# Extensis™
# Portfolio™

# GETTING STARTED WITH PORTFOLIO

# Step-by-Step Guide

Welcome! Here's a step-by-step guide to getting you started with Extensis Portfolio.

» It is designed to help you install the 30-day trial, set up an initial catalog, add and find your digital assets, manage metadata, and more.

» These instructions are for setting up a testing environment for your trial. It is not intended to be used as a guideline for configuring or selecting a production server. If you need help with production server requirements, please speak to your Extensis Regional Business Manager for assistance.

» We recommend that you work with your IT department to install and activate your trial.

» Watch step-by-step tutorial videos to get a quick start with Extensis Portfolio www.extensis.com/portfolio-tutorials/.

# Before you get started...

To ensure your installation runs smoothly and to help avoid common issues that could lengthen or complicate the process, it is important to:

## Windows Users

☐ Use a clean OS server that is a non-production server. This will eliminate conflicts with other software and avoid impacting production.

☐ Make sure your firewall(s) and your antivirus software are off.

☐ Make sure you have the proper system requirements in place in order to run the application.

☐ Have the assets to be catalogued by Portfolio local to your machine. If this is not the case, Portfolio Services must run under a Domain-Level Service Account where the Service Account has Local Admin Rights on the Windows Server that Portfolio Server is running on, "Log on as Service" privileges, and full read/write access to the network locations with assets being cataloged.

☐ Make sure you have Adobe's DNG converter installed on your server. The DNG converter is not installed as part of the Portfolio install process and will need to be installed properly. If you have the Adobe DNG converter already installed on your server you can disregard this step.

## Mac Users

☐ Use a clean OS server that is a non-production server. This will eliminate conflicts with other software and avoid impacting production.

☐ Make sure your firewall(s) and your antivirus software are off.

☐ Make sure you have the proper system requirements in place in order to run the application.

☐ Have the assets to be catalogued by Portfolio local to your machine.

☐ Make sure you're using the Administrator account for your Mac OS.

☐ Make sure you have Adobe's DNG converter installed on your server. The DNG converter is not installed as part of the Portfolio install process and will need to be installed properly. If you have the Adobe DNG converter already installed on your server you can disregard this step.

# Step 1.
# Download and install Portfolio Administration

This will allow you to set up catalogs, assign users, register your serial number, and more.

Watch a step-by-step tutorial video for installing Portfolio at www.extensis.com/portfolio-tutorials/.

## Windows Users

1. Download the Portfolio installer from https://www.extensis.com/support/portfolio-2017-support/. Choose Portfolio 2017 (Windows).

2. Once the download is complete, move the zipped file to your desktop. From there, right-click the installer, unzip the file.

3. Now that you have the installer downloaded and unzipped it, right-click it, and choose Run as Administrator.

4. Follow the prompts and the installer will move you through the rest of the process.

5. Finish by closing the installer window.

## Mac Users

1. Download the Portfolio installer from https://www.extensis.com/support/portfolio-2017-support/. Choose Portfolio 2017 (Mac).

2. Save the zipped file to your desktop. After you have downloaded the zipped file, double-click to run the Archive Utility and unpackage the zipped file.

3. Double-click the .dmg file to open its contents. Double-click the .mpkg file to run the installer.

4. If you get an error message telling you that the file can't be opened, press OK to dismiss the message. Then access the computer's System Preferences and go to the Security & Privacy section. Click the Open Anyway button. In a few seconds, the installer will start to automatically run again. When prompted, click Open to continue.

5. Follow the prompts and the installer will move you through the rest of the process.
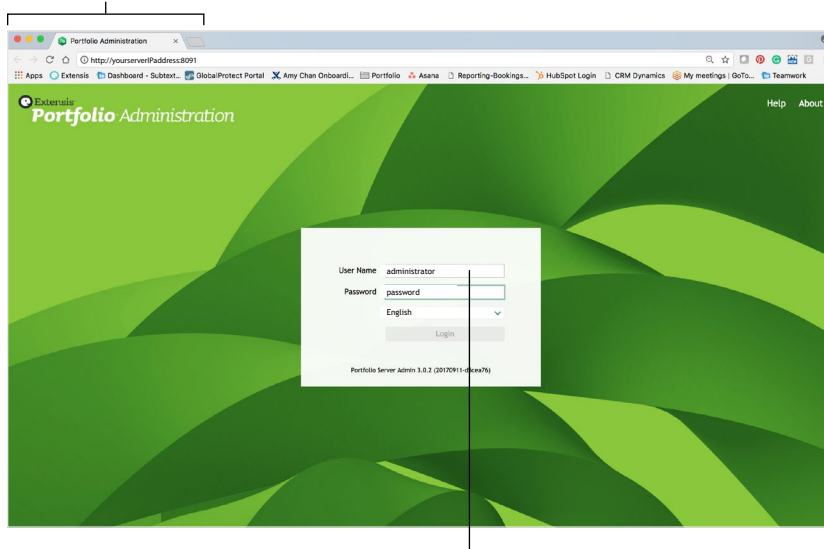
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# Step 2.
# Activate Software

After you sign up for the trial, activate it with Portfolio trial license serial number you received. If you haven't already, sign up for the 30-day trial here.
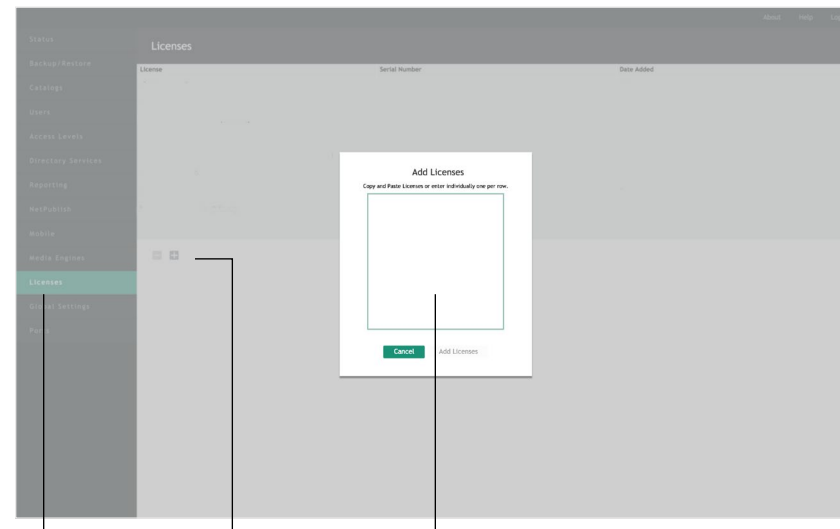
» Get the serial number provided via the email you received after signing up to receive the 30-day trial.

» Login to the Portfolio Administration

1. In your browser bar, enter:
   http://yourserverIPaddress:8091

   Replace *yourserverIPaddress* with the IP address or hostname where you installed Portfolio.
   If you're not sure what your server IP address is, please consult with your network administrator.



2. Enter in the trial credentials.
   Username: administrator
   Password: password



1. Open Licences Tab   2. Click the + to add   3. Copy and Paste your 30-day trial license number(s)

# Step 3.
# Create a Catalog

Create one or multiple catalogs to store collections of your digital assets.

Watch a step-by-step tutorial video for *Creating Catalogs* at [www.extensis.com/portfolio-tutorials/](www.extensis.com/portfolio-tutorials/).



1. Open Catalogs Tab    2. Click Add New Catalog

3. Type in Catalog Name    4. Select Watch Folders

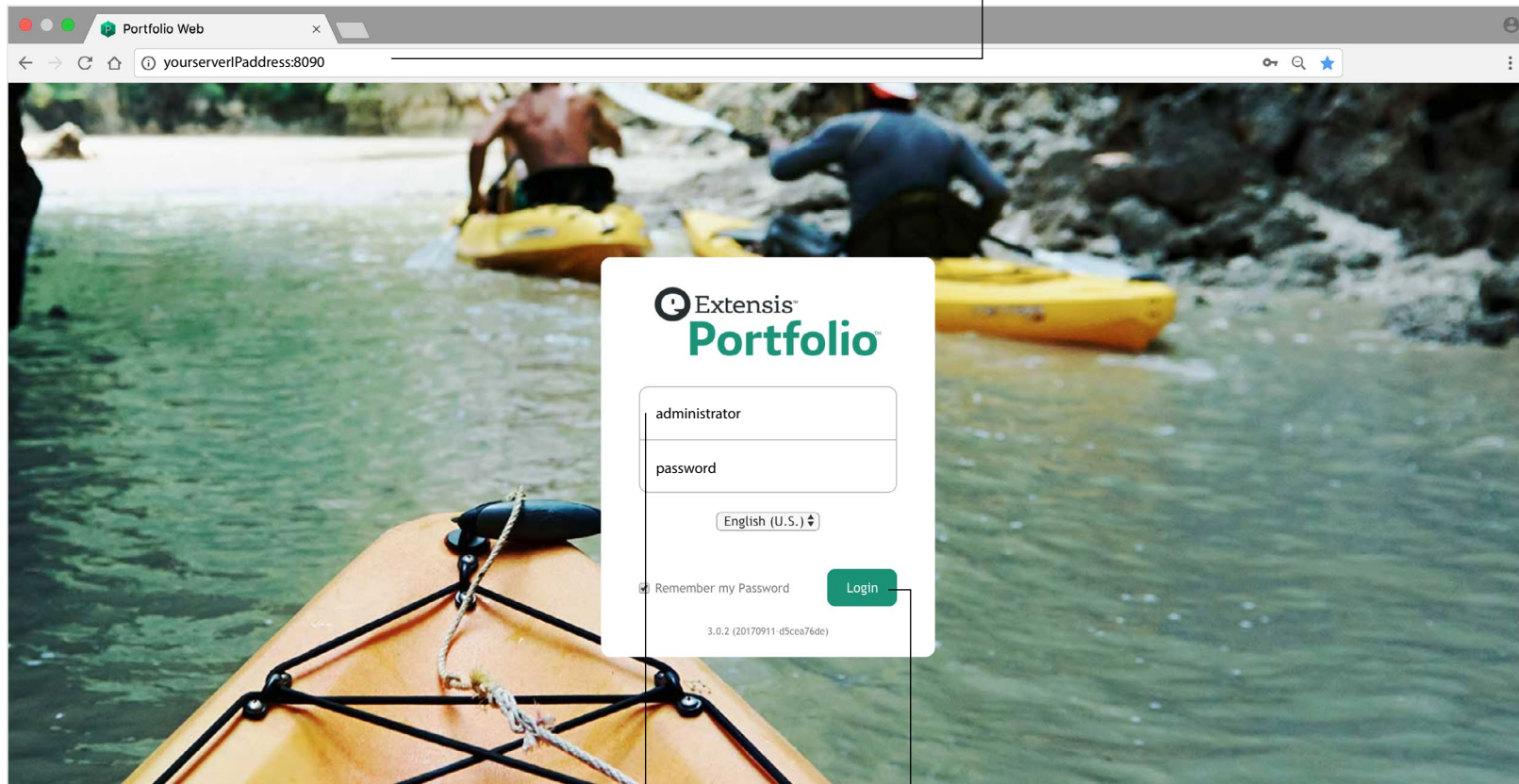5. Uncheck the Create an AutoSync folder

6. Click Create

# Step 4.
# Login to the Portfolio Web Client

Start storing, organizing, finding, accessing, and sharing your assets. To use the Portfolio Desktop Client, [download](#) and install it for your operating system.

1. In your browser bar, enter yourserverIPaddress:8090

   Replace *yourserverIPaddress* with the IP address or hostname where you installed Portfolio.

Portfolio Web — yourserverIPaddress:8090

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administrator

password

English (U.S.) ⬍

☑ Remember my Password          Login

3.0.2 (20170911-d5cea76de)

2. Enter in the trial credentials:
   Username: administrator
   Password: password

3. Click Login

If you would like drag and drop files between Portfolio and your creative apps, folders, and desktop; install the Portfolio Desktop Client.
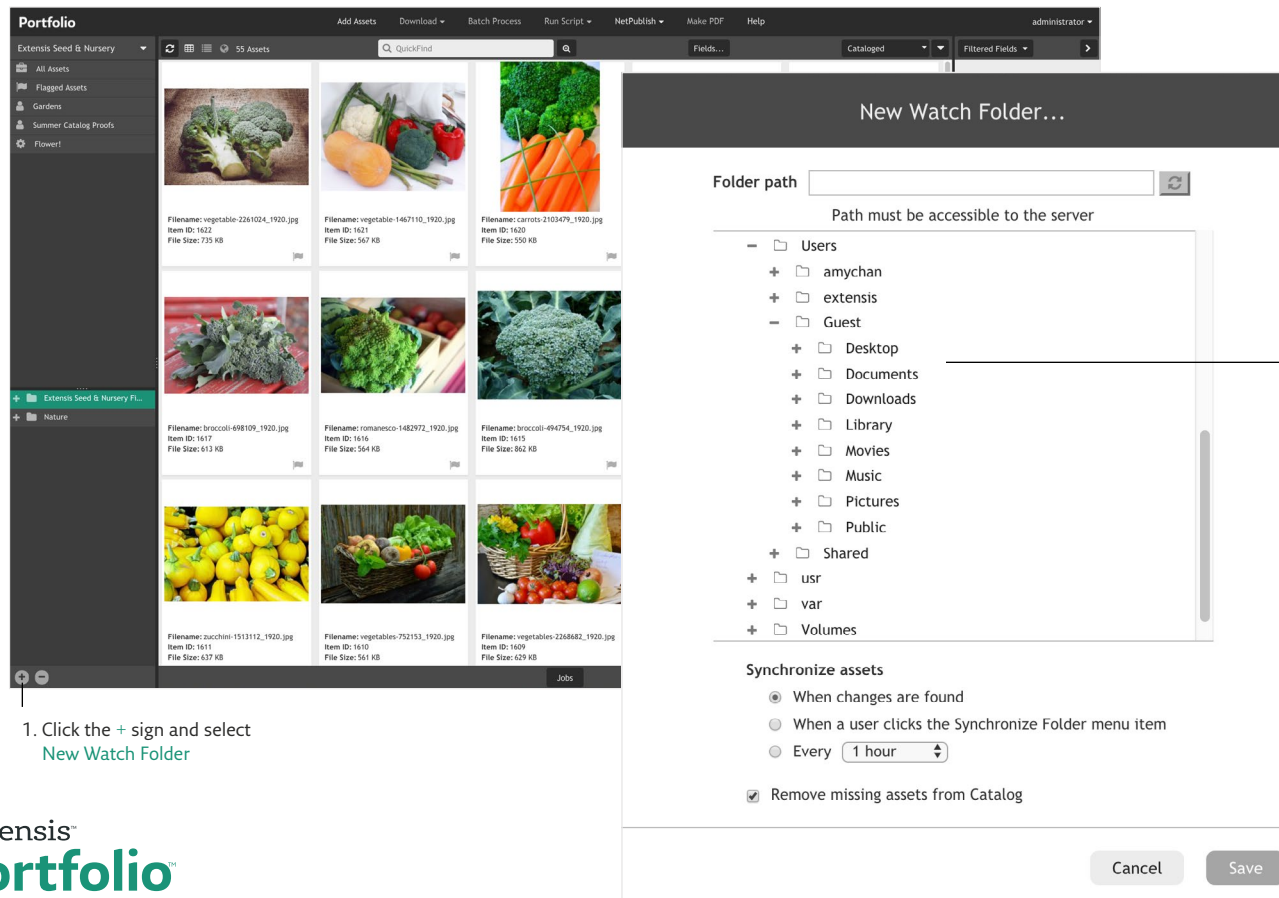[Windows Installer](#) | [Mac Installer](#)

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# Step 5.
# Add Assets to Your Catalog

Create a Watch Folder to connect your assets to Portfolio.

In this walk-through, we created a Watch Folder catalog, which allows Portfolio to continually watch the folders in your connected file system and synchronize it when a change is found. This makes it easy to keep your assets coordinated when you're connecting Portfolio to an existing folder structure, including those on Box or DropBox.

Test it out by adding files into the Watch Folder in the connected folder, refreshing your Portfolio view, and seeing the new asset(s) appear. You can also remove an asset from the Portfolio client and delete it from the catalog and your disk.

Watch a step-by-step tutorial video for *Adding Assets* at
www.extensis.com/portfolio-tutorials/.



1. Click the + sign and select New Watch Folder

2. Navigate to a folder that is local to your machine that includes the assets you would like to be managed by Portfolio
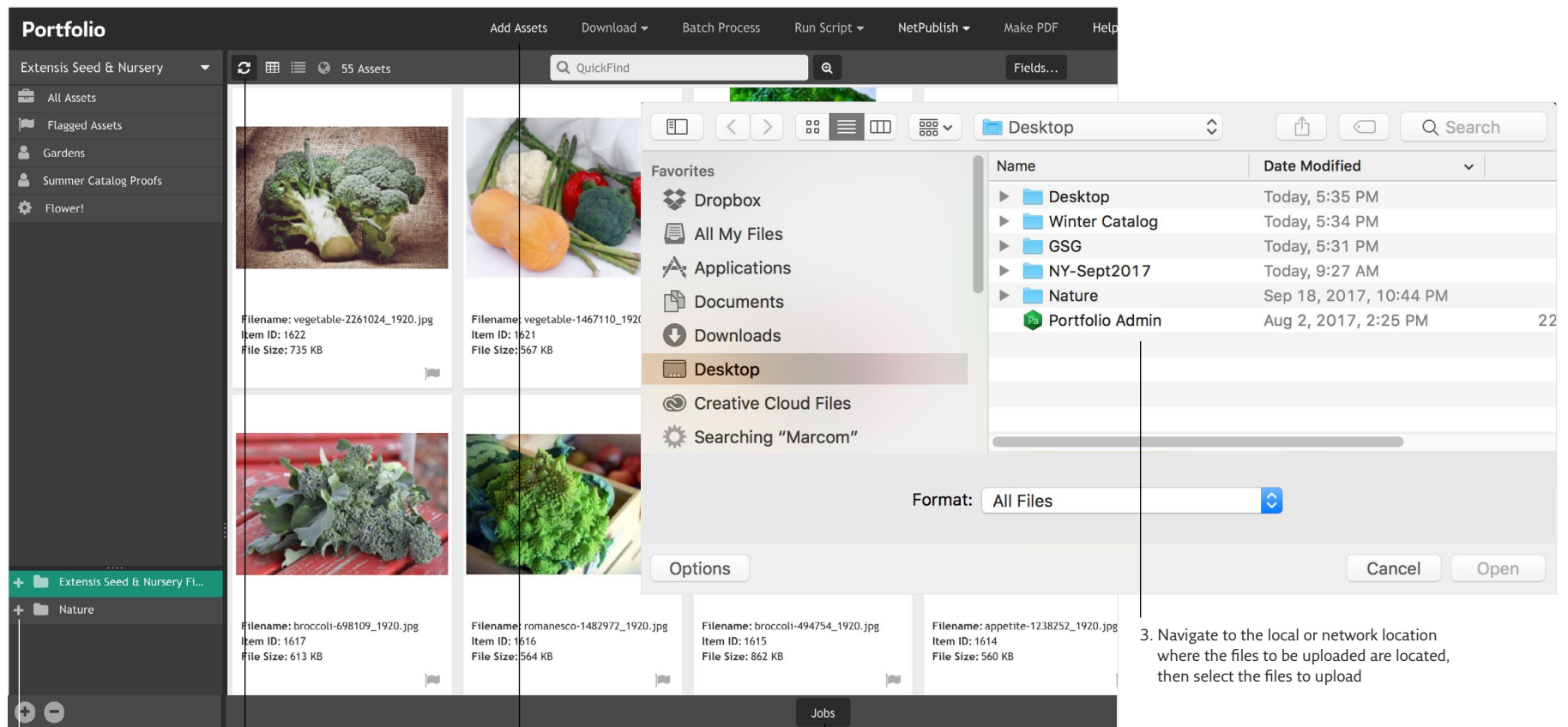
3. Select the folder

4. Click Save

# Step 5.
# Add Assets to Your Catalog (continued)

**Add Assets from toolbar menu.**

When you want to add more assets to Portfolio, you can use Add Assets from the toolbar.



1. Select folder to add your files

2. Click Add Assets

5. Click refresh arrows to see assets in the view box below
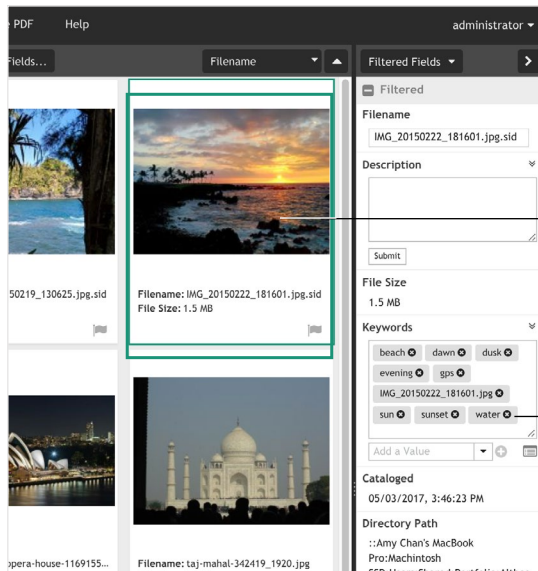
4. Watch the completion of job status

3. Navigate to the local or network location where the files to be uploaded are located, then select the files to upload

# Step 6.
# Add Metadata

Associate metadata to each of your assets to power Portfolio's search functionality.

Portfolio has a number of ways to add metadata and keywords to your assets to get you started. First, Portfolio will extract data such as Filename, File Size, IPTC and EXIF metadata, and GPS location fields (when available) and populate many of the basic information fields in Portfolio. It will also pull over path-based information gleaned from each cataloged file's location on disk. Then Portfolio provides multiple ways for you to add in your own metadata and asset information.
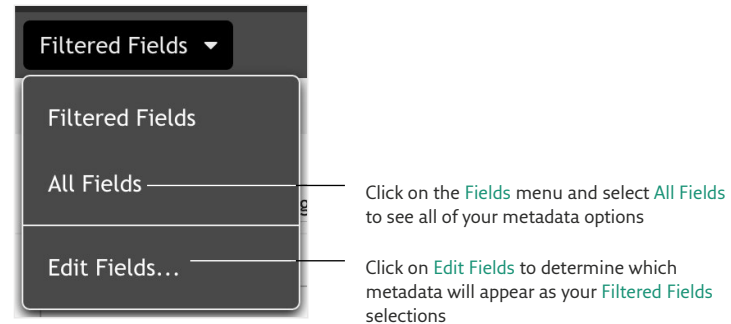
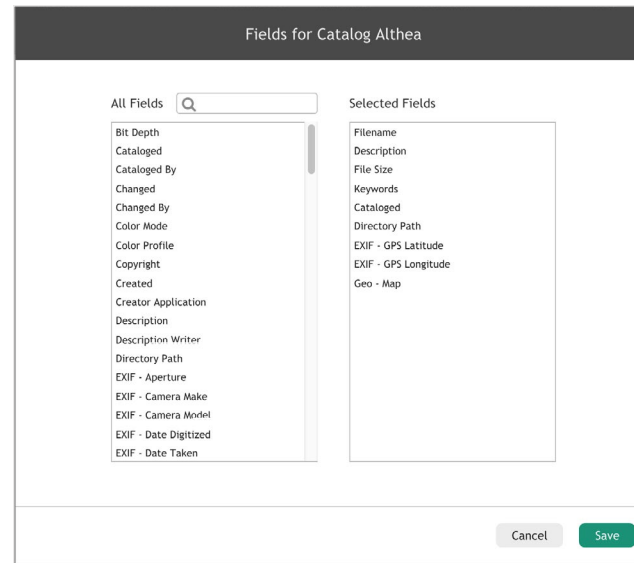Watch a step-by-step tutorial video for *Adding Metadata and Keywords* www.extensis.com/portfolio-tutorials/.



1. Select one of your assets and notice the metadata that has been automatically attached to your assets

2. Add or modify any of the metadata fields

# Step 7.
# Select the Metadata Fields to Display



Click on the Fields menu and select All Fields to see all of your metadata options

Click on Edit Fields to determine which metadata will appear as your Filtered Fields selections

Place the fields you'd like to see in the Selected Fields column. Either drag the field from one box to the other or simply double-click the field name.
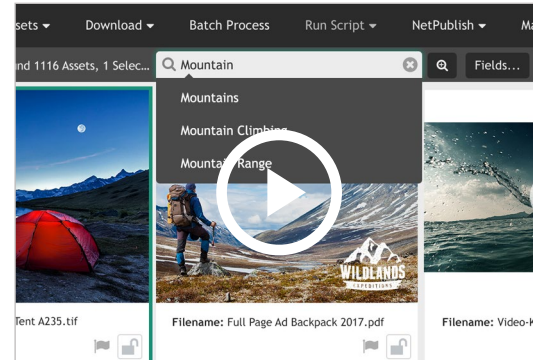
# Step 8.
# Search and Find Your Assets

Portfolio's search functionality is connected to all of your metadata fields and the text of catalogued documents. Searches will be performed against the organizers (folders, galleries) selected in the Organizers Panel. Matching assets will display in your main window. There are several ways to search for your assets. QuickFind is one of the more common ways to search for assets in Portfolio.





## QuickFind

You can use any of these Types of Search in the QuickFind field.

Watch a step-by-step tutorial video for *Finding Assets* at www.extensis.com/portfolio-tutorials/.

| TYPE OF SEARCH | EXAMPLE | |
|---|---|---|
| | Enter in... | Will return with... |
| Single Term | cat | "cat, catalog, catastrophe" |
| Multiple Terms | cat dog | "cats, dogs, cat-dogs, dog-cats, doggone, catnap" |
| Wildcard: Use the * to stand in for any number of characters | *cat | "cat, catastrophe, scatterbrained, dog-cats, uncategorical" |
| Phrases | To search for an exact phrase, put the phrase in double straight quotes | |
| Boolean:. | Use AND in simple searches to find assets with two terms. Ex. cat AND dog | |

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# About Portfolio by Extensis

Extensis Portfolio is a highly rated Digital Asset Management system that is designed to help companies and workgroups of all sizes efficiently manage asset creation, organization and utilization. It ensures users have immediate access to the correct files in the desired format in a central location. It is the only digital asset management solution that is affordable, simple to use, can be setup within a day, and provides everything organizations need to get started right out of the box. As a standards-based platform that works with other systems and existing workflows, Portfolio provides a single place for teams to locate important files with consistent metadata information using a web browser or Mac and Windows desktop applications. Portfolio is ideal for organizations with large collections of images, videos, and marketing collateral.

Extensis Portfolio can be deployed on-premise or hosted in the cloud. Its on-premise technology is based on more than 20 years of software engineering and its cloud hosted technology has been developed and continues to be supported by certified cloud-op engineers on staff. Portfolio uses web based APIs to integrate with key business applications, for example, to monitor and ingest assets from Box, DropBox and Google Drive, so that you can consolidate all assets in a centralized location. In addition, Extensis is investing in cloud integrations with industry leading partners that allow you to leverage services such as Clarifai for image recognition and automated asset tagging, and FADEL for asset rights clearance. Extensis Portfolio ensures that your digital assets are always available to your users whenever they need them, whether you choose an on-premise or cloud hosted deployment.

For more information, visit: **www.extensis.com**