code to multiple Custom Fields.

Cataloging Options—Mappings tab (Windows)

A Mappings tab

B List Headers: On/Off, Title, Code, Field, Action (see item descriptions (**J**) through (**N**)).

C Add: Opens the Mapping dialog to add a mapping.

D Edit: Opens the Mapping dialog to edit the selected mapping.

E Delete: Deletes the selected mapping.

F OK: Closes the dialog and accepts the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.

G Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.

H Apply (Windows): Apply changes.

I Help (Windows): Access online Help.

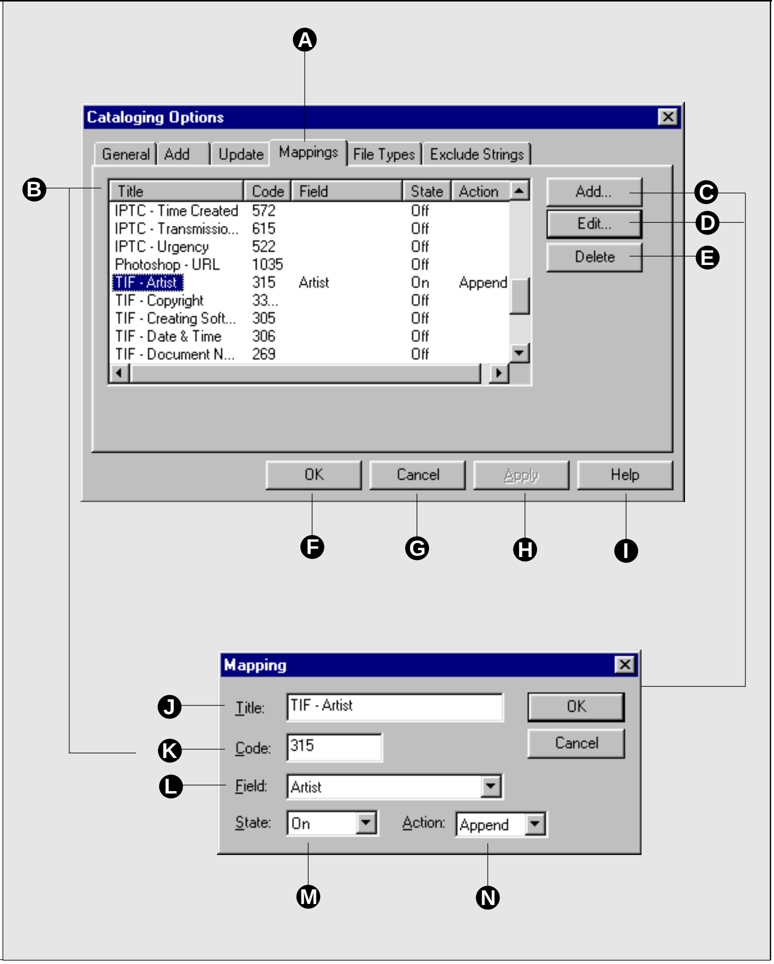
J Title: Enter a title for the mapping.

K Code: Enter the ID code for the source file field to be mapped.

L Field: Select an existing Portfolio catalog Custom Field from the pop-up.

M State: On enables the mapping; Off disables it.

N Action: Append adds data from the source file field to any existing data in the catalog Custom Field. Replace replaces any existing data in the catalog Custom Field with the data from the source file field.



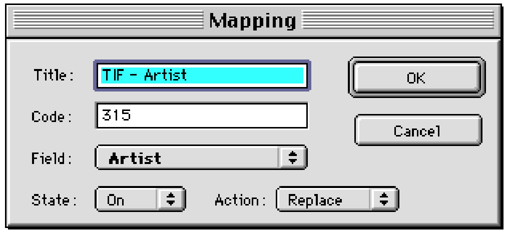
Tip

Since you cannot export a tagged data field without a Custom Field to map it to, the Mappings tab will be blank until you have created at least one Custom Field.

To Map an existing Tag Code to a Custom Field:

1. **Create a Custom Field (Catalog > Administration > Custom Fields) for each source file tagged field that you want to extract.**
2. **Select Catalog > Cataloging Options [Command-J (Mac OS) or Ctrl+J (Windows)]. Click the Mappings tab to select it.**
3. **Select the first source file Tag Title/Code that you want to map, then click "Edit."**

   The "Mapping" dialog will be displayed, showing the selected Tag and its ID Code.



4. **Assign a catalog Custom Field to the Tag by selecting it from the Field pop-up menu.**
5. **Set the State to On or Off.**

   On instructs Portfolio to import the data from the Tag. Off instructs Portfolio to ignore the Tag.
6. **Select the appropriate Action from the Action pop-up.**

   Replace replaces any existing data in the specified Custom Field with the data from the source file field. Append adds data from the source file field to any existing data in the catalog Custom Field. If the field is a Multi-valued field, Append adds a new value to the list.
7. **Click "OK" to accept the settings and return to the Mappings tab.**
8. **Repeat steps 3 through 6 for all the tagged fields that you wish to import.**

To Add a Tag ID Code to the Mappings list:

1. **Create a Custom Field (Catalog > Administration > Custom Fields) for each source file tagged field that you want to map.**
2. **Select Catalog > Cataloging Options... [Command+J (Mac OS) or Ctrl+J (Windows)].**
3. **Click the Mappings tab to select it, then click "Add."**
4. **Enter the Tag ID Code, and enter a Title for the Tag.**

   Data is extracted using the ID Code. The tag Title is informational—you can name the tag anything you like.
5. **Assign a catalog Custom Field to the Tag by selecting it from the Field pop-up menu.**
6. **Set the State to On or Off, and select the appropriate Action from the Action pop-up.**
7. **Click "OK" to accept the settings and return to the Mappings tab.**
8. **Repeat steps 3 through 7 for all the tagged fields that you want to map.**

Excluding Files from being Cataloged

Using Portfolio Cataloging Options, you can tell Portfolio to skip files of a certain File Type or Name.

Exclude by Type: You can exclude files of a specific File Type from a catalog by deselecting or deleting that file type from the File Types list of the Cataloging Options File Types tab (*below*).

Exclude by Name: You can exclude files with a specific File Name by creating an "exclusions" list that specifies an explicit set of file names or patterns. File name exclusions are specified in the Cataloging Options Exclude tab *(page 145)*.

File Types

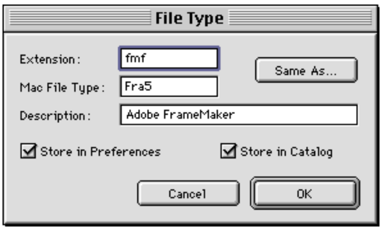
Portfolio recognizes and catalogs all file types, regardless of whether the file type appears on the File Types list. You only need to add file types to the list if you want to exclude a type that does not appear on the list, or if you will be excluding some types and including other types that do not appear on the list.

Tip

To catalog all File Types, select "Catalog All Types" from the File Types tab of the Cataloging Options dialog (Catalog > Cataloging Options).

The File Types tab is described on *page 144.* The default File Types list is shown in *Appendix B, page 296.*

To add a File Type:



1. **Choose Catalog > Cataloging Options [or press Command+J (Mac OS) or Ctrl+J (Windows)].**
2. **Click the File Types tab to select it.**
3. **Click "Add."**
3. **Enter the file type information, or click "Same As..." and locate a file of the same type. Portfolio will copy the parameters of this file type into the fields.**
4. **Click "OK" to add this file type to the list.**

Cataloging Options—File Types tab

A File Types tab

B Catalog All / Catalog Following Types: Determines which file types Portfolio will recognize.

All Types: All File Types will be cataloged, even if the File Type does not appear on the list.

Following Types: Recognizes only those File Types that are enabled (checked) in the File Types list.

C File Types list: Displays a list of all File Types recognized by Portfolio. Enable the “Catalog Following Types” option and uncheck a file type to prevent Portfolio from recognizing it.

D OK: Closes the dialog and accepts the settings. Starts the cataloging or updating process if displayed in response to an add or update items request.

E Cancel: Closes the dialog without changing any settings. Also cancels the cataloging operation if the dialog was displayed in response to an add or update items request.

F Delete: Deletes the selected File Type from the list.

G Add/Edit: Opens the File Type modification dialog. Click Add to add a File Type to the list. Select a file type and click Edit to modify a File Type entry.

H Extension: Enter the 3-letter File Type extension.

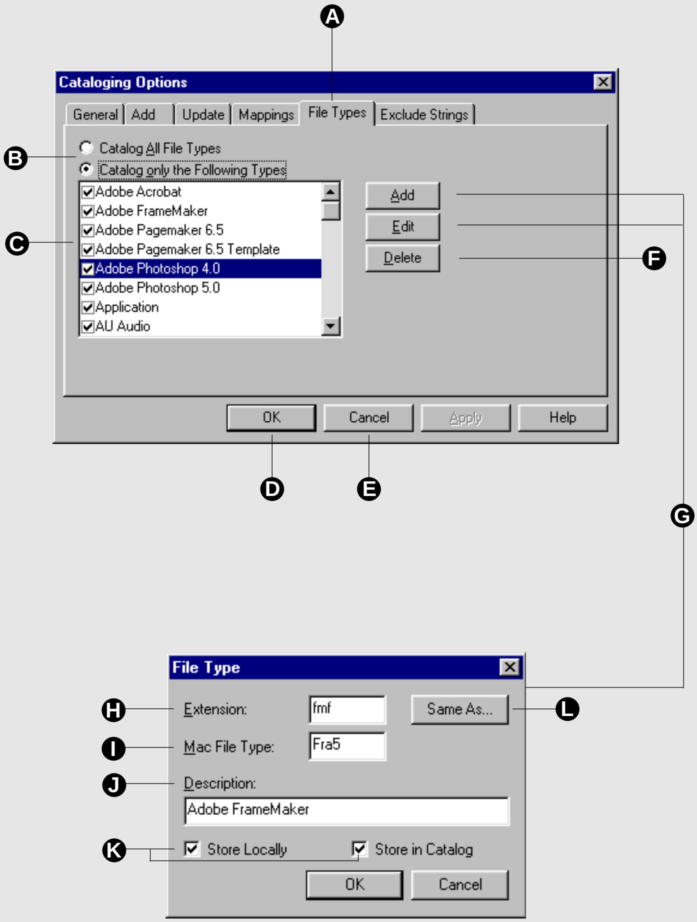
I Mac File Type: For Macintosh files, enter the File Type.

J Description: Enter a description for the File Type.

K Storage Preference: Select “Store in Preferences” (Mac OS) or “Store Locally” (Windows) to save the File Types list on the user’s machine so that it is available for all catalogs opened on that machine. Select “Store in Catalog” to store the list in the catalog, making it available for all users who open the catalog.

L Same As: Click to locate a file with the desired File Type. Portfolio will populate the File Type fields with information from the selected file.

The default File Types list is shown in *Appendix B, page 296.*



Tip

A common use of exclusions is to exclude CMYK plate files from a catalog, allowing only the composite file to be cataloged. To do this, create four exclusions: Ends with .C, Ends with .M, Ends with .Y, and Ends with .K. If the plate files are saved with these extensions (which they usually are), Portfolio will skip these files, even if they are placed in the same folder as the composite. This allows you to drop a whole folder of CMYK files into an open Gallery to catalog them, without manually selecting just the composite images.

Exclude

Using the Cataloging Options Exclude tab you can exclude files with a specific File Name by creating an "exclusions" list that specifies an explicit set of file names or patterns.

To add a File Name to the exclusions list:

1. **Choose Catalog > Cataloging Options [or press Command+J (Mac OS) or Ctrl+J (Windows)].**
2. **Click the Exclude tab to select it.**
3. **Select the file name search parameter from the pop-up menu: Begins with, Contains, or Ends with.**
4. **Enter the filename or partial name that you want to exclude from cataloging. Letter case (uppercase/lowercase) is ignored.**
5. **Click "Add."**

   Portfolio searches each pathname and each segment of the path for text strings matching any of the parameters you enter. For example: If you enter "Begins with: DUP" and "Ends with: 97" Portfolio will exclude "Duplicate_PH050," "Report_97," and "C:\Duplicates\Image.jpg"

Cataloging Options—Exclude tab

A Exclude tab

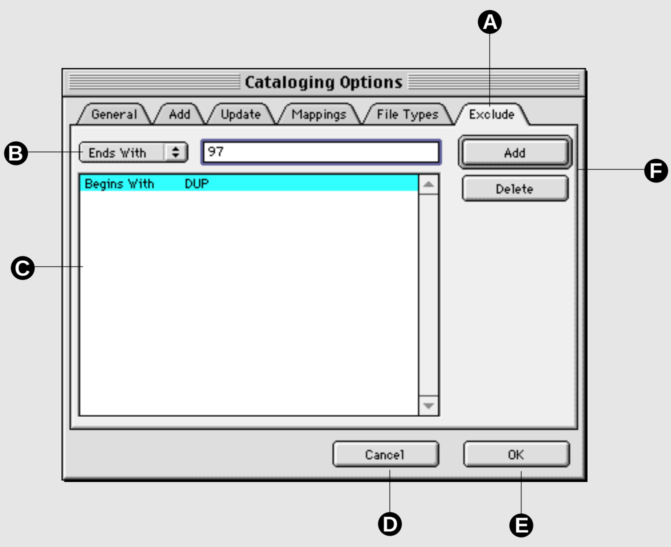
B File Name and Name Options Pop-up menu: Select "Begins with," "Contains," or "Ends with," then enter the name or partial name that you wish to exclude from cataloging.

C Exclude list: Lists all of the names and partial names that will be excluded from cataloging. Excludes files matching any of the listed parameters (acts like an "or" function).

D Cancel: Close the dialog without changing any settings.

E OK: Close the dialog and accept the settings.

F Editing controls: Allows you to Add or Delete file names from the Exclude list.

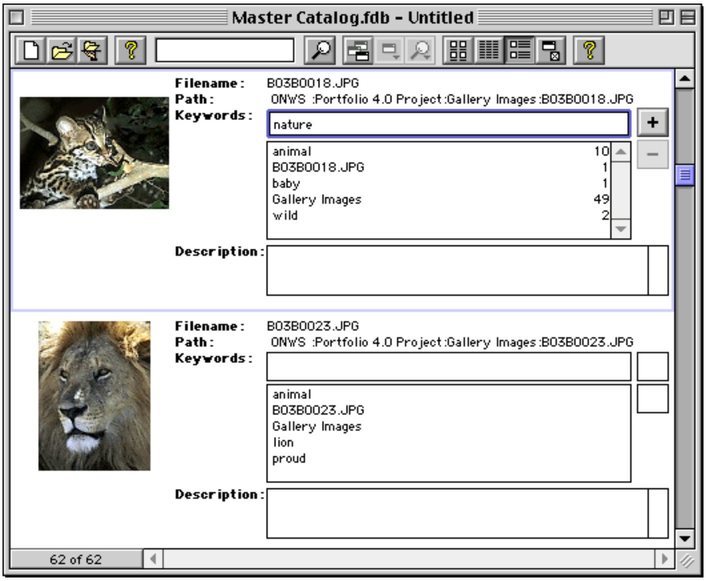


Editing Fields in Place in Record View

Portfolio 5.0 adds another dimension to organizing and managing catalog records—the ability to edit fields directly, without the need to select and open special editing palettes.

In **Record view,** you can edit directly in the desired field by enabling the “Edit” option in the Record tab of the Customize Gallery dialog (View > Customize...).

Movement	Key
Next Field	Tab
Previous Field	Shift-Tab
Next Record	Command-↑ (Mac)
Next Record	Ctrl-↑ (Windows)
Previous Record	Command-↓ (Mac)
Previous Record	Ctrl-↓ (Windows)



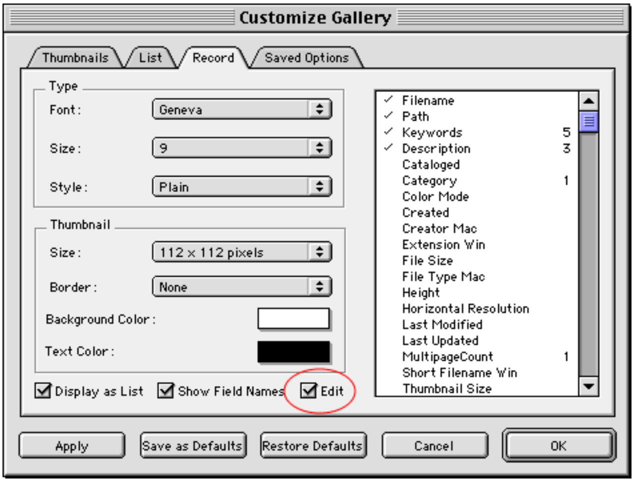
With Edit in Record View enabled, add (+) and delete (-) buttons are displayed beside multi-valued fields, such as keywords. This allows you to easily add or delete keywords directly from the gallery window.

Note: System fields (with the exception of Keywords and Descriptions) are not editable, since they contain information entered by the system that is never user-editable. URL fields are editable, but do not act as hyperlinks when Edit in Record is enabled.

To Edit records in place in Record view:

1. **From an open Gallery, choose Record view by selecting it from the View menu, or click the Record view icon on the Toolbar, or press Command-R (Mac OS) or Ctrl+R (Windows).**
2. **Open the Customize Galleries window by selecting it from the View menu, or click the Customize Gallery icon on the Toolbar, or press Command-D (Mac OS) or Ctrl+D (Windows).**

   The Customize Gallery dialog is displayed.
3. **Select the Record tab.**
4. **Put a checkmark in the Edit box located near the bottom of the window.**



5. **Click "OK."**

   The Gallery will now allow editing in place in Record view. You can use the shift and shift-tab to move between fields, and (Mac OS only) Command-up arrow and Command-down arrow to move between records.

Keywords

> **Tip**
>
> For information about searching using keywords, see *page 39.*

Each item in a catalog has certain information associated with it, such as filename, file type, volume, and so on. Each item can also have one or more keywords associated with it. A keyword is a word or phrase that you associate with a particular item, and a good keyword list can be a valuable tool for finding the material you need in a catalog.

Keywords can be extracted from the item's source file and/or added to item records manually. An unlimited number of keywords can be assigned to each item. By using catalog access level permissions *(page 192)*, a catalog Administrator can control who is allowed to edit item keywords.

A catalog can also include a preset list of keywords called the Master Keywords List. Master Keywords can only be created with Administrator access. Users select keywords from the Master Keyword list, which helps maintain consistent keywording among items in a catalog or across multiple catalogs. See "Catalog Administration," *(page 202)* for information on creating and maintaining a Master Keywords list.

Adding Keywords by Extracting Them from Source Files

> **Note**
>
> You must have Editor level access or higher to modify keywords. *See page 194.*

If you have selected the "Extract Keywords" option (Catalog > Cataloging Options: Add and/or Update tab) for Adding and/or Updating, Portfolio examines all source files for keywords created in their native applications when you add and/or update items in a catalog. As items are cataloged or updated, extracted keywords are added to the item's keyword list according to the settings in the Add and Update tabs *(pages 134 and 137)*.

Viewing Item Keywords

> **Tip**
>
> If you double-click a keyword in the Gallery window List view (or in Record view, if keywords are displayed), all the items with that keyword are located and displayed in the Gallery (replacing the items previously displayed in that Gallery).

You can view the keywords associated with a selected item in the following locations:

- At the bottom of the Gallery window in List view (View > List)
- In the Gallery window in Record view (View > Record), if keywords have been included in the view (View > Customize).
- In the Keywords tab of the Item Properties dialog (Item > Item Properties: Keywords)
- In the Edit Keywords dialog (Item > Edit Keywords)

When keywords are shown, the number beside each keyword indicates how many items in the catalog have that keyword assigned.

Viewing Keywords for the Selected Item

A Keywords for the selected item as displayed in the Item Properties dialog (Item > Item Properties: Keywords).

B Keywords for the selected item(s) as displayed in the Edit Keywords dialog (Item > Edit Keywords).

C Keywords for the selected item as displayed in the Gallery List view (View > List).

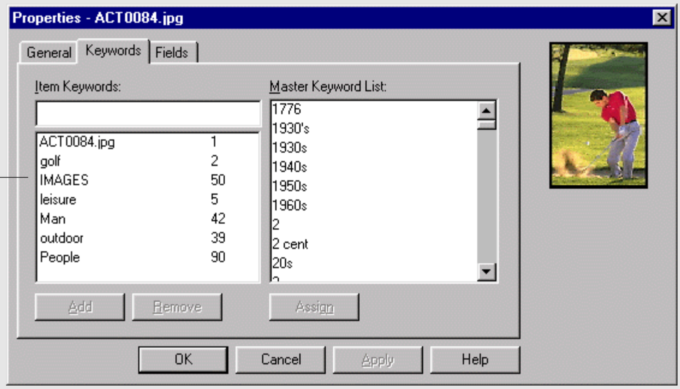
For information on adding keywords to the selected item, see *page 152.*

For information on viewing keywords for the entire catalog, see *page 150.*

For information on extracting keywords from an item's source file, see *page 204.*

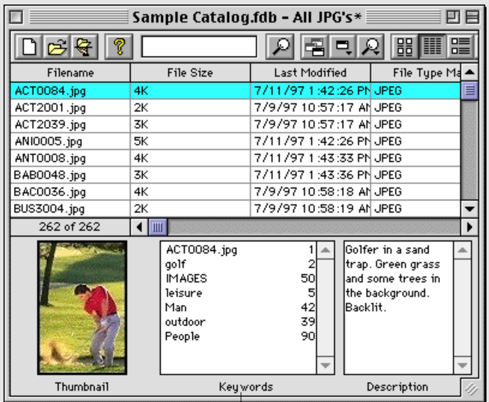
For information on creating a Master Keywords list, see *page 202.*

Item Properties



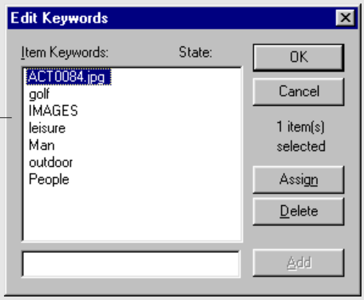
A

Gallery Window



C

Edit Keywords



B

To display the keywords for an item:

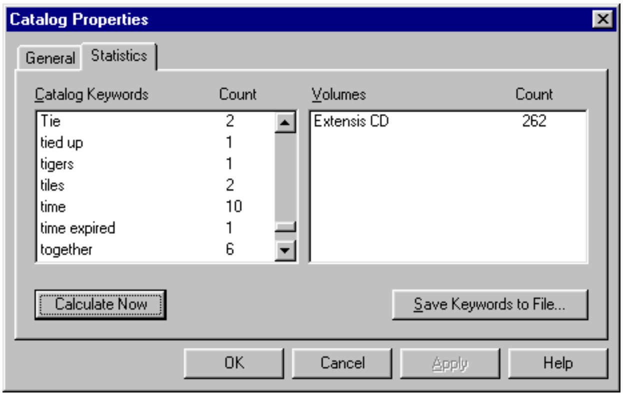
1. **Select the item, then choose Item Properties... from the Item menu, or press Command+I (Mac OS) or Alt+Enter (Windows).**
2. **In the Item Properties dialog, click the Keywords tab.**

   The item's keywords appear in a list box on the left. Master Keywords appear on the right.
3. **Click "OK" when you are finished viewing the keywords.**

To display the keywords for an entire catalog:

1. **Choose Catalog Properties... from the Catalog menu, or press Command+Option+J (Macintosh) or Ctrl+Shift+J (Windows).**

   The "Catalog Properties" dialog is displayed.
2. **Click the Statistics tab to select it.**
3. **Click "Calculate..."**



The keywords for all items in the catalog, and the number of occurrences of each keyword, are displayed in the list box on the left. The more items in the catalog, the longer this process will take.

Tip

You can export a catalog's keywords to a text file by clicking "Export Keywords...." (Mac OS) or "Save Keywords to File" (Windows) on the Statistics tab of the Catalog Properties dialog (Catalog > Catalog Properties: Statistics). This is useful if you want to import those keywords into a catalog's Master Keywords list.

Adding, Assigning, and Deleting Keywords

You can manually enter and assign keywords to the items in the catalog, and you can edit an item's keyword list whether keywords were added manually or extracted from the item's source file. With the exception of the Master Keywords List, you cannot add keywords to the catalog without assigning them to at least one item.

To add and assign keywords to items you must first select the items in the Gallery window. Once the items are selected you can assign keywords in the following ways:

- **Single items:** From the Item Properties dialog (Item > Item Properties), from the Edit Keywords dialog (Item > Edit Keywords), or from the Master Keywords Palette (View > Master Keywords Palette). *See page 156.*
- **Multiple items:** From the Edit Keywords dialog, or from the Master Keywords Palette. *See page 156.*

Adding and Assigning Keywords to Selected Items

From the Item Properties dialog you can work with a single selected item:

A Add: Enter a keyword, then click Add to add it to the selected item's keyword list (this assigns the keyword to the selected item).

B Remove: Select a keyword assigned to the selected item, then click Remove to remove it from the item's keyword list.

C Assign: Select an item from the Master Keywords list, then select Assign to assign the keyword to the item.

D Cancel: Closes the dialog without applying any changes.

E OK: Closes the dialog and applies the keyword changes to the item record.

From the Edit Keywords dialog you can work with multiple selected items:

F Keyword field: Enter keywords to assign to the selected items.

G Keywords list: Shows all keywords assigned to at least one of the selected items.

H Add: Adds text in the Keyword field (**F**) as a new keyword to all the selected items.

I Assign: Adds the selected keyword (which is assigned to one or more of the selected items) to the rest of the selected items *(see page 155).*

J Delete: Deletes the selected keyword from all selected items.

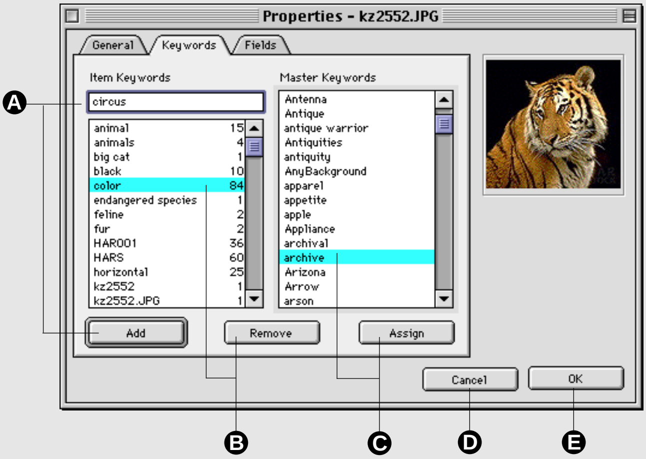
K Selected Items: Shows how many catalog items are currently selected.

L OK: Closes the dialog and applies the keyword changes (indicated in the State column (**N**)) to the selected items.

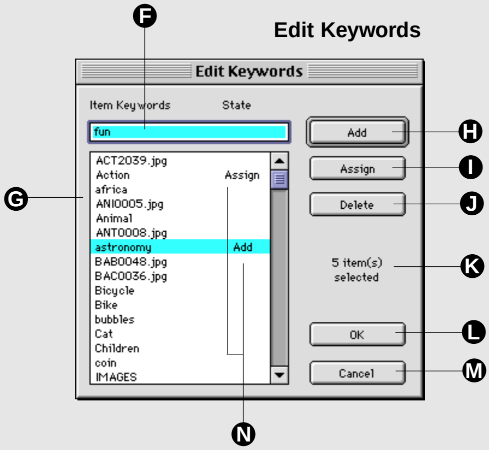
M Cancel: Closes the dialog without applying *any* keyword changes.

N State: Displays the action that will be taken with keywords during this editing session. Options are: Add (**H**), Assign (**I**), or Delete (**J**). The actions indicated by the status of the State field are not applied to the selected items until the dialog is closed by clicking "OK."

Item Properties



Edit Keywords

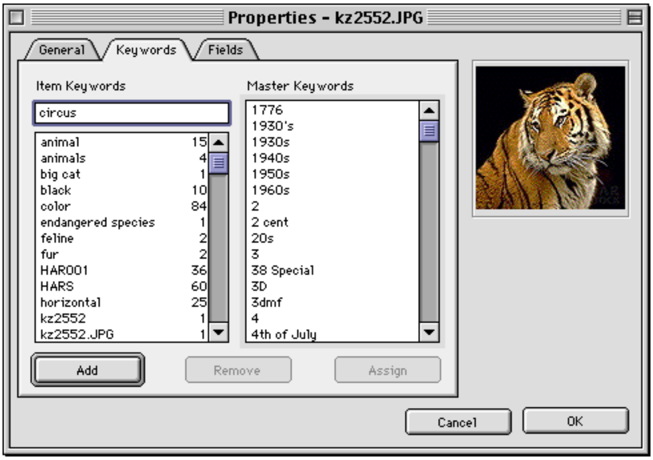


To Add keywords to a single item:

1. **Select the item that you want to add keywords to, then choose Item Properties... from the Item menu (or press Command+I (Mac OS) or Alt+Enter (Windows).**

   The “Item Properties" dialog is displayed.

2. **Click the Keywords tab to select it.**

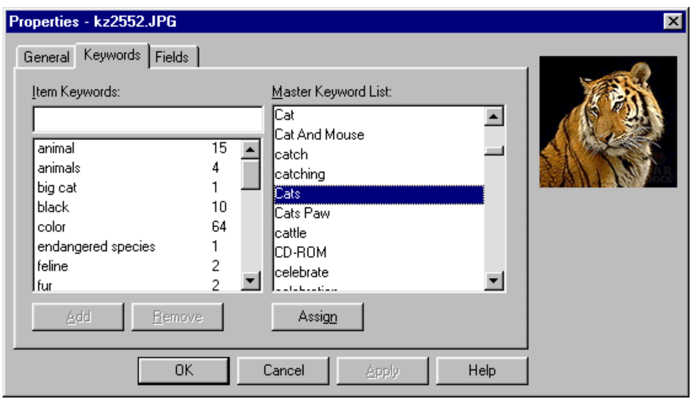


3. **Type a keyword in the text box, then click “Add.”**

   Note: If the catalog administrator has restricted keyword additions to only those in the Master Keyword list, Portfolio checks your additions against the list and notifies you of any “illegal" keywords.

— or —

3. **If you have a Master Keywords list, select a keyword from the Master Keywords list, then click “Assign,” or double-click the Master Keyword.**



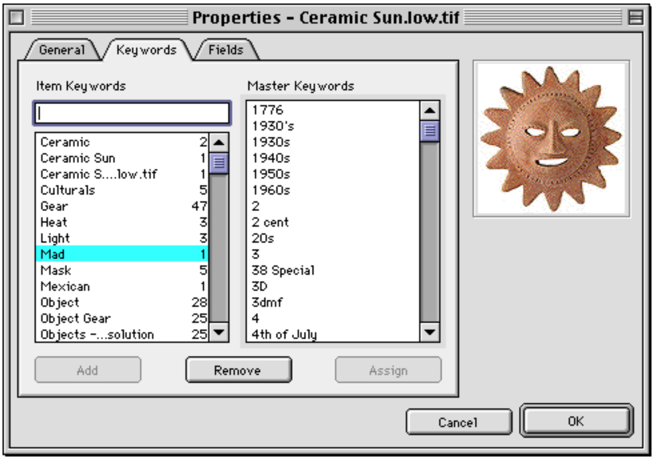
4. **When you are finished adding keywords, click "OK" to close the dialog and assign the keywords to the item.**

To Remove a keyword from an item:

1. **Select the item that you want to remove keywords from, then choose Item > Item Properties [or press Command+I Mac OS or Alt+Enter (Windows).**

   The "Item Properties" dialog is displayed.

2. **Click the Keywords tab to select it.**
3. **From the item's keyword list, select the keyword that you want to remove.**
4. **Click "Remove."**



5. **When you have finished selecting all the keywords that you want to remove from the selected item, click "OK." This closes the dialog and removes the keyword(s).**

   The keywords are not actually removed from the item until you click "OK." If you accidentally remove the wrong keywords, you can click "Cancel" to close the dialog without applying the changes.

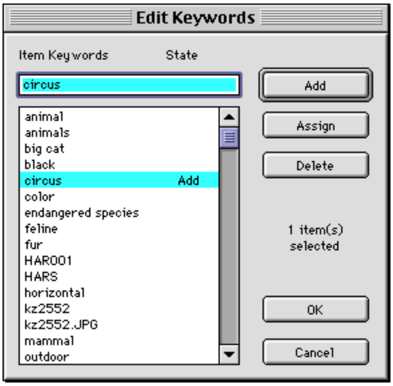
   When you delete a keyword it appears in the text entry box. This is handy if you decide you want to add it back—you can do so easily by clicking the "Add" button.

To Add a keyword and assign it to multiple items:

1. **In the Gallery window, select the items that you want to add keywords to.**
2. **Choose Item > Edit Keywords... [or press Command-Y (Mac OS) or Ctrl+Y (Windows)].**

   The Edit Keywords dialog opens.

   All the keywords assigned to at least one of the selected items will be displayed in the keywords list.



3. **Type a keyword in the text box, then click "Add."**

   The "State" of the keyword is changed to "Add," indicating that it will be added to the catalog and assigned to the selected items.

   Note: You do not need to click "Assign" after you add a keyword—"Add" implies "Assign" (that is, all keywords with either Add or Assign in the State field will be assigned to all selected items in the active Gallery when the dialog is closed. "Add" just tells you it's a new keyword).

4. **When you have finished adding keywords, click "OK" to close the dialog and assign the keyword to the selected items.**

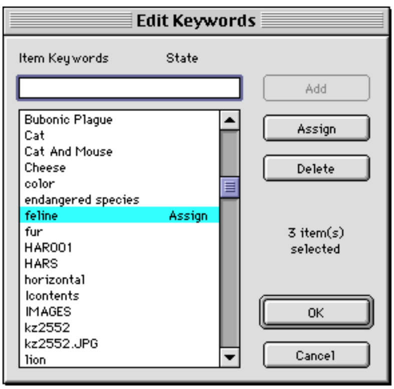
   If you close the dialog by clicking "Cancel," all changes are discarded.

To take a keyword that is already assigned to one item and assign it to other items:

1. **In the Gallery window, select both the item that has the keyword you want to assign, and the items that you want to assign the keyword to.**
2. **Choose Item > Edit Keywords... [or press Command+Y (Mac OS) or Ctrl+Y (Windows)].**

   The Edit Keywords dialog opens.

   All the keywords assigned to the selected items will be displayed in the keywords list.



3. **Locate the keyword that you want to assign to the selected items.**
4. **Click "Assign."**

   The "state" of the keyword is changed to "Assign."

5. **When you have finished assigning keywords, click "OK" to close the dialog and assign the keyword(s) to the selected items.**

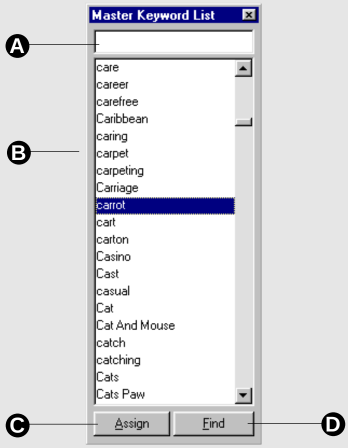
Assign Keywords from the Master Keywords Palette

A Find: Enter a keyword or partial keyword, then click the Find button to move to the location on the list of the closest matching keyword. Handy for quickly moving around a long list.

B List of Keywords: Select a Keyword from the list, then click Assign to assign the keyword to the selected items. You can also drag keywords to a Gallery to assign them to selected items. Double-click a keyword to locate gallery items with that keyword.

C Assign: Select a Master Keyword from the list, then click Assign to assign the keyword to the selected items.

D Find: Select a Master Keyword from the list, then click Find to locate all the items with that keyword assigned, and display them in the Gallery window.



Tip

To jump to a particular part of the list, start typing the keyword in the edit box. The list will jump to the first word beginning with the text that you entered.

Tip

You can drag multiple keywords from the Master Keywords list and drop them on the thumbnail of any one of the selected items to assign them to all the selected items at once.

Tip

Keep the Master Keywords Palette open while you are working with multiple catalogs. As you click in different Catalog Gallery windows, the Master Keywords Palette is immediately updated with the keywords for that catalog.

To assign keywords to items using the Master Keyword list:

1. **In the Gallery window, select the items that you want to assign Master Keywords to.**
2. **Choose Master Keywords Palette from the Window menu [or press Command+K (Mac OS) or Ctrl+K (Windows)].**

   The Master Keywords Palette will be displayed, showing all the Master Keywords in the catalog.
3. **On the Master Keywords List, locate and select the keyword(s) that you want to assign to all the selected items. [Press Command-click (Mac OS) or Ctrl-click (Windows) to select keywords non-contiguously.]**
4. **Click “Assign.”**

   The keywords are assigned to all the selected items immediately.

To find all items to which a keyword is assigned:

1. **Open the Master Keywords Palette [Window > Show Master Keywords Palette, or press Command+K (Mac OS) or Ctrl+K (Windows)].**
2. **Select the keyword that you want to change, then click “Find,” or double-click the word.**
3. **In the Gallery window, all the items with that keyword will be displayed.**

Master Palettes (Predefined Custom Lists)

New in Portfolio 5.0 is the ability to display entries from any Custom Field with a Predefined List on palettes.

These lists behave just like Master Keywords on the Master Keywords List, except that they are created automatically when Custom Fields designated as Predefined List are created. To create these kinds of Custom Fields, see *page 210*.

After the Custom Field has been created and the list entries added, the Custom Field name is displayed on the Window menu: Master Palettes sub-menu as “Show [Field]” where [Field] is the name of the Custom Field.

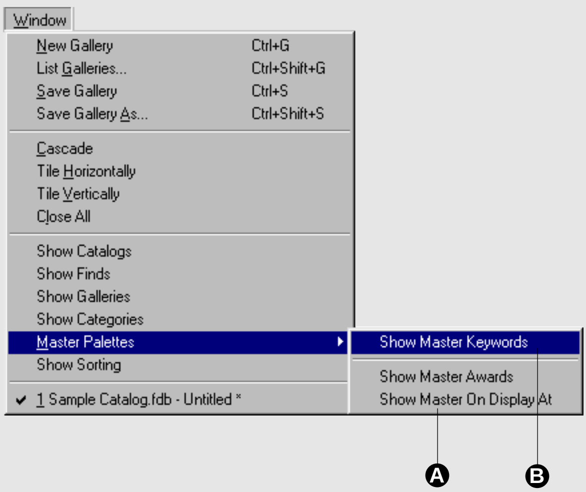
Selecting a “Show [Field]” name from the Master Palettes submenu opens a palette with the Custom Field list displayed.

Show Master Palettes

To open the Master Keyword palette, or any Custom Field palette (predefined list Custom Fields only), select it from the Master Palettes submenu of the Windows menu.

A Custom Field (Predefined List) Palettes: Each Custom Field created as a predefined list will be displayed here with the word “Master” preceding the name of the field. Simply select the name to open the Master Palette for that field.

B Master Keywords Palette: Select to open the Master Keywords palette



Master Palettes—Custom Field Values

A Palette tab: Displays the Custom Field name. Master palettes can be docked and undocked just like other Portfolio palettes (see *page 37*).

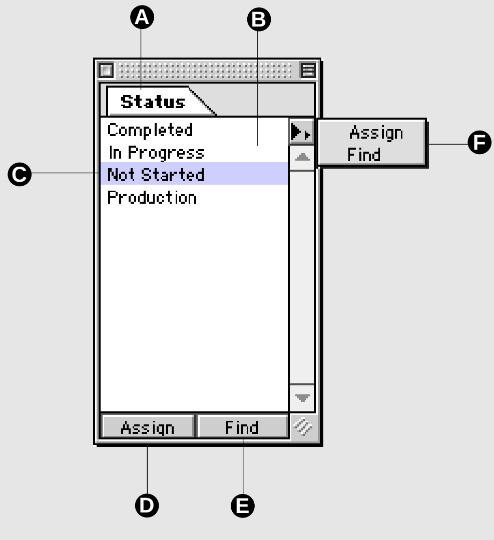
B List of Custom Field Keywords: All the entries for the predefined list field are displayed.

C Selected list entry (value): Select an entry on the list, then click Assign to assign that value to the custom field of selected items in the Gallery. You can also drag an entry to a Gallery to assign it to selected items.

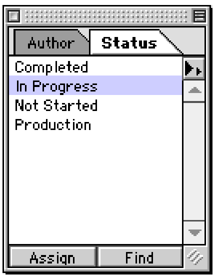
D Assign: Select a Custom Field value from the list, then click Assign to assign that value to the appropriate Custom Field (shown in the palette tab, (**A**)) for selected gallery items.

E Find: Select a Custom Field keyword from the list, then click Find to locate all the items with that word assigned, and display them in the Gallery window.

F Master palette fly-out menu: Options are Assign and Find.



To assign words to items from a Master Palette:



1. **In the Gallery window, select the items that you want to assign keywords to. [Command-click (Mac OS) or Ctrl-click (Windows) to select records non-contiguously.]**

2. **Open the appropriate Master Palette: From the Window menu, Master Palettes sub-menu, choose the appropriate Custom Field name.**

   A palette for the Custom Field will be displayed, showing all the entries assigned to that field.

   You can dock and undock Master Palettes just like other palettes (see *page 37).*

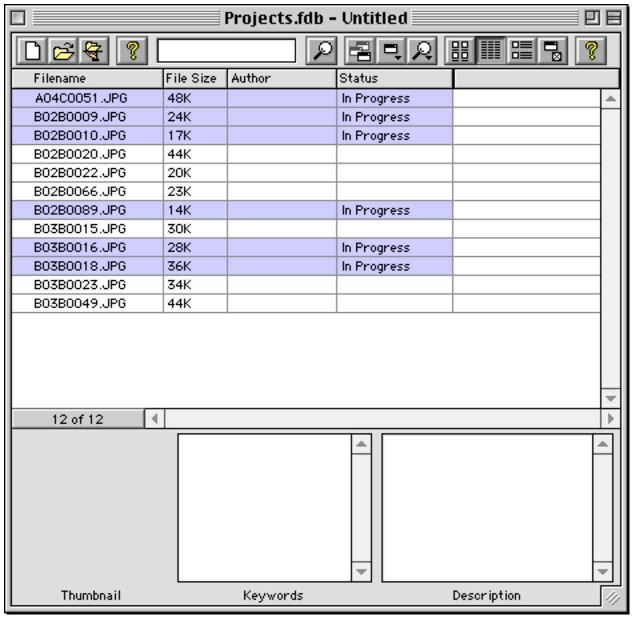
3. **On the palette, locate and select the word(s) that you want to assign to all selected Gallery items. [Press Command-click (Mac OS) or Ctrl-click (Windows) to select words non-contiguously.]**

   In our example, we will be assigning the word “In Progress” to the Status field of several discontiguous records in the Gallery.

4. **Click the “Assign” button at the bottom of the palette, or select “Assign” from the palette fly-out menu.**

— or —

4. **Drag and Drop the words onto the Gallery.**



The list word(s) are assigned to all selected items in the Gallery immediately.

To find all items to which a predefined list word is assigned:

1. **Open the appropriate Master Palette: From the Window menu, Master Palettes sub-menu, choose the appropriate Custom Field name.**
2. **Select the word that you want to search on, then click “Find,” or simply double-click the word.**
3. **In the Gallery window, all the items with that word will be displayed.**

Item Descriptions

In addition to adding keywords to any item, you can add a description up to 32,000 characters long. You can use the description field to keep track of any information about the source file that you might find useful or important, but information that you probably won't use to locate catalog items. You might want to use the Description field for photo captions, small amounts of marketing copy, or miscellaneous notes.

If the original application provides a way for you to enter and save descriptive text with the source file, Portfolio can often extract this information automatically as it catalogs the item. Otherwise, you can add or edit a description after cataloging. In a network environment, a catalog administrator can control who edits descriptions.

Adding Descriptions by Extracting Them from Source Files

If you have selected the "Extract Descriptions" option (Catalog > Cataloging Options: Add and/or Update tab) for Adding and/or Updating, Portfolio examines all source files for descriptions created in their native applications when you add and/or update items in a catalog. As items are cataloged or updated, extracted descriptions are added to the catalog according to the settings in the Add and Updates tab *(pages 134 and 137).*

Entering and Editing Item Descriptions

You can manually enter item descriptions into a catalog, and you can edit existing descriptions whether they were added manually or extracted from an item's source file.

To enter or edit a description manually:

1. **Select the item to which you want to add a description, then choose "Item Properties..." from the Item menu.**

   The "Item Properties" dialog box appears with the General tab selected.

2. **Type a description in the Description text box, then click "OK."**

   The description is added to the item.

Note: If the Description text box is disabled, it indicates that you do not have permission to edit descriptions for items in the open catalog (requires Editor mode or higher). If you are working in a network environment, check with your catalog administrator.

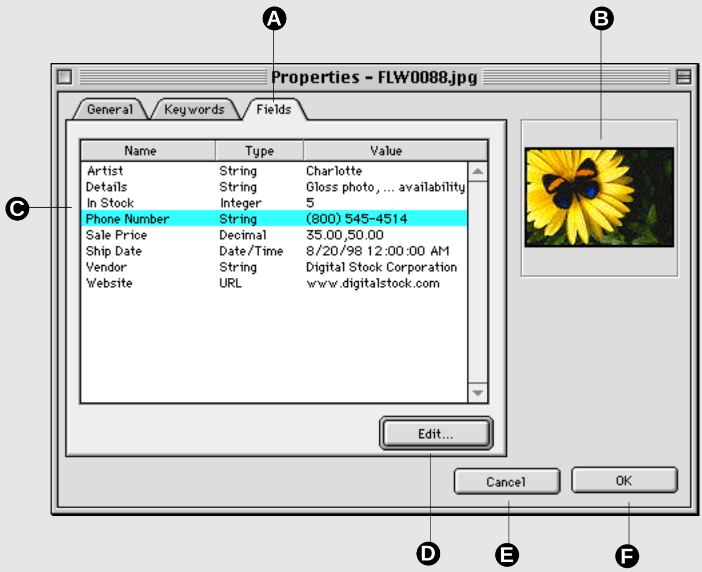
Adding Data to Custom Fields

If custom fields have been defined for a catalog, you can change their value (or contents). For example, you can add photographers' names to a custom “Photographer” field in a catalog of photographic images. Some custom fields even allow more than one entry, and others allow you to select from a predefined list of items so that consistency is maintained from record to record, and/or between catalogs. See *page 206* for information on creating special Custom Fields.

Note: You must have Editor level access or above to a catalog in order to change its Custom Field values. Creating new Custom Fields requires Administrator level access. See page 194.

Item Properties—Fields Tab

- **A** Custom Fields tab
- **B** Thumbnail Preview: Displays the thumbnail for the selected Gallery item.
- **C** Custom Field List: Lists all the Custom Fields that have been created for the catalog, even if no values have been assigned to a field.
- **D** Edit: Opens the appropriate Edit dialog for the selected Custom Field.
- **E** Cancel: Closes the dialog without saving changes in any of the tabs.
- **F** OK: Closes the dialog and saves changes to all the tabs.

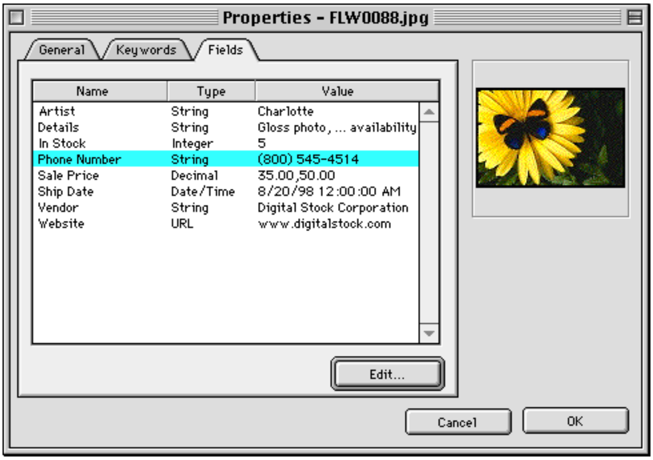


Tip

In addition to the methods shown here for adding data to Custom Fields, you can edit fields directly in Record View *(page 146)*, or add words from predefined Custom Field lists available on Master Palettes *(page 156)*.

To Edit existing Custom Fields:

1. **Select an item in a Gallery window, then choose Item > Item Properties.**
2. **In the Item Properties dialog, click the “Fields” tab to select it.**

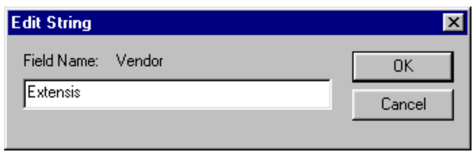


All custom fields for the catalog are displayed, even if no data is currently entered in a field for the selected item.

3. **Select the field you want to change, then click “Edit...”**

   The “Edit” dialog box for the field will be displayed. This dialog differs for the different field types— see *page 209*.

4. **Type the appropriate value in the text box, then click “OK” to close the edit dialog.**



If you enter a value that is incorrect for the field type, clicking “OK” produces no result. (Re-enter the proper value type or click “Cancel.”)

5. **Click “OK” to close the dialog and accept the changes.**

Field Type	Data Example
Date/Time	8/20/98 1:15 pm
Decimal	50.00
Integer	100
String	Text
Text Block	Multiple lines of text
URL	www.extensis.com

Custom Field Editing Dialogs

Custom Field values are entered from the Item Properties dialog (Item > Item Properties). The following six editing dialogs are available. See “Adding Custom Fields” starting on *page 206* for additional information on field types.

A Single-line string: Enter text strings. Number of characters allowed is set when the custom field is created.

B Text Block: Enter text strings that can be displayed on multiple lines.

C Predefined list: Select an entry from the pop-up list of predefined values.

D Multi-value list: Enter a value to add it to the list.

E Date/Time: Enter date and time using the syntax mm/dd/yy hh:mm:ss.

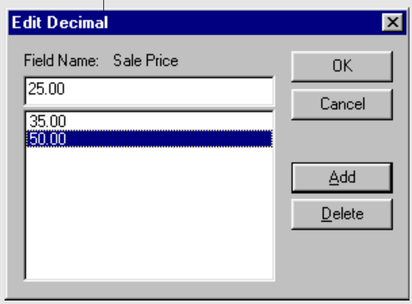
F URL: Enter a title for the URL and the URL string. The text in the Title field is what will appear in the URL field for the item. Clicking the Title launches the selected browser and opens the indicated URL.

C

Predefined List

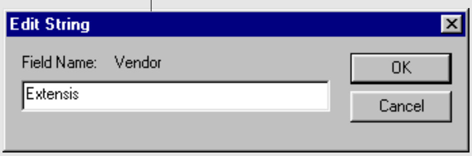
D

Multi-value List



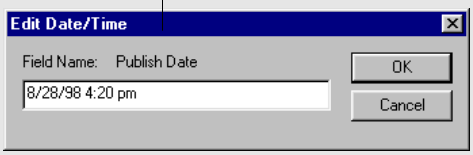
A

String



E

Date/Time



B

Text Block

F

URL

Replacing Keywords, Descriptions, and Field Values using Search Parameters

You can easily replace keywords, descriptions, and Custom Field values for multiple items in a catalog at the same time using Portfolio's powerful Replace function. For example, if you have defined a Custom Field for the print date for your images and the print date for some of those images slips by a week, you can replace the incorrect date in that field for all the affected images at once. You can even search on a different field than the field being replaced, and you can choose to search all the items in the active Gallery, or limit the search to only the selected items.

Find and Replace

A Context: Determines search context. Options are:

Replace all Items in Gallery: Replaces the indicated field value of all the records in the active Gallery with the value defined in the Replace clause. Disables the Find clause.

Search Selected Items: Limits the scope of the Find to the currently selected items in the active Gallery.

Search Gallery: Searches the entire active Gallery for matching records.

B and C Find clause: Sets the parameters of the search.

Fields pop-up: Displays all fields, including Custom Fields. In Portfolio 5.0, all fields are indexed.

Operator pop-up: Defines the search operator. List changes depending on find field type (**B**).

Search value: Enter the string to be searched for.

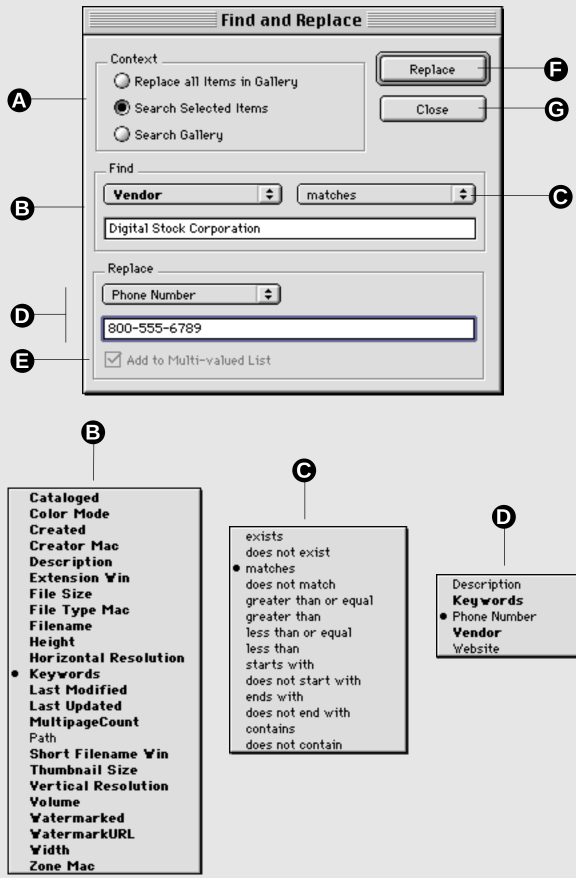
D Replace clause: Determines which field value will be replaced.

Replace text box: Enter the string that will be used to replace the existing string.

E Add to Multi-valued List: Controls how multi-valued fields are handled. See *page 211.*

F Replace: Click to initiate the Find and Replace operation. If the field is a single value field, the entire contents of the replacement field are replaced.

G Close: Click to close the dialog box.



To Replace items based on field values:

1. **Choose Replace... from the Catalog menu (or press Command+Option+R (Mac OS) or Ctrl+Shift+R (Windows).**

   The "Find and Replace" dialog box appears.

2. **Select the Context of the search using the Context radio buttons.**

   - **Replace all Items in Gallery:** Disables the Find and forces the Replace value into all records in the Gallery.
   - **Search Selected Items:** For the selected items, Replace the value for all records matching the search criteria. Unselected records are not affected.
   - **Search in Gallery:** For all items in the Gallery, Replace the value for all records matching the search criteria.

3. **Enter the parameters of the Find by selecting the field to be searched and a search clause from the pop-ups, then enter the text string to search on.**

   Note: This step does not apply if you selected "Replace all Items in Gallery" in step 2.

4. **Enter the parameters of the Replace by selecting a field to be replaced from the Replace Field pop-up, then enter the data string that will replace the existing data in the selected field.**

   If the field you selected is a Multi-valued field, indicate whether you want the Replace value added to the list of existing values, or to replace the value indicated in the Find value field.

   Note: Exercise caution when you perform a Replace where the Find field is different than the Replace field and "Add to Multi-valued List" is unchecked, as the entire contents of the Replace field will be replaced.

5. **Click "Replace."**

   Item records matching the Find criteria will be located, and data in the indicated Replace field will be replaced.

   Note: Because the "Replace" command in Portfolio is replacing field data in item records that are already being displayed, and is not (like the Portfolio "Find" command) searching for items to display, the "Replace" command has no effect on the Gallery (other than to show any field data that was replaced during the Replace operation).

Tip

You can populate Custom Fields based on information in existing fields. This can be handy when you want to add a new field based on existing information and/or move existing information into a different field. For example, you might search for every record that has a particular vendor name in the Description field and move that vendor's name to a custom "Vendor Name" field. Then you might search all the records again using the Vendor Name, and add the vendor's web address to a custom "Vendor Website" field.

Add to Multi-valued List Checkbox

The Multi-valued List option is only available when a Custom Field defined as a Multi-value List is selected in the Replace clause.

There are four possible options for replacing multi-valued fields. These are based on the type of search being conducted, and whether the "Add to Multi-valued List" checkbox is On (checked) or Off (unchecked). An example of each is given below. The first three options are fairly straight-forward. The fourth can be extremely powerful, but unless understood fully, may lead to unwanted results. If you are interested in applying the fourth scenario, you may want to experiment with a small, unwanted catalog until you fully understand the ramifications.

For the following, assume that you have a Multi-valued List with two items it: "cat" and "dog."

Examples and Results:

Option 1: You want to search for all records containing "cat" and add the word "snake" to the list. To accomplish this, enter "cat" in the Find field, enter "snake" in the Replace field, and turn the "Add Multi-value" checkbox On. This results in a multi-value list containing "cat," "dog" and "snake."

Option 2: You want to search for all records with some commonality and add "snake" to the value list. To accomplish this, enter your search parameter in the Find field (such as a creation date or partial filename), enter "snake" in the Replace field, and turn the "Add Multi-value" checkbox On. This results in a multi-value list containing "cat," "dog" and "snake."

Option 3: You want to search for all records containing "cat" and replace the word "cat" with the word "snake." To accomplish this, enter "cat" in the Find field, enter "snake" in the Replace field, and turn the "Add Multi-value" checkbox Off. This results in a multi-value list containing only "snake" and "dog."

Option 4: You want to search for all records with some commonality and replace the entire value list with the word "snake." To accomplish this, enter your search parameter in the Find field (such as a creation date or partial filename), enter "snake" in the Replace field, and turn the "Add Multi-value" checkbox Off. This results in a multi-value list containing *only* the word "snake." This can be helpful when you want to replace the entire value list and start over again with new values. After replacing the list with a single value you can perform a regular Find to locate all the items with that value and add the other list items in the normal way.

Populating Fields in Multiple Records at the Same Time

Portfolio makes it easy to add information to multiple records at the same time, either as a replacement for existing text, or to add new information to the same field in many records at once. The easiest way to do this is using the “Replace all items in the Gallery” command, an option on the Replace dialog (Catalog > Replace).

Warning

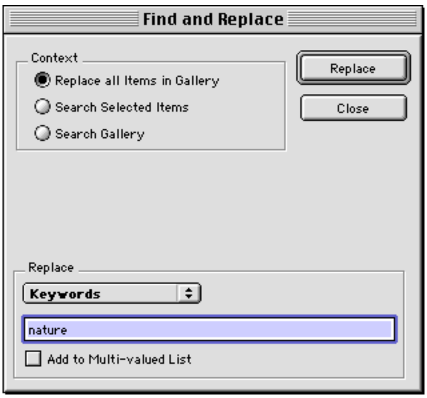
This is an extremely powerful feature, allowing you to replace data in a selected field for many records at once. Be aware that any data already existing in the selected field will be overwritten.

For example, you might have several hundred records that you want to add a keyword to, or you may have gotten a batch of photographs that you want to add the artist’s name to. All of this can be done easily in Portfolio. Simply open a Gallery with all of the records that you want to change, select this option on the Replace dialog, choose the field that you want to change from the pop-up menu, and enter the desired text.

To populate a field in multiple records at the same time:

1. **Open a Gallery and locate all the records that you want to affect.**
2. **From the Catalog menu, choose “Replace...” [Command+Option+R (Mac OS) or Ctrl+Alt+R (Windows)].**
3. **Click “Replace all items in Gallery.”**

   Notice that the search portion of the dialog is no longer available. This is because you have already found the records that you want to change (all records in the currently active Gallery).



4. **From the Replace pop-up menu, select the field that you want to affect.**

   Only fields that can be replaced will be listed. These include the system fields Keywords and Description, plus any Custom Fields that have been created.
5. **Enter the text that you want to appear in the selected field.**

   Text entered here will completely replace any text already existing in the selected field.
6. **Click “Replace.”**

   Entered text will replace any existing text in the selected field for all records in the active Gallery.

Portfolio works directly with many products to make cataloging fast and easy. This section describes how to prepare documents in various applications so that cataloging them is as easy as possible.

Adobe Photoshop 3.0.x through 5.5

You can save thumbnails, keywords and captions from your Photoshop documents for use in Portfolio catalogs.

> **Tip**
>
> You can use Portfolio Mappings (Catalog > Cataloging Options: Mappings tab) to extract all user added data in the File Info fields of Photoshop files. See *page 139* for details.

To include a thumbnail and preview in Photoshop:

1. **Choose "General..." from the Preferences submenu in Photoshop's File menu.**
2. **Click "More."**
3. **In the Image Previews section of the dialog box, select "Always Save."**
4. **Click "OK."**

To include keywords and captions in Photoshop:

1. **Choose "File Info" from Photoshop's File menu.**
2. **Enter your caption in the caption field.**
3. **Click "Next" to switch to the "Keywords" panel.**
4. **Enter your keywords.**
5. **Click "OK" to close the dialog box.**

Adobe Illustrator 7.0 and 8.0

Illustrator automatically saves a thumbnail that Portfolio can display into native (.ai) files.

For Illustrator EPS files, in the Save Options dialog, choose to save both a thumbnail and a preview.

Adobe PageMaker 6.5 (Macintosh only)

PageMaker saves thumbnails that Portfolio can display in the catalog.

Tip

Macintosh: Included on the Extensis CD for Portfolio users is a free Quark XTension “Extensis QX-Drag&Drop.” This powerful XTension gives QuarkXPress the ability to accept drag and drop items, such as the items in your Portfolio catalogs. Before you can use this XTension you must run the QX-Drag&Drop Installer to install it in your Quark XTension folder.

Tip

Macintosh: Included on the Extensis CD is the XTension “Visions Edge Preview Editor Lite,” which allows you to save full-color thumbnails of your QuarkXPress documents. Refer to the instructions accompanying the XTension for help. *(Extensis cannot offer Technical Support for Preview Editor Lite.)*

QuarkXPress 3.31 and above (Macintosh only)

You can save thumbnails of your documents for use in Portfolio catalogs.

To attach a thumbnail in QuarkXPress:

1. **When saving a QuarkXPress document, make sure that “Include Preview” is selected in the QuarkXPress Save dialog box.**

   This will save a black-and-white thumbnail of the first page of your Quark document.

Categorizing Records—The Categories Palette

Portfolio 5.0 offers the ability to organize groups of records visually, using a folder hierarchy which is accessible through the Categories palette.

For example, you might want to use this feature to organize:

- all the versions of a job file, such as low and high resolution images, RGB version, CMYK files, etc.
- all the elements of a print job, such as the document files, images, and fonts

The Categories palette consists of a hierarchy of folders that are linked to items in the catalog. By double-clicking a folder icon on this palette you can display all the cataloged items in a folder and, optionally its subfolders.

Categories Palette

The Categories palette lets you organize project items visually using a folder hierarchy.

To open the Categories palette, choose Window > Show Categories.

A Categories palette tab

B List of Category Folders: All the folders associated with catalog items are listed.

Drag folders up and down to create a hierarchy.

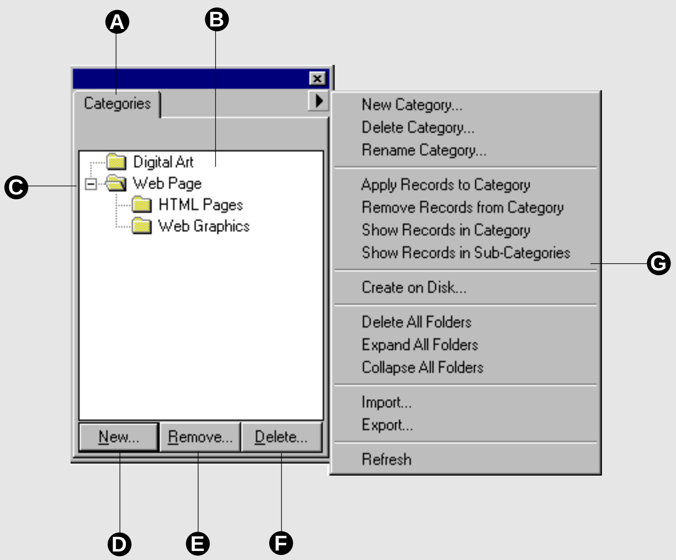
C Expand/contract: Click to expand and contract the folder hierarchical list.

D New Folder: Click to create a new folder at the current level of the hierarchy.

E Remove from Category: Click to remove items (selected in the Gallery window) from the Category.

F Delete Folder: Click to remove a folder from the palette.

G Categories palette fly-out menu: Allows you to perform various tasks with folders and folder contents. Options are: New, Delete, Rename, Apply, Remove, Show Records in Categories, Show Records in Sub-categories, Create on Disk, Delete All Folders, Expand All Folders, Collapse All Folders, Import, Export, and Refresh. See *page 170* for a description of each menu item.



Tip

Each folder that you create is considered a “category.” You may, for your own organizational purposes, arrange categories as sub-categories of other categories by dragging a folder under another folder on the Categories palette.

Working with the Categories palette can make organizing and cataloging project files a snap. Using options on the Categories palette you can create the folder hierarchy manually, then drag items from the catalog onto the Categories palette folders to link them. Or you can catalog an entire job of items in nested subfolders automatically by dragging folders from the desktop (Mac OS) or Explorer (Windows) directly onto the Categories palette. When you drag folders onto the Categories palette, items in those folders are automatically added to the catalog and linked to their respective folders (sub-directories become sub-categories).

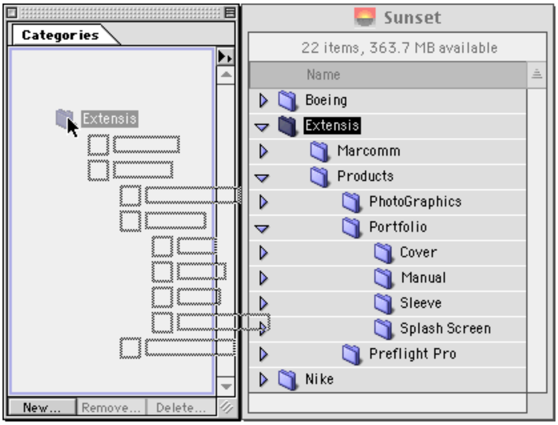
By working with data the other direction—dragging folders from the Categories palette to the hard drive—you can recreate an entire job (folders, subfolders, and the cataloged contents), or any number of individual folders and contents, on any local or network volume in one easy step.

Categories Palette Menu Option	Function Performed
New Category...	Create a new folder at the root level of the hierarchy.
Delete Category...	Delete the selected folder from the Categories palette.
Rename Category...	Rename the selected folder.
Apply Records to Category	Assign selected Gallery items to the Category.
Remove Records from Category	Remove selected Gallery items from the Category.
Show Records in Category	Find all cataloged items in selected folder and display them in the Gallery.
Show Records in Sub-categories	Same as Show Records in Category (above), but includes subfolders.
Create on Disk...	Copy folder and the original (source) files to the hard drive.
Delete All Folders	Deletes all folders from the Categories palette.
Expand All Folders	Expands all folders in the Categories palette.
Collapse All Folders	Collapses all folders in the Categories palette.
Import	Import saved categories (Portfolio .pjd file). Must be exported from a catalog.
Export	Export categories to a Portfolio .pjd file for importing into another catalog.
Refresh	Refreshes the Categories palette to reflect recent changes.

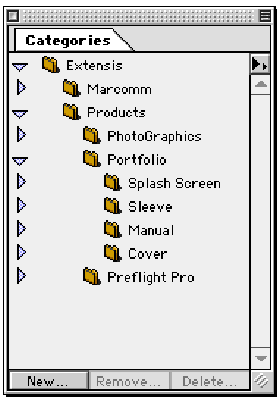
> **Tip**
>
> **Macintosh:** To drag and drop folders from the Finder onto the Categories palette in Portfolio, you will need to arrange your desktop so that you can see both the Categories palette and the window that you want to drag from.
>
> To do so, hide all windows except Portfolio. In the Finder (Desktop), open the folder containing the items that you want to drag into Portfolio. Arrange your folder window so that it is visible when Portfolio is active (you may have to close some or all Gallery windows in Portfolio). You will now be able to drag from one to the other.

To add an existing folder to the Categories palette:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **On the workstation [Finder (Mac OS) or Explorer (Windows)], locate the folder and sub-folders that you wish to add to the Category.**
3. **Drag the top-level folder from the Finder/Explorer and drop it onto the Categories palette in Portfolio, or onto another folder on the palette.**



The folder hierarchy will be recreated on the Categories palette, and folder contents will be cataloged and linked to the appropriate folders on the palette.



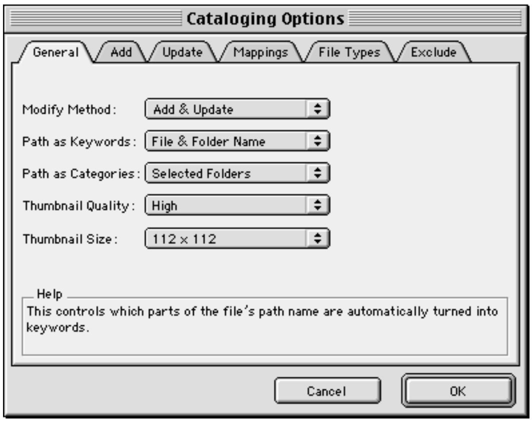
Double-click a folder to display the cataloged contents in a Gallery window.

Path as Categories

Portfolio allows you to link cataloged items to a Categories folder automatically at Add and/or Update time using the Path as Categories option.

To enable Path as Categories:

1. **Open the desired catalog, then open the Cataloging Options dialog (Catalog > Cataloging Options: General tab).**
2. **Choose an appropriate Modify Method from the pop-up menu: Add, Update, or Add & Update.**
3. **From the Path as Categories pop-up menu, choose "Selected Folders."**



When items are added or updated, categories (folders on the Categories palette) will be created using the same name as the folders containing the item source file(s). Folder hierarchy will be maintained when the categories are created.

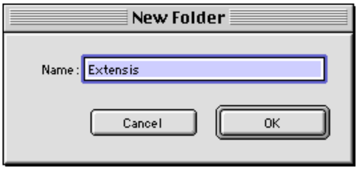
Tip

New folders are created at the same level as the selected folder. To create folders at the root (top) level of the hierarchy, click anywhere in the white space of the palette to deselect all folders. To place a folder at a lower level, drag and drop it into the desired folder on the palette.

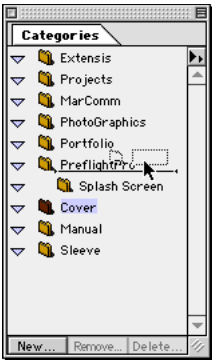
To create a new category using the Categories palette:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Click the "New..." button or choose "New..." from the palette fly-out menu.**

   You will be prompted to enter a name for the folder.
3. **Enter the folder name, then click "OK."**

   The folder will be created at the selected level (below the currently selected folder) on the Categories palette.
4. **Continue creating folders (steps 2 and 3) until all the folders have been created.**
5. **Drag the folders up and down as necessary until the folder hierarchy is as you like it.**

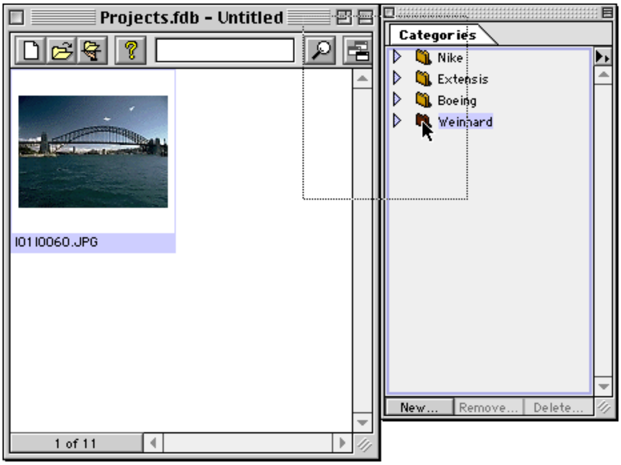
   

   Use the insertion bar to gauge exactly where to drop each folder.

   If you don't care about the hierarchy of submenus, simply drag and drop sub-folders into the appropriate folder.

To link cataloged items to an existing folder:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Locate the item(s) that you want to add to a folder on the palette.**
3. **Select the items, then drag and drop them into the desired folder on the Categories palette.**



The selected Gallery items will be linked to the folder.

— *or* —

3. **Select the items in the Gallery.**
4. **On the Categories palette, select the target folder.**
5. **From the Categories palette fly-out menu, choose "Apply Records to Category."**

   The selected Gallery items will be linked to the folder.

To display cataloged items in a Categories folder:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Double-click the desired folder.**

   Items in the selected folder will be displayed in the Gallery.

To display items in a Category and all sub-categories:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Select the desired category (by highlighting the folder).**
3. **Choose “Show Records in Sub-categories” from the palette fly-out menu.**

   Items in the selected folder and all sub-folders will be displayed in the Gallery.

To remove cataloged items from a Categories folder:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Open a Gallery and select the items that you want to remove from the folder.**
3. **Click the “Remove” button on the Categories palette, , or choose “Remove Records from Category” from the fly-out menu.**

   The selected catalog items will be removed from the folder, but not from the Gallery or Catalog.

To remove a Category:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Select the Category that you want to delete, then click the Delete button at the bottom of the palette, or choose “Delete Category” from the fly-out menu.**

To create a job on disk from your Categories:

1. **Open the desired catalog, then open the Categories palette (Window > Show Categories).**
2. **Select the top-level folder that you want to create the Category from.**
3. **Drag the folder to the Finder (Mac OS) or Explorer (Windows).**

   A dialog will be displayed asking if you want to create one folder for all the items, or if you prefer to maintain the folder hierarchy.

— or —

3. **Choose "Create on Disk..." from the palette fly-out menu, then choose a folder where you want the items to be stored.**
4. **Click "Create one folder" to have all items placed in a single folder, or "Create all folders" to maintain folder hierarchy.**

   A copy of each source file will be placed in the appropriate folder on the disk.

Note

Scripting applies to Portfolio Network and Portfolio Server Editions only.

Scripting

A number of Portfolio commands can be accessed through Scripting.

Macintosh: Portfolio supports AppleScript and any other OSA-compliant scripting language.

Windows: Portfolio supports OLE Automation, which can be accessed by a number of scripting languages such as Visual Basic, Visual C++, Java, etc.

For information and examples on the scripting interface for each platform, refer to the “Scripts” folder on the Extensis CD.

Note: Extensis Technical Support cannot provide instruction on how to use the various scripting languages.

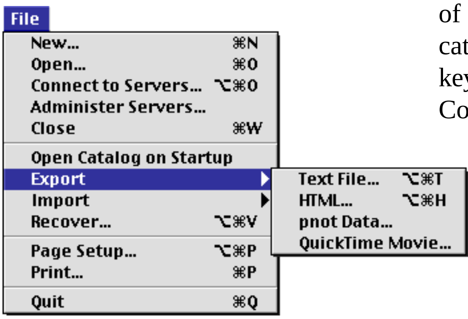
The Scripts Menu

The scripts or applications that you write to automate Portfolio can be conveniently launched from within the catalog using a special Scripts menu. This menu is installed in the Portfolio menu bar when valid scripts are placed in a folder named “Scripts” located in the same folder as the Portfolio application. Scripts and applications located in the Scripts folder are added to the Scripts menu and are available as regular menu commands.

Tip

Mac OS: The Mac OS uses the “-” (dash) character to signify a break in menus. Because of this rule, do not create scripts with a “-” as the first character of the filename.

This feature is particularly useful for creating custom commands for catalog users. For example: A script could be written that takes the currently selected items and adds the current date to a custom “Publish Date” field in each record. By placing this script in the Scripts folder located in the Portfolio application folder, the user can execute the script by selecting it from the Scripts menu, without needing to know anything about scripts. In fact, the menu item would appear to be a built-in function of Portfolio.



This chapter describes how to **Import** field values from a database into Portfolio catalogs, allowing you to automate some of your keyword and field entries, as well as convert existing catalogs into Portfolio catalogs. Data can only be imported into keywords, description, and Custom Fields. Built-in fields, like Color Mode, Created, etc., cannot be changed on importing.

Also covered are Portfolio **Export** functions, which allow you to export catalog data to a text file, to create simple Web pages of catalog items, to export "pnot" data (Macintosh only), and to export Slideshows as QuickTime movies.

Technical Notes About Importing and Exporting

1. URL fields are exported and imported with the import and export fields separated by the Group Separator character (just like keywords—see table on *page 180*).
2. URL fields are special when importing: If the "Replace Multi-valued" checkbox is Off, existing data in a URL field will not be changed by imported data; empty URL fields can still receive data. If the checkbox is On, existing URLs will be replaced as expected with the imported data.
3. Color Mode is exported as a number, not a string, as follows:

Unknown	=	0	
Black & White	=	1	
Grayscale	=	2	
RGB	=	3	
CMYK	=	4	
YUV	=	5	(TIFF; also known as YCbCr)
Lab	=	6	
YCCK	=	7	(JPEG)

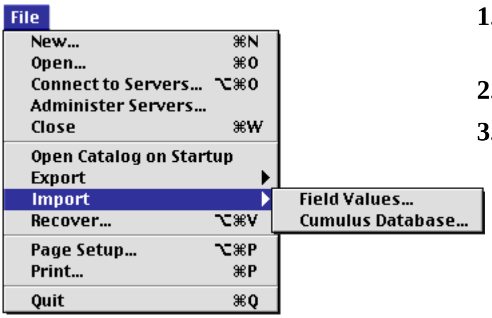
4. Custom Fields of type Date/Time always import/export Time, even if the "Display Time" checkbox is Off. *(See page 209.)*

Using Portfolio's "Import Field Values" you can bring data from an external database into Portfolio by matching fields from the database with fields in Portfolio.

To set up a database file for import into Portfolio, it should be exported as text, with tab delimited fields and carriage return delimited records, and should have field headers included (the first record in the text file is assumed to contain the database field headers and is therefore not imported).

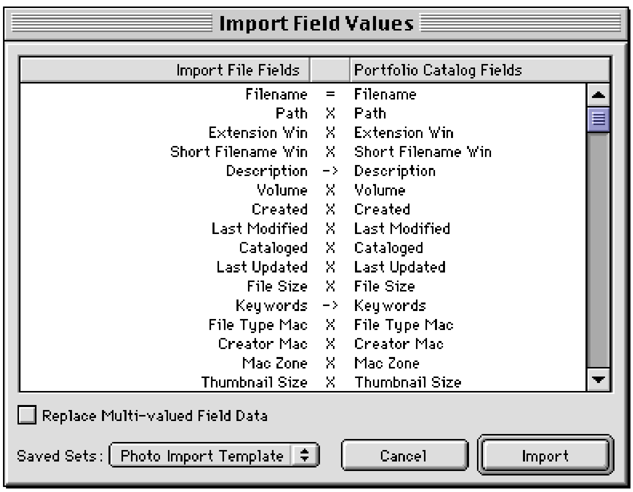
Portfolio should be pre-configured with any required Custom Fields prior to initiating the import. Otherwise, data targeted for Portfolio Custom Fields will not be imported.

To Import Field Values:

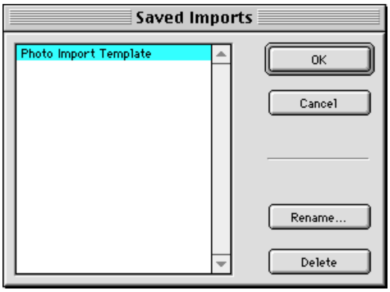


1. **From the File menu in Portfolio, choose Import > Field Values.**
2. **Locate the text file to be imported.**
3. **Match each Import File Field headers from the database (these should be in the first record) with the appropriate Portfolio Catalog Field name.**

   Move the File Fields and Portfolio fields up and down the list to reorder their relative position. Click between the two columns to activate the Import pop-up menu. This allows you to select the appropriate import operator: Key, Import, or Skip.



Symbol	Function	Description
=	Key	Defines the key relationship. The selected Import File Field will be searched for matching values in the Portfolio Catalog Field. Only one Key relationship can be designated for the import.
-->	Import	Indicates that the Import File Field will be imported into the Portfolio Catalog Field indicated to the right of the arrow.
x	Skip	Indicates that the Import File Field will not be imported.



4. When you have finished setting up the import fields, you can save the settings for future use. To do so, select "Save As..." from the Saved Sets pop-up menu.

5. When you are ready to import the database, click "Import."

Portfolio will examine the field value data in Record #2 (the first record with data, since the first record holds the field headers) for appropriate data types by comparing each value in the record with the paired Portfolio field type specified at the start of the import (step 3, *page 179*). If a value does not match, a warning is presented, allowing you to cancel the import.

If all record types match, Portfolio will import the data. As the import progresses, data in any field which does not match the paired Portfolio field type, is skipped.

Replace Multi-valued Field Data

When checked, values imported into a Multi-valued field overwrite the values in the Portfolio record. When unchecked, the values being imported are added to the end of the list in the Portfolio record.

Technical Notes about Importing Text Files

Because the import text file is delimited by tabs between fields and carriage returns between records, make sure your data does not contain either of these characters within a field, as it will cause unexpected results on Importing. Portfolio follows the ASCII standard by recognizing ASCII 11 as the Vertical Tab character. This character should be used to denote a linebreak within a field (such as in a text block like the Description field). Portfolio also recognizes ASCII 29 as the Group Separator character. This character should be used to delimit values within a multi-valued field (such as the Keywords field). If you are exporting multi-line or multi-valued data from other databases, make sure to use these characters. Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

Note

Converting Cumulus Catalogs applies to Portfolio Network and Portfolio Server Editions only.

Converting Cumulus Catalogs (Macintosh)

To import an existing Cumulus catalog you will need to export the catalog database in Cumulus, then import those records into Portfolio.

To convert a Cumulus Catalog:

In Cumulus:

1. **Select the records you want to convert to Portfolio, or choose “Select All” from the Edit menu to select the entire catalog.**
2. **Choose File > Export Record...**
3. **Specify a file name and location where you want to save the Export file.**

In Portfolio:

4. **Either open an existing Portfolio 5.0 catalog, or create a new Portfolio catalog.**

   The import process can import records into either a new or existing catalog.
5. **Select Publisher access level or higher (Catalog > Access > Publisher).**
6. **Choose File > Import > Cumulus Database...**
7. **From the Open file dialog, locate and select the Export file you saved in step 3, then click “Open.”**
8. **Portfolio will display a progress bar while it converts the records into its own format. Note that the original source files do not have to be available during the conversion process.**

Fields from the Cumulus database are imported as indicated in the table on the following page.

Cumulus	➪	Portfolio
Record name	➪	Filename
Notes	➪	Description
Categories	➪	Keywords
File Size	➪	File Size
File	➪	Path
Program	➪	Creator Mac
Type	➪	File Type Mac
Vertical Resolution	➪	Vertical Resolution
Horizontal Resolution	➪	Horizontal Resolution
Height	➪	Height
Width	➪	Width
Created	➪	Created
Modified	➪	Last Modified
Cataloged	➪	Cataloged
Modified (2)	➪	Last Updated
File	➪	Volume

Cumulus Fields not Imported into Portfolio:

- Color Mode (Cumulus' color modes do not match the color modes used by Portfolio)
- Status
- User Name

Additional Notes:

1. The Portfolio field Zone Mac is populated if the path points to a different AppleTalk zone.
2. The Portfolio field Extension Win is generated based on the filename (the same way Portfolio generates it when cataloging).
3. The thumbnail is imported at whatever size it was saved in Cumulus.
4. The Portfolio fields "Thumbnail Size" and "Color Mode" are left blank. To fill in this information, the Portfolio records need to be updated with the Regenerate Thumbnail option enabled. This will also reset the thumbnail to a standard Portfolio size, which could result in space savings in the catalog. See *page 132* for additional information on Updating records.

Export to Text File

You can export your Portfolio catalog data to a text file, and you can specify which fields will be exported and which fields will be skipped. Only data for the selected items in the active Gallery will be exported.

To export catalog fields as text:

1. **In the Gallery window, select the items for which you want to export text data.**

   To select the entire catalog, choose View > Find All [**Command+'** (Mac OS) or **Ctrl+'** (Windows) and then Edit > Select All [**Command+A** (Mac OS) or **Ctrl+A** (Windows)].

2. **Choose Export > Text File... [Command+Option+T** (Mac OS) or **Ctrl+Shift+T** (Windows)].

3. **Click in the left-most column of the Catalog Fields list to enable or disable items from export. A checkmark indicates that the item will be exported.**

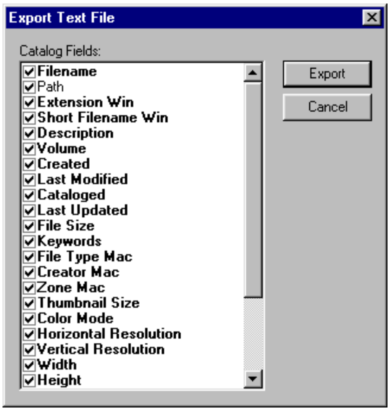
4. **Click "Export."**

5. **Enter a name for the file and indicate the storage location, then click "OK."**

   Portfolio will begin exporting the records and will display a progress bar to keep you posted on its progress. When exporting is complete, you will have a tab-delimited text file containing information from each item record that you selected. In the file, each field within a record is delimited by a tab, and each record is delimited with a carriage return.

Tip

Macintosh: Click and drag in the checkmark column to quickly add or delete checkmarks for multiple entries.



Technical Notes about Exporting Text Files

Because the exported text file is delimited by tabs between fields and carriage returns between records, Portfolio cannot use either of these characters within a field, as it will result in an improperly formatted file.

Therefore, Portfolio follows the ASCII standard by using ASCII 11 as the Vertical Tab character. This character will be used to denote a linebreak within a field (such as in a text block like the Description field). Portfolio also uses ASCII 29 as the Group Separator character. This character will be used to delimit values within a multi-valued field (such as the Keywords field). Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

Tip

For sample templates and more details about Exporting HTML from the Portfolio client, see *“Templates and Macros”* starting on *page 277.*

Export to HTML

The Portfolio Export to HTML function allows you to export catalog items as static Web pages, for posting on a Web Server.

You can specify either that the HTML pages produced will be based on the items and the layout of the currently active Gallery view, or you can specify that Portfolio export the pages using a custom HTML settings file (Template). Information on creating such a template (by directly editing the HTML code) is given in the section *“Exporting HTML Templates,” page 277.*

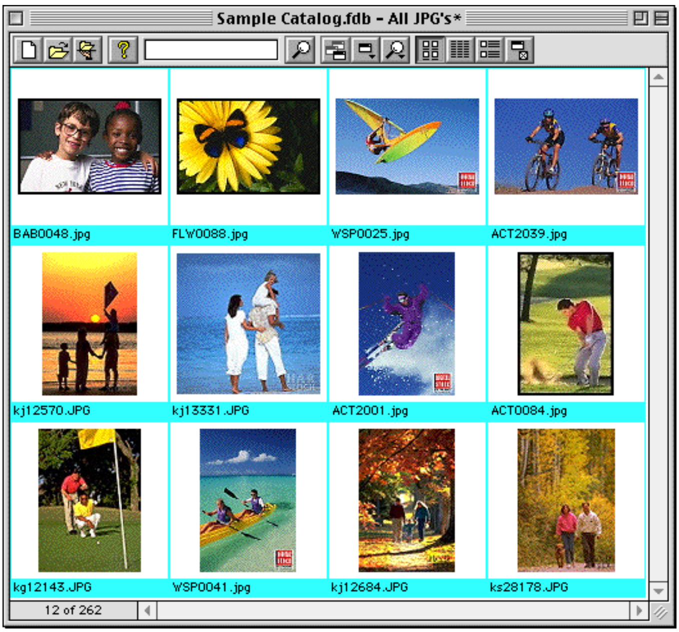
To export catalog items as Web pages just as they appear in the active Gallery:

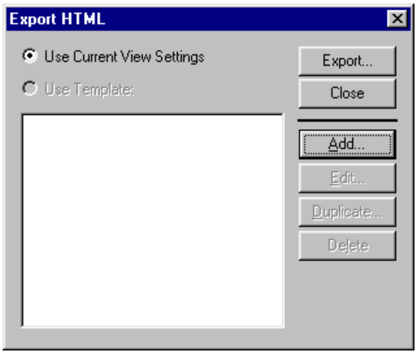
1. **Select the desired Gallery view and customize it so that it looks just like you want it to look when viewed on the Web. Thumbnails are exported in the order that they displayed in the catalog.**

   Portfolio creates the Web page layout with the items positioned just as they are in the Gallery, so you may want to reorder the items to create just the right display.

2. **Select the records that you want to export.**

   You must indicate which items in the Gallery you want to export.



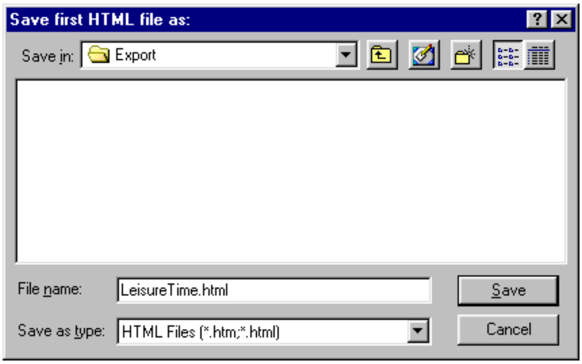


3. **Choose File > Export > HTML [Command+Option+H (Mac OS) or Ctrl+Shift+H (Windows)].**

   The Export HTML dialog will be displayed.

4. **In the Export HTML dialog, choose "Use Current View Settings," then click "Export."**

5. **Portfolio will ask you to enter a file name for the first HTML page, and locate where to save the HTML files that are created.**

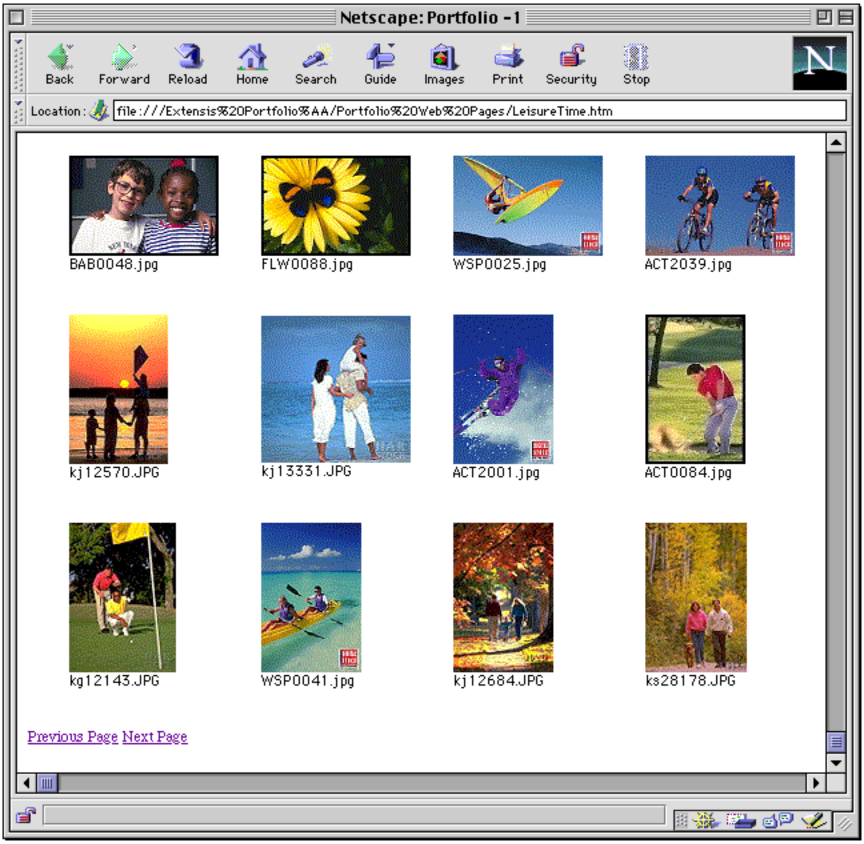


   If more than one page of HTML is required (depending on how many records were selected), Portfolio will generate additional pages and place them in the same location as the first file. All the Web page files will start with the file name you entered, followed by a hyphen ("-") and a number corresponding the page number. For example, if the first file was named "PortWeb.htm", the second file will be named "PortWeb-1.htm," etc.

6. **Click "Save" to start the export process.**

   Portfolio will also create a folder named "Images" at the same location as the Web pages. Portfolio will store JPEG thumbnails of each of the selected items in the Images folder. If any files (either the HTML files or the thumbnail images) already exist in this location, you will be asked whether you want to replace the files or stop the export process.

7. **Open the new Web page(s) in your Web browser to preview the results.**



Portfolio's HTML Export process generates relative links. This allows you to upload the folder of exported items (all the HTML pages and the Images folder) to your Service Provider or to a Web site on your corporate intranet and have the items published without hand-coding any HTML and without manually linking the images and pages. Contact your Internet Service Provider or System Administrator for assistance in uploading and publishing your folder of catalog Web pages.

> **Tip**
>
> See *page 279* for additional Technical Notes about HTML.

Technical Notes about Exporting HTML

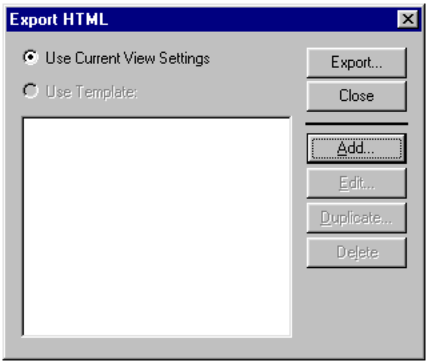
1. Portfolio does not export borders in the HTML documents. Any border settings in the Gallery view will be ignored.
2. Portfolio exports thumbnails at the size they were when cataloged, not at the selected display size in the Gallery window. If the thumbnails in the catalog were stored at different sizes, the HTML output will display the thumbnails at different sizes. It is generally recommended that the exported records all use the same size thumbnails. If you do have thumbnails of different sizes, use the Modification Method "Update Unconditionally" and enable Regenerate Thumbnails (Cataloging Options: Rules tab); this forces the thumbnails to be reset to one size. Be aware that the 256 x 256 thumbnails are roughly four times larger than the 112 x 112 thumbnails, so download times over the Internet could be significantly longer if you use this size, depending on the user's bandwidth.

Creating Catalog Web Pages from an HTML Template

Besides being able to automatically export HTML based on the current Gallery setup, Portfolio can export your catalog items as Web pages using HTML coding that you provide. This gives you great flexibility in creating catalog layouts for the Web.

The HTML information that you enter can be saved as a template. Any HTML Templates that you create are saved within the Portfolio catalog, so you can quickly export any set of records to Web pages using your pre-defined formats at any time.

To export catalog items as Web pages using an HTML Template:

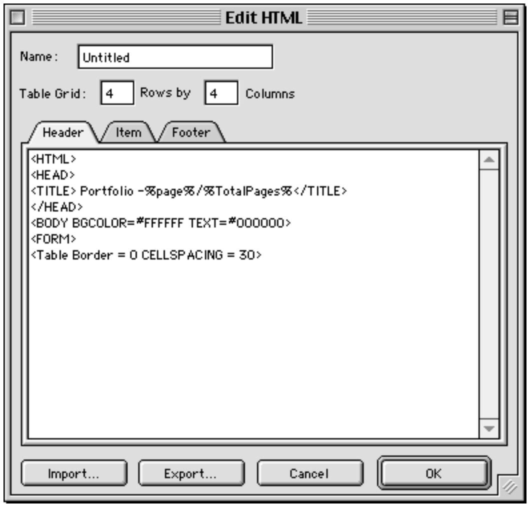


1. **In the active Gallery, select the records that you want to export as Web pages. The records will be exported in the order they are displayed in the gallery, so rearrange the records if desired.**
2. **Select File > Export > HTML [Command+Option+H (Mac OS) or Ctrl+Shift+H (Windows)].**

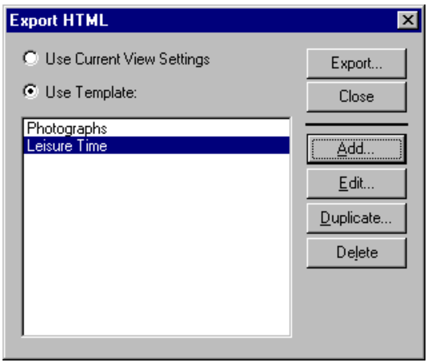
   The Export HTML dialog will be displayed.
3. **In the Export HTML dialog, click "Add..." to create a new HTML Export Template.**

   The Edit HTML dialog will be displayed, showing the HTML codes and tags representing the current Gallery view.
4. **Enter a name for the template.**

5. **In the Table Grid fields, enter the number of rows and columns of thumbnails that you want to display on each page.**



This selection controls how many items fit on a page, and as a result, how many pages are generated for each export based on the number of items you have selected.



6. **Edit the HTML as necessary to produce your desired result. See the following section for details about the three HTML data blocks.**
7. **Click 'OK' to save the Template and return to the Export HTML dialog.**
8. **In the Export HTML dialog, choose the "Use Template" radio button and select your template in the list.**
9. **Click "Export" to generate the Web page(s) based on the information you configured in the template.**

For more information on creating Portfolio HTML templates, see *Templates and Template Macros, page 277*.

Export “pnot” Data (Macintosh only)

The Export “pnot” Data function embeds standard “pnot” resources created in Portfolio, such as keywords and description, directly into each selected item’s source file for use in programs like Photoshop.

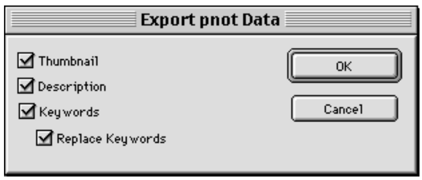
To update item source files with “pnot” data:

1. **Select the items whose source file you want to add “pnot” resources to.**

   Item’s whose source file cannot be found will be skipped.

2. **Choose File > Export > pnot Data...**

3. **Select the data you would like to add to the source files. Options are: Thumbnail, Description, and Keywords.**

   If you select Keywords, you can elect to replace any keywords currently embedded in the item’s source file, or append the keywords to the end of any existing list.

4. **Click “OK.”**

   The data fields you selected will be written to the source files of the selected items.

   When the export has been completed, Portfolio will display a summary of how many records were successfully updated.

For more information on the Macintosh “pnot” resource search Apple’s Developer website at: http://www.apple.com/developer

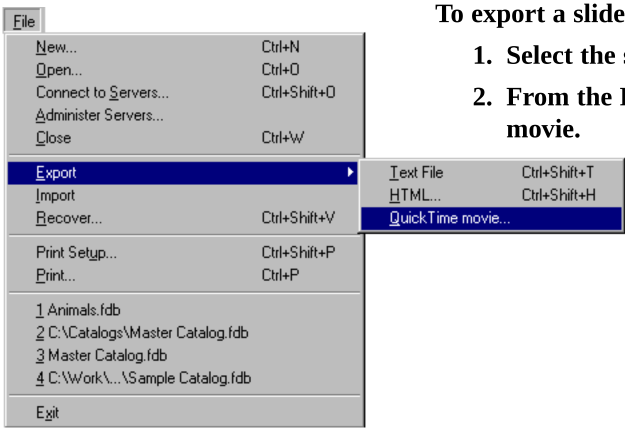
Tips

Before exporting pnot data you may want to select the “Missing Files” command (Catalog > Missing Files) to find and update missing links to ensure that pnot data is exported for all the selected files.

You may also want to verify that the source files you want to add the data to are not stored on a CD or other write-protected volume and therefore cannot be updated with the new data.

Export QuickTime Movie (Mac OS)

The Export QuickTime Movie option exports slideshows from the catalog and saves them in QuickTime movie format. You can specify Transitions for the movie when the slideshow is exported.



To export a slideshow as a QuickTime movie:

1. **Select the slideshow Gallery**
2. **From the File menu, choose Export > QuickTime movie.**

A dialog box will be displayed asking you to enter specifics about the size of the movie.

3. **Set the movie options and Transition Effects as you want them.**
4. **Click "OK."**
5. **You will be asked to name the movie file and specify the location where you want to save it.**
6. **Click "Save."**

Notes: If the original image (the item's source file) cannot be found when the Slideshow is exported, the catalog thumbnail is exported instead. If you export a QuickTime movie file (.mov), the resulting movie file will be blank.

Catalog Administration

> **Tip**
>
> Most of the procedures in this chapter require Administrator level access.

This chapter describes how to maintain Portfolio catalogs and how to use catalog functions in a multi-user environment. For help administering a Portfolio Catalog Server, see *page 221*.

For information on providing access to shared catalogs, see page 235. For information on accessing a Portfolio Server, see page 24.

Catalog Security / Access Levels

Catalog Access Levels

> **Tip**
>
> If you need to know a password for a catalog and are unsure who the Administrator is, select Catalog > Catalog Properties: General, and look for the option "Password set by:"

There are four access levels that can be established for a catalog: Administrator, Publisher, Editor and Reader. Each level can have its own password (Level-based access). Alternately, you can assign an access level and password by individual user (User-based access). Whether you assign passwords by access level or by user, access levels function the same.

Administrator—the highest level access—provides access to all catalog functions, including creating Custom Fields and editing the Master Keyword List. Other users can enter data in Custom Fields that the Administrator creates, and apply keywords to items from the Master Keywords List.

The Administrator is responsible for setting all access level passwords, and Administrator is the only access level that can change passwords. When a catalog is created it is automatically given Administrator level access, so that you will have access to all the features functions necessary to set up the catalog.

Important: A shared catalog cannot be accessed by other users when it is in use by the Administrator. Conversely, you cannot switch to Administrator level if other users have the catalog open. Multiple users can have Administrator access (if they know the password (level-based access) or have permission (user-based access) but only one person at a time can access the catalog when it is in Administrator mode.

> **Tip**
>
> You can change the access level that is set by default when catalogs are opened on your machine. To do so, select Edit > Preferences, then select the desired opening mode access level from the pop-up menu.

Portfolio access levels are inherited; that is, the Administrator level includes the privileges of all other levels (in addition to its other privileges), the Publisher level includes the privileges of the Editor and Reader levels, and so on.

You can change catalog access level by selecting "Access" from the Catalog menu *(page 194)*. To switch to User-based access, choose Catalog > Administration: Passwords tab *(page 199)*.

Catalog Access Levels

Catalog Feature	Reader	Editor	Publisher	Administrator
View a catalog	✓	✓	✓	✓
Search catalog/search multiple	✓	✓	✓	✓
Preview items	✓	✓	✓	✓
Copy item source files	✓	✓	✓	✓
Categories (create on disk)	✓	✓	✓	
Run Slideshows	✓	✓	✓	✓
Slideshow Options (temporary changes)	✓	✓	✓	✓
Digimarc watermarks (read)	✓	✓	✓	
Assign keywords to items		✓	✓	✓
Create and edit thumbnail borders		✓	✓	✓
Edit keywords, descriptions and custom field values		✓	✓	✓
Import field values		✓	✓	✓
Replace field values		✓	✓	✓
Categories (create/delete/rearrange/export/import)		✓	✓	✓
Digimarc watermarks (embed/write to record)		✓	✓	✓
Add items to an existing catalog			✓	✓
Cumulus Database Import			✓	✓
Delete or Rename an item's source file			✓	✓
HTML Export			✓	✓
Move item source files			✓	✓
Placeholder Records Creation			✓	✓
"pnot" data Export			✓	✓
QuickTime Movie Export			✓	✓
Save Galleries			✓	✓
Save Finds			✓	✓
Slideshow Options (make permanent changes)			✓	✓
Text File Export			✓	✓
Update cataloged items			✓	✓
Assign Passwords; Level-based / User-based Access				✓
Define Custom Fields				✓
Disk Preview				✓
Master Keywords List Creation				✓
Startup Options				✓

Level-Based and User-Based Access

Tip

The catalog must be opened and in Administrator mode before you can set passwords (Level-based Access) or add users (User-level Access).

Portfolio 5.0 gives you the option of managing catalog access in one of two ways: Level-based or User-based.

Level-based: Level-based access allows all users to open a catalog in any one of the four levels (Reader, Editor, Publisher, or Administrator) with a single shared password. This is the standard access method available in earlier versions of Portfolio.

User-based: User-based access allows you to assign different access levels and passwords for each individual user.

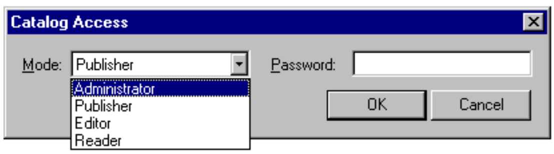
No matter which method is used to manage catalog access, once a catalog is opened, the features available in a particular access level are the same (see table on *page 192*).

Tip

You can set a catalog to open automatically in Administrator mode by setting this option in Preferences (Edit > Preferences: General tab, Default Open Mode).

To open the catalog in Administrator mode:

1. **Open the catalog.**
2. **Choose “Access...” from the Catalog menu [or press Command+Option+B (Mac OS) or Ctrl+Shift+B (Windows)].**
3. **Select “Administrator” from the Mode pop-up menu, then enter the correct password (if a password has been set).**



4. **Click “OK.”**

To change catalog Access Level:

1. **Open the catalog.**
2. **Choose “Access...” from the Catalog menu [or press Command+Option+B (Mac OS) or Ctrl+Shift+B (Windows)].**
3. **Select the desired access level from the Mode pop-up menu, then enter the correct password (if a password has been set).**
4. **Click “OK.”**

   The feature set for the new access level will be engaged (see table on *page 192*).

Catalog Administration—Passwords tab

A Passwords tab: Allows you to add, delete, or modify Access Level passwords or Users for the active catalog.

B Level-based Access: Allows you to set catalog access by level only. All users open catalogs with a shared password. Passwords can be set for each of the four access levels.

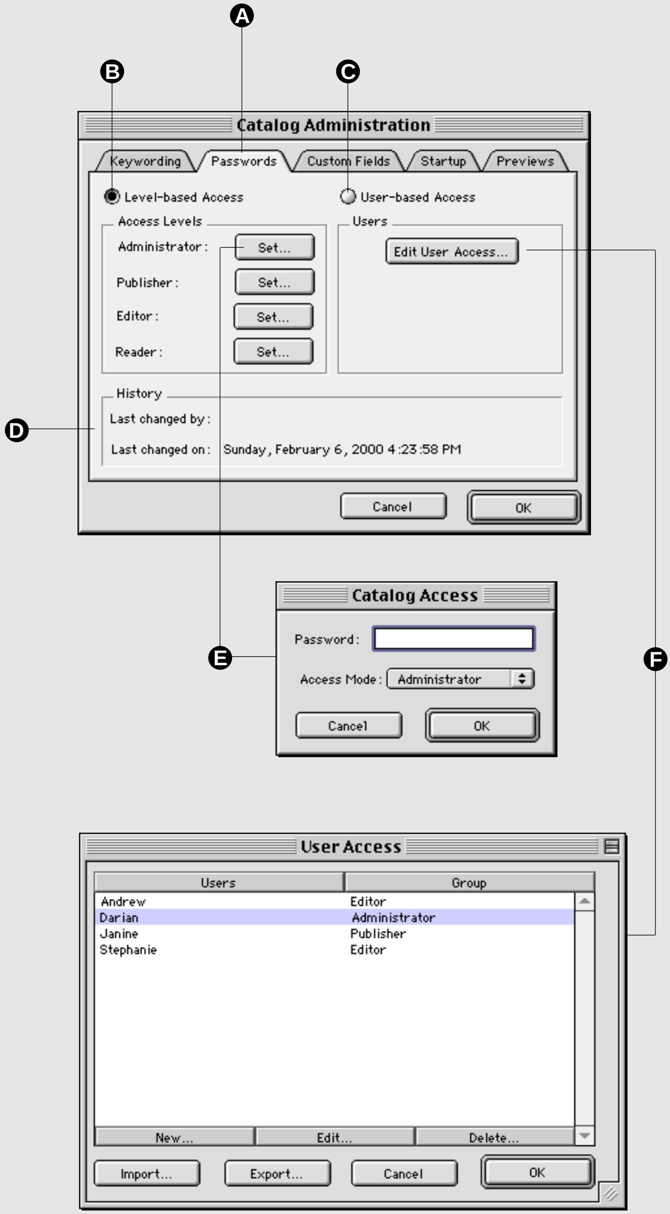
C User-based Access: Allows you to set catalog access for individual users. Each user is assigned their own access level and password.

D History: Indicates Administrator who last changed passwords, and the date and time of the change.

E Set Password (Level-based): Click to set a shared password for each of the four access levels. Listed highest access to lowest: Administrator, Publisher, Editor, Reader.

F Edit User Access (User-based): Click to add or edit users, and set their individual access level and password.

Using either access method (Level-based or User-based), access levels behave the same and are inclusive. For example, to allow a user to have Editor access and Publisher access, give them Publisher permission.



To set either Level-based Access or User-based Access:

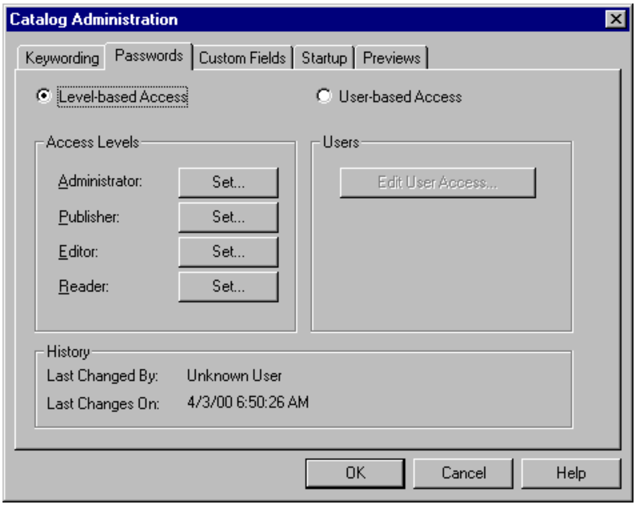
1. **Open the catalog in Administrator mode.**

   Choose “Access...” from the Catalog menu **[Command+Option+B (Mac OS) or Ctrl+Shift+B (Windows)]**.

   Select “Administrator access level,” then enter the correct password (if a password has been set).

2. **Choose Catalog > Administration... [Command+H (Mac OS) or Ctrl+H (Windows)].**

   The Catalog Administration dialog is displayed.



3. **Click either Level-based Access or User-based Access.**

   If Level-based Access is selected, set access level passwords *(page 197)*.

   If User-based Access is selected, add users and set their access level and password *(page 199)*.

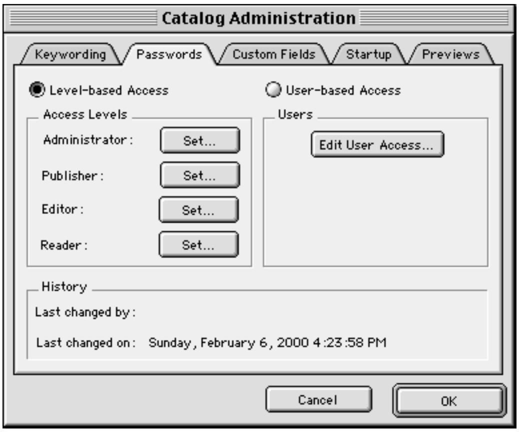
Multiple users can use a catalog simultaneously across a network, within the restrictions of their access privileges. Therefore, password protection is strongly recommended when a catalog is available to multiple users. Protection is not necessary, however, if you are the single user of a catalog on your own computer.

You can set passwords when you first create a catalog, or if you have Administrator privileges for the catalog.

To set or change catalog passwords:

1. **Open the catalog in Administrator mode** ***(page 194)*****.**
2. **Select "Administration..." from the Catalog menu.**

   The Catalog Administration dialog box is displayed.
3. **Click the Passwords tab.**



4. **Verify that the Level-based Access radio button is selected.**
5. **Click "Set Password..." for the desired Access Level.**

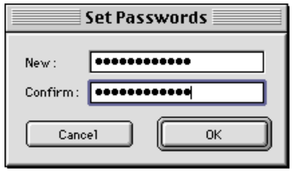
   The "Set Password" dialog box is displayed.

Tip

You can use a higher level password to access all lower levels. For example, if you know the Administrator password, you can enter it to access Publisher level. This is handy if you need to switch out of Administrator mode in order to share the catalog with other users.

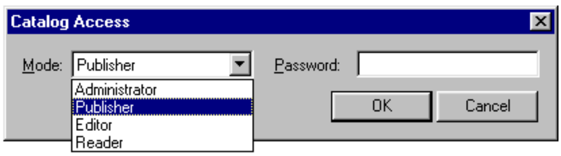
6. **Type the new password in the appropriate text box, type it again in the Confirm box, then click “OK.”**

   Enter the new password in the Confirm field to verify that you entered it correctly. Passwords must be between 4 and 12 characters in length.



7. **Repeat steps 5 and 6 for the other passwords that you want to set.**
8. **Click "OK" to close the Catalog Administration dialog box and save the new password(s).**
9. **Close the catalog and reopen it to put the password(s) into effect.**

   Once a catalog is password-protected with a password for any access level, Passwords access selections are displayed when the catalog is opened. Users can then choose their access level from the Access Mode pop-up menu, enter the correct password and click “OK” to open the catalog.



Note: Even if you set only a Reader password, users logging in as Editor, Publisher, or Administrator will need that Reader password to gain access to the catalog. For example, if you only set an Administrator password, you won’t need to enter a password to access the catalog in other access levels.

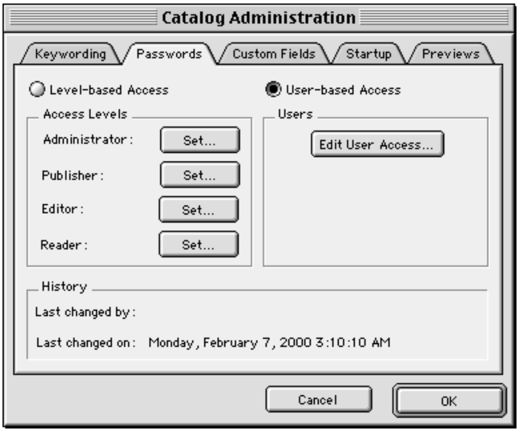
Adding Users and Passwords for User-based Access

Some multi-user environments are better served by providing individual users with their own catalog access level and password, rather than having all users share an access level password. In these situations, User-based Access should be used.

To add individual users and passwords:

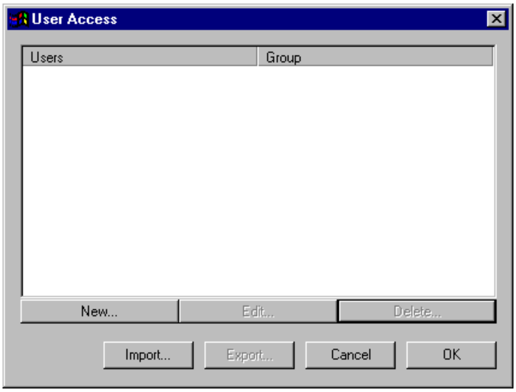
1. **Open the catalog in Administrator mode *(page 194)*.**
2. **Select "Administration..." from the Catalog menu.**

   The Catalog Administration dialog box is displayed.
3. **Click the Passwords tab.**
4. **Click the User-based Access radio button.**

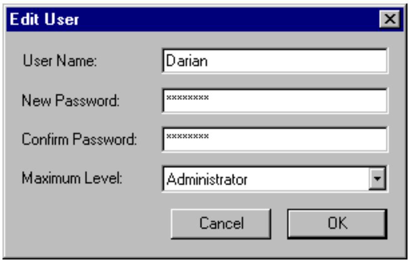


5. **Click "Edit User Access..."**

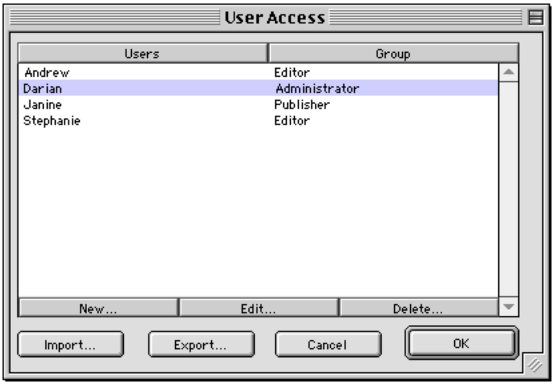
   The User Access dialog box is displayed.



5. **Click “New...”**
6. **Enter the user’s Name, enter and confirm their Password, and select an access level (group) for them from the pop-up menu.**



7. **Click “OK.”**



The new user will appear on the Users and Groups list.

8. **When you have finished adding users, click “OK.”**

Tip

When User-level Access is enabled you must have at least one user with Administrator level permission. If you attempt to close the User Access dialog (OK button) with no Administrator set, a warning dialog will be displayed.

To change individual users and/or passwords:

1. **Open the catalog.**
2. **Select “Administration...” from the Catalog menu.**
3. **Click the Passwords tab.**
4. **Click the User-based Access radio button.**
5. **Click “Edit User Access...”**

   The Users and Groups dialog box is displayed.

6. **Select the desired user, then click “Edit...” or “Delete...” depending on what changes you want to make.**

Importing and Exporting User Lists

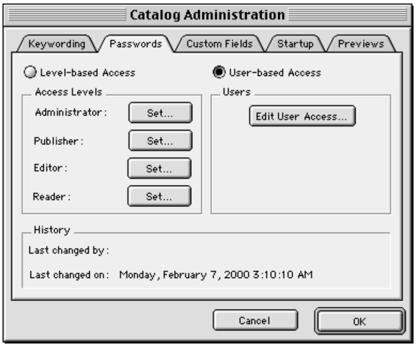
If your users may be accessing multiple catalogs, you can create a Users list in one catalog, then export it for use in other catalogs.

To export a User Access list:

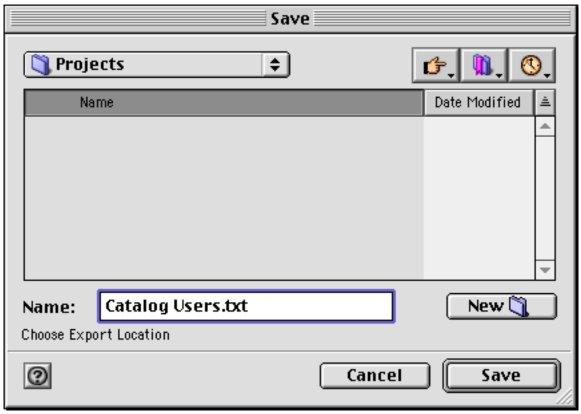
Note: You must add users (page 199) before you have a list to export.

1. **Open the catalog in Administrator mode *(page 194)*.**
2. **Select "Administration..." from the Catalog menu.**

   The Catalog Administration dialog box is displayed.



3. **Click the Passwords tab.**
4. **Under "User-level Access," click "Edit User Access..."**
5. **Click "Export..."**
6. **Enter a name and location for the text file that will be created from the Users list.**



7. **Click "Save."**

To import a Users list:

1. **Open the catalog in Administrator mode *(page 194)*.**
2. **Choose Catalog > Administrator: Passwords tab.**

   The Catalog Administration dialog box is displayed.

3. **Under "User-level Access," click "Edit User Access..."**
4. **Click "Import..."**
5. **Locate and open the text file containing your Portfolio Users and Groups list.**

Creating a Master Keywords List

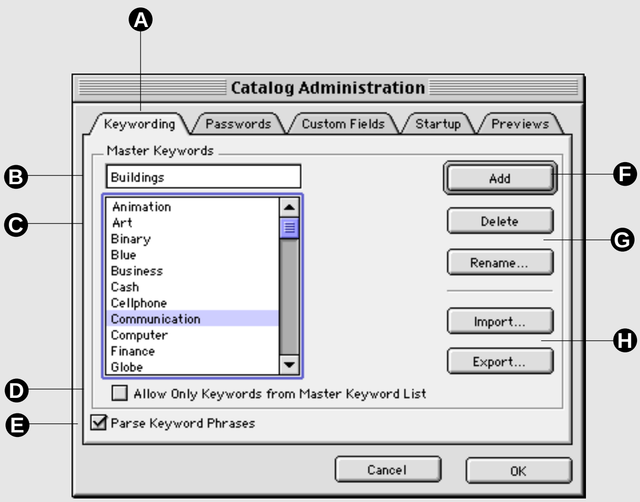
Establishing a Master Keywords list for a catalog can help you maintain consistent keywords among the items in the catalog, or across catalogs. With a Master Keyword list, you can ensure that only the keywords in the list are used in the catalog.

You can enter Master Keywords manually, or you can import them from an existing text file.

Note: Master Keywords are not dynamic. That is, when you change or delete a Master Keyword in the "Catalog Administration" dialog box, that Master Keyword is not automatically changed in any items to which it's been applied.

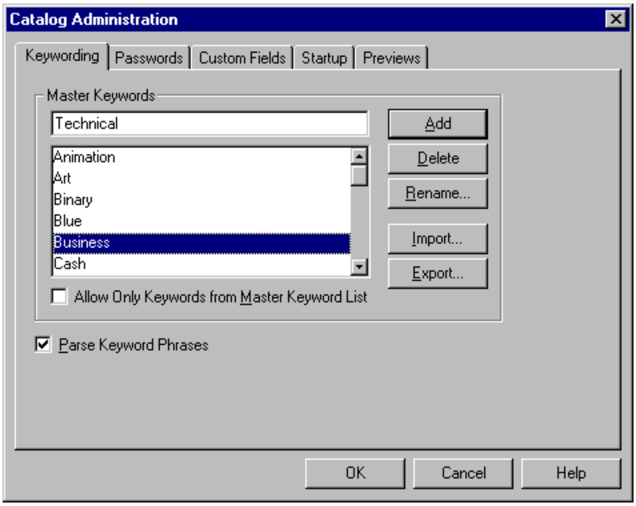
Catalog Administration—Keywording tab

- **A** Keywording tab: Allows you to add items to and edit the Master Keywords list.
- **B** Keyword text box: Type new keywords in the text box.
- **C** Master Keywords list
- **D** Allow Only Keywords from Master Keywords List: Forces users to assign only keywords that appear on the Master Keywords list.
- **E** Parse Keyword Phrases: allows keyword phrases (keywords consisting of more than one word) to be parsed into individual keywords.
- **F** Add: Click here to add the keyword in the keyword text box (**B**) to the list.
- **G** Delete and Rename: Select one or more keywords from the list to Delete. Select keywords one at a time to Rename; the keyword is renamed in the list only—the name change is not applied to catalog items.
- **H** Import and Export: Export Master Keyword list to a text file for importing into another catalog. Import from a text file or Master Keyword list exported from another catalog.



To add keywords to the Master Keywords list:

1. **Choose Catalog > Administration… [Command+H (Mac OS) or Ctrl+H (Windows)].**
2. **Click the Keywording tab to select it.**



3. **Type new keywords into the text box at the top of the dialog, then click “Add.”**

   If you enter a word that is already on the list, the “Add” button will be dimmed.

4. **When you have finished adding Master Keywords, click “OK” to save the changes and close the dialog.**

To Rename or Delete Master Keywords:

1. **Choose Catalog > Administration… [Command+H (Mac OS) or Ctrl+H (Windows)].**
2. **Click the Keywording tab to select it.**
3. **Select the keyword that you want to Rename or Delete, then click the appropriate button.**

   If you selected Rename, enter a new name for the keyword.

4. **When you have finished working with Master Keywords, click “OK” to close the dialog and save the changes.**

   Note: Deleting a keyword from the Master Keyword list does not remove it from any items that have that keyword assigned to them.

Exporting and Importing Keywords

You can export the Master Keywords list from one catalog and import it into another. This is handy if you want to share keywords across multiple catalogs. You can also export the standard keywords from any catalog, import it into the Master Keywords list of another catalog, then work with the list to rename, add, or remove keywords to build a suitable Master Keywords list.

Portfolio exports keywords to a file in which each keyword is delimited by a carriage return, so you can also import lists of Master Keywords from any suitable text file.

To Export a list of Master Keywords:

1. **Open the catalog that contains the Master Keywords that you want to export. You will need to have Administrator access (Catalog > Access).**
2. **Choose Catalog > Administration... [Command+H (Mac OS) or Ctrl+H (Windows)], then select the Keywording tab.**
3. **Click "Export..."**
4. **Specify a name and location for the exported file, then click "Save."**

To Import any list of keywords to the Master Keywords list:

1. **Open the catalog that you want to import the keywords into. You will need to have Administrator access (Catalog > Access).**
2. **Choose Catalog > Administration... [Command+H (Mac OS) or Ctrl+H (Windows)], then select the Keywording tab.**
3. **Click "Import..."**
4. **Locate the file containing the keywords that you want to import, then click "Open."**

   The keywords will be added to the Master Keywords list.

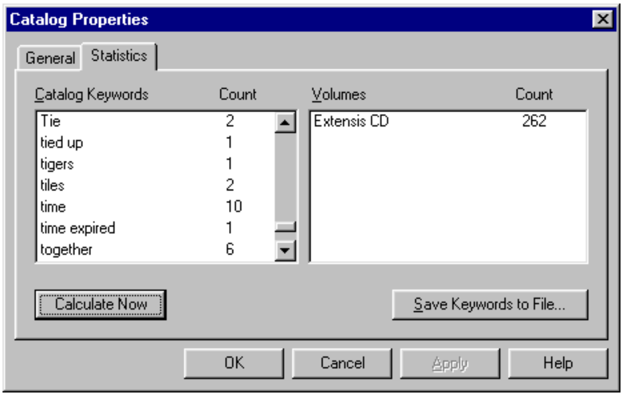
Tip

If you decide you do not want to keep the keywords after they have been imported, click Cancel in the Catalog Administration dialog to close the dialog without saving the imported keyword list.

To Export regular catalog keywords:

1. **Open the catalog that contains the keywords that you want to export. (You do not need any special permissions to export standard keywords).**
2. **Choose Catalog > Catalog Properties... [Command+ Option+J (Mac OS) or Ctrl+Shift+J (Windows)].**
3. **Select the Statistics tab.**

4. **On the Statistics tab, click "Calculate..." (Mac OS) or "Calculate Now" (Windows).**



Portfolio will build a list of catalog keywords. If the catalog has many records, this may take some time.

5. **Click "Export Keywords..."**
6. **Specify a name and location for the exported file, then click "Save."**

   The keywords will be saved to a file in which each keyword is delimited by a carriage return, so that it can be imported into the Master Keywords list of another Portfolio catalog *(see page 204)*.

Parsing Keyword Phrases

Portfolio offers an option that allows keyword phrases (keywords consisting of more than one word) to be parsed into individual keywords. For example, adding the keyword phrase "Mother and child" with keyword phrase parsing on would result in "Mother and child," "Mother," "and," and "child" being added to the item.

The advantage of parsing keyword phrases is it allows the user to do a very fast "Starts with" or "Matches" search on words that would otherwise not be found without using a "contains" search. In the example above, searching on "Starts with child" will only return the item if keyword parsing is on.

To enable or disable keyword phrase parsing: Click this option on the Catalog Administration Keywording tab. The checkmark indicates that parsing is enabled.

Adding Custom Fields

Portfolio Catalogs consist of a number of predefined fields. These system fields, such as Filename, Path, Created and so on, categorize the file information for each item in a catalog, allowing you to search for specific items based on that information.

In addition to the predefined system fields, you can define Custom Fields to hold specialized information about catalog items. For instance, you might want to add a field for Web site URLs to a catalog of GIF files, or a "Photographer" field to a catalog of photographic images.

All fields, including Custom Fields, are indexed.

There are six Custom Field types from from which to choose:

Field Type	Data Example
Date/Time	8/20/98 1:15 pm
Decimal	50.00
Integer	100
String	Text
Text Block	Multiple lines of text
URL	http://www.extensis.com

- **Date/Time:** Enter date and/or 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.
- **Integer:** 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).
- **String:** 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 on Windows and on Mac OS systems with Internet Config properly set up. You can enter any reference in URL format including: http, ftp, telnet, gopher, even local files or applications. This field can be used to allow users to click on a web address to go directly to a specific site; or using a mailto:username@site.com entry, automatically create a mail message addressed to the username@site that you enter.

Tip

Macintosh: Portfolio uses Internet Config (installed with QuickTime 4.0) to determine what application handles the URL type. Refer to your Internet Config documentation for details.

You add data to Custom Fields either by typing it into the item record (Item > Item Properties: Fields tab), by extracting data from the source file and mapping it to the appropriate Custom Field (Catalog > Cataloging Options: Mappings tab), or by importing them (File > Import > Field Values).

Note: When you copy records from one catalog to another, if the catalogs have matching Custom Fields, field data will be copied along with other record data. In other words, if you want to copy Custom Field data from one catalog to another, you must create identical Custom Fields in each one.

Catalog Administration—Custom Fields

A Custom Fields tab: Allows you to add, delete, or modify Custom Fields.

B Custom Fields list

C Add: Click to access the Custom Fields Definition dialog to add and define Custom Fields.

D Edit: Select a Custom Field from the list, then click here to access the Custom Fields Definition dialog to edit the selected Custom Field.

E Delete: Select a Custom Field from the list, then click here to Delete it.

F Name: Enter a name for the Custom Field, or change the name of an existing field.

G Type: Select the type of field. See *pages 209 through 212.*

H Length: Allows you to enter a maximum string length (*page 209).*

I Multiple Values: Click to allow the field to contain multiple values.

J Predefined List: Click to indicate that the field will include a predefined list.

K Edit List: Click to open the Edit Custom List dialog.

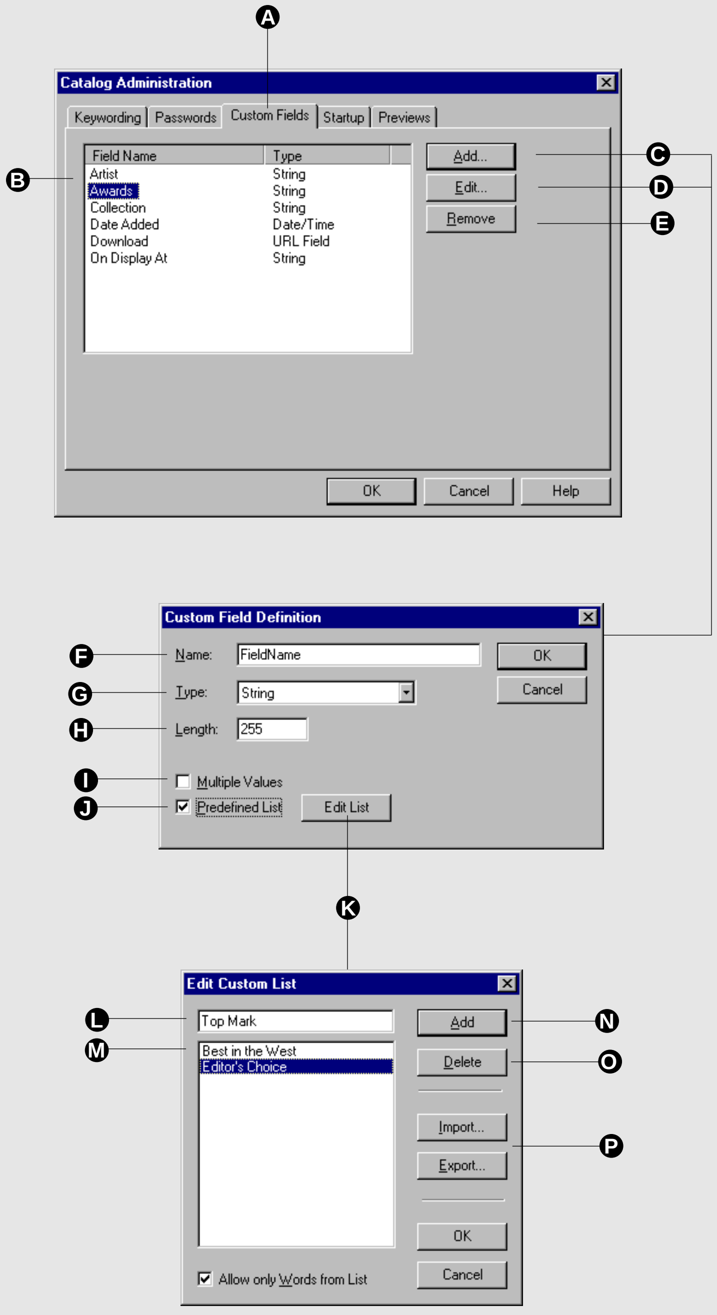
L Entry Box: Enter field list values one at a time in the text box, then click "Add" to add it to the list.

M Field data list: Displays the predefined data list for the selected Custom Field.

N Add: Click to add the value entered in the text box (**L**) to the predefined data list.

O Delete: Select one or more names (Mac OS) or individual names (Windows) from the predefined data list (**M**) that you want to remove from the list, then click Delete. The names are removed from the Predefined Data list, but not from any items that they have been assigned to.

P Import and Export: Export the Predefined Data list to a text file for importing into another catalog. Import from a text file or Predefined Data list exported from another catalog

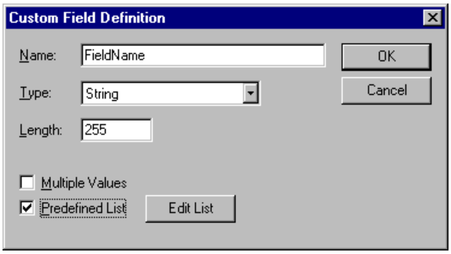


To add Custom Fields to a catalog:

Note: Once a Custom Field has been created and added to the catalog's Custom Fields list, only the field Name, Display Time (Date/Time fields only), Text Block, and Predefined List options can be changed.

1. **Open the catalog in Administrator mode *(page 194)*.**
2. **Choose Catalog > Administration... [Command+H (Mac OS) or Ctrl+H (Windows)].**
3. **Select the Custom Fields tab.**
4. **Click "Add..."**

   The "Custom Field Definition" dialog box is displayed.



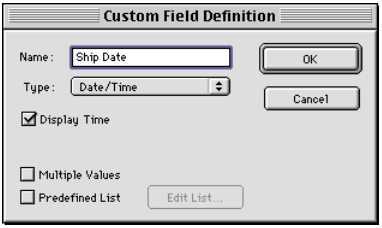
4. **Enter a name for the field in the "Name:" text box.**
5. **Choose the field type from the "Type:" pop-up menu.**

   The field type determines the values that can be entered into this field. *(See page 209.)* Field types cannot be changed once they are defined.
6. **Select the appropriate remaining options for the field type you selected, then click "OK" to return to the Custom Fields tab.**
7. **When you have finished adding Custom Fields, click "OK" to close the Catalog Administration dialog and save changes made on any of the tabs.**

   For more information on setting up each Custom Field type, see *pages 209 through 211*.

Custom Field Restrictions

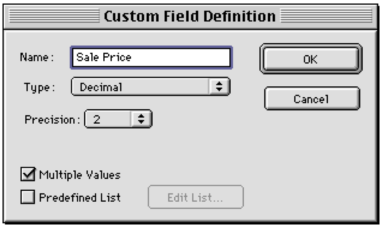
1. URL fields cannot be set up with a predefined list.
2. URL fields cannot have multiple values.
3. URL fields must have both title and URL fields filled.



Date/Time

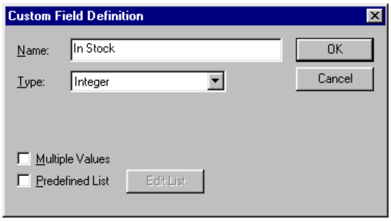
This field type allows you to enter date and/or time values into your records. You can elect to have Time values not displayed by deselecting the “Display Time” option in the Date/Time Custom Field Definition dialog. Date/Time fields include multiple values, and/or be configured as a predefined list.

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 turning off “Display Time,” the time will still be noted by Portfolio when a search is generated. For example: Searching for “5/20/98” will not find a record which contains “5/20/98 3:00 pm” because the request is interpreted as “5/20/98 12:00:00.” This is true even if the time is not being displayed.



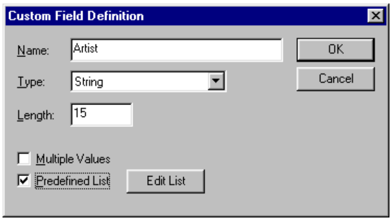
Decimal

This field type allows you to enter decimal point numeric values with a precision up to 8 decimal points. Decimal fields can include multiple values, and/or be configured as a predefined list. To set the Precision, select it from the pop-up.



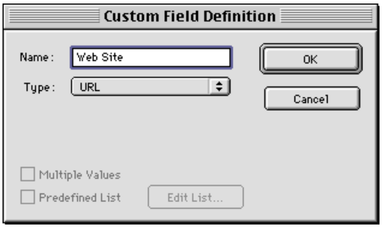
Integer

This field type allows you to enter regular numeric values. Integer fields include multiple values, and/or can be configured as a predefined list.



String

This field type allows you to enter single line text values. You can specify a maximum string length for the field by entering the number of allowable characters in the Length text box. The data in a String Field can be from 1 to 249 characters long, and include multiple values, and/or be configured as a predefined list. String fields cannot contain multi-lined text (see *Text Blocks* on *page 212*).



URL

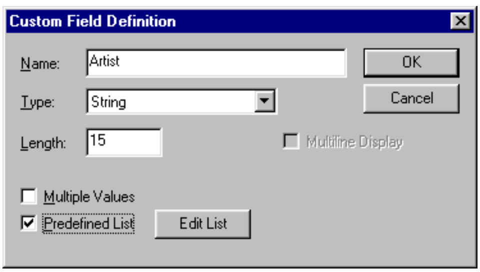
This field type allows you to enter Web and other URL addresses. If the syntax is correct for a URL, the data will become an active hyperlink on Windows, and on Mac OS systems with Internet Config properly set up. To create an active link, enter any reference in URL format including: http, ftp, telnet, gopher, even local files or applications. Typically URL data might look like: http://www.extensis.com; ftp://ftp.extensis.com/pub/file1.zip; http://www.extensis.com/buynow/cgi?sku=012345; mailto:username@extensis.com.

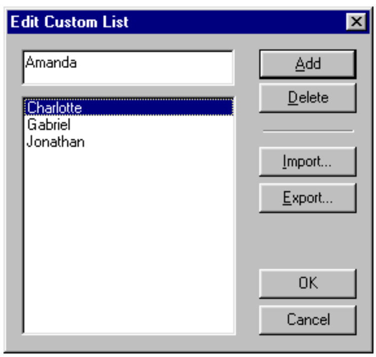
When you edit a URL to add data to it (Item > Item Properties) the Title that you enter is displayed in the record and becomes the active link (Portfolio links the Title to the actual URL in the URL field). You can give the URL any Title you like—the Title does not need to refer to the actual URL.

Note: When importing data into a URL field (Import > Field Values), Portfolio treats the URL field as a multi-valued field with two values. The first value is the Title and the second value is the URL address. If you wish to import URLs into Portfolio they must conform to this format. Portfolio follows the same formatting when exporting URL data. For more information on importing field values, see page 179.

Predefined Lists

You can create Predefined Lists of items for your Custom Fields. By predefining field entry data you can provide master lists of data that users can select from when entering data in Custom Fields *(Master Palettes, page 156)*. All of the Custom Field types except URL and Text Block can be set up with a predefined list.

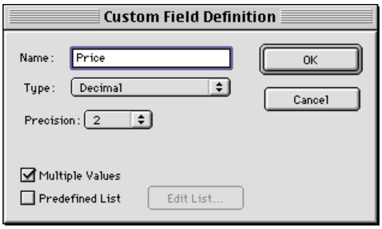


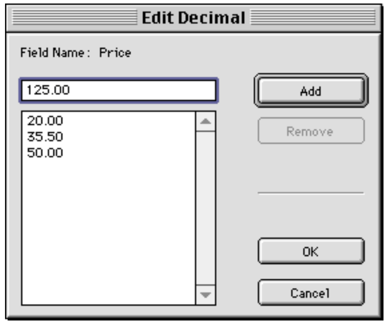


Like the Master Keywords list, predefined Custom Field values accessed from Master Palettes ensures that the exact same data is entered in the data field every time. For example, you might want to create a list of your standard vendors and enter the appropriate vendor name to an item's record by selecting it from the list. Deleting an item from a predefined list does not delete it from items that have that data assigned.

Multiple Value Lists

Multi-value lists allow you to specify Custom Fields that can contain more than one value. Keywords is an example, but you might want to define other multi-value lists, such as multiple vendor names or multiple item pricing.





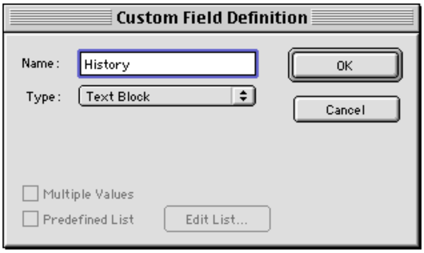
To set up a Custom Field with Multiple Values: Open the Custom Fields Definition dialog (Catalog > Administration: Custom Fields tab and click "Add"). Choose any field type except URL or Text Block, then click "Multiple Values."

As with all Custom Fields, you add data to the list of values by typing it into the item record (Item > Item Properties: Fields tab), by extracting data from the source file and mapping it to the appropriate Custom Field (Catalog > Cataloging Options: Mappings tab), or by importing it (File > Import > Field Values.)

You can specify how many lines are made available to display the multiple value data in Record view (View > Customize: Record tab). In the Record tab Fields List, fields that have (or can have) multiple lines of data display a number in the right-most column *(see (**P**) on page 101)*. To change the number of display lines, select a number from the Display Fields pop-up (Macintosh) or enter a number in the Edit String dialog (Windows). If no additional lines have been selected, this number defaults to 1.

Text Block

Text Blocks are multi-lined fields that can be any length up to 32K. This field type allows you to add lengthy lines of text to records (that is, you can include line breaks or carriage returns in these fields).



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.

To add text to a Text Block field, open a Gallery and select the desired catalog item. Then choose Item > Item Properties. Click the Fields tab. On the Fields list, select the Text Block field that you want to edit. Click "Edit." A dialog box will be displayed where you can enter text.

Or you could enable Record View and edit the field directly (be sure to show the field in this view in the Catalog Options dialog). See *page 160* for more information on adding information to Custom Fields.

Note: When editing a Text Block Custom Field in Record view, a maximum of 20 lines can be viewed at one time.

Setting Catalog Startup Options

The Startup Options allow you to determine which, if any, processes will be run automatically when the catalog is opened. Options are:

- Open Find Dialog
- Open MKL (Master Keywords List) Palette
- Run Slideshow
- Display Custom Splashscreen
- Disable Link to Original

Note: Large splashscreens add to catalog size and can take a long time to load. It's good practice to size your splashscreen so that it is no larger than the screen.

Catalog Administration—Startup tab

A Startup tab: Allows you to determine which, if any, processes are run automatically when the catalog is opened.

B Open Find Dialog: Automatically opens the Find dialog when the catalog is opened.

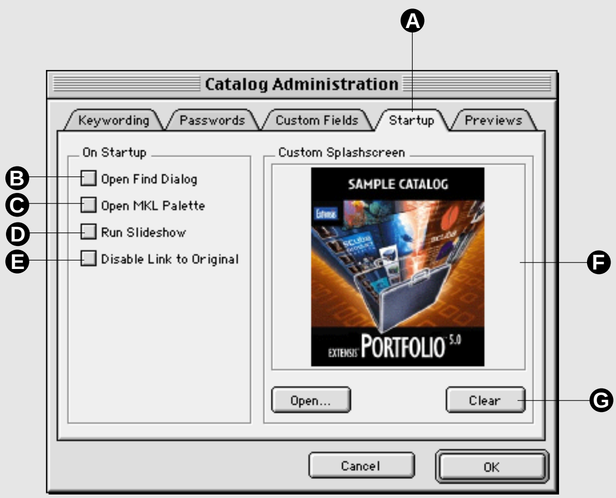
C Open MKL Palette: Automatically opens the Master Keywords List Palette when the catalog is opened. Handy if you publish catalogs and want to present the Master Keywords palette automatically to your users.

D Run Slideshow: Opens the catalog and automatically initiates a Slideshow based on the items in the active Gallery and the Slideshow Options. *See page 109 for more information on slideshows.*

E Disable Link to Original: Disables the ability to preview the original image. This is useful when you are distributing a catalog to clients without the source files.

F Custom Splashscreen: Import a JPEG file to be displayed when the catalog is opened. If an image appears here, it is automatically displayed for 4 seconds when the catalog is opened.

G Open and Clear: Use these buttons to Open a JPEG file to be used as the Catalog Splashscreen. Click Clear to remove the image and open the catalog without a Splashscreen.



Setting Preview Options (Disk Preview)

Notes

The Preview directory must be accessible to all users.

Selecting a higher quality preview JPEG will result in larger files being created.

Tip

Do not select the same folder for both Disk Previews and Background Cataloging *(page 126)*. Doing so will cause Background Cataloging to fail.

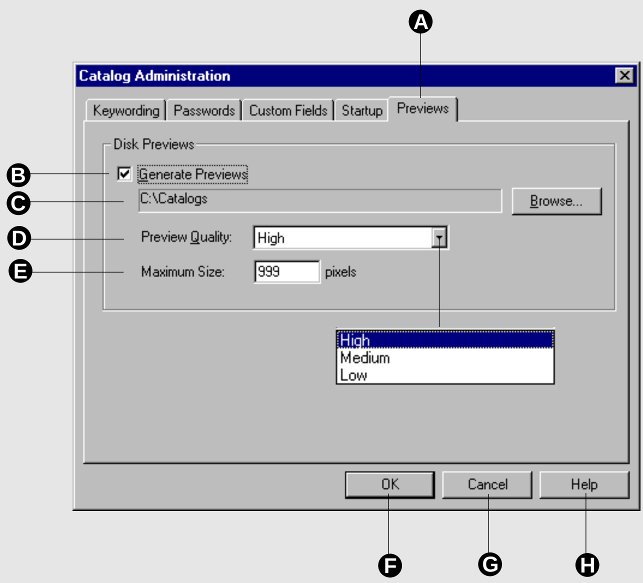
When the “generate Previews” option is enabled, Portfolio will create full-sized 72-dpi JPEG preview images when items are cataloged. Previews are stored in a folder you designate, which can be on a local device, or on a file server. This means you can have the item source files anywhere—even offline (such as on a CD)—and users will still be able to preview the items. Additionally, having larger Preview files available on disk can make opening image Preview dialogs *(page 76)* much faster.

Multimedia files (movies, sounds, etc.) and files that cannot have thumbnails generated will not have Previews generated. If Generate Preview is enabled, Portfolio will always attempt to *generate* a Thumbnail and Preview (thumbnails will not be *extracted*). The Preview for multi-page items will be generated from the first page. You can also designate the quality of the JPEG Preview, either High, Medium, or Low.

To prevent excessively large disk files from previews, the maximum size of the long side of a preview image is 1000 pixels. You can set the Maximum Size to any value between 100 and 1000.

Catalog Administration—Previews tab

- **A** Previews tab: Allows you to enable generation of full-sized JPEG previews during cataloging.
- **B** Generate Previews: Checkmark indicates that preview generation is enabled.
- **C** Location: Click to locate the folder where previews will be stored. This can be a local device or network server. For multi-user catalogs, the Previews directory should be placed in a location accessible to all users.
- **D** Preview Quality: Determines the quality of the created JPEG preview. Options are: High, Medium, Low.
- **E** Max Size: Sets the maximum size of the preview. Enter a value between 100 pixels and 1000 pixels.
- **F** OK: Click to accept the settings and close the dialog.
- **G** Cancel: Click to close the dialog without making any changes.
- **H** Help: Click to open web help.



Catalogs—especially large ones—that are heavily used and frequently updated can become out-of-date. In addition to routinely backing up all catalogs and source files (and keeping the backups in a safe place), it is a good idea to perform other housecleaning tasks regularly as well. Portfolio provides the catalog manager or administrator with tools that can help with routine catalog maintenance.

Exporting catalogs as text files: See *page 184.*

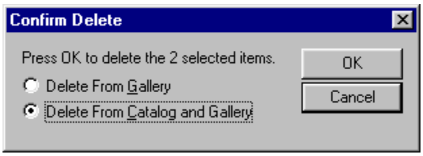
Removing Items from a Catalog

The "Delete Items..." command lets you clear a catalog of unwanted or out-of-date items or references.

To remove specific items from a catalog:

1. **In the catalog Gallery window, select the items that you want to delete.**
2. **Select "Delete Items..." from the Catalog menu.**

   The "Delete Items" dialog box is displayed.



3. **Select "Delete from Catalog" (Mac OS) or "Delete from Catalog and Gallery" (Windows), then click "OK."**

   Note: Select "Delete from Gallery" if you want to remove the item from the Gallery window only; the item remains in the catalog when you click "OK."

— or —

1. **In the Gallery window select the items that you delete and press Option+Delete (Mac OS) or Ctrl+Backspace (Windows).**

Checking for Missing Files

You can easily determine if any file references in a Portfolio catalog are no longer valid using the "Missing Files..." command [Choose Catalog > Missing Items, or press **Command+ Option+M** (Mac OS) or **Ctrl+Shift+M** (Windows)]. Portfolio only checks for missing files on mounted volumes. See *page 125* for more information on the Missing Files command.

Recovering Damaged Catalogs

Should you ever have trouble opening a Portfolio catalog and suspect that it may have been damaged, you may be able to recover it using the Recover command. Another time to run the Recovery command is when you experience crashes when sorting or searching on a particular field.

To Recover a catalog:

1. **Close the catalog that you want to recover.**

   You cannot run the Recovery command on an open catalog.

2. **Choose "Recover..." from the File menu, or press Command+Option+V (Mac OS) or Ctrl+Shift+V (Windows).**

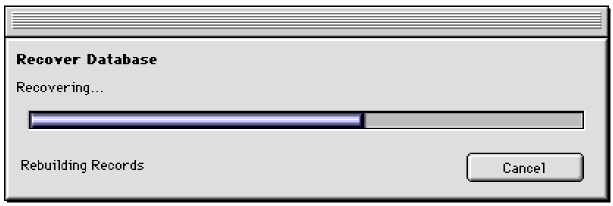
   A directory dialog box is displayed.

3. **Locate the catalog you want to recover, then click "Open."**

   A second directory dialog box is displayed.

4. **Type a new name for the recovered catalog, select where you want to save it, then click "Save."**

   A progress window is displayed as Portfolio checks the catalog and attempts to repair the damage.



5. **When the completed status report is displayed, click "OK."**

   Open the recovered catalog to verify that all the items are intact.

Note

This section applies to Portfolio Network and Portfolio Server Editions only.

Tip

If someone deletes an item from a multiuser catalog and that item is in one or more of your saved Galleries, an "Item Deleted" icon appears in place of the item thumbnail. Choose "Refresh" from the Catalog menu to remove these icons from the Gallery, then resave the Gallery.

Tip

In cross-platform environments, be sure that network server and volume names are the same for each platform. This allows Portfolio to locate files between platforms.

Using Portfolio on a Network

A single Portfolio catalog can contain references to source files on multiple hard disks, network servers, CD-ROM discs, or removable disks, whether these media are mounted or not. When Portfolio needs to retrieve a source file that resides on a network volume, it automatically mounts that volume, prompting for a volume password when required.

If a source file is stored on removable media, such as floppy disks or CD-ROMs, Portfolio prompts for the disk by name. Portfolio also prompts for source files that have been moved or renamed.

Shared Catalogs

Portfolio provides two ways to share catalogs in a multi-user, networked environment:

Filesharing: Filesharing uses standard system networking to share catalogs on either a dedicated file server somewhere or on a user's computer (provided that filesharing is turned on). Users connect to these catalogs by choosing Open, navigating to the particular volume, and selecting the catalog itself. Each user's Portfolio application (client) intelligently sets flags within the catalog file itself to control things such as when other users are allowed to access the catalog, and when other users should be blocked from writing to a particular record. For example, when one user writes to a record, other users accessing the catalog are blocked from writing to that record. Filesharing does not require the addition of Portfolio Server software, but fewer users can access catalogs simultaneously. Catalog operations like searching are much slower than with Portfolio Server software installed.

Client/Server: In this networking scheme, special Portfolio Server software is used to manage catalogs on a Windows NT or Mac OS server machine. The Portfolio Server application opens the catalogs, and monitors the network for clients. End-users, running standard Portfolio application software (client), access the Server using the "Connect to Server" command. Once connected to the server users can select catalogs to open. The server software then controls all catalog access. Portfolio Server software allows a larger number of simultaneous users, and most catalog operations are performed significantly faster. *Note: The number of users permitted to connect simultaneously is set by the multi-user license agreement. Additional connection requests will be refused by the Portfolio Server when this limit is reached.*

SQL Server: Using Portfolio SQL server software you can keep catalogs on your SQL server and access them from the Portfolio client. This provides all of the advantages of using Portfolio to manage your catalogs, but keep the data on your SQL Server. SQL Server software is sold separately.

Network Security Protection

Your organization is authorized to use as many copies of Portfolio as designated in your site license agreement. When you run Portfolio on a network, the application checks the network to see how many copies of Portfolio with the same serial number are running. If the program finds that more duplicate serial numbers are in use than are in the site license agreement, an alert box appears. Click "OK" to close the alert box. Another user must quit Portfolio before you can launch the copy that you want to use.

If you did not purchase a Portfolio site license, only one copy of Portfolio per serial number may be in use on your network.

Filesharing Network Concerns

In a typical network scenario, many users would open Portfolio, locate items they want, and leave Portfolio running in the background while they switch to other applications to edit source files, work on other documents, read e-mail, and so forth. Meanwhile, at any given time, only some of those users would be actively using the catalog to search for and preview items they might be interested in, while fewer still might be adding or updating items, keywords, or descriptions.

The greater the number of users who have a catalog open, the slower individual searches will be, depending on what tasks the users are performing in Portfolio. The speed of the network and computer can also affect the performance of Portfolio.

If you want to limit who can write to or read from a catalog, you can set passwords as described in *"Catalog Access Levels"* on *page 194*. Whether or not your catalog is password-protected, it is essential that you set up the necessary network access conditions.

If you are experiencing performance problems in a multi-user network environment, your situation may benefit from installing a Portfolio Server to manage catalog access.

Managing Source Files

There are many ways to organize the source files for items in a Portfolio catalog. Each strategy has advantages and disadvantages, but considering the options and planning ahead can save you time in the long run and significantly increase Portfolio's usefulness to you and your workgroup.

One of the key benefits of using Portfolio is that you do not need to remember where a source file is located or what it is called. However, because Portfolio can use filenames, folder names, or entire pathnames as keywords, and because you can then use those keywords to help in searching, a rational plan for naming and organizing files and folders is helpful.

Each workgroup must ultimately decide what works best for its own situation based on how the group works and how work flows through it. Here are a few suggestions that might help in your planning.

Organizing Source Files

One of the most obvious ways to organize files into folders is to set up a series of folders for each project, client, or category (for example, travel, business or architecture). Within a folder, use subfolders to partition related files appropriately.

Another approach is to organize files into folders by file type, by parent application, or by department of origin (for example, Marketing, Sales or Publications).

Once you've organized your files into folders, it's easy to include the files into Portfolio catalogs.

Naming Source Files

Use naming and organizing strategies together to make the most of keyword searching in Portfolio. Once you have decided how to organize your files, consider the following alternatives for naming them:

- Use file extensions to indicate file type. This is very important when using Portfolio in a cross-platform environment, where you'll want to keep Windows file naming restrictions in mind when naming Macintosh files and vice versa.
- Use number or alphabetic prefixes to help sort items in ways that matter for the kinds of files you use. For example, you might use frame numbers for images from a single photo shoot or counter or time code readings for sounds, movies, or images digitized from video or audio tape.

Note

This section applies to Portfolio Network and Portfolio Server Editions only.

Administering Served Catalogs

Catalog Administration is a single-user function. That is, a catalog that is open in Administrator mode cannot be opened by anyone else.

On the Portfolio Server, where catalogs are shared with other users simultaneously, this means that others will not be able to access the catalog while you are using it in Administration mode. When you open a catalog as the Administrator, all other users are locked out.

If other users have the catalog open when you change to Administrator mode, they will be logged off immediately. To prevent this from happening, we suggest that you use options in the Server Administration dialog *(page 224)* to give users a time period in which to log themselves off (by closing the catalog), or give them a time period after which they will be logged off.

To prevent users from being logged off inadvertently, a served catalog cannot be opened in Administrator mode, even if you set "Default Open Mode = Administrator" in Edit > Preferences. In this case, the catalog will default to Publisher mode when it opens. You can then alert your users and switch to Administrator mode (Catalog > Access).

While you have the catalog open in Administrator mode it will not appear on the "Connect to Servers" dialog for other users even though the catalog is still being served. To release the catalog for other users, either close it or change to a different access mode (Publisher, Editor, Reader).

For additional information on setting up catalogs on a Portfolio Server, see *"Server Administration"* starting on *page 221*.

Server Administration

> **Note**
>
> This section applies to Portfolio Network and Portfolio Server Editions only.

> **Tip**
>
> For information on administering an SQL Connect, see *page 266*.

The Portfolio Server is a powerful catalog server, allowing access to Portfolio catalogs using standard Portfolio 5.0 application software. Unlike typical server applications however, the Portfolio Server is easy to set up and use, and requires almost no maintenance.

While standard Portfolio 5.0 application software is capable of providing access to shared catalogs through standard system filesharing, the Portfolio Server provides superior performance in multi-user situations. Using the Portfolio Server instead of regular system networking yields:

- Increased performance in a networked environment
- Increased number of simultaneous connections
- Connection to Portfolio SQL Connect *(page 266)* (software sold separately)

With Portfolio Server you can:

- Connect remotely to the server (using TCP/IP)
- Manage the Server and Catalogs from the standard Portfolio 5.0 application (client)
- Keep Catalogs open on the Server while they are being administered

Note: Instructions on creating and administering Portfolio catalogs for access from a web server (PortWeb) start on page 236.

Server Administration versus Catalog Administration

When using the Portfolio 5.0 application in conjunction with the Portfolio Server, two different types of Administration are available:

Server Administration: The Server Administrator has permission to administer the Portfolio Server. In addition, the Server Administrator creates, opens, and closes Catalogs on the Server. Client access is added through adding special multi-user serial numbers to the Server. Server Administrator duties are described in this section.

Catalog Administration: The Catalog Administrator has permission to access Administrator level functions for particular Catalog(s). Catalog Administration is discussed starting on *page 192*.

System Requirements

Windows:
- Pentium PC (233 MHz or faster recommended)
- Microsoft Windows NT 4.0 or higher (Server or Workstation)
- 32MB RAM (64MB RAM or more recommended)
- TCP/IP Services installed
- For optional SQL Connect requirements, see *page 266*

Mac OS:
- Power PC
- Mac OS 8.1 or higher
- 32MB RAM (64MB RAM or more recommended)
- TCP/IP Services installed

Server hardware requirements are based on performance. The Server will function on any WinNT 4.0 system, but performance will probably be unacceptable if used with any system below the listed requirements. In addition, the Portfolio Server software will normally benefit a great deal from a faster processor, more physical memory, multiple processors, faster network connections, and faster hard drives (such as Ultrawide SCSI drives).

Note: Extensis does not provide Technical Support for configuring TCP/IP Services, setting up DNS services, configuring a firewall, or other networking issues. For assistance with these issues, please consult your System Administrator or the product vendor's technical support.

Installing the Server

Installing the Portfolio Server is quick and easy. Simply launch the installer and allow it to guide you.

The Portfolio Server application has no interface itself; access to Server features is handled through standard Portfolio 5.0 application software. *Note: On Windows NT, the Portfolio Server is a system service. This service must be started on the Server before it will be active. To do so, open the "Services" Control Panel. Select "Portfolio Server" from the list and click "Start."*

To access a Portfolio Server: Open the Portfolio 5.0 application. From the File menu choose "Administer Servers..." Select a Server, then click "Administer." From the Administer Services dialog you can add and administer one or more Portfolio Servers (see *page 223*).

Tip

Before you can perform any Portfolio Server Administration operations, the Portfolio 5.0 Server software must running on the server machine, and the Portfolio 5.0 application software must be running on the machine from which you wish to access the Server.

Administering a Portfolio Server

Portfolio Servers are accessed and administered from the Portfolio 5.0 application via the Administer Servers command.

Once a Portfolio Server has been made available to the network *(page 225)*, the Server Administrator can:

- Create Catalogs to be served
- Serve and Unserve catalogs
- Open and close Portfolio SQL Connect (sold separately) catalogs
- Log off individual users
- Set/change Server Administration passwords
- Add multiple user access by entering special multi-user serial numbers

Refer to other sections of this Portfolio User Guide for assistance in creating, managing, and administering Catalogs.

Administer Servers Dialog

Allows you to add, remove, and edit (change name, IP address, password, etc.) Portfolio Servers, and to access the Server Administration dialog for the selected Portfolio Server.

A Servers and Catalogs list: Displays all available Portfolio Servers and served catalogs, including Servers with SQL catalogs. Click the expand icon (or double-click the Server name) to display the list of served catalogs.

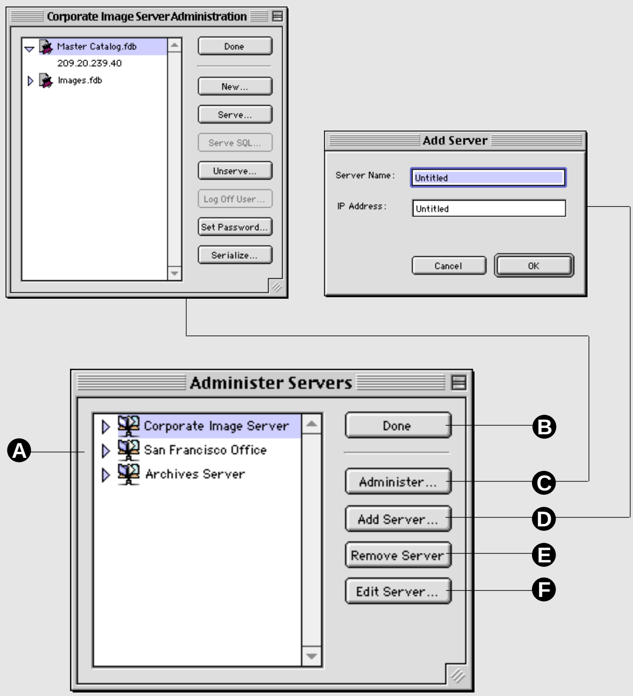
B Done: Closes the dialog.

C Administer: Click to open the Server Administration dialog for the selected Portfolio Server (see *page 224*). From this dialog you can add, remove, serve and unserve Catalogs, as well as change Server password and add multi-user Serial Codes.

D Add Server: Allows you to add a new Portfolio Server to the list.

E Remove Server: Allows you to remove selected Portfolio Servers.

F Edit Server: Allows you change the server name and/or IP address.



Server Administration Dialog

Allows you to administer the selected Portfolio Server from the Portfolio 5.0 application. To access this dialog, select (highlight) the desired Server name from the list on the Administer Server dialog (File > Administer Servers), then click “Administer...”

A Catalog and Users list: Includes all served catalogs on the selected Portfolio Server, including served SQL databases *(page 266)*. Click the expand icon to display the list of users logged on to each catalog.

B Done: Closes the dialog.

C New: Allows you to create a new Catalog on the Portfolio Server.

D Serve: Displays a list of catalogs available for serving (in, or aliased in, the Server’s “Catalogs” folder), and allows you to open catalogs for serving on this Server.

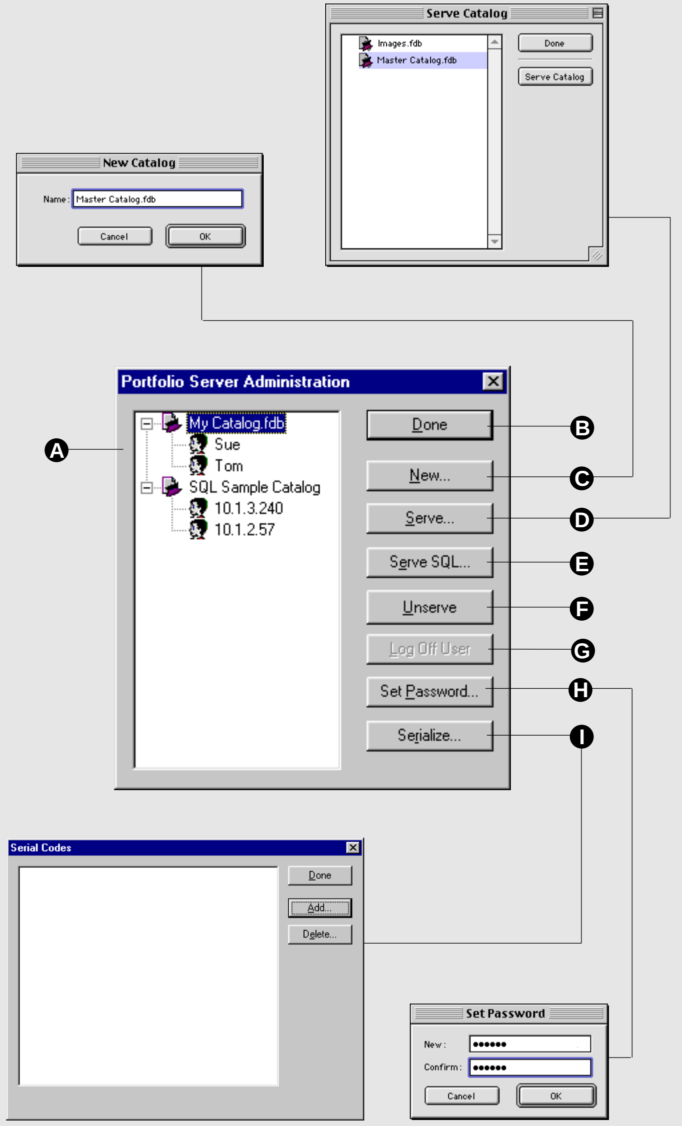
E Serve SQL: Opens a dialog where you can set up SQL Servers and serve SQL databases as catalogs. See *page 266*.

F Unserve: Allows you to unserve a selected catalog or SQL database. Users will be notified and given a pre-set time to do so. See *page 230*.

G Log Off User: Allows you to log off selected user(s) from a served Catalog immediately.

H Set Password: Allows you to set or change the Administrator password for the selected Portfolio Server.

I Serialize: Allows you to serialize the selected Portfolio Server and/or Portfolio SQL Connect. Multi-user serial codes are entered into each individual user’s Portfolio 5.0 application (client).



Before you can serve catalogs on your Portfolio Server you must make the server available—that is, tell the Portfolio application where to find the server. You do this through the Server Administration dialog, shown on *page 224*.

To add a Portfolio Server:

1. **Launch the Portfolio 5.0 application.**

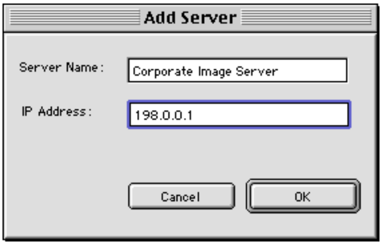
   You do not need to have a catalog open.

2. **From the File menu, choose "Administer Servers..."**

   The Administer Servers dialog will be displayed.

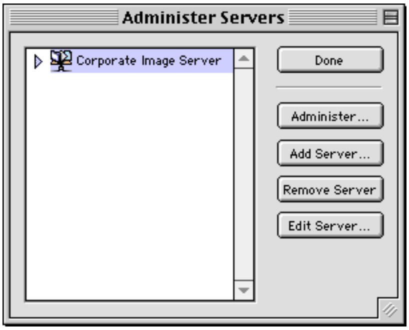
   If no servers have been added, the servers list will be blank.

3. **Click "Add Server..."**



4. **Enter the name and IP address for the Server.**
5. **Click "OK."**

   The Server will be added to the list and will be available for users to access (see *page 235* for setting up user access).



Selecting the Server name on the list will activate the Administer, Remove Server, and Edit Server buttons.

When one or more Portfolio Servers have been added (made available) *(page 225)*, you can administer them by creating and serving Catalogs. To do that, you must first access the Server through the Server Administration dialog (shown on *page 224*).

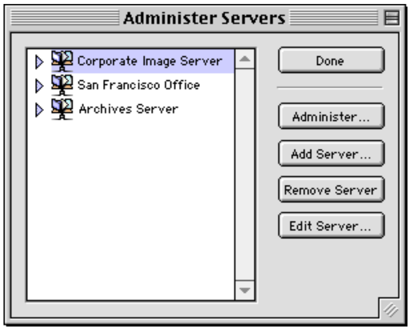
To access a Portfolio Server:

1. **Launch the Portfolio 5.0 application.**

   The Portfolio Server can be accessed via the Portfolio application from anywhere on the network or internet. With Portfolio 5.0 there is no separate Server Administration software.

2. **From the File menu, choose "Administer Servers."**

   The Administer Servers dialog is displayed.



Note: If no server names appear on the list, you will have to add them before they can be administered. See page 225.

3. **Select the desired Portfolio Server from the list, then click "Administer..."**

   You will be asked to enter the Server Administrator password. *The first time you access a Portfolio Server as the Administrator, you will be prompted to serialize the Server (see page 232).*

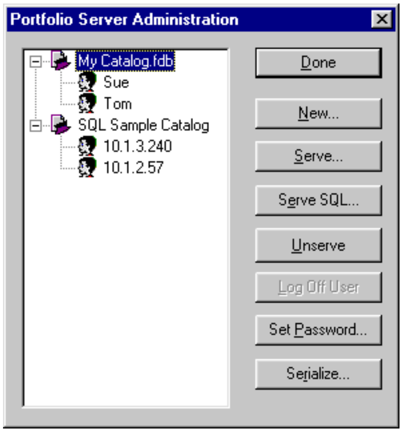
4. **Enter the Server Administrator password, then click "OK."**

The first time you access a Portfolio Server as the Administrator the password will be blank. You can enter a password, or just click "OK" and set the password later.

Important

While you can do so, in most environments it is probably not a good idea to leave the Server Administrator password blank.

The Server Administration dialog for the selected Portfolio Server will be displayed, and any served catalogs for that Server will be listed.



You can view any users connected to served catalogs by clicking the expansion icon, or by double-clicking the catalog name.

From the Server Administration dialog you can create, serve and unserve catalogs, log off users, set the password for the selected Server, and add the Server serial code.

From the Administration dialog for the selected server *(page 224)* you can create new (empty) catalogs to be served on a Portfolio Server.

To add a Catalog to a Portfolio Server:

1. **Open the Server Administration dialog (File > Administer Servers > [select server] > Administer).**
2. **Click “New...”**

   The New Catalog dialog will be displayed.

3. **Enter the name of the catalog that you wish to create.**

   On Windows, and on Mac OS if compatibility with Windows users is required, catalogs must be given a “.fdb” filename extension.
4. **Click “OK.”**

   The Catalog will be added to the list of Catalogs in the “Catalogs” folder on the Server machine.

— or —

1. **Create a Catalog from the Portfolio client *(page 113)*.**
2. **Copy the catalog (via the operating system) to the Portfolio Server’s “Catalogs” folder.**

You can now serve the catalog *(page 229)* to make it available to your users.

Tip

Catalogs (or their aliases) located in the "Catalogs" folder of the Portfolio Server are served automatically when the Portfolio Server application is launched.

To serve (open for use) a Catalog on a Portfolio Server:

1. **Open the Server Administration dialog (File > Administer Server > [select server] > Administer).**
2. **Click "Serve..."**

   A list of available Catalogs on the Portfolio Server will be displayed.

— or —

2. **Navigate through folders and volumes accessible to the Portfolio Server to locate the Catalog to be served.**

   Catalogs do not have to be located in the Catalogs folder to be served *(see sidebar Tip)*.
3. **Select the Catalog that you want to serve, then click "Serve."**

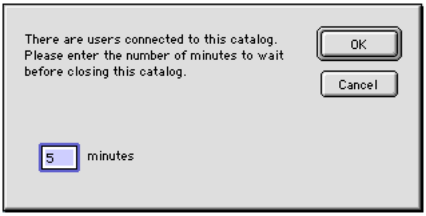
   The Catalog will become available to Portfolio users.

   Note: When a catalog is first served it is opened automatically in Administrator mode. To make the catalog available to users, close the catalog or change access mode to a level lower than Administrator (Publisher, Editor, or Reader).

To unserve a Catalog on a Portfolio Server:

1. **Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).**
2. **From the list of served Catalogs, select the Catalog that you wish to unserve (make unavailable).**
3. **Click "Unserve..."**

   If users are connected to the Catalog, a warning dialog will be displayed. You can enter a delay time in minutes before the Catalog closes.



   Connected users will be notified of the imminent closing so that they can close open windows and connections related to that Catalog.

Notes on Unserved Catalogs:

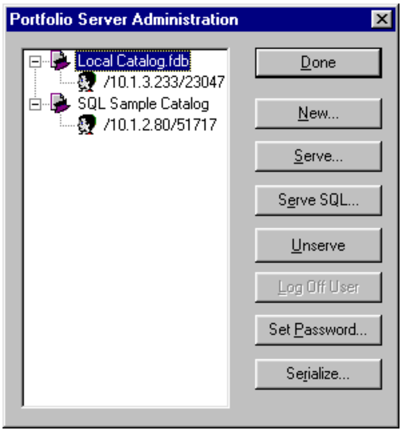
- **Portfolio Server and source images:** As with the filesharing model of multi-user Portfolio access, the Server does not serve the original files, only the records of cataloged items (see "Portfolio Basics" on *page 12*). What this means is that the client machine must have access via the file system to the original file in order to perform functions that require the source file, such as Preview (unless the option "Generate Previews" was enabled when the item was cataloged); Copy; Move; Rename; etc.

  See page 217 for tips on filesharing in a mixed Macintosh and Windows environment.

- **Server Port number:** The Portfolio Server operates via port 2903. In order to avoid conflicts with other applications, make sure no other server software is using this port on the server machine. (We are currently unaware of any other application that uses this port address.) Be aware that if you have clients attempting to access the server through a corporate firewall, you may have to have the network administrator open a hole in the firewall for this port.

To log off users on a Portfolio Server:

1. **Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).**
2. **From the list of served Catalogs, locate the Catalog with users that you wish to log off, then click the expansion arrow to view a list of active users on the Catalog.**



3. **Select the user that you want to log off.**
4. **Click "Log Off User."**

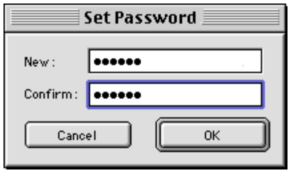
   That user will be logged off immediately.

   Note: To allow users a time frame within which they can log themselves off (by closing their copy of the catalog), use the "Unserve..." command (see page 230).

Server Administrator Password

To set or change the Portfolio Server Administrator password:

1. **Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).**
2. **Click "Set Password..."**



The Set Password dialog will be displayed.

3. **Enter and confirm the new Server Administrator password, then click "OK."**

   To exit the dialog without affecting the password, click "Cancel."

Serialization

In Portfolio 5.0, the Portfolio Server is activated with a single Portfolio Server serial code. (Portfolio SQL Connect is activated with a single SQL Serial Code. See *page 276*).

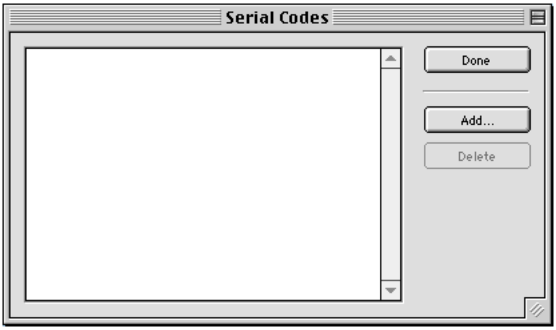
The first time you attempt to administer a Portfolio Server you will be prompted to enter the serial code. You can also access the Serial Codes dialog from the Server Administration dialog (File > Administer Servers > [select server] > Administer > Serialize).

Multi-user serial numbers (licenses) allow users to connect to the Portfolio Server, up to the limit of users for that serial number. The multi-user serial number is entered at each workstation when the Portfolio 5.0 application (client) is installed. The Portfolio Server tracks how many connections are open at one time, and limits access to the catalog to the maximum number of connections for that serial number. To add additional connections, simply contact Extensis Customer Service to purchase additional multi-user serial numbers.

To serialize a Portfolio Server:

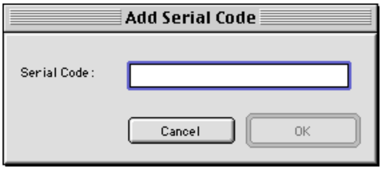
1. **Open the Server Administration dialog for the server (File > Administer Servers > [select server] > Administer).**
2. **Click "Serialize..."**

   The Serial Codes dialog is displayed.



3. **Click "Add..."**

   The Add Serial Code dialog is displayed.



4. **Enter the Portfolio Server Serial Code (and/or SQL Connect Serial Code), then click "OK."**

   When you click "OK" you will be returned to the Serial Codes dialog. The newly entered codes will be listed.

5. **Click "Done" to return to the Server Administration dialog.**

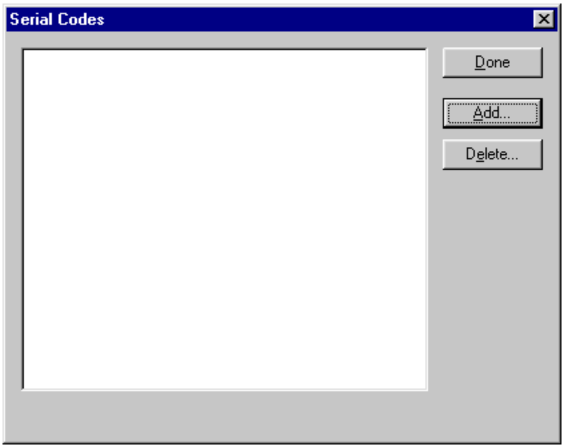
Removing a Portfolio Server or SQL Connect Serial Code

This feature is helpful if you wish to move a serial number from one server to another, such as when setting up a Portfolio Server in a different location.

Note that the serial can be used on only one Portfolio Server at a time.

To remove the serial number from a Portfolio Server, or to remove SQL Connect:

1. **Open the Administration dialog for the server (File > Administer Servers > [select server] > Administer).**
2. **Click "Serialize..."**



The Serial Codes dialog is displayed.

3. **Select the Serial Code that you wish to remove, then click "Delete."**

   The serial code will be removed from the list, and those connections will no longer be available on the selected server.

Once a catalog is served you will want to give users access to the catalog. Detailed user instructions are given on *page 24*. The process from a Server Administration standpoint is summarized here.

> **Tip**
>
> Server connection files are stored in the "Servers" folder located in the Portfolio application folder for each client. Once a server has been added to one client, its connection file can be distributed throughout a workgroup, eliminating the need for other users to go through the "Add Server" process.

To access served catalogs:

1. **Note the name given to the Portfolio Server(s) that you wish to give access to.**

   Server names are displayed on the Connect to Servers dialog (File > Connect to Servers) and the Administer Servers dialog (File > Administer Servers).

2. **Give this name to your Portfolio users.**
3. **On the user's machine, launch Portfolio 5.0, then choose File > Connect to Servers...**

   The Connect to Servers dialog will be displayed.

4. **Choose "Add Server..." and enter the name and IP address of the Portfolio Server.**

   The client application will poll the Server and display any catalogs being served.

5. **Click "OK" then click "Done."**

   The user can now open catalogs served on that Server.

Notes on Accessing Served Catalogs:

- Client machines must have TCP services active to access the Server. For Mac OS clients, the machine must be using Open Transport TCP 1.1 or higher; classic networking is not supported.
- Clients can access a served catalog in Administrator mode, but all other users must be logged off first. You can log users off from the Server Administration dialog, or users can simply disconnect.
- The client application will attempt to open the catalog in the mode set in the user's Preferences. If the preference is set to Administrator, the client application will automatically attempt to connect to the catalog in Publisher mode.

  Note: The user will be asked to enter a Password if the catalog requires it.
- For more information on installing and using the client, refer to the other sections of this Portfolio User Guide.

PortWeb

Note

This section applies to Portfolio Network and Portfolio Server Editions only.

Tip

For additional examples using PortWeb to serve catalogs over the internet, we invite you to visit the PortWeb pages on the Extensis web site:

http://portweb.extensis.com

PortWeb 5.0, a web server plug-in, is an easy-to-use add-on to the Portfolio 5.0 asset management system that enables web browser-based users to browse Portfolio catalogs. PortWeb establishes a connection between a web server and either a Portfolio Server or a Portfolio catalog on disk to provide a truly dynamic link between web-based users and Portfolio catalogs, so they can quickly search up-to-date Portfolio information.

System

To install and use PortWeb 5.0, you will need the following:

Macintosh	
Minimum hardware	PPC Only
Minimum OS	System 8.1
Supported Web Servers	StarNine WebStar 2.0–4.2
	Apple Web Server (Part of Appleshare IP 6)
Windows	
Minimum hardware	Pentium 200
Minimum OS	Windows 95/98/2000/NT 4.0
Supported Web Servers	MS Internet Information Server (IIS) (3.0–5.0)
	MS Personal Web Sharing Server (95/98)
	MS Peer to Peer Web Sharing Services (NT)

Installing PortWeb

You can find instructions for quick and easy installation on the CD-ROM that is included with your product or, if you downloaded the installer from our web site, running the installer will place an informational Read Me on your hard drive.

In addition, to use PortWeb, you will also need to install Portfolio. Refer to other sections of this Users Guide for instructions on how to install and use Portfolio.

Macintosh Memory Usage

As a plug-in, PortWeb does not allocate its own memory partition, but rather operates within the memory partition of the web server. Because PortWeb needs more memory than most plug-ins, you should increase the amount of memory that your web server allows the plug-in after you have run the PortWeb installer.

WebStar:

1. **Make sure that WebStar is not running.**
2. **Select the WebStar application in the Finder.**
3. **Choose "Get Info" from the File menu.**
4. **Increase the "Preferred Size" by 3000 K.**

Appleshare IP 6.x:

1. **Open the Appleshare IP Web & File Admin application**
2. **Choose "Web & File Server Settings" from the Server menu.**
3. **Switch to the Web Plug-Ins pane.**
4. **Increase the "Maximum Plug-in Memory Usage" by 3000 K.**
5. **Restart the web server.**

Required Knowledge

Setting up and administering PortWeb is not difficult, but it does require some understanding of HTML. Much of the necessary information is covered within this manual, but you will benefit from additional reading. Some good starting points for tutorials on the web are:

NCSA Beginner's Guide to HTML:
`http://www.ncsa.uiuc.edu/General/Internet/WWW/HTMLPrimer.html`

Welcome to the HTML Basics:
`http://www.projectcool.com/developer/zones/basics_top.html`

Forms tutorial: `http://www.devshed.com/resource/intermediate/html/forms.phtml`

Nuthin' but Links Forms Tutorial:
`http://pages.prodigy.net/bombadil/forms.htm`

The Compendium of HTML Elements:
`http://www.htmlcompendium.org/`

Overview

Overview of Web Server Plug-ins

A web server plug-in extends the functionality of the web server. Essentially, when a web server is launched, it looks to determine whether any plug-ins are installed. If plug-ins are found, they are loaded, so that the web server becomes aware of the new types of requests that can be handled, and which plug-in should receive the request.

Overview of PortWeb

PortWeb works by registering itself with the web server, so that the web server knows to pass certain types of requests on to PortWeb. The general process that occurs in a user's search through PortWeb is as follows:

1. The user loads a static HTML search page containing a search form.
2. The user enters search criteria and submits the form.
3. The web server passes the form data over to PortWeb.
4. PortWeb parses the data and performs the search in a specified Portfolio catalog.
5. PortWeb parses the specified Export HTML template.
6. PortWeb merges the search results with the template and returns the page back to the user's web browser (via the web server) for display.

Plug-In Communication Methods

In general, there are two mechanisms for communicating with a web server plug-in. These are known as the **GET** and **POST** methods.

Plug-In Communication Methods

Method	Command
GET	Typically, the GET method is used as an embedded link, such as: <A HREF="**/scripts/PortWeb.dll**?QuickFind=cat&catalog=WebTest">**...**</A>
POST	The POST method, on the other hand, is usually used inside an HTML Form, such as: <FORM ACTION="**/scripts/PortWeb.dll**?QuickFind" METHOD=POST > <INPUT NAME="QuickFind" TYPE="TEXT" VALUE="cat"> <INPUT NAME="catalog" TYPE="HIDDEN" VALUE="WebTest"> <INPUT TYPE="submit" VALUE="Search"> </FORM>

Note that the GET method can be used in a form (simply by setting the Method to “GET”), but it is common practice to use the POST method in these situations.

The primary difference between the two methods is that POST allows for user intervention via a form for changing parameters, while the GET method has hard-coded parameters. Each of these methods is useful, depending on the situation. For example, if you wanted to have a simple button that automatically searches a particular catalog for a particular keyword, then the GET method is the simpler and more concise approach. However, if you’d like to ask the user for particular parameters (such as the keywords to search for) then a form using the POST method is more applicable. In addition, the POST method can have unlimited request data and parameters, but the GET method can be limited to 4K of request information (depending on the browser).

PortWeb fully supports both methods, and there are actually situations where it makes sense to use both methods on the same HTML page.

PortWeb Request Types

Regardless of which method is used to communicate with PortWeb, the general structure of the request is the same. Each time a request is sent to the plug-in, the web server must first identify the plug-in, then the plug-in identifies the command to be executed and the parameters necessary for that command to work.

Identifying the Plug-In

The plug-in's location must always be provided in a request. This is what tells the web server to pass the request on to PortWeb. Plug-ins are identified differently on different platforms. Refer to the section corresponding to the platform of your web server. Throughout this section, the two platforms will be used interchangeably. Be sure to use the syntax appropriate for your platform, as shown in the tables.

Windows

Identifying the Plug-In—Windows

Method	Command
GET	Using the GET method, the plug-in is identified as the first part of the HREF: <A HREF="**/scripts/PortWeb.dll**?QuickFind=cat&catalog=WebTest">**...**</A>
POST	Using the POST method, the plug-in is identified in the first half of the ACTION attribute: <FORM ACTION="**/scripts/PortWeb.dll**?QuickFind" METHOD=POST >

In both cases (GET and POST), you must provide not only the name of the plug-in, but also the path to the plug-in on the server. The simplest mechanism for referencing the plug-in is to use a "root-relative" path, such as "/scripts/PortWeb.dll..." This indicates that the plug-in is located in the "scripts" directory at the root level of the web server.

Alternately, you could use a full URL to locate the plug-in, such as:

<A HREF="**http://www.myserver.com/scripts/PortWeb.dll...**></A>

This is often used when the plug-in is running on a web server other than the one serving the web pages.

Identifying the Plug-In—Macintosh

Method	Command
GET	Using the GET method, the plug-in is identified as the first part of the HREF: `<A HREF=".PortWeb?QuickFind=cat&catalog=WebTest">...</A>`
POST	Using the POST method, the plug-in is identified in the first half of the ACTION attribute: `<FORM ACTION=".PortWeb?QuickFind" METHOD=POST >`

Normally, the path to the plug-in is not required. This is because the plug-in is registered with the server when the web server launches. However, if the plug-in is on a separate web server other than the one serving the web pages, you would use the full URL. For example:

```
<FORM ACTION="http://otherserver.com/.PortWeb?QuickFind" METHOD=POST >
```

> **Tip**
>
> For sample templates and more details about PortWeb HTML, see *"PortWeb Templates"* starting on *page 281.*

PortWeb Commands

The commands currently supported in PortWeb are shown in the table below.

The command is always passed in immediately following the plug-in location. The question mark (`?`) is used to indicate the beginning of the request variables. The first variable indicates which request (`quickfind`, `query`, etc.) to perform.

Using the GET method, the command immediately follows the plug-in location.

```
<A HREF="/scripts/PortWeb.dll?quickfind=cat&catalog=Sample">...</A>
```

Using the POST method, the command is identified in the second half of the ACTION attribute:

```
<FORM ACTION="/scripts/PortWeb.dll?quickfind" METHOD=POST >
```

PortWeb Commands

Command	Description
`quickfind`	A very simple search command for doing basic keyword searches.
`query`	A more flexible search command for creating complex searches.
`add`	Adds one or more records to a user's collection (shopping cart).
`show`	Displays the user's collection.
`remove`	Removes one or more records from a user's collection.
`adminshow`	Displays the Administration module for PortWeb.

PortWeb Parameters

Each command requires one or more parameters. These are all the variables that affect what the command does. For example, two of the most important parameters for any request are the name of the catalog to search and the response template to be used.

Using the GET method, parameters are specified directly within the HREF, and are entered as value pairs (a parameter and its value). Each value pair is separated by an ampersand (`&`). The parameter is separated from the its value by an equals sign (`=`). In the following example, the parameter "`catalog`" is passed in with the value "`Sample`."

```
<A HREF="/scripts/PortWeb.dll?quickfind=cat&catalog=Sample">...</A>
```

Using the POST method, the parameters are defined using form INPUT tags. In the following example, the parameter "`catalog`" is passed in with the value "`Sample`." In this case, the parameter is hidden, so that it cannot be modified by the user. Other INPUT types (such as "`TEXT`") could be used to get information from the user. For more information on setting up HTML forms, please refer to an HTML reference guide. (See *"Required Knowledge"* on *page 237*, for suggested starting points).

```
<FORM ACTION="/scripts/PortWeb.dll?quickfind" METHOD=POST >
   <INPUT NAME="catalog" TYPE="HIDDEN" VALUE="Sample">
</FORM>
```

Setup and Administration

Before users can access PortWeb, it needs to be configured via the PortWeb Administration page. This page is accessed by issuing the “adminshow” command to the PortWeb plug-in.

Using the Administration Module

To access the plug-in, enter the appropriate URL for the platform hosting the web server:

Windows

`http://yourserver/scripts/PortWeb.dll?adminshow`

(Where “`yourserver`” is the IP address or domain name of your web server.)

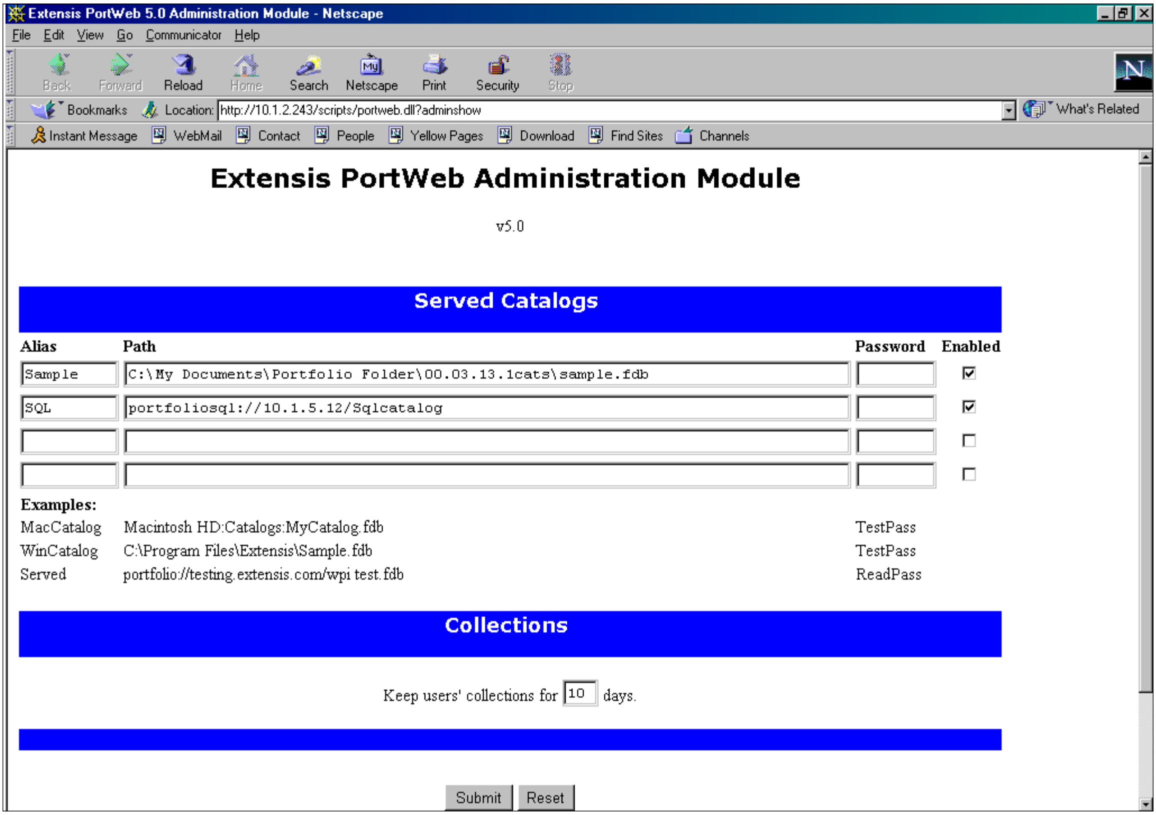
Macintosh

`http://yourserver/.PortWeb?adminshow`

(Where “`yourserver`” is the IP address or domain name of your web server.)

With WebStar, you can also access PortWeb’s Administration module via the Plug-ins page of the WebStar administration pages.

You may be asked for an administrator name and password. For more information on authenticating administrators, refer to the "Authentication" section, below. The resulting web page should look something like:



There are three sections to the Administration module, which are explained in detail below. The Submit button at the bottom of the form allows you to save any changes you've made. The Reset button clears any changes you've made to the form.

1. Served Catalogs

The Served Catalogs section identifies the mappings between particular catalogs and their web "aliases." Using aliases allows the user to pass in a shorter request (i.e. "dogs" instead of "`D:\Portfolio\Files\Catalogs\dog database.fdb`").

It also has the added advantage of not requiring an Administrator to rewrite all of their HTML pages (and response templates) because the location of a catalog has changed. Instead, changing the mapping in the Administration module will keep all the templates current.

The administration module will display all the current mappings (both active and inactive) and two additional lines to add new mappings. If you want to enter more than two mappings in one session, simply enter the first two and click Submit to get a new form that contains the new mappings and two new lines in the form. To permanently delete a mapping, clear the Alias, Path, and Password entry fields and then click the Submit button.

The four components for a proper catalog mapping (Alias, Path, Password, and Enabled) are discussed below and on the following pages.

Alias

This should be a short, easily remembered name by which the catalog will be referred to when specifying which catalog to search via PortWeb. Avoid using spaces and non-standard non-ANSI characters (such as trademark symbols, ellipses, etc.) in this name, or you will have to take special steps to encode the alias in the your HTML pages.

Path

This is the full path to the Portfolio catalog. The catalog can be either a file on disk or a catalog being served by a Portfolio Server.

Local (on disk): To reference a local path, simply type in the entire path name, such as:

Windows

`F:\Portfolio\Catalogs\dog.fdb`

or

Macintosh

`Macintosh HD:Portfolio:dog.fdb`

The disk can be in any location accessible via the file system of the computer hosting PortWeb. Note that some Macintosh characters do not map to the ISO-standard character set used on the Internet. If your catalog's path has odd characters (such as copyright symbols, curly-quotes, etc.) you will probably need to change the path on disk to work over the Internet properly.

Important

When connecting to a served Portfolio or SQL catalog, be sure that the pathname containing "portfolio" is all lower-case. If it is not, the connection will fail.

Served Native: To reference a Macintosh or Windows catalog (same for both) being served by a Portfolio server, use the following format:

`portfolio://128.0.0.01/dog.fdb`

The word "`portfolio:`" must be all lower-case.

Served SQL: To reference a catalog being served on an SQL server, use the following format:

`portfoliosql://192.168.0.1/dog.fdb`

The word "`portfoliosql:`" must be all lower-case.

Password

This is the Reader password for the catalog, if one has been specified. If there is no password for the Reader level of the catalog, simply leave the field blank. Note that because higher-level passwords work for lower levels (i.e. you can log into Reader mode with a Publisher password), it will work to use any of the four access levels' passwords in this field.

Note: PortWeb only supports Level-based passwords when giving access to catalogs. If your catalog is set up with User-based access, users will not be able to connect to the catalog. To change to Level-based catalog access, see page 197.

Enabled

This checkbox *(see page 245)* indicates whether the mapping is currently active. When this checkbox is unchecked, PortWeb releases the catalog. This is useful when you want to deactivate a catalog temporarily without having to delete and re-enter all the information on the entire line.

When a mapping is enabled, PortWeb opens a connection to the catalog. As a result, you cannot open a Portfolio catalog in Administrator mode or with the Portfolio Server while PortWeb is connected to that catalog.

Be aware that if you have a served catalog enabled in your list, the catalog will become inaccessible via PortWeb if you close that catalog on the Portfolio Server and then reopen that catalog on the Portfolio Server. As a result, you will get an empty page returned if you make a requests using this served catalog. To remedy this, return to the PortWeb Administration Module page and resubmit the page (with that mapping enabled).

If the Administration page displays an unchecked "Enabled" box after you submit it, verify that the path was entered correctly. Also verify that catalog is not opened exclusively by a Portfolio client. If you are trying to access a served catalog, make sure you are using the appropriate syntax (see "Path" on *page 247*).

2. Collections

The Collections section controls the duration for which Collection records should be kept in the database. Simply specify the number of days for which the users' collections should be retained. Bear in mind that the collection database's file size will increase the longer you retain these records.

Authentication

In order to access the Administration module, you must have administrative access to the web server. PortWeb will attempt to authenticate that you have such privileges before displaying the Administration module page. Most web servers have their own unique mechanism for validating administrators.

Some web servers do not have any authentication at all; in these situations, PortWeb will check to see whether you are accessing the administration page from the same machine (based on IP address) as the web server itself. If you attempt to access the Administration module from a remote machine on a web server that does not support authentication, the attempt will fail.

WebStar 2.0: You must access the Administration module through WebStar's administration page. The usual URLs (`http://yourserver/.PortWeb?adminshow`) may not work. When accessed through WebStar's administration page, PortWeb will allow any user in the "pi_admin" realm to read and change settings. *(See the WebStar manual for more information on security, realms, and users.)*

WebStar 3.0 and 4.0: If you access PortWeb administration through the usual URL (`http://yourserver/.PortWeb?adminshow`) or through WebStar's administration page, PortWeb will allow any user in the Administration realm to read and change settings. You can also specify the realm for PortWeb administration (i.e. `http://yourserver/pi_admin.PortWeb?adminshow`), and PortWeb will allow users in that realm to access PortWeb administration. *(See the WebStar manual for more information on security, realms, and users.)*

AppleShare IP: PortWeb requires that you access the Administration module from the machine running PortWeb.

Windows NT 4.0/Windows 2000 Server Internet Information Server and Windows NT 4.0/Windows 2000 Workstation Peer Web Services: With the “Basic Authentication” setting checked in the Service Properties dialog, the user will be prompted for a name and password. Any user who belongs to the “Administrators” group on the server computer will be properly authenticated and allowed to view and edit the PortWeb Administration module.

Personal Web Sharing Server for Windows 95 and Windows 98: Most versions of PWS do not support authentication. In these situations, you must access the Administration module from the machine running PortWeb.

Basic PortWeb Tutorial

To get introduced quickly to how PortWeb works, follow the basic tutorial laid out in the following steps.

Setting Up the Tutorial

This tutorial uses the Portfolio 5.0 Sample Catalog to illustrate some of the basic features of PortWeb.

To set up the tutorial:

1. **Install the PortWeb plug-in and launch your web server.**

   Tutorial files are installed at the root level of your web server.

2. **Launch a web browser, and connect to the Administration module. Do this by entering the URL appropriate for your platform:**

   Windows
   `http://yourserver/scripts/PortWeb.dll?admin-show`

   Macintosh
   `http://yourserver/.PortWeb?adminshow`

   (Where "`yourserver`" is the IP address or domain name of your web server.)

3. **You may be asked to enter your web server Administrator name and password information.**

4. **The resulting page should be the Extensis PortWeb Administration Module. See** ***"Served Catalogs"* on *page 246.***

5. **In the first blank line of this section's form, enter the name "Sample" in the Alias field.**

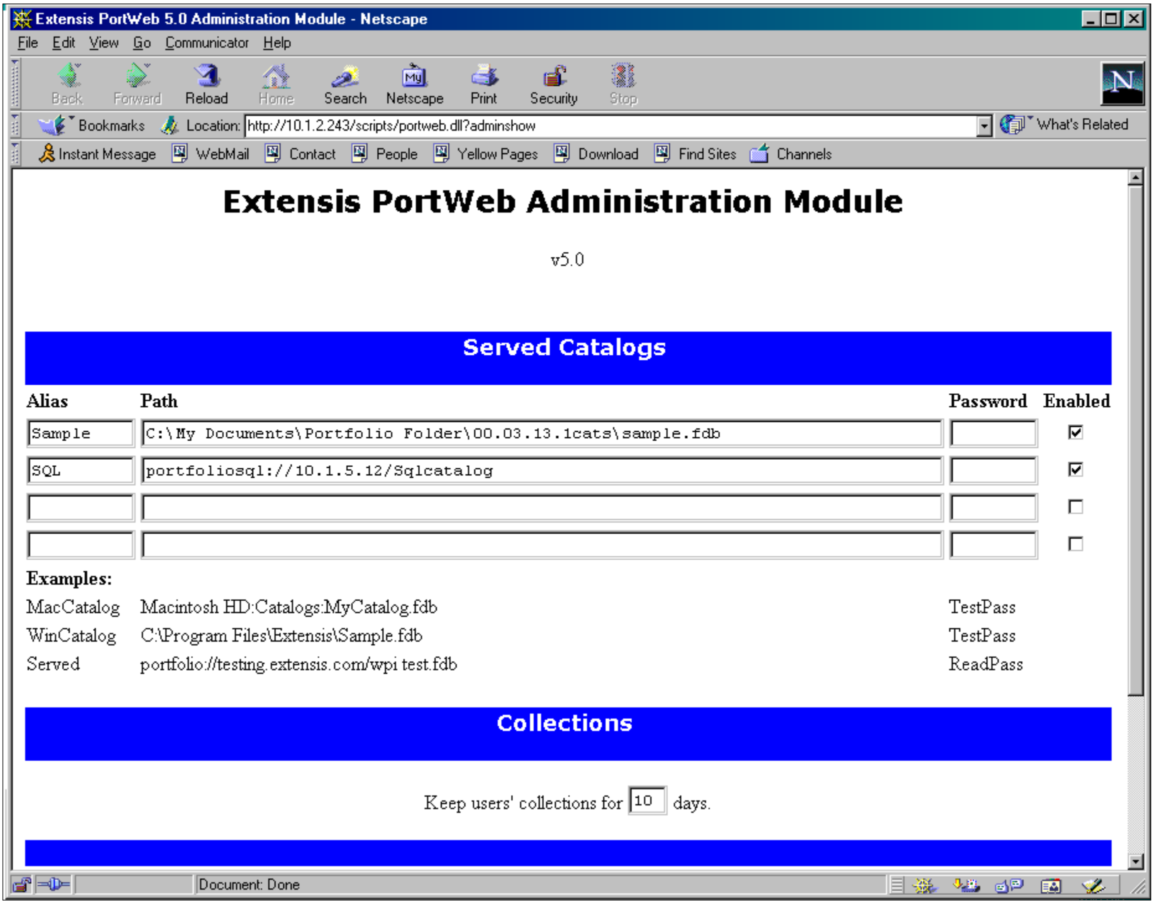
6. **In the path, enter the path to the Sample Catalog (located in the “Tutorial” folder). The path should be the full path, such as:**

   Macintosh
   `Macintosh HD:WebStar 3.0:Tutorial:Sample Catalog.fdb`

   Windows
   `C:\Inetpub\wwwroot\Tutorial\Sample Catalog.fdb`

   Note that the actual paths may vary based on the configuration of your computer.

7. **Leave the Password field blank and make sure the Enabled box is checked on this line of the form.**



8. **Click the "Submit" button at the bottom of the Administration form.**

   This instructs PortWeb to begin accepting requests for information from this catalog. If the Administration page is returned with the enable box disabled, check the path and verify that the catalog is not opened exclusively by a Portfolio client.

Loading the Basic Page

Once the Sample Catalog is properly being served by PortWeb, launch your web browser, and load the search page through your web server. To do this, point your web browser at the web server's IP address or domain name, and then follow it with one of the following search pages:

Macintosh
`http://yourserver/Tutorial/Basic.html`

Windows
`http://yourserver/Tutorial/Basic.html`

(Where "`yourserver`" is the IP address or domain name of your web server.)

Note: Do not load the HTML page directly from disk (i.e. where the URL looks like "`file:///C:/|/Tutorial/Basic_Win.html`*") as this will prevent the forms from functioning correctly.*

Trying the Different Options

Try the different searches, and examine the source code for each one to get a feel for how the different searches work. Open the "Sample Catalog.fdb" catalog and examine the Export HTML templates to see how the more advanced search results are formatted.

There's much more to PortWeb than what is covered in this tutorial. For more information on more advanced topics, refer to *"PortWeb Templates," pages 281 through 291*.

Creating Search Pages

PortWeb does not generate a search form. Instead, you have total freedom to create search requests in any format you can conceive of in HTML. This allows PortWeb to integrate seamlessly with your existing web site. The search form you create can be as simple or as complex as your needs require. Two different commands provide for both simple and complex search queries.

QuickFind Command

The quickfind command is a simplified search mechanism for basic keyword searches. It performs a "Keywords starts with" search with the specified text. The acceptable parameters are shown in the table below:

QuickFind Command

Parameter	Description
`quickfind`	This is the name of the command, but also the parameter for passing in the keyword to search for.
`catalog`	Specifies the alias of the catalog to be used. The alias is mapped via the settings file to either a catalog on disk or a catalog being served by a Portfolio server.
`template [OPTIONAL]`	Specifies the name of the Export HTML template to be used for the response page. If this parameter is not passed in, a default Export HTML template will be used (a basic thumbnail view layout in a 4 x 4 grid).
`sorton [OPTIONAL]`	Identifies the field on which to sort the found set is be sorted. The sort field must be an indexed single-value field. If it is not specified, the order of the record set is the order returned by the Find.
`ascending [OPTIONAL]`	Specifies the order in which the record set is sorted. A value of 0 indicates ascending, a value of 1 indicates descending. If the sorton parameter is not provided, this parameter is ignored. If the sorton parameter is provided and this parameter is not, the default sort order is 0 (ascending).
`offset [OPTIONAL]`	A positive integer indicating how many records have already been displayed from the collection. If the parameter is not specified, the display starts from the first record in the collection.

Examples:

- This simple search looks for the records containing a keyword that starts with “Com” in the catalog aliased to “Sample” in the PortWeb settings file. Records containing the keywords “computer” and “communications” would both be returned.

```
<A HREF="/scripts/PortWeb.dll?quickfind=com&catalog=Sample">...</A>
```

- This is essentially the same search, but using a form that allows the user to enter the keywords for which to search. This also shows all of the optional parameters being used.

```
<FORM ACTION="/scripts/PortWeb.dll?QuickFind" METHOD=POST >
   <INPUT NAME="quickfind" TYPE="Text" VALUE="">
   <INPUT NAME="template" TYPE="HIDDEN" VALUE="Simple">
   <INPUT NAME="sorton" TYPE="HIDDEN" VALUE="Filename">
   <INPUT NAME="ascending" TYPE="HIDDEN" VALUE="1">
   <INPUT NAME="offset" TYPE="HIDDEN" VALUE="10">
   <INPUT NAME="catalog" TYPE="HIDDEN" VALUE="Sample">
   <INPUT TYPE="submit">
</FORM>
```

Query Command

The `query` request is the core of PortWeb. This command causes a search to be performed in a particular Portfolio catalog, and the results to be returned in a particular layout. The values that can be passed in shown in the table below.

Query Command

Parameter	Description
`query`	This is the set of parameters that define the search.
`catalog`	Specifies the alias of the catalog to be used. The alias is mapped via the settings file to either a catalog on disk or a catalog being served by a Portfolio server.
`template [OPTIONAL]`	Specifies the name of the Export HTML template to be used for the response page. If this parameter is not passed in, a default Export HTML template is used (a basic thumbnail view layout in a 4 x 4 grid).
`sorton [OPTIONAL]`	Identifies an indexed, single-valued field on which the found set should be sorted. If it is not specified, the order of the record set is the order returned by the find.
`ascending [OPTIONAL]`	Specifies the order in which the record set is sorted. A value of 0 indicates ascending, a value of 1 indicates descending. If the sorton parameter is not provided, this parameter is ignored. If the sorton parameter is provided and this parameter is not, the default sort order is 0 (ascending).
`offset [OPTIONAL]`	A positive integer indicating how many records have already been displayed from the collection. If the parameter is not specified, the display starts from the first record in the collection.

Query Parameter

This parameter is a set of variables which define the search that should be executed in Portfolio. Each clause of a query is defined by three variables: Field, Operator, and Value. Each clause (after the first) must be joined to the previous using a join variable (either “and” or “or”).

The acceptable values for each variable are shown in the table below.

Query Parameter

Variable	Acceptable Values
`field`	Any indexed field in the specified database. If an unindexed field is specified, the query will fail.
`op`	The following operators are allowed*: • Matches / Does Not Match – Works with all fields except Date fields • Equals / Does Not Equal – Works only with Date fields • Greater Than / Greater Than or Equal To – Works only with Number fields • Less Than / Less Than or Equal To – Works only with Number fields • Starts With / Does Not Start With – Works only with String fields
`value`	Only works with Number fields.
`join [OPTIONAL]`	Used only when the query has more than one clause, this can have a value of either “and” or “or”. If this parameter is not specified, “and” will be used.

** You can use all of the operators supported by the Portfolio client in PortWeb, however not all operators work with each field. If your operator does not work with a selected field, the search clause is skipped. If you're unsure whether an operator is supported with a specific field, you can verify it using the Portfolio client's find feature. Choose your fieldname in the Portfolio client's find dialog, then use the operator pull-down to see which operators are supported for that fieldname.*

A `query` is validated by the plug-in based on the following criteria:

- All three variables must exist for each clause.
- For every clause after the first one, a `join` variable must also be supplied (with the value being either "and" or "or").
- Each `field` variable and `operator` variable must meet the rules set above.

If any of these validations fails for a particular clause, the clause is skipped. If validation fails for all clauses in a query, the plug-in returns the "No matching records found" page. If the validation succeeds, the remaining parameters are evaluated.

A `query` can contain a maximum of ten clauses.

Example:

The following example shows a two clause `query` command. (The comments are just for clarity). The various parameters can be hidden or exposed, depending on the site's needs. In this example, the first clause's value field is entered by the user, but all other values are hidden.

```
<FORM ACTION="/scripts/PortWeb.dll?query" METHOD=POST >
  <INPUT NAME="template" TYPE="HIDDEN" VALUE="Simple">
  <INPUT NAME="catalog" TYPE="HIDDEN" VALUE="Sample">

  <!-- This is the first clause, and prompts the user for a keyword -->
  <INPUT NAME="field" TYPE="HIDDEN" VALUE="Keywords">
  <INPUT NAME="op" TYPE="HIDDEN" VALUE="matches">
  <INPUT NAME="value" TYPE="TEXT" VALUE="">

  <!-- This is a second clause (with the required join) that is entirely hidden. -->

  <INPUT NAME="join" TYPE="HIDDEN" VALUE="and">
  <INPUT NAME="field" TYPE="HIDDEN" VALUE="Extension Win">
  <INPUT NAME="op" TYPE="HIDDEN" VALUE="matches">
  <INPUT NAME="value" TYPE="HIDDEN" VALUE="jpg">
  <INPUT TYPE="Submit">
</FORM>
```

Creating Response Templates

The response to a PortWeb command is formatted by a response template stored in the Portfolio catalog. The response templates are the same templates that are used by the Portfolio client in the Export HTML dialog. Response templates are created in the Portfolio 5.0 client by creating new Export HTML templates.

The Default Template

The simplest response template is simply no template at all. If no response template is specified in a PortWeb command, a default response is generated. For example, the following request will use the default template because no template parameter is specified. (This is the same query as the first example in the Basic tutorial.)

Macintosh

```
http://yourserver/.PortWeb?quickfind=com&catalog=S
ample
```

Windows

```
http://yourserver/scripts/PortWeb.dll?quickfind=co
m&catalog=Sample
```

(Where "`yourserver`" is the IP address or domain name of your web server.)

The response is a four by four grid of thumbnails with the filename displayed beneath each thumbnail. For some purposes, this default response may be sufficient.

Creating a Simple Template

In most situations, a customized response template is necessary. To create simple templates, you can customize your view in Portfolio and then add a new Export HTML template. The template HTML displayed in the Edit HTML dialog is an HTML approximation of the gallery you have created.

Example:

1. **Open the Portfolio Sample Catalog in the Portfolio 5.0 client. (The Sample Catalog is available on the Extensis CD or from Extensis' web site: http://www.extensis.com/)**
2. **Load the "Blue text" gallery from the Saved Galleries button on the toolbar.**
3. **Choose File>Export>HTML.**
4. **From the Export HTML dialog, click the Add… button.**
5. **The Edit HTML dialog is displayed. In this will be the code Portfolio generated that approximates the view in Portfolio.**
6. **Enter a name for the template, such as "blue."**
7. **Enter grid settings, such as four rows by one column. In the case of Record view and List view, you typically would want one column.**
8. **Click Save.**
9. **Upon returning to the the Export HTML dialog, you'll see the template was added to the list of templates in the catalog. Click Close to return to Portfolio.**

To access this template via the web, it is simply a matter of supplying the template name as a parameter. So, building on the previous example, we can expand it to:

Macintosh

`http://yourserver/.PortWeb?quickfind=com&catalog=Sample&template=blue`

Windows

`http://yourserver/scripts/PortWeb.dll?quickfind=com&catalog=Sample&template=blue`

(Where "`yourserver`" is the IP address or domain name of your web server.)

Collections

Collections (also known as "shopping carts") are a common feature of many web sites, and allow users to keep track of a particular set of items. This is particularly useful in the context of an image database, in which a user may want to gather a set of images from a number of different searches.

PortWeb has built-in support for collections. PortWeb creates a shopping cart for any user who wants to track items (assuming the page is designed to make use of shopping carts). PortWeb can maintain a user's shopping cart across multiple sessions, and can maintain separate carts for each catalog a user visits.

Collection record sets are stored in a proprietary database file named "PortWeb.wdb". The Administrator has the ability to set how long collections are kept in the database. Below are the various commands. Note that the collection requests only work correctly for users who allow their browsers to accept cookies (see the end of this section).

Note: Collections are stored separately for different catalogs. In other words, items from one catalog cannot be added to the same shopping cart as items from a different catalog.

Working with Collections

The common user experience with a collection in PortWeb is:

1. The user submits a search via the `query` command.
2. The user is returned a web page generated by the query request.
3. On the page is a button reading "Add to my shopping cart."
4. Clicking this generates a Collection request to add one or more records. If no collection currently exists for the current user in the current catalog (based on the cookie received in the query), a new collection record is created.
5. The result of the Add command is a newly generated page showing the current collection, and a cookie is placed on the user's system.
6. From this shopping cart page, the user can choose to remove items from the cart.

To add collection functionality to a site powered by PortWeb, you can either use collection macros, or use the collection commands directly. Normally it is easier to use the macros, as PortWeb will generate much of the necessary HTML automatically. However, there may be times when the flexibility provided by using the collection commands is desired.

Collection Templates

Collection templates are not really any different than any other response template. The primary difference is that they are displaying results from a user's collection set, instead of results from a particular query. Often the same response templates can be used for both a query and a collection. Of course, if you want to provide the users the ability to manipulate the collection, you'll need to create collection templates that make use of the Add and Remove commands.

For more information on collection-specific macros, refer to the PortWeb Templates section *(page 281)*.

Collections Tutorial

To see how collections work, you can look at the supplied tutorial *(page 251)* and examine the Collections example.

Collection Commands

Add Command

The add command adds one or more records to the user's collection set. If no collection set for the user of the particular catalog exists, then a new collection set is created and a cookie is returned to the user. The parameters specified are:

Add Command

Parameter	Description
catalog	Specifies the alias of the catalog is to be used. The alias is mapped via the settings file to either a catalog on disk or a catalog being served by a Portfolio server.
rid	Specifies the record ID in the catalog. Record IDs are unique within a catalog. This can be one record or a list of records (e.g., …&rid=70&rid=75&rid=85&…). Any invalid RIDs are ignored.
template [OPTIONAL]	Specifies the alias of the template to be used. If this parameter is not passed in, a default Export HTML template is used (a basic thumbnail view layout).
sorton [OPTIONAL]	Identifies an indexed, single-valued field on which the found set should be sorted. If it is not specified, the order of the record set is the order returned by the Find.
ascending [OPTIONAL]	Specifies the order in which the record set is sorted. A value of 0 indicates ascending, a value of 1 indicates descending. If the sorton parameter is not provided, this parameter is ignored. If the sorton parameter is provided and this parameter is not, the default sort order is 0 (ascending).
offset [OPTIONAL]	A positive integer indicating how many records have already been displayed from the collection. If the parameter is not specified, the display should start from the first record in the collection.

Remove Command

The `remove` command removes one or more records from the user's collection set. If no cookie exists, or if the ID in the user's cookie does not match any records in the collections database, or if the IDs in the cookie do not match the catalog specified in the request, then an error is returned to the user on the "No matching records found" page. The parameters specified are:

Remove Command

Parameter	Description
`catalog`	Specifies the alias of the catalog is to be used. The alias is mapped via the settings file to either a catalog on disk or a catalog being served by a Portfolio server.
`rid`	Specifies the record ID in the catalog. Record IDs are unique within a catalog. This can be one record or a list of records (e.g., …&rid=70&rid=75&rid=85&…). Any invalid RIDs are ignored.
`template [OPTIONAL]`	Specifies the alias of the template to be used. If this parameter is not passed in, a default Export HTML template is used (a basic thumbnail view layout).
`sorton [OPTIONAL]`	Identifies an indexed, single-valued field on which the found set should be sorted. If it is not specified, the order of the record set is the order returned by the Find.
`ascending [OPTIONAL]`	Specifies the order in which the record set is sorted. A value of 0 indicates ascending, a value of 1 indicates descending. If the sorton parameter is not provided, this parameter is ignored. If the sorton parameter is provided and this parameter is not, the default sort order is 0 (ascending).
`offset [OPTIONAL]`	A positive integer indicating how many records have already been displayed from the collection. If the parameter is not specified, the display should start from the first record in the collection.

Show Command

The `show` command displays the records in a user's collection set. The parameters are:

Show Command

Parameter	Description
`catalog`	Specifies the alias of the catalog is to be used. The alias is mapped via the settings file to either a catalog on disk or a catalog being served by a Portfolio server.
`rid`	Specifies the record ID in the catalog. Record IDs are unique within a catalog. This can be one record or a list of records (e.g., `…&rid=70&rid=75&rid=85&…`). Any invalid rids are ignored.
`template [OPTIONAL]`	Specifies the alias of the template to be used. If this parameter is not passed in, a default Export HTML template is used (a basic thumbnail view layout).
`sorton [OPTIONAL]`	Identifies an indexed, single-valued field on which the found set should be sorted. If it is not specified, the order of the record set is the order returned by the Find.
`ascending [OPTIONAL]`	Specifies the order in which the record set is sorted. A value of 0 indicates ascending, a value of 1 indicates descending. If the sorton parameter is not provided, this parameter is ignored. If the sorton parameter is provided and this parameter is not, the default sort order is 0 (ascending).
`offset [OPTIONAL]`	A positive integer indicating how many records have already been displayed from the collection. If the parameter is not specified, the display should start from the first record in the collection.

Cookies

Whenever a collection request (`add`, `show`, `remove`) is successful, a cookie containing the collection's id number is sent from the web server to the client's browser. If the cookie is accepted, it is stored on the user's machine, and sent back to PortWeb for every subsequent request.

Users can refuse individual cookies, or set their browsers to refuse all cookies. If cookies are refused, every add request will create a new, one-item collection in PortWeb's collection database. In this case, the results of all collection requests (`add`, `show`, and `remove`) will act as if the request had been applied to an empty cart.

Cookies set by PortWeb have an expiration date that matches the plug-in's collection expiration setting.

SQL Connect Administration

> **Note**
>
> This section applies to Portfolio Network and Portfolio Server Editions only.

> **Tip**
>
> This section will help you set up an SQL database for serving as a Portfolio catalog, and set up the Portfolio Server to serve this catalog. For detailed information on administering the Portfolio Server, see *page 221*.

Portfolio SQL Connect (sold separately) works in conjunction with Portfolio Server software and the Portfolio client application to allow you to store data in existing corporate SQL databases, such as Microsoft SQL Server and Oracle, and to access those records from Portfolio as if they were served Portfolio catalogs.

Once the SQL database is set up, and Portfolio SQL Connect and Portfolio Server are running, accessing and administering the catalogs is the same as if the catalogs were created and stored directly on a Portfolio Server.

System Requirements

SQL database, running on any Server:

- Oracle 8i
- Microsoft SQL Server 6.5 or Microsoft SQL Server 7.0

Windows NT, required for running the Portfolio Server and connecting with the SQL Server:

- Pentium PC (233 MHz or faster recommended)
- Microsoft Windows NT 4.0 or higher (Server or Workstation)
- 32MB RAM (64MB RAM or more recommended)
- TCP/IP Services installed
- ODBC drivers appropriate for connecting to the SQL Server
- *Oracle only:* a System DNS that points to the Oracle Server

Server hardware requirements are based on performance. The Server will function on any WinNT 4.0 system, but performance will probably be unacceptable if used with any system below the listed requirements. In addition, the Portfolio Server software will normally benefit a great deal from a faster processor, more physical memory, multiple processors, faster network connections, and faster hard drives (such as Ultrawide SCSI drives).

Note: Extensis does not provide Technical Support for setting up an SQL database, configuring TCP/IP Services, setting up DNS services, configuring a firewall, or other networking issues. For assistance with these issues, please consult your System Administrator or the product vendor's technical support.

Getting Started with SQL

Before you can access catalogs through Portfolio, you must verify that you have the correct ODBC drivers installed on the machine that will be running Portfolio Server. Then you'll need to set up the SQL database. When that is done you can install both Portfolio SQL Connect and Portfolio Server software. There is no direct interface in either of these Portfolio products. SQL Connect requires no user interface, and the Portfolio Server is accessed and administered remotely using standard Portfolio application software.

Set up the SQL Server

1. **On the SQL database computer, create a new SQL database.**

   Refer to the user documentation provided with the SQL application for guidance.

   SQL Server 6.5: You must specify a maximum size for your database. As a general rule, estimate 15K/record for small (112x112) thumbnails and 30K/record for large (256x256) thumbnails. Since it is difficult to expand a database after it is created, it may be useful to leave room for unexpected growth.

2. **Create an administrative user for the database.**

   SQL Server 6.5 and 7.0: A user with administrative rights must be created for this database. This can either be the standard "sa" account, or another user with database owner (dbo) rights. Make sure the "master" database is the default database for the dbo you've created.

   SQL Server 6.5 and 7.0: Portfolio Server will create one connection per user per database. Increase the maximum number of concurrent connections allowed by the system, if necessary. For example, if you are serving two Portfolio SQL catalogs from one SQL server, and each database has 50 users connected (even if they are the same set of users in each case) you'll need at least 100 concurrent connections to the SQL server.

   Oracle 8i: The administrative user that you create must have the DBA role assigned to it.

Install the Correct ODBC Drivers

SQL Server 6.5 and 7.0: Install the ODBC and SQL Server drivers according to the instructions supplied with the Microsoft SQL Server.

Oracle 8i: Install the Oracle Client software (including ODBC and Oracle driver options). In the ODBC Control Panel, create a System DSN with the user name you created in step 2. ***IMPORTANT!*** Make sure the "Force Retrieval of Long Columns" option is checked (enabled).

When the ODBC driver has been verified (and the DSN created if this is an Oracle database) you can proceed with setting up Portfolio SQL Connect and Portfolio Server, *page 270*.

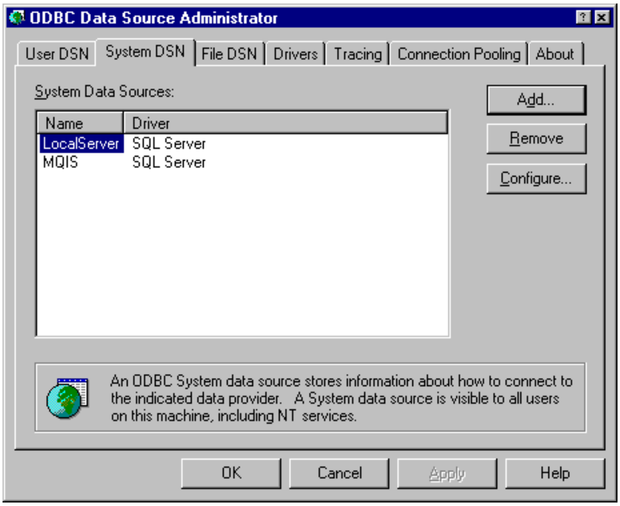
Oracle Only: Create a DSN

To create a DSN:

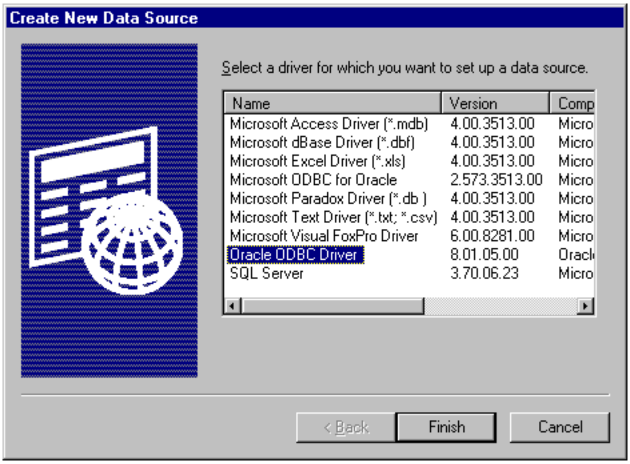
a) Open the ODBC (32 bit) Control Panel (Start > Settings > Control Panel > ODBC (32 bit).

b) In the "ODBC Data Source Administrator" dialog, select the "System DSN" tab.

c) Click "Add."



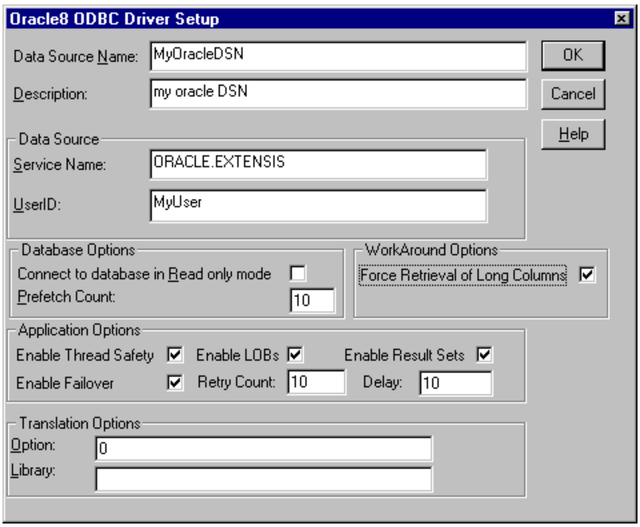
d) **In the “Create New Data Source” dialog, select the Oracle ODBC Driver.**



e) **Click “Finish.”**

The Oracle ODBC Driver Setup dialog will be displayed.

f) **Enter the following information:**



Data Source Name: The name of the DSN you are adding.

Service Name: The name of the Oracle instance, usually in the format “database-name.domain”. Check with the Oracle Database Administrator for the correct name.

UserID: A valid user ID for the Oracle database. This person must have database ownership rights.

Force Retrieval of Long Columns: Must be enabled.

All other fields: For the remaining fields, accept the default settings.

The completed form should look something like the screen shot shown.

g) **Click “OK” to accept the changes and add the DSN.**

Tip

Before you can perform any Portfolio SQL Administration operations, the SQL database must be set up, Portfolio SQL Connect and Portfolio Server must running on the server machine, and the Portfolio 5.0 application must be running on the machine from which you wish to access the Server. See *page 272.*

Installing Portfolio SQL Connect

Installing Portfolio SQL Connect is quick and easy. Simply launch the installer and allow it to guide you.

SQL Connect has no interface itself; access to Portfolio Server is handled through standard Portfolio 5.0 application software

To access a Portfolio SQL Server: Open the Portfolio 5.0 application. From the File menu choose “Administer Servers...” From the Server Administration dialog you can add and administer one or more SQL Servers (see *page 272*).

Serve SQL Database Dialog

Allows you to add, remove, and edit (change name, IP address, password, etc.) of SQL Servers, and to serve SQL databases as Portfolio Catalogs.

To open the Serve SQL Database Dialog (**A**), choose File > Administer Servers > [select Portfolio Server] > Administer > Serve SQL.

A Serve SQL Database: Allows you to add, remove, or change set up for the selected Portfolio Server, and to open the Server Administration for it.

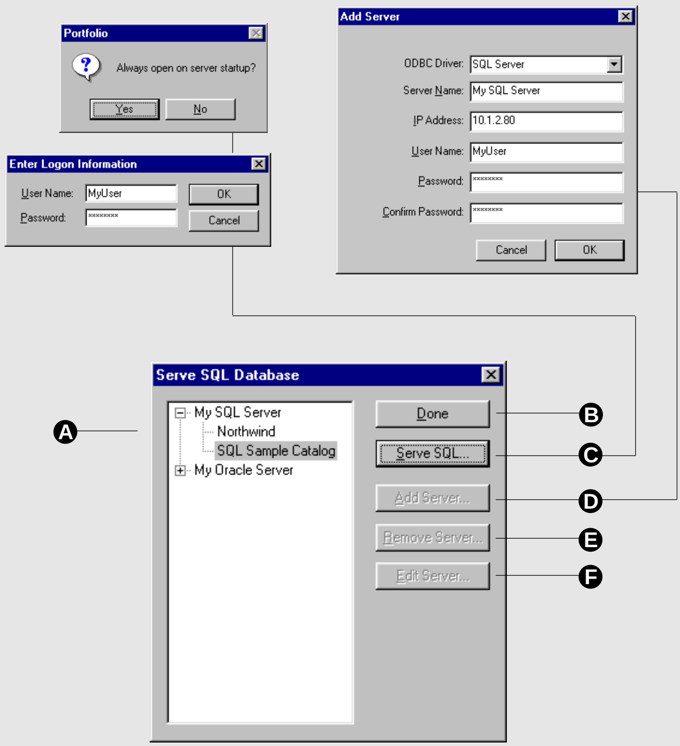
B Done: Closes the dialog.

C Serve SQL command: Select the SQL database that you want to serve as a Portfolio catalog, then click this button. You will be asked to specify whether this catalog is to be opened automatically when the Portfolio Server is launched. Then you will need to log on to the database as the database owner. The database will automatically be opened in Administrator mode. To allow other users to access the catalog, close the catalog or change access level to Publisher, Editor, or Reader.

D Add Server: Allows you to add a new SQL Server to the list.

E Remove Server: Allows you to remove the selected SQL Server.

F Edit Server: Allows you to change parameters of the SQL Server (see (**D**)).



Important

You will need to enter the SQL Connect Serial Code before you can access the SQL catalog. See *pages 275–276.*

Serving an SQL Database as a Portfolio Catalog

When the Portfolio Server that will be used to serve the SQL database has been added to the list of servers *(page 225)*, you can proceed to serve the database as a Portfolio Catalog.

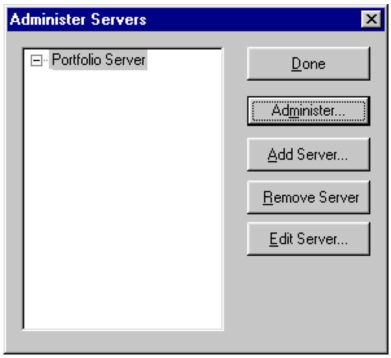
To serve an SQL database (catalog):

1. **From the File menu in the Portfolio 5.0 application, choose "Administer Servers."**

   The Administer Servers dialog is displayed.

   Note: If no server appears on the list, you will need to add one before it can be administered. See page 225.

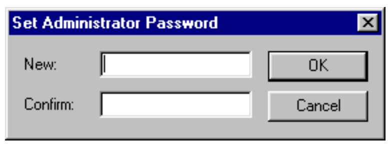
2. **From the list of Portfolio Servers, select the Server that you will be using to serve the SQL catalog, then click "Administer..."**



The first time you access a Portfolio Server as the Administrator, you will be prompted to serialize the Server (see page 232). At this time you should also enter the SQL Connect Serial Code (see page 275).

   You will be asked to enter the Server Administrator password. This is the password to the Portfolio Server.

3. **Enter the Administrator password for the Portfolio Server, then click "OK."**

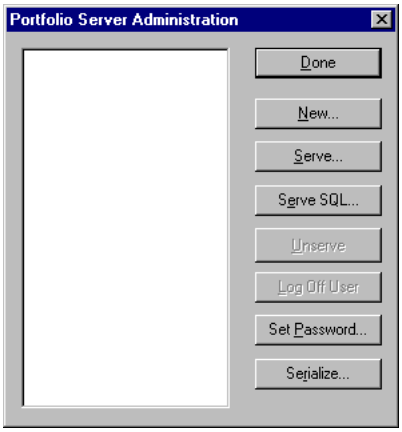


The first time a Portfolio Server is accessed by the Administrator, the password will be blank. You can enter a password, or just click "OK" and set the password later.

Important

While you can do so, in network environments the Server Administrator password should never be left blank.

The Server Administration dialog for the selected Portfolio Server will be displayed. Any catalogs already being served will be listed, including any active users.

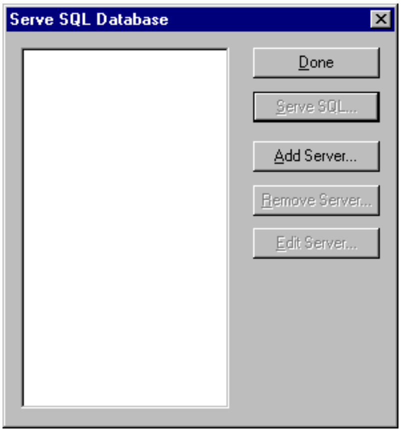


If if no catalogs are being served on this Portfolio Server (which is typically the case the first time you set up an SQL Server), the list will be empty.

You will now set up the SQL Server.

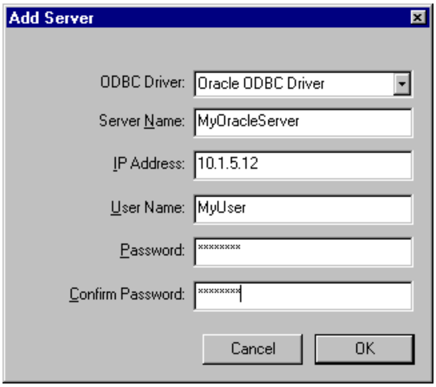
4. **Click the “Serve SQL” button.**

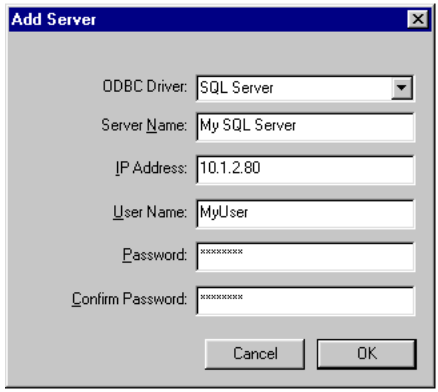
   The Serve SQL Database dialog will be displayed.



If if no SQL Servers have been set up (such as the first time you set up an SQL Server), the list will be empty.

5. **Click "Add Server."**
6. **Select the appropriate ODBC driver from the pop-up menu, then fill in the rest of the fields.**

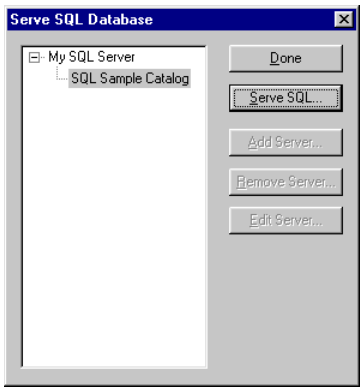




You will need to enter a name (this should be a different name than the name you gave the Portfolio Server) and the IP address of the SQL or Oracle Server.

You will also need to enter a User Name and Password for the SQL Server. This can be the same name and password that you used for SQL Database administration in step 2 on *page 267*, but you can use a different name and password for SQL Server administration if you prefer.

7. **When you have finished with SQL Server set up, click "OK."**



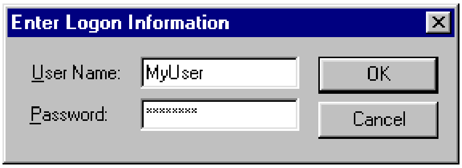
The SQL Server name, and any SQL Databases (catalogs) that you set up on that SQL Server will be displayed on the list. Now you will serve the SQL catalog.

8. **Select the SQL database (catalog) that you wish to serve, then click "Serve SQL."**

9. **You will be asked if you want to always serve this catalog when the Portfolio Server is started up.**

   This allows you to have the SQL database served automatically each time the Portfolio Server is launched.

10. **Next you will be prompted to enter the User Name and Password that you created as the SQL database administrator.**



   This must be the same user name and password that you entered as the database owner (dbo).

11. **Click "OK."**

   The catalog will be opened in Administrator mode. When the catalog is in Administrator mode, other users are locked out. To allow users to access the catalog, either close the catalog or change to a lower access level *(page 194)*.

12. **You can now administer the catalog just as you would any other Portfolio catalog.**

Serialization

Portfolio SQL Connect is activated with a single SQL Serial Code, and each Portfolio Server is activated with a single Portfolio Server Serial Code.

To activate Portfolio SQL Connect: After the Portfolio Server is set up, enter the SQL Serial Code from the Portfolio Server Administration dialog (File > Administer Servers > [select server] > Administer > Serialize). See *page 276*.

Note: The first time you attempt to administer a Portfolio Server you will be prompted to enter the Server Serial Code.

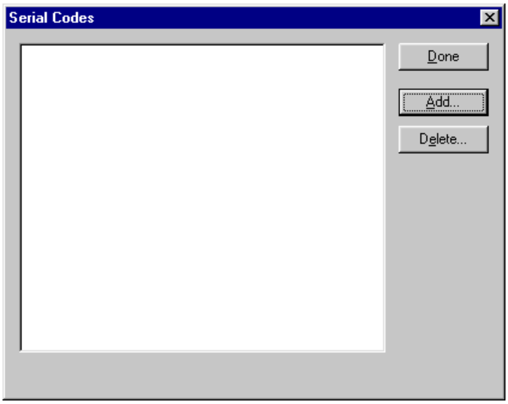
Adding Users

Multi-user serial numbers (licenses) allow users to connect to the Portfolio Server, up to the limit of users for that serial number. The multi-user serial number is entered at each workstation when the Portfolio 5.0 application (client) is installed. The Portfolio Server tracks how many connections are open at one time, and limits access to the catalog to the maximum number of connections for that serial number. To add additional connections, contact Extensis Customer Service to purchase additional multi-user serial numbers.

To add an SQL Connect Serial Code:

1. **Open the Server Administration dialog for the Portfolio Server (File > Administer Servers > [select server] > Administer).**
2. **Click "Serialize..."**

   The Serial Codes dialog is displayed.

3. **Click "Add..."**

   The Add Serial Code dialog is displayed.
4. **Enter the SQL Connect Serial Code, then click "OK."**

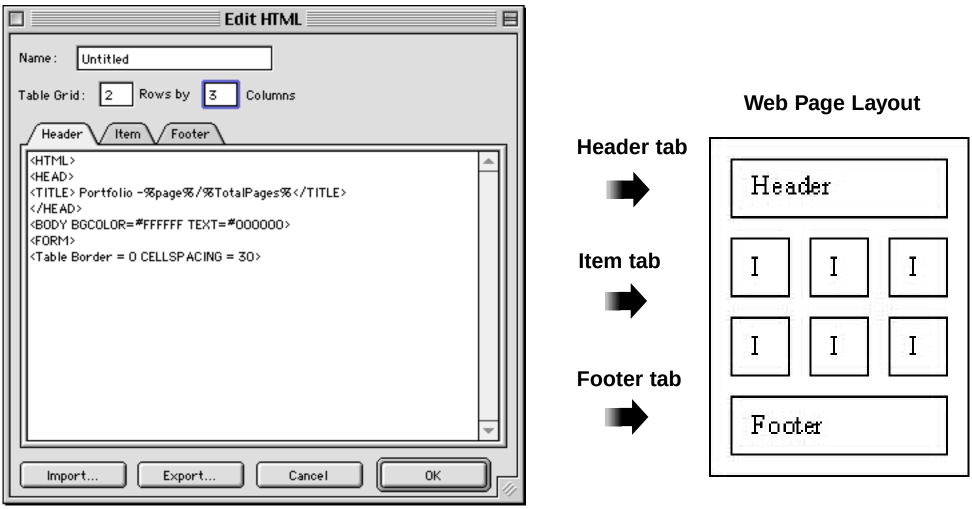
   When you click "OK" you will be returned to the Serial Codes dialog. The newly entered code will be listed.
5. **Click "Done" to return to the Server Administration dialog.**

To remove an SQL Connect Serial Code:

1. **Open the Server Administration dialog for the Portfolio Server (File > Administer Servers > [select server] > Administer).**
2. **Click "Serialize..."**
3. **Select the Serial Code that you wish to remove.**
4. **Click "Delete..."**
5. **Click "Done" to return to the Server Administration dialog.**

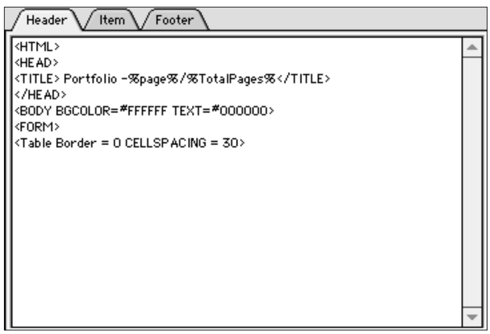
Export HTML Templates

The three HTML data tabs in the Edit HTML dialog represent the three portions of an HTML document (Header, Item, Footer). The Header is the set of tags at the top of the file, the Item is the set of tags written once for each record being written into a page, and the Footer is the set of tags written at the end of the file.



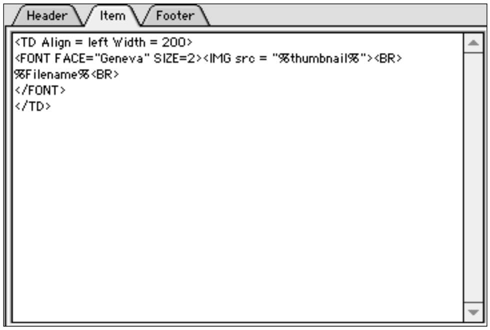
The following rules apply to each block:

Header:



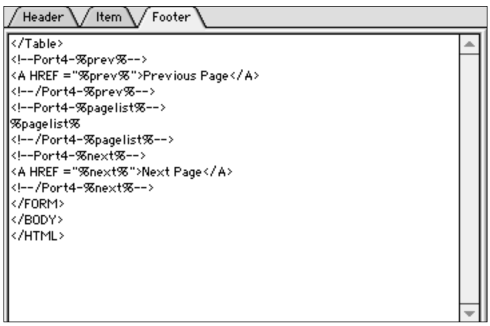
1. The header must contain the <HTML> tag and the <BODY> tag.
2. Because the grid layout is generated as a table, the Header must end with a <TABLE> tag.
3. See the “Export HTML Macros” section *(page 279)* for acceptable macros within the Header.

Item:



1. The item tab should contain all of the formatting for a particular table cell, including the opening <TD> tag and the closing </TD> tag.
2. Portfolio will generate the row tags (<TR> and </TR>) on its own, based upon the grid dimensions. Do not include these tags in any of the cells (unless you are adding your own rows at the top or bottom of the table).
3. The key to properly configuring the Item tab is in using macros. Please refer to other parts of this section for information on how to use macros.

Footer:



1. The Footer must start by closing out the table with a </TABLE> tag.
2. The Footer should close out with </BODY> and </HTML> tags.
3. See the “Export HTML Macros” section *(page 279)* for acceptable macros within the Footer.

Export HTML Macros:

Portfolio uses a macro language in the HTML Templates to allow for substitution of variable data at the time the HTML files are actually generated. All macros start and end with a `%` sign, so the proper use would be `%macro%`. To display a "`%`" sign in the actual HTML, use two consecutive `%` signs in the template (i.e. "`%%`" in the template produces one "`%`" in the generated output). The macros are case-insensitive.

The following tables list the supported macros within the different blocks:

All Blocks	
`%prev%`	Link to previous page. This will be the name of the previous file generated in the series of files. If this is the first file in the series, the name of the current file is substituted. Example: `<A HREF="%prev%">Previous Page</A>` Results: A hyperlink ("Previous Page") is displayed. When clicked, it takes the user to the previous page in the generated series.
`%next%`	Link to next page. This will be the name of the next file generated in the series of files. If this is the last file in the series, the name of the current file is substituted. Example: `<A HREF="%next%">Next Page</A>` Results: A hyperlink ("Next Page") is displayed. When clicked, it takes the user to the next page in the generated series.
`%page%`	Substitutes a number indicating which page in the series is being generated. Example: `<TITLE>Portfolio Search – %page%</TITLE>` Results: The text "Portfolio Search – 1" is displayed in the title bar of the browser window. (Assuming this is the first page in the series and assuming this tag is placed in the header prior to a <BODY> tag.)

Technical Notes on Exporting HTML

1. Using the `%fieldname%@x` *(page 280)* makes use of two different form controls (the drop-down menu and the scrolling list box). Because of this, the page must contain a <FORM> tag for these tags to be interpreted properly.

   The <FORM> tag can be either in the Item block or in the Header. If you plan to have a separate set of form controls on the page, put the <FORM> tag towards the beginning of the item block (usually just after the <TD> tag) and the </FORM> tag towards the end (usually just before the </TD> tag). This will prevent the controls from accidentally causing data to be submitted via your Submit control.

Item Block Only	
%thumbnail%	Substitutes a relative path to the thumbnail file for the current record (located in the Images subfolder). This is most commonly used to display the thumbnail on the page. Example: <IMG SRC="%thumbnail%"> Results: Thumbnail is displayed on the web page.
%fieldname%	Substitutes text data from the named field in the current record. For multi-valued fields, the text will be displayed as comma-delimited values (the same way it is displayed in Thumbnail view). Example: <B>%filename%</B> Results: "image001.jpg" is displayed in bold. (Assuming the record's filename is "image001.jpg".)
%fieldname^x%	Substitutes the value x from a multi-valued in the current record. If there are less than x values in the field, an empty string is substituted. x can only be a value between 1 and 9. The primary use of this field is for URLs. Example: <A HREF="%myurl%^2">%myurl%^1</A> Results: A hyperlink is generated in which the source is the URL value of the field (i.e. the second value in MYURL), and the text displayed on screen is the title value (i.e the first value in MYURL.)
%fieldname%@x	Substitutes text data from from the named field in the current record. However, the data in the field will be displayed as either a drop-down list or a scrolling list box. This macro is intended primarily for multi-valued fields. Substituting a value of 0 for x results in a drop-down list being generated. Substituting a value of 1 through 9 for x results in a scrolling list box of x lines being generated. Example: %keywords%@0 Results: The keyword list for the record is displayed as a drop-down list, with the first keyword displayed. Example: %keywords%@5 Results: The keyword list for the record is displayed as a scrolling list box that is 5 rows in height.

Tip

For more information on the specifics of creating pages for the Web and coding in HTML, consult any of the excellent tutorials and reference guides available on the Internet, or check your local bookstore or library for additional information.

2. To display a large text box for a multi-line field, wrap the field in a TEXTAREA tag.

   Example: <TEXTAREA COLS=50 ROWS = 3 WRAP ="SOFT" NAME="Description">%Description%</TEXTAREA>

   Results: This will cause a scrollable box 3 rows by 50 characters to be drawn with the contents of the record's Description field displayed. Note that this is also a FORM control, so the previous note regarding FORM tags applies here as well.

3. As with any HTML code, results will vary based on what make and version of browser the viewer is using. It is recommended that you test the generated results with any browsers with which you anticipate your visitors might access the pages.

> **Note**
>
> PortWeb features apply to Portfolio Network and Portfolio Server Editions only.

PortWeb Templates

Exported HTML templates define the HTML that is generated by PortWeb in response to a request. They can contain virtually any HTML code of which you can conceive.

PortWeb does not analyze the HTML you enter, other than to verify that you have used legitimate macro names. Therefore, any HTML you can create can be used, including JavaScript, DHTML, XML, etc.

There are three key aspects to an Export HTML template that are unique to PortWeb: Template Blocks, Template Macros, and Macro Blocks.

Template Blocks

PortWeb's HTML templates are made up of three blocks. You can define HTML for the Header, Item, and Footer. The Header section is placed at the beginning of each generated page, the item section is inserted into each table cell, and the footer is placed at the end of each generated page. In Portfolio's Edit Template dialog, you can either type the HTML directly into each block or paste it in using Paste from the Edit menu.

The following rules apply to each block in a PortWeb template:

Header:

1. The header must contain the `<HTML>` tag and the `<BODY>` tag.
2. Because the grid layout is generated as a table, the Header must end with a `<TABLE>` tag.

Footer:

1. The Footer must start by closing out the table with a `</TABLE>` tag.
2. The Footer should close out with `</BODY>` and `</HTML>` tags.

Item:

1. The item block should contain all of the formatting for a particular table cell, including the opening `<TD>` tag and the closing `</TD>` tag.
2. PortWeb will generate the row tags (`<TR>` and `</TR>`) on its own, based upon the grid dimensions. Do not include these tags in any of the cells (unless you are adding your own rows at the top or bottom of the table).

Template Macros

Portfolio uses a macro language in the HTML Templates to allow substitution of variable data at the time the HTML files are actually generated. All macros start and end with a `%` sign, so the proper use would be `%macro%`. To display a "`%`" sign in the actual HTML, use two consecutive `%` signs in the template (i.e. "`%%`" in the template produces one "`%`" in the generated output). Macros are case-insensitive.

The complete list of acceptable macros is shown in the table below.

PortWeb HTML Template Macros

Macro Name	Description
%fieldname%	Any field available to the user can be inserted into the item block. At the time of export, the value of the field for the particular record being processed is substituted for the macro.
%thumbnail%	Substitutes a thumbnail request. Note that this is different functionality than the existing Export HTML mechanism (which was putting a path to disk).
%RID%	Inserts the Record ID for the particular record. The Record ID is unique in the catalog and is used by commands such as Thumbnail, Add, and Remove to reference specific records in the catalog.
%prev%	Substitutes a relative link to the previous HTML file generated in the series. If the file being generated is the first file, an empty string is substituted.
%next%	Substitutes a relative link to the next HTML file to be generated in the series. If the file being generated is the last file, an empty string is substituted.
%pagelist%	Generates HTML for a set of page number links (i.e. 1 2 3 4 5)
%page%	Inserts the number of the current page into the HTML.
%totalpages%	Inserts the count of the total number of pages that could be generated, given the grid size and the count of the found record set.
%totalitems%	Inserts the count of the total number of found records for the submitted query.
%collectionadd%	Generates the HTML for a Collection Add request.
%collectionremove%	Generates the HTML for a Collection Remove request.
%Ccollectionshow%	Generates the HTML for a Collection Show request.

Special Macros

A few sets of macros behave differently, depending on whether the Portfolio client or PortWeb is generating the results.

Page Macros

`[%prev%, %next%, and %pagelist%]`

The HTML generated by the Portfolio client for `%Prev%`, `%Next%`, and `%PageList%` macros generate links to other HTML pages on disk. When these macros are handled by PortWeb, the generated HTML is instead new quickfind or query commands with the appropriate offset parameter.

For example, a template that generates two rows by four columns will use the following macro:

```
<A HREF = "%Next%">
```

to generate this HTML:

```
<A HREF=".PortWeb?quickfind=test&catalog=Sample&template=Simple&offset=8">
```

The catalog name, quickfind value, template name, and offset are all automatically determined based on the original request. When the user clicks on the link, a new quickfind command is submitted to PortWeb that instructs PortWeb to start generating results with the ninth item. This powerful feature means PortWeb only generates results for one page at a time, meaning response times are kept to a minimum.

While you could conceivably create these links manually, Portfolio automates all of this for you.

Thumbnail Macro

`[%thumbnail%]`

The `%thumbnail%` macro, when handled by PortWeb, generates a Thumbnail command (described on *page 285*) and fills in the appropriate parameters.

For example, a template that contains the following macro:

```
<IMG SRC="%thumbnail%">
```

will generate the following HTML.

```
<IMG SRC="PortWeb.dll?thumbnail=20&catalog=WebTest">
```

The Record ID specified for the catalog and the catalog name are automatically determined based on the original request.

Thumbnail Command

The thumbnail request is used to request a JPEG data stream of a particular thumbnail. This allows PortWeb to stream thumbnail data from a particular record in a catalog back to the web browser without ever having to write the data to disk first. Typically, these requests will be embedded in the HTML results from the query request. This will cause the browser to submit these requests back to PortWeb, allowing it to return each thumbnail as an individual JPEG stream.

The thumbnail command should always be part of an image link:

```
<IMG SRC="PortWeb.dll?thumbnail=80&catalog=WebTest">
```

The two parameters that must be supplied are shown below.

Thumbnail Command

Parameter	Description
`thumbnail`	Specifies the record's unique ID in the catalog. This parameter must appear first when doing a GET request.
`catalog`	Specifies the alias of the catalog is to be used. The alias is mapped via the settings file to either a catalog on disk or a catalog being served by a Portfolio server.

Usage

There are two Export HTML macros you can use to supply the record id: `%thumbnail%` and `%rid%`. The `%thumbnail%` macro provides the entire path for the image's SRC parameter, while the `%RID%` supplies only the record's id. Examples:

```
<IMG SRC="%thumbnail%">
```

```
<IMG SRC="PortWeb.dll?thumbnail=%rid%&catalog=Sample">
```

Normally it is easier to use the %thumbnail% macro, since it automatically encodes the RID and catalog name, but there may be times when you want to use the additional flexibility of manually establishing the other parameters.

Collection Macros

`[%CollectionAdd%, %CollectionRemove%, and %CollectionShow%]`

These commands have no purpose when using Export HTML with the Portfolio client, as they are dynamic commands that are built so that PortWeb can remember users' selections. For more information on using these commands with PortWeb, refer to "Collections" on *page 261*.

Macro Blocks

Export HTML allows for markers to delineate the beginning and end of "macro blocks." Macro blocks define the beginning and end of a section of HTML that surrounds a Portfolio macro. If the macro evaluates to an empty value, then none of the HTML text within the macro block is generated. Macro blocks are defined using HTML comment tags in the following structure:

`<!--Port4-%macro%-->` and `<!--/Port4-%macro%-->`

where the first comment opens the block and the second comment closes the block. As PortWeb processes the template, each time it encounters an open comment, it evaluates the macro defined within. If the macro has a value of nil (for example, if the field is empty), PortWeb skips the HTML code until the corresponding close comment is found (or the end of the section is reached).

The most common use for the macro blocks is the "Previous" and "Next" macros, so that additional information does not get generated. Take the following example:

```
<!--Port4-%prev%-->
<A HREF="%prev%">Previous Page</A>
<!--/Port4-%prev%-->
```

When PortWeb processes this section for page one of a search, if it were on the first page, the `%prev%` macro would evaluate to "nothing." Therefore, PortWeb would not generate any text until the close comment is encountered.

Another example would be to add a field name in front of a field macro, but not display the field name if there was no value for the field:

```
<!--Port4-%filename%-->
File Name: %filename% <BR>
<!--/Port4-%filename%-->
```

A more elaborate possibility would use the macro of one field as a logic flag for determining whether to display a completely different piece of information:

```
<!--Port4-%HasSource%-->
<A HREF="%path%">%filename%</A>
<!--/Port4-%HasSource%-->
```

The preceding example would insert a hyperlink to the source file, but only if there was a value in the field "HasSource."

Note that it is possible to nest macro blocks, but it may result in unanticipated results if the blocks are not properly nested or if the blocks are not properly terminated with a close comment, since PortWeb simply stops generating text until it encounters the appropriate close block or the end of the section.

Special Macro Blocks

Several macro blocks are set to evaluate to empty in particular situations:

- `%prev%` will evaluate to empty if the page being generated is the first page in a record set. This is useful for omitting a "Previous" link from the first page of a set.
- `%next%` will evaluate to empty if the page being generated is the last page in a record set. This is useful for omitting a "Next" link from the last page of a set.
- `%collectionadd%`, `%collectionremove%`, and `%collectionshow%` will evaluate to empty if the page is being generated by the Portfolio 5.0 client. Since these commands only work with PortWeb, this can allow you to use the same templates with both the Portfolio client and PortWeb.
- `%totalitems%` will evaluate to empty if no items are returned by a request. This is useful for generating HTML when there is a found set and you want to hide text, formatting, or buttons when no records are returned by a search.

Working with Templates on Disk

The Portfolio 5.0 client has the capability to save Portfolio’s HTML Templates to disk. This is particularly useful if you are working with larger amounts of HTML code, as you can then edit the HTML in an HTML-savvy text editor. In addition, it makes it much easier to move templates between catalogs or share templates with other users. Note that Portfolio’s custom formatting makes it difficult to work with these templates in visual page editors, such as Macromedia Dreamweaver or Adobe PageMill.

Template File Structure

When templates are written to files on disk, Portfolio inserts specific comment tags to define the beginning and end of the three template blocks. The tags are:

Header	Start	`<!—Port4-Header-->`
	End	`<!—/Port4-Header-->`
Item	Start	`<!—Port4-Item-->`
	End	`<!—/Port4-Item-->`
Footer	Start	`<!—Port4-Footer-->`
	End	`<!—/Port4-Footer-->`

In between each set of tags is the contents of each block. Other than these block tags, the HTML is identical to the HTML displayed in the Edit HTML dialog.

When the template is imported, Portfolio looks for the same tag pairs to determine into which blocks to place the HTML code. The tags themselves are stripped.

Exporting Templates

To export a template, simply click the Export… button in the Edit HTML dialog. You will be prompted to name the file. Once it is exported, you can open the file in any text editor.

Importing Templates

To import a template, simply click the Import… button in the Edit HTML dialog. You will be prompted to locate a file to import. Once you select a file, Portfolio scans it for the block tags and imports the information into the appropriate fields. If the appropriate start and end tags are not found, Portfolio will not import any of the data. All three sections do not need to be present in the file; if a section is missing, the block in the Edit HTML dialog will be untouched.

Note: Portfolio uses the "`%`*" sign to denote special macros, and will not handle "*`%`*" symbols that may be part of your HTML (such as "*`width=100%`*"). When importing HTML generated by other applications, convert each "*`%`*" sign in the HTML source file to two consecutive "*`%`*" signs in the template (i.e. "*`width=100%`*" in the source file should be changed to "*`width=100%%`*" in the template).*

Using Collection Macros

The three collection macros are %collectionadd%, %collectionremove%, and %collectionshow%. These macros behave differently depending on whether they are placed in the Item block or in the Header or Footer blocks.

Collection Macros in the Item Block

When the macros are placed in the Item block, a partial GET request is generated. For example, entering the `%collectionadd%` macro results in the following HTML being generated:

```
.PortWeb?add&rid=75&catalog=Sample
```

For this to be useful, the macro needs to be inserted into an anchor of some type. For example, consider the following template code:

```
<A HREF = "%collectionadd%&template=myCart">Add to Cart</A>
```

The resulting generated HTML is:

```
<A HREF = ".PortWeb?add&rid=75&catalog=Sample&template=myCart">Add to Cart</A>
```

This is then a valid link that, when clicked, would add Record ID 75 to the user's collection and display the contents of the cart using the "myCart template." Note that the "`&template=myCart`" parameter had to be specified separately, as the system does not know what template you want to use to display the cart. If the template parameter had been omitted, the default 4x4 thumbnail response would have been used. For more details on the parameters that are used by each collection command, refer to the section below, titled "Collection Commands."

The `%collectionremove%` and `%collectionshow%` macros behave in much the same way when placed in the Item block. The `%CollectionRemove%` macro will automatically generate the rid and catalog parameters; you must supply the template and other optional parameters. The `%collectionshow%` macro will automatically generate the catalog parameter; again, you must supply the template and other optional parameters.

Collection Macros in the Header and Footer Blocks

When the collection macros are placed in the Header or Footer blocks, the generated HTML is different. This is because these commands have different meaning in this context, because there are no particular records that can be referenced from these locations.

Instead, PortWeb generates the start of an HTML Form block. For example, placing the `%collectionadd%` macro in the header results in the following HTML being generated:

```
<FORM ACTION=".PortWeb?add" METHOD=POST>
<INPUT TYPE=HIDDEN NAME=catalog VALUE="Sample">
```

While at first glance this may not appear particularly useful, this is actually a very valuable feature. Because PortWeb is capable of handling multiple items in an Add add or Remove remove command, you can set up the template so that multiple records can be submitted in one form. For example, add the following line to the item block.

```
<INPUT TYPE="checkbox" NAME="rid" VALUE=%rid%>Add to Cart
```

And then place a Submit button and a close Form tag in the footer.

```
<INPUT TYPE="submit" NAME="send" VALUE="Add Selected Items">
<INPUT TYPE=HIDDEN NAME=template VALUE="Sample">
</FORM>
```

The generated HTML will have a checkbox for each item. If you check a set of these boxes and click the “Add Selected Items” button, all of the checked records will be added to the shopping cart and the results will be displayed using the “Sample” template.

Appendix A: Keyboard Shortcuts

Command	Macintosh Hotkey	Windows Hotkey
Create a new catalog	Command+N	Ctrl+N
Open an existing catalog	Command+O	Ctrl+O
Connect to Server	Command+Option+O	Ctrl+Shift+O
Print a Gallery	Command+P	Ctrl+P
Page Setup	Command+Option+P	Ctrl+Shift+P
Cut Gallery Items	Command+X	Ctrl+X
Copy Gallery Items	Command+C	Ctrl+C
Paste Gallery Items	Command+V	Ctrl+V
Undo (text entry only)	Command+Z	Ctrl+Z
Select all items in a catalog	Command+A	Ctrl+A
Save Gallery	Command+S	Ctrl+S
Save Gallery As...	Command+Option+S	Ctrl+Shift+S
Master Keywords Palette (Open/Close)	Command+K	Ctrl+K
Thumbnail view	Command+T	Ctrl+T
List view	Command+L	Ctrl+L
Record view	Command+R	Ctrl+R
Customize Gallery	Command+D	Ctrl+D
Sort by Other	Command+Option+D	Ctrl+Shift+D
Find specific items in a catalog	Command+F	Ctrl+F
Find all items in a catalog	Command+'	Ctrl+'
Replace	Command+Option+R	Ctrl+Shift+R
Add items to a catalog	Command+E	Ctrl+E
Update items in a catalog	Command+U	Ctrl+U
Cataloging Options	Command+J	Ctrl+J
Catalog Properties	Command+Option+J	Ctrl+Shift+J
Slideshow	Command+;	Ctrl+;
Preferences	Command+Option+E	Ctrl+Shift+E
Recover	Command+Option+V	Ctrl+Shift+V
Export Text File	Command+Option+T	Ctrl+Shift+T
Export HTML	Command+Option+H	Ctrl+Shift+H
Administration	Command+H	Ctrl+H
Change access level	Command+Option+B	Ctrl+Shift+B
Close a catalog	Command+W	Ctrl+W
Quit / Exit	Command+Q	Alt+F4

Command	Macintosh Hotkey	Windows Hotkey
Item Properties	Command+I	Alt+Enter
Preview Original	Command+B	Ctrl+B
Edit Original	Command+M	Ctrl+M
Copy Original	Command+Option+C	Ctrl+Shift+C
Move Original	Command+Option+Y	Ctrl+Shift+Y
Delete Original	Command+Option+X	Ctrl+Shift+X
Find Original	Command+Option+F	Ctrl+Shift+F
Rename Original	Command+Option+N	Ctrl+Shift+N
Rotate Thumbnail 90° CW	Command+]	Ctrl+]
Rotate Thumbnail 90° CCW	Command+[	Ctrl+[
New Gallery	Command+G	Ctrl+G
List Galleries	Command+Option+G	Ctrl+Shift+G
Online Help	Help	F1

Function	Shortcut
Preview an item	Double-click the item in any Gallery view Double-click the item thumbnail in the “Item Properties” dialog
Search using keyword	Double-click the keyword in List or Record view Double-click the keyword in the “Item Properties” dialog box Double-click the keyword in the “Catalog Properties” dialog box Double-click the keyword in the Master Keywords Palette
Remove item from Gallery window	Select the item and press Delete
Remove item from catalog	Select the item and press Option+Delete (Macintosh) Select the item and press Ctrl+Backspace (Windows)

Function	Shortcut
Move between Gallery items	Arrow keys
Scroll one screen at a time	Page Up / Page Down
Go to Top of Gallery window	Home (Macintosh) or Ctrl+Home (Windows)
Go to Bottom of Gallery window	End (Macintosh) or Ctrl+End (Windows)
Go to First item in the Row	Home (Windows Thumbnail view only)
Go to Last item in the Row	End (Windows Thumbnail view only)

Appendix B: File Types

Format	Mac File Type	Windows Extension	Extract Thumbnail	QuickTime 4.0	Portfolio 5 Native	Liberty Systems	Inso
Adobe Acrobat	PDF	.pdf	✓†			✓	
Adobe Illustrator 3.0 - 7.0	TEXT	.ai	✓			✓	
Adobe Illustrator 8.0	TEXT	.ai	✓			✓	
Adobe PageMaker 6.5	AB65		✓**				
Adobe Photoshop 2.5 - 5.5	8BPS	.psd	✓†	✓*			
AIFF Sound file	AIFF	.aif		✓			
AutoCAD		.dwg					✓
AVI Video		.avi		✓			
CorelDRAW 3.0 - 8.0		.cdr					✓
CorelDRAW Presentation Exchange		.cmx					✓
Encapsulated Postscript	EPSF	.eps	✓			✓	
FlashPix	FPIX	.fpx		✓			
Graphics Interchange Format (GIF)	GIFf	.gif			✓		
GIF Animated Graphics	GIFf	.gif		✓			
Joint Photo Experts Group (JPEG)	JPEG	.jpg	✓		✓		
Kodak PhotoCD††	PCDI	.pcd					
Macintosh Picture	PICT	.pct		✓	✓		
Macintosh Sound file	sfil	.snd		✓			
Macromedia Freehand 5.0 - 8.0	AGD2		✓**				
Microsoft Powerpoint 2.0 - 8.0	SLD8	.ppt					✓
MIDI Sound file	MIDI	.mid		✓			
MPEG Sound/Video	MPEG	.mpg		✓			
Multi-Ad Creator	MuAd		✓**				
Portable Network Graphics	PNGf	.png		✓			
Postscript Interpretive	TEXT	.ps				✓	
QuarkXPress 3.3 - 4.0	XDOC	.qxd	✓†				
QuickDraw 3D Metafile	3DMF	.3dmf		✓			
QuickTime Movie	MooV	.mov		✓			
Tagged Image Format (TIFF)	TIFF	.tif	✓		✓		
Truevision Targa	TPIC	.tga		✓			
Windows and OS/2 Bitmap	BMPp	.bmp, .dib		✓	✓		
(Microsoft) Windows Metafile		.wmf			✓	✓	
WAVE Sound file		.wav		✓			

* Translator does not support multi-layer files without Composite Layer/2.5 Compatibility turned on.
† Preview multiple pages
** Mac OS only
†† PDC Translator

Appendix C: Mappings

The following entries in the Mappings list are created automatically when a new catalog is created. To map these fields and tags to Portfolio Custom Fields (or enter additional fields), see *page 92*.

Type	Field	Code
TIFF	Document Name	269
	Image Description	270
	Scanner Make	271
	Scanner Model	272
	Page Name	285
	Creating Software	305
	Date & Time	306
	Artist	315
	Host Computer	316
	Ink Names	333
	Target Printer	337
	Copyright	33432
Photoshop	URL	1035
IPTC	News Wire	286
	Object Name	517
	Urgency	522
	Category	527
	Supplemental Category	532 (multiple)
	Keywords	537 (multiple)
	Instructions	552
	Date Created	567
	Time Created	572
	Byline	592
	Byline Title	597
	City	602
	State	607
	Country Code	612
	Country	613
	Transmission Reference	615
	Headline	617
	Credit	622
	Source	627
	Copyright	628
	Caption	632
	Caption Writer	634

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