Extensis™ Portfolio™

Portfolio 3
Web Client Guide

Legal notices

Portfolio v3.6.2 ❧ 19 September 2019

Contents

Intro to Portfolio Web
What's New
Version 3.6.2
- We have added new Smart Keyword Engines for **Art Style**, **Art Movement**, and **Art Subject**. These engines return identifying characteristics for images of artworks in your catalog. **Art Style** returns keywords such as **Art Deco**, **Rustic**, or **Shabby Chic**; **Art Movement** returns keywords such as **Classical**, **Cubism**, or **Romanticism**; and **Art Subject** returns keywords such as **Abstract**, **Food**, or **Places**.
- We now support running Portfolio on Windows Server 2019.

Version 3.6.1
Client improvements
- Portfolio now extracts and embeds metadata in JPEG 2000 files. **Learn more** on page 35.
- NetPublish allows selecting which fields to display beneath thumbnails. **Learn more** on page 56.
- NetPublish allows displaying a "Terms of Service" for your NetPublish site. **Learn more** on page 57.
- Preview mode now includes access to the **Properties** panel, so you can view and modify metadata while viewing the full image. **Learn more** on page 11.
- Preview mode allows navigating between all items if none are selected. **Learn more** on page 12.

Version 3.6
Client improvements
- Option to show only the assets in a selected folder, and not its subfolders
- Filter the gallery list by name
- Mark galleries as favorites and move them to the top of the list
- Photoshop Rating: Star ratings can be edited visually in any view (Web and Desktop clients)
- Preview Mode allows you to crop and download a copy of an asset

Administration improvements
- Licensing and activation improvements.
- New reports: Most Downloaded Assets, Most Previewed Assets, Deleted Assets, Downloads, Uploads, File Types, Search Terms.
- Unlimited Smart Keywords included at no charge when you have an Annual Service Agreement
- Automatically add Smart Keywords while cataloging assets

Connecting to Portfolio
To connect to Portfolio, you must first have the following access information from your Portfolio Administrator:
- The Portfolio server's IP address or server name;
- the Portfolio server port number used for Portfolio Web connections;
- your user name;
- your password.

To connect to Portfolio:
1. Open a supported web browser.
2. In the address field, enter the IP address or server name followed by a colon and the port number.
   The default port for connecting to Portfolio is 8090. For example:
   http://192.168.0.1:8090
   http://servername:8090
3. Select your preferred language from the drop-down menu.
4. Enter your user name and password and click **Login**.

Check the box labeled **Remember my Password** to have Portfolio Web remember your password on the current computer and browser.

> **NOTE:** Portfolio can be configured so that you can use your network login and password; check with your Portfolio Administrator to see if this has been set up for you.

Changing the display language

You can specify the language of the Portfolio Web application through the **Language** drop-down menu on the **Login** page.

To change the current language setting:
1. Log out of the Portfolio Web application.
2. Select a new display language from the menu and log in.

The Portfolio Web Client interface
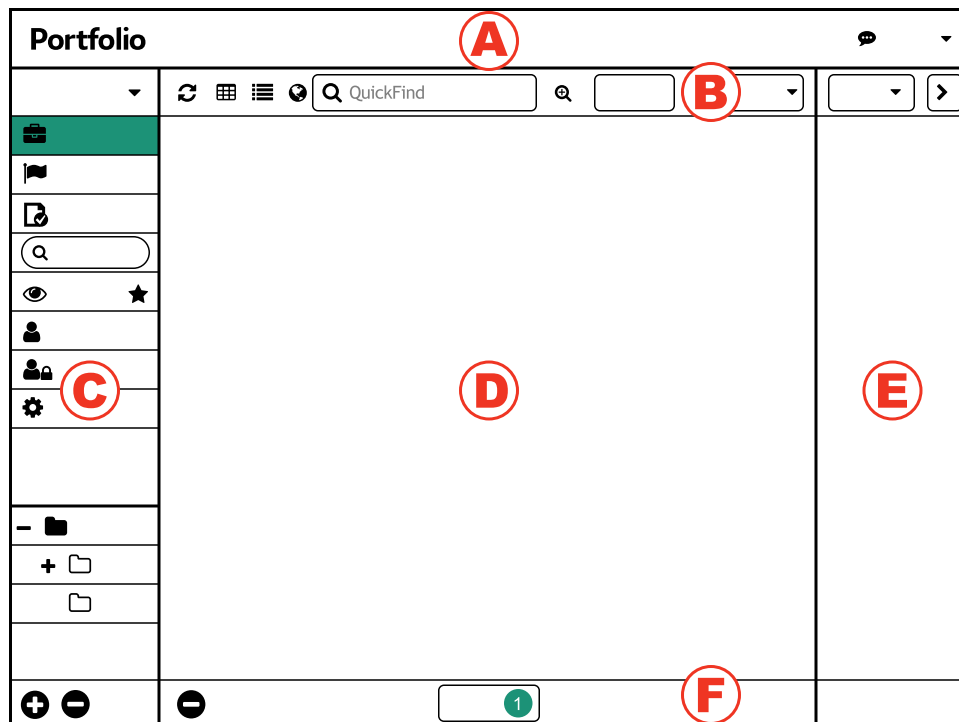
A: Main toolbar; **B:** View, Find, and Sort options; **C:** Organizers panel; **D:** Main window;
E: Properties panel; **F:** Status bar

A. Main toolbar

The main toolbar is displayed across the top of the Portfolio Web interface. This toolbar gives you access to the major functions, such as uploading, downloading, and converting files.

Click **Feedback** 💬 to send feedback on your experience with the Portfolio Web or Desktop client.

B. View, Find, and Sort

Portfolio Web can display items in three view modes: ⊞ Grid, ☰ List, and 🌐 Map. Depending on your workflow, each view mode has its advantages.

You can sort the Grid and List views on any data field, in either ascending or descending order.

Use QuickFind to instantly search common item data fields, or switch to Advanced Find to search for items using a number of criteria.

The **Field Chooser** allows you to choose data fields to display with each item in the Grid view, List view, the Properties display in Preview mode, and the Properties panel.

See also: **Main Window View Options** on the next page; **QuickFind** on page 25; **Advanced Find** on page 26; **Using Map view** on page 8; **The Field Chooser** on page 10

C. Organizers panel

The **Organizers** panel at the left side of the window allows you to select one of the catalogs that are available to you, then displays the **Galleries** and **Folders** within that catalog.

To select a catalog, click the pop-up menu at the top of the panel.

Click a gallery or folder to display the items it contains in the main window.

Use 🔍⬚ at the top of the **Galleries** list to filter gallery names.

Drag the separator between galleries and folders up or down to show more of one and fewer of the other.

Click ☆ to the right of a gallery name to mark the gallery as a favorite (and move it to the top of the **Galleries** list).

See also: **Organizers** on page 18

D. Main window

The main window displays thumbnails and data within your catalog. When you select a catalog, gallery, or folder in the **Organizers** panel, the main window displays the assets within your selection.

You can refine how items are displayed using the main toolbar at the top. You can control:
- The sort order of assets on the page;
- Whether to display a grid or list view of your assets, or a map showing asset location information.

The main window also displays the results of any QuickFind or other catalog search.

See also: **Main Window View Options** on the next page; **Using Map view** on page 8

E. Properties panel

The **Properties** panel displays file system and metadata information for items selected in the main window. Many of the fields that are displayed can be edited directly.

When you select a single item, all of that item's catalog information and metadata is displayed in the **Properties** panel. Any metadata that you edit is applied only to the selected item.

When you select multiple items, the **Properties** panel displays the fields that are common to all selected items. Any changes you make in the displayed fields will be applied to **all** items in the selection.

You can hide the **Properties** panel using the icon ⟩ at the top right of the panel.

See also: **Asset Properties and Metadata** on page 31

F. Status bar

The Status bar at the bottom of the window shows how many jobs have been processed. Click **Jobs** to view the results of individual jobs.

See also: **Jobs** on page 52

Shortcut menus

When you have selected assets in the main window, or an organizer in the **Organizers** panel, you can access common functions from a shortcut menu. Right-click one of the selected assets to reveal a menu of functions you can perform.

Main Window View Options
⊞ Grid view

The **Grid** view displays a thumbnail of each asset and as many metadata fields as you want to include.

To change the information displayed with each asset, click the **Fields** button in the **View, Find, and Sort** toolbar.

≣ List view

List view displays a scrollable list of files with a small thumbnail, flag status, and the same metadata fields displayed in **Grid** view.

🌐 Map view

Map view displays a world map. Any assets that have GPS or other geospatial metadata will be displayed on the map.

For details about **Map** view, see **Using Map view** on the next page.

Previewing assets

Preview mode displays a large, zoomable preview of individual assets selected from any of the view modes.

To preview assets in **Grid** or **List** view, select one or more, then double-click one of the selected assets.

To preview an asset in **Map** view, click on a pin 📍 on the map, then double-click the preview image.

Previews are automatically generated by Portfolio. The maximum preview image size or audio/video clip duration can be specified for each catalog by the Catalog Administrator in the Portfolio Administration application.

Some file types do not support thumbnail or preview images; for these types of files, the file icon is shown instead.

Fields

You can choose the properties that you want to display with each asset's thumbnail in **List** or **Grid** view.

To open the **Field Chooser**, click **Fields** in the **View, Find, and Sort** toolbar.

For more information about using the **Field Chooser**, see **The Field Chooser** on page 10.

🔄 Refresh

To update the current view (especially after adding or removing items from an organizer), click 🔄 in the **View, Find, and Sort** toolbar.

The 🔄 button will pulsate when the main window needs to be refreshed.

Using Map view
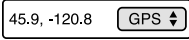
Map view allows you to filter and view assets that contain valid location information, either a GPS point or a bounding rectangle. To view your assets in relation to the world map, click 🌐.

In Map view, assets that are geographically close together are shown as a cluster, a colored circle ⑤ with the number of assets. Individual assets are shown as a pin 📍.

If you hold the mouse pointer over a cluster without clicking, Portfolio will display a rectangle that shows the area that includes the assets in the cluster. When you click the cluster, Portfolio will zoom in to the bounds of the cluster.

Map view controls

CONTROL/ACTION	RESULT
➕	Zoom in
➖	Zoom out
⌂	Home: Zoom map to the search bounds
⛶	Display map in full screen
⊡	Exit full screen
🔍	Search the map for an address or landmark
▦	Select which elements to display on the map
▪	Set or clear search bounds for the map
[mini-map showing Vancouver, Seattle, Washington, Portland]	Shows the region displayed in the main map view; click and drag the mini-map to change the map view
◤	Shows the mini-map
◢	Hides the mini-map
45.9, -120.8 [GPS ⇕]	Shows the cursor coordinates when you move the mouse over the map; change the coordinate reference system using the pop-up menu
📍	Click to show a thumbnail of the associated asset; click the thumbnail to select the asset
5	Hover to show bounds of the cluster; click to zoom to the cluster bounds
Double-click in the map	Zoom in on the location clicked
SHIFT double-click in the map	Zoom out from the location clicked
Mouse scroll	Zoom in/out
Click and drag in the map	Pan the map

Search bounds

Setting search bounds is the equivalent of search the Portfolio catalog for assets that lie within the bounds. The **View, Find, and Sort** toolbar shows this in two ways: When a search boundary is in use, the **Map** view icon changes color 🌎, and the number of asset within the bounds is displayed.

The search bounds are shown on the map as a blue rectangle with a translucent light blue interior.

To set search bounds, click ▪, then use the center handle to move the bounding box and the corner handles to resize the bounding box. Click **Save** to set the bounds.

To remove the geographic search bounds, click ▪ then click 🗑.

About geographic references

Portfolio has added support for several types of "georeferenced" assets. A georeferenced asset is an asset that contains location information defining where on Earth the asset is positioned.

There are two kinds of location information that Portfolio can utilize with assets: GPS metadata that tells (for example) where a photo was taken, and GIS (Geographic Information System) metadata, that includes position, resolution, and rotation information.

Many digital cameras and most smart phone cameras include GPS location information. Portfolio can pinpoint where a photo was taken on a world map, and let you view a thumbnail for each photo identified this way.

There are several file formats specific to Geographic Information Systems (GIS). These include MrSID, GeoTIFF, and many other formats. GIS files are typically images of a portion of the Earth's surface, used in scientific, legal, and other fields to precisely identify and display geographic elements. These files include, internally or as auxiliary files, metadata that allows Portfolio to display the image as part of the world map.

The Field Chooser

To choose which fields to display for assets in **List** and **Grid** views and the **Properties** panel, choose **Edit Fields** from the drop-down menu ⬚▾.

Choosing fields

The **Field Chooser** shows a list of all fields in the catalog on the left, and fields displayed in the current view on the right.
- To add a field to the current view, drag it from the list on the left to the list on the right.
- To change the order that fields are displayed in, drag a field up or down in the list on the right.
- To remove a field from the current view, drag it out of the list on the right.
- To narrow down the list of fields on the left, type a partial field name in the **Search** box at the top of the dialog.

Click **Save** to save your changes.

Field Preset Lists

Users with Catalog Administrator or Publisher access level can save field lists as presets that are available to all catalog users.

In the **Field Chooser**, you can:
- Choose a preset to edit from the **Presets** menu at the top of the dialog;
- Click **+** to add a new preset;
- Click **−** to remove the selected preset.

A Catalog Administrator can assign the permission to **Manage Public Field Lists** to users with other access levels.

Previewing assets

In **Grid** or **List** view, you can select one or more assets and view them in **Preview** mode. To view assets in **Preview** mode:

- Double-click an asset;
- Select several assets and double-click one of them.

In **Map** view, you can click a pin 📍 then double-click the thumbnail to view the asset in **Preview** mode.

While in **Preview** mode, you can navigate through assets using the arrow keys or the **Next** ⊙ and **Previous** ⊙ icons. If you have selected multiple assets to preview, navigation will cycle through the assets you selected; otherwise, you can navigate through all assets in the organizer.

PDF preview controls

When you preview a PDF in Portfolio Desktop or Web, you can:

- Zoom in or out using the buttons or popup menu at the lower left of the preview window;

  [100% ⬍] ⊖ ⊕

- Navigate through the PDF using the previous/next page buttons at the bottom center of the window, or enter a page number to visit;

  ⊙ ⊙ [10] / 31

- Search the PDF for a phrase, then visit each occurrence of the found text using the controls at the bottom right of the window.

  (🔍 alpha ⊗) 12/25 ⊙ ⊙

Preview mode controls

When you enter **Preview** mode, the main window shows a large image preview and, optionally, the **Properties** panel.

Move your mouse to temporarily reveal the asset's filename; this will fade out when you stop moving the mouse.

Properties:

- Click ⟨ at the top right to display the **Properties** panel.
- Click ⟩ to hide the panel.
- Drag the left edge of the **Properties** panel to change its size.
- Edit properties for an individual asset in the panel.
- When you view a different asset, its properties are displayed if the **Properties** panel is visible.

The visibility and size of the **Properties** panel are remembered between sessions.

Zoom in:

- Click **+**.
- Double-click the image.
- Press ☐ on the main keyboard (not the numeric keypad).

To zoom in faster, hold down the *SHIFT* key while clicking **+** or pressing ☐.

NOTE: You can also zoom in and out using the scroll function of your mouse.

Pan:

- While zoomed, click and drag in the image to pan to another part of the image.

Zoom out:
- Click **−**.
- Hold down $\boxed{\textit{SHIFT}}$ and double-click the image.
- Press $\boxed{-}$ on the main keyboard.

To zoom out faster, hold down the $\boxed{\textit{SHIFT}}$ key while clicking **−** or pressing $\boxed{-}$.

Reset zoom:
- Press $\boxed{0}$ (the digit zero) on the main keyboard to reset the zoom to 100%.

NOTE: Zoom is not available for media clips.

Crop and download:
- Click ⏢, drag across the image to select a crop region, then click ⊕ and choose a format to download.
  A derivative image, cropped to your specifications, will be downloaded.

Download derivative:
- Click ⊕ and choose a format to download.

Star rating:
- Click in the stars ☆ ☆ ☆ ☆ ☆ to rate or change the rating.
  This is embedded in the asset's Photoshop Rating field.

Flag:
- Click the ⚑ to flag or un-flag the asset.

View next/previous asset:
- Click **Next** ⊙ or press the right arrow key $\boxed{\rightarrow}$ to view the next asset.
- Click **Previous** ⊙ or press the left arrow key $\boxed{\leftarrow}$ to view the previous asset.

When you view a different asset, its properties are displayed if the **Properties** panel is visible.

Exit Preview mode:
- Click ⊗ or press $\boxed{\textit{ESC}}$.

Access Levels

There are four access levels that determine what each user can do with assets in a catalog. Access levels are assigned by the Portfolio Administrator or Catalog Administrator for each user of a catalog.

This means that while you may have the Publisher access level for one catalog, you may only have Reader access level for another.

Check with your Catalog Administrator for your access level details.

Catalog Administrator: This level allows access to all functionality available. Catalog Administrators have access to advanced operations, like editing custom fields, metadata mappings, and Watch Folder settings.

Catalog Administrator access should not to be confused with the Portfolio Administrator, who has access to all server settings, including creating new catalogs and adding new users.

Publisher: Publishers are able to upload and delete assets from a catalog as well as update all metadata for files in a the catalog. Publishers can also create galleries.

Editor: Editors are able to modify metadata, such as entering keywords and custom field values.

Reader: Readers may only view assets in the catalog. They cannot add or remove assets or edit metadata.

Your Catalog Administrator may also give you specific access to other features of Portfolio Web and Desktop. These include:

- **Access and Process Originals:** This allows you to download original files. If you have this permission and **Use Convert Presets**, you can also use the **Batch Process** feature.
- **Add Assets:** This allows you to add assets to a catalog.
- **Can Smart Keyword:** This allows you to use the Smart Keyword service to add keywords to assets. Your Portfolio Administrator needs to add a license for the Smart Keyword service.
- **Check Out Assets:** This allows you to check out an asset from a vault-based catalog. You would do this if you need to edit the asset.
- **Delete Asset from Catalog:** This allows you to remove assets from a catalog. (In a Vault catalog, this will also remove the asset from the Vault.)
- **Delete Original Assets:** If you have the **Delete Asset from Catalog** permission, then having this permission allows you to delete original assets from Watch Folders on disk.
- **Embed Metadata:** Allows you to edit metadata that can be embedded in a file. Embeddable metadata is indicated with the ✏ icon.
- **Import/Export Metadata:** When this setting is enabled, you can export metadata from a catalog to a comma-delimited text file, or import metadata for existing cataloged assets.
- **Make PDF:** When this setting is enabled, you can generate a PDF contact sheet.
- **Manage Presets (Convert and Make PDF):** When enabled, you are able to create and edit presets from the **Batch Process** and **Make PDF** dialogs.
- **Manage Public Field Lists:** With this permission, you can add, remove, and edit field list presets.
- **Manage Public Galleries:** When this setting is enabled, you can create, update, and delete public galleries.
- **Modify Folder Structures:** This permission allows you to add and remove subfolders. To be able to move subfolders, you need to have the **Move Assets** permission.
- **Move Assets:** This permission allows you to move assets between folders.
- **Publish NetPublish Sites:** This allows you to publish galleries as a NetPublish website so other users in your organization can access assets.
- **Sync AutoSync Folders:** This permission allows you to manually sync a watch folder.
- **Update Asset Fields:** This permission allows you to edit metadata for an asset. To use this, you must also have the **Embed Metadata** permission.
- **Use Convert Presets:** This allows you to use custom conversion presets created by others. If you have this permission and **Access and Process Originals**, you can also use the **Batch Process** feature.

Adding and Organizing Assets

Portfolio's reason for being is to keep your assets organized and accessible. In order to do this, you need to add assets to your catalog. You and other users may also benefit by grouping your assets into galleries.

Adding assets

There are a number of ways to add assets to a catalog:

- You can upload files to Portfolio directly from Portfolio Web. (This works with either Watch Folder or vault-based catalogs.)
- You can add files to a Watch Folder on a computer on your network. A Catalog Administrator or Publisher can create folders for Watch Folder catalogs using Portfolio Web. (The Portfolio server needs to have access to the Watch Folder in order to catalog files in it.)
- You can upload files from your iPhone®, iPad®, or Android™ device using Portfolio Flow.

Galleries

Galleries can be very useful in identifying groups of assets.

A gallery is like a playlist of assets: you can add assets to the list but they never leave the safety of the catalog.

Galleries can be permanent or temporary, and can be private or public.

A private gallery is only accessible to the user that creates it.

A public gallery can be seen by all members of the catalog. The creator can make it read-only so that other members can use the gallery but can't add or remove assets from it.

Smart Galleries

A smart gallery is created using search criteria. Portfolio creates a list of assets that match certain search criteria, like video files with the keyword "puppy."

This makes it simple to save frequent searches and have the up-to-date results available instantly.

Finding assets

Once your assets have been catalogued, Portfolio provides tools for finding assets.

QuickFind lets you immediately search common metadata fields for certain text.

Advanced Find lets you specify multiple search criteria to narrow your search.

Editing Assets

Once your assets have been catalogued, you will need to add keywords and other searchable information. You may even need to modify the contents of an asset.

Portfolio provides tools to add, import, and export metadata and to check out, modify, and check in assets.

Cataloging files

There are a number of ways to add items to a catalog.

- You can upload files to Portfolio directly from Portfolio Web. (This works with either Watch Folder or vault-based catalogs.)
- You can add files to a Watch Folder on a computer on your network. A Catalog Administrator or Publisher can create folders for Watch Folder catalogs using Portfolio Desktop or Portfolio Web. (The Portfolio server needs to have access to the Watch Folder in order to catalog files in it.)
- You can upload files from your iPhone®, iPad®, or Android™ device using Portfolio Flow®.

Uploading files

You must be assigned permission to catalog files in Portfolio.

The upload process is slightly different between vault catalogs and Watch Folder catalogs.

For both catalog types, the cataloging status is displayed at the bottom of the main window in the **Status** bar. For a more detailed report of cataloging status, see **Jobs** on page 52.

The **All Assets** organizer icon looks like ▣.

> **NOTES**
>
> In a vault catalog, files are copied to the vault, a secure location on the Portfolio server. Files here cannot be accessed using Windows Explorer or the Macintosh Finder, and cannot be opened directly by other applications.
>
> The vault allows you to keep your files secure. Users with the Check Out Assets permission can check assets out, make changes, and check them back in; Portfolio will automatically create a new version of an item when it is checked back in.
>
> In Watch Folder catalogs, your original files are copied to a Watch Folder and are always accessible to users who have access to that folder.

To upload files to a vault catalog:

1. You can select a folder or subfolder in the vault where you would like to add your files. If you do not select a vault folder, files will be uploaded to the main catalog folder.
2. Click the **Add Assets** menu on the toolbar and choose **Upload**.
3. Navigate to the local or network location where the files to be uploaded are located, then select the files to upload.
4. Click **Choose** or **Open** to upload the selected files.

You can also add files that are stored on the Portfolio server system to a vault catalog. See **Ingesting files** on the next page for details.

> **NOTE:** A catalog can be set up to allow only certain file types to be added. If you receive a message about **Excluded Files**, it may be because of a file type restriction. Check with your Catalog Administrator.

To upload files to Watch Folder catalog:
1. Select the folder where you would like to upload files.
2. Click **Add Assets** on the toolbar.
   For Watch Folder catalogs, **Add Assets** is not a menu.
3. Navigate to the local or network location where the files to be uploaded are located, then select the files to upload.
4. Click **Choose** or **Open** to upload the selected files.

> **NOTE:** While uploading audio or video files, Portfolio will create a preview clip. The preview may not be available immediately; when a clip is available to play, the file's icon will show a small "movie camera" ▆◀ indicator. You can then double-click the file to open it in **Preview** mode and play the preview clip.

Managed Upload

The catalog administrator may require you to enter certain metadata for the files you upload. If so, a window will open, displaying the metadata fields to be filled in.

Required fields will be marked with a red asterisk. All other fields are optional.
1. Enter appropriate metadata for the files you are uploading.
   If some metadata does not apply to some of the files, you can either cancel the upload and try again with only those files that should share metadata, or proceed with the upload and edit the metadata after the upload is complete.
2. Click **Submit** to start the upload.

Ingesting files

The **Ingest** operation allows you to import an entire folder of files, including the structure of subfolders, into your vault-based catalog.

The folder must be accessible to the Portfolio server, either on a local drive or a shared network folder.

Note: Network folders mapped to a drive letter are not visible to Portfolio.

To add a folder of files:
1. Select the folder or subfolder that you want the folder to be copied to.
2. Click **Add Assets** and choose **Ingest**.
3. Select the folder to import and click **Ingest**.

Creating a Watch Folder

To add a watch folder:

1. At the bottom of the **Organizers** panel, click **+** and choose **New Watch Folder**.
2. Type a folder path or browse the list and choose a folder to watch.
3. Select a synchronization setting:
   When changes are found: Portfolio continually watches the folder and synchronizes with the server when a change is found.
   When a user selects Synchronize Folder: The folder is synchronized manually. To synchronize, right-click the folder in the Organizers panel and choose **Synchronize Folder** from the shortcut menu.
   At regular intervals: Choose an interval from the pop-up menu.
4. Check **Remove missing assets from Catalog** to have a catalog entry removed if its associated asset is no longer present in the watch folder.
5. Click **Save** to create the watch folder.

Changing or removing a Watch Folder
Watch Folder settings

After you create a Watch Folder, it is easy to change its settings.

1. Double-click the Watch Folder in the **Organizers** panel.
2. Change the desired settings and click **Save**.

Removing a Watch Folder

To have Portfolio stop watching a folder for new or changed assets, you can remove the Watch Folder from the catalog. This does not affect the folder on disk.

Normally when you remove a Watch Folder, the assets that are in it are left in the Portfolio catalog. You can choose to remove those assets when you remove the Watch Folder.

To remove a Watch Folder from a catalog:

1. Select the Watch Folder in the folders list at the bottom of the **Organizers** panel.
2. Click **−** below the panel.
3. To have Portfolio remove the watched assets from the catalog, check **Remove Assets from Catalog**. (This will not affect files on disk.)
4. Click **Remove**.

Organizers

Organizers help you manage your digital assets and use them in your daily workflows. There are several kinds of organizers:

- Catalogs are created by your Portfolio Administrator and are the main grouping of digital assets. You can be assigned to multiple catalogs but can only work in one at a time.
- Folders are folders on disk or in the vault where assets are stored or cataloged. Folders are usually used for either or both of two functions: organizing assets, and (in Watch Folder catalogs) adding assets to a catalog.
- Galleries are different ways you can organize assets within a catalog. You may have a gallery with all photos of dogs, and another with cats; each gallery may include photos of dogs and cats together.
- Built-in organizers give you a quick way to see certain important groups of assets: the **All Assets** gallery shows everything in the catalog, the **Flagged Assets** gallery shows all assets that you have flagged, and the **Checked Out Assets** gallery shows assets currently checked out by any user.

The Organizers panel

Use the Organizers panel to:

- change catalogs;
- work with built-in organizers;
- work with galleries; and
- work with folders.

Changing catalogs

Portfolio Web and Desktop work with one catalog at a time. To change catalogs, click the pop-up menu at the top of the **Organizers** panel and choose a new catalog.

The menu lists only the catalogs that you have access to; if you don't see the catalogs that you expect, ask your Portfolio Administrator for access.

Built-in organizers

Portfolio Web and Desktop include three built-in organizers for your convenience.

- 💼 **All Assets** displays all assets in the catalog. You can do anything with these assets, but this is especially convenient for finding assets that you want to include in other galleries.
- 🚩 **Flagged Assets** displays assets that you have flagged. For more information, see **Working with Flagged Assets** on page 20.
- 🗒 **Checked Out Assets** (only available in vault catalogs) displays assets checked out by any user. See **Checking out assets** on page 41 for more information.

You can work with assets in the built-in organizers just as you can in any gallery or folder.

Galleries

You can add galleries, delete galleries and change gallery properties.

- **To add a gallery,** click + at the bottom of the **Organizers** panel and choose **Add Gallery** from the pop-up menu.
- **To delete a gallery,** select it in the **Galleries** list and click – at the bottom of the **Organizers** panel.
- **To edit a gallery,** right-click it and choose **Edit Gallery** from the shortcut menu.
- **To filter the Galleries list,** click the search field (Q⎯⎯) and type some text in the field above the **Galleries** list.
- **To mark a gallery as a favorite,** move the mouse pointer to the right end of the gallery's listing, then click the star ☆ icon that appears.

For more information on creating and editing galleries, see **Creating, renaming, and deleting galleries** on page 23.

For details on adding assets, see **Adding assets to a gallery** on page 23.

For more about removing assets from a gallery, see **Removing assets from a gallery** on page 23.

Folders

Folders work differently depending on whether the catalog is a vault catalog or a Watch Folder catalog.

In a vault catalog, folders are primarily to give your assets an organizational structure, and are totally optional.

In a Watch Folder catalog, folders provide organization but also provide a mechanism for cataloging files and keeping cataloged assets up-to-date.

To create a subfolder, select a folder or subfolder, click + and choose **New Subfolder**.

To delete a subfolder and all its contents, select it and click – .

Vault folders

Each vault catalog has a main folder ▮ whose name is the same as the catalog. Unless you create subfolders ▭ within this folder, all files you add to the catalog will be placed into this folder.

Subfolders can be used to temporarily or permanently organize assets stored in the vault catalog.

You can upload assets to a subfolder, and move assets between subfolders or between a subfolder and the main catalog folder.

Watch Folders

Portfolio uses Watch Folders ▮ and subfolders ▭ to keep cataloged assets up-to-date when the file on disk changes.

Portfolio "keeps an eye" on Watch Folders for any changes, and re-catalogs any files that have changed.

Usually, the Portfolio Administrator will create a Watch Folder when he creates the catalog; the Catalog Administrator can create additional Watch Folders from within the Portfolio Web or Desktop clients.

Subfolders are folders inside of Watch Folders. All folders inside a Watch Folder are accessible to the Portfolio Web and Desktop clients as subfolders, whether they are created using a Portfolio client or directly using the operating system. (Folders that have special permissions or restrictions applied, and operating system folders, may not be accessible as subfolders of Watch Folders.)

Working with Flagged Assets

The **Flagged Assets** organizer is a special organizer that shows the assets you have flagged during your current browser session. (This means that, if you log out from Portfolio then log back in without quitting your browser session, the flagged assets will be retained.)

To flag an asset:
- Click the **Flag** 🚩 icon at the bottom of a thumbnail in **Grid** view
- Check the box in the **Flagged** column in **List** view
- Click the **Flag** 🚩 icon in an item preview

You can work with assets in the **Flagged Assets** organizer just as you would any other organizer, keeping in mind that once you exit Portfolio Web and quit your browser, the flags will be cleared from those assets.

The **Flagged Assets** organizer is unique for each user in each catalog; if you and a coworker are logged in to the same catalog, you can each flag whatever assets you desire without affecting the other user's **Flagged Assets**.

NOTE: You can not publish the **Flagged Assets** organizer as a NetPublish site. You can create a new gallery and add the flagged assets to it, then publish the new gallery, but changing an asset's flagged state will not change the contents of the new gallery.

Folders

Folders in Portfolio Web and Desktop show the organization of assets. Folders work differently depending on whether the catalog is a vault catalog or a Watch Folder catalog.

In a vault catalog, folders are primarily for organization, and can also be used as a destination for uploading files. There is always one main folder that contains your assets, and you can create as many subfolders (and subfolders within subfolders) as you desire.

In a Watch Folder catalog, folders are watched by Portfolio for changes. When a file within a folder or subfolder changes, its catalog entry is updated.

Common folder actions

To create a subfolder:
1. In the **Organizers** panel, select a top-level folder ▮ or subfolder ▯.
2. At the lower left corner of the **Organizers** panel, click + and choose **New Subfolder**.
3. Enter a folder name and click **Save**.

To add assets to a folder:
1. Select a folder or subfolder.
2. For a vault catalog, choose **Upload** from the **Add Assets** menu. For a Watch Folder catalog, click **Add Assets**.
3. Select the files to upload and click **Choose** or **Open**.

To move assets between folders:
1. Click the source folder or subfolder.
2. Select the assets to move.
3. Drag the selected assets from the main window to the destination folder or subfolder.

To show the subfolders within a folder, click + next to the folder icon.

To move a subfolder, drag it to the desired destination. In Watch Folder catalogs, you can only move a subfolder somewhere within the same top-level Watch Folder.

To delete a subfolder, select it and click – at the bottom of the **Organizers** panel.

To hide items in a folder's subfolders, hold down `SHIFT` and click the folder, or right-click the folder and choose **Hide Contents of Subfolders**.

Vault folders

Within a vault catalog, there is one main, top level folder ▆ whose name is the same as the catalog.

Within this folder, you can create as many subfolders as needed. You can also create subfolders within subfolders.

Subfolders can be used as a destination for uploaded files, and can also be used to organize assets within the vault.

Watch Folders

Watch Folders can be created in two different ways: by the Portfolio Administrator when he creates a catalog, or by a Catalog Administrator.

Watch Folders are "watched" by Portfolio for changes in their content, and the catalog is updated to reflect those changes.

Subfolders are folders inside a Watch Folder (or inside another subfolder). You can create subfolders within the Portfolio Web and Desktop clients, or from Windows Explorer or the Macintosh Finder.

Syncing a Watch Folder

Watch Folders are watched for changes and synchronized on a schedule. By default, folders are watched continuously and changes are synchronized immediately; these settings can be changed when you create or edit a Watch Folder in Portfolio Web or Desktop. See **Changing or removing a Watch Folder** on page 17.

If you need to synchronize a Watch Folder without waiting for its schedule, right-click the folder in the Organizers panel and choose **Synchronize Folder** from the shortcut menu.

Removing a Watch Folder

To have Portfolio stop watching a folder for new or changed assets, you can remove the Watch Folder from the catalog. This does not affect the folder on disk.

Normally when you remove a Watch Folder, the assets that are in it are left in the Portfolio catalog. You can choose to remove those assets when you remove the Watch Folder.

To remove a Watch Folder from a catalog:
1. Select the Watch Folder in the folders list at the bottom of the **Organizers** panel.
2. Click – below the panel.
3. To have Portfolio remove the watched assets from the catalog, check **Remove Assets from Catalog**. (This will not affect files on disk.)
4. Click **Remove**.

Organizer Icon Reference

ICON	ORGANIZER TYPE	ICON	ORGANIZER TYPE
💼	All Assets	👤	Public Gallery
🚩	Flagged Assets organizer	👤🔒	Public, Read-only Gallery
📄✓	Checked Out Assets organizer	⚙	Public Smart Gallery
📁	Top level folder	👤🔒⚙	Public, Read-only Smart Gallery
📂	Subfolder	👁	Private Gallery
		👁 ⚙	Private Smart Gallery

NOTE: If you own a gallery you can change its name, public/private and read-only status; double-click the gallery in the **Organizers** list to open the **Gallery** window.

Galleries

A gallery can display any subset of the assets in your catalog.

A gallery is a good way to organize and view only certain assets in your catalog. For example, a photographer may create a catalog of his entire body of work, but have one gallery that displays only portrait photos, and another gallery that contains landscape photos.

Public, private, and read-only settings

By default, galleries are private: only the user that creates a gallery can access or modify it. Galleries can be made **public** so that they are available to all users of a catalog. If you choose to make your gallery public, you can restrict changes to that gallery by making it **read-only** to other users.

If a public gallery is not read-only, any catalog member can choose to be notified any time a change is made to the gallery contents.

To find out how to change the gallery access level or request notification for a public gallery, see **Making a gallery public or private** on page 24.

Smart galleries

When you open a smart gallery, Portfolio automatically searches the Portfolio catalog and selects the appropriate assets to display. Smart galleries can be configured to search and select assets for any metadata stored in your catalog. For more information about creating and using smart galleries, see **Creating a smart gallery** on page 24.

Filtering and favorites

Once you add galleries to your catalog, the **Filter** field (🔍⬚) is displayed above the **Galleries** list. Enter some text in the filter field to limit the list of galleries.

You can mark frequently-accessed galleries as **Favorite** galleries; move the mouse pointer over the right end of the gallery's entry in the list and click the star ☆ icon that is displayed. **Favorite** galleries are listed alphabetically above all non-favorite galleries.

Creating, renaming, and deleting galleries

To create a new gallery in a catalog:
1. Click **+** at the bottom of the **Organizers** panel and choose **Add Gallery** from the menu.
2. Enter a gallery name.
3. Select privacy settings for the gallery:
   - **Public** galleries are available to all members of the catalog. **Read Only** means others can only view your gallery, not change it.
   - **Private** galleries are only available to you.
4. Click **Save**.

The new gallery is displayed in the **Organizers** panel.

To rename a gallery:
   - Double-click the gallery name in the **Organizers** panel then enter the new name.

To delete a gallery:
1. Select the gallery in the **Organizers** panel.
2. Click **–** at the bottom of the **Organizers** panel.
3. Click **OK**.

Adding assets to a gallery

You can add assets to galleries for which you have the appropriate permission and access level to modify. See your Portfolio Administrator to determine your access level. For details, see **Access Levels** on page 12.

NOTE: You cannot add assets to a Read-Only gallery that you do not own.

To add assets to a gallery:
1. Select an organizer in the **Organizers** panel.
2. Select one or more assets in the main window.
3. Drag assets from the main window onto the gallery icon in the **Organizers** panel.

Removing assets from a gallery

NOTE: Assets cannot be removed from a smart gallery because a smart gallery displays assets that meet certain search criteria.

To remove assets from a gallery (without removing them from the catalog):
1. From the **Organizers** panel, select the gallery.
   If you are not the gallery's owner, then make sure that the gallery is not marked Read Only.
2. In the main window, select one or more assets to remove from the gallery.
3. Click **–** at the lower left corner of the main window, or right-click a selected asset and choose **Delete Selection**.
4. In the dialog, make sure that only **Delete assets from <gallery>** is checked, then click **Delete**.

To remove all assets from a gallery, right-click on the gallery and choose **Delete Contents**.

For more about deleting assets from a gallery or catalog, see **Deleting assets** on page 44.

Sorting a gallery

To sort files in a gallery, choose a sort field from the **Sort By** drop-down menu in the toolbar.

You can change the sort order by clicking the icon to the right of the **Sort By** menu. When the icon shows as ▲, items are sorted in ascending order; when the icon is ▼, the sort order is descending.

Making a gallery public or private

When many people have access to a single catalog, it can be beneficial to create galleries to which individual users have access.

When you create a gallery, you can choose to make it public or private. You can choose to make a public gallery Read-Only so that other catalog members can view but not change your gallery.

To change the privacy settings of a gallery:
1. In the **Organizers** panel, double-click the name of the gallery.
2. Select privacy settings for the gallery:
   - **Public** galleries are available to all members of the catalog.
   - **Private** galleries are only available to you.
   - The **Read-Only** option restricts the ability for other users to change your public gallery. You are still able to modify the contents of the gallery.
3. Click **Save**.

Creating a smart gallery

A **smart gallery** is a saved set of Advanced Find search criteria. When you open a smart gallery, the search is performed and the results are displayed in the Main window.

As new assets are added to the catalog that fit your search parameters, they will be displayed when you open or refresh the smart gallery.

To create a new smart gallery:
1. Click 🔍 to start **Advanced Find**.
2. Enter search parameters. For more information, see **Advanced Find** on page 26.
3. Click **Save as Smart Gallery**.
4. Enter a name for the smart gallery.
5. Select privacy settings for the smart gallery:
   - **Public** smart galleries are available to all members of the catalog.
   - **Private** smart galleries are only available to you.
   - The **Read-Only** option restricts the ability for other users to change your public smart gallery search settings.
6. Click **Save**.

The new smart gallery is displayed in the **Organizers** panel.

Finding Assets

There are several ways to search for assets with Portfolio Web and Desktop clients.

QuickFind allows you to quickly search most catalog fields.

Advanced Find can be customized to search your catalog for up to five criteria using any type of data tracked by Portfolio. You can refine your search, then update the displayed results.

Keywords: When you are viewing properties of an asset, you can click a keyword associated with that asset to quickly find all other assets in the catalog that use that keyword.

QuickFind

QuickFind, in the Toolbar at the top of the main window, is a powerful way to search for a word or phrase quickly.

> 🔍 QuickFind ⊗

QuickFind only searches on assets in the selected **Organizers** panel. Selecting a catalog searches the entire catalog, but selecting a gallery only searches the assets in that specific gallery.

To perform a QuickFind search:
1. Select an organizer in the **Organizers** panel.
2. Type a word or phrase in the **QuickFind** field and press `ENTER`.
3. Matching assets are displayed in the main window.

To clear the main window of the QuickFind search results, click **Clear Results** ⊗ at the right end of the **QuickFind** field.

QuickFind details

- **All fields:** QuickFind searches all fields except Item ID and Date/Time fields; to search in these fields, use **Advanced Find**.
- **Document text:** QuickFind even searches the text of cataloged documents!
- **Single term:** QuickFind will find any word that starts with the entered text. For example, searching for cat will find cat, catalog, and catastrophe, but not scatterbrained.
- **Multiple terms:** QuickFind will find all words that start with any of the entered terms (logical OR). For example, searching for cat dog will return cats, dogs, cat-dogs, dog-cats, doggone, and catnap, but not hotdog or uncategorical.
- **Wildcard:** Use the * to stand in for any number of characters (zero or more). For example, searching for *cat will return cat, catastrophe, scatterbrained, dog-cats, and uncategorical.
- **Phrases:** To search for an exact phrase, put the phrase in double straight quotes.
- **Boolean:** Use **AND** in simple searches to find two terms in the same field. For example, searching for cats dogs would return all assets that have either the term cats or the term dogs in any field; searching for cats AND dogs would return only the assets that have both terms. (Each term may be in separate fields, so if an asset has the keyword cats and the description no dogs in this photo, it would be found, but an asset with the keyword cats and the description only cats in this photo would not be found.)
- **Single field:** You can search specific fields as long as the field name is one word. For example, Keywords:cats will return only assets with the keyword cats. If an asset has cats in every field except Keywords, it will not be returned by this search. (This search requires you to use the system name for a field, which might be different than the name displayed in the **Properties** panel. Ask your Portfolio Administrator for a list of system field names.)

Unsupported searches

Since QuickFind is designed to be simple and quick, it does not support complex search patterns, such as mixing multiple terms with Boolean searches (cats AND dogs hamsters) or searching in multiple fields (Keywords:cats Filename:dogs).

Advanced Find

Advanced Find can be used to locate assets by searching data in any field in the catalog, including the text of cataloged documents. Advanced Find is considerably more flexible and powerful than QuickFind.
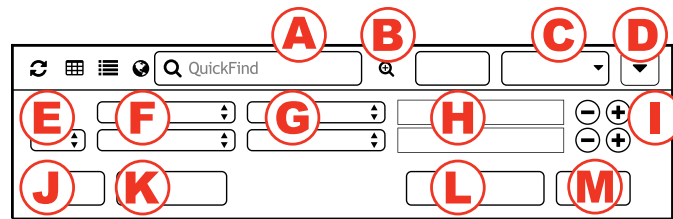
The **Advanced Find** panel

A. **QuickFind field**
B. **Advanced Find:** Click to show or hide the Advanced Find controls.
C. **Sort field:** Select the field to sort the main window view.
D. **Sort order:** Click to sort the view in ascending or descending order.
E. **Boolean:** Determines how criteria are used in searches: **AND** means both must match, **OR** means either must match.
F. **Search field:** Choose a field to search on.
G. **Search operator:** How to search for the value.
H. **Search term:** Enter a value to match in the search field.
I. **Add/Remove criterion:** Click **+** to add another search criterion, **–** to remove the search criterion.
J. **Close:** Closes the Advanced Find options.
K. **Reset Search:** Clears the Advanced Find criteria and resets all options.
L. **Save as Smart Gallery:** Click to create a Smart Gallery based on these search criteria.
M. **Search:** Click to start the search with the specified criteria.

Search results can also be converted into Find Criteria for Smart Galleries on the fly. For more information on Smart Galleries, see **Organizers** on page 18.

The **Advanced Find** tool only searches whatever is selected in the **Organizers** panel.

To use Advanced Find:
1. Select an organizer in the **Organizers** panel.
2. Click **Advanced Find** ⊛ at the right end of the **QuickFind** field.
3. Select a field to search from the drop-down menu.
4. Select a search operator from the second drop-down menu.
5. Enter a search term into the text box.
   Depending on the field type and the search operator you select, a search term may not be required. For example, if you search using the **exists** search operator, a search term is not required since you only want to locate assets that have any data in the selected field.
6. If more detailed search parameters are required, click **+** to the right of the first parameter to add another parameter. Repeat the above steps to add more search parameters, up to a maximum of 10.
7. When you are ready to start your search, click **Search** or press the ⎵ENTER⎵ key.

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

> **TIP:** When you click a keyword to find all assets using that keyword, Portfolio starts an **Advanced Find** operation.

Date searches
Some search fields include dates; **Catalogued**, **Changed**, and **Created** indicate the dates that an asset was added to the catalog, the most recent date the asset file was modified, and the date the asset file was created.

> **NOTE:** All date fields always include a time as well; if this information does not exist in the source, then Portfolio sets the time as 12:00 AM.

The operators you can use when searching on date fields are:
- **exists/does not exist**: whether the asset date actually exists
- **on or before:** the asset date is exactly, or falls before, the target search date and time
- **before:** the asset date falls before the search date
- **on or after:** the asset date is exactly, or falls after, the search date
- **after:** the asset date falls after the search date
- **in the future:** the asset date falls after the current date and time
- **in the past:** the asset date falls before the current date
- **in the next:** the asset date falls within the specified number of days in the future
- **in the previous:** the asset date falls within the specified number of days in the past
- **today:** the asset date is the current date
- **this month:** the asset date falls within the current calendar month
- **this year:** the asset date falls within the current year

Search criteria options
The following tables list the most common built-in catalog fields that you can search on. If your catalog has custom fields, you will be able to search those fields as well.

When assets are cataloged, some information is extracted from metadata associated with the file. Many files, especially those produced with Adobe applications, include XMP metadata: a rich variety of information about the file and the conditions of its creation. Portfolio extracts that information if available to populate many basic information fields.

Basic Fields

These fields are common to many types of documents.

FIELD NAME	DESCRIPTION
Filename	The name of the cataloged file.
File Size	The size of the file.
Created	The date the original file was created. See the note about Date and Time fields below.
Modified	The date that the original file was modified before being cataloged. See the note about Date and Time fields below.
Description	A description of the file.
Keywords	Keywords assigned to the asset.

> **NOTE:** Date and Time fields always include both a date and time, even if the display only shows a date. If you only know the date, but not the time, that you need to search for, then you should use two search criteria to search a date range. For example, if you are looking for photos taken on July 4, 2017, then you can use the search criteria "Created on or after 07/04/2017 12:00 am" and "Created on or before 07/05/2017 12:00 am" to locate files created any time within the 24-hour period.

File Information fields

These fields contain information about an asset's location on disk and its dimensions.

FIELD NAME	DESCRIPTION
Directory Path	The full directory path for a file, not including the filename.
Volume	The physical drive or disk on which the file resides.
Height	The asset's height, in pixels (empty if thumbnails were extracted).
Width	The asset's width, in pixels (empty if thumbnails were extracted).
Horizontal Resolution	The asset's horizontal resolution, in dots per inch.
Vertical Resolution	The asset's vertical resolution, in dots per inch.
Bit Depth	The number of bits used to store color information in an image file.
Color Mode	The Color Mode is the way that colors are stored in an image. Portfolio extracts color mode information directly from the image. The color modes that Portfolio understands are: Black & White, Grayscale, RGB, CMYK, YUV, Lab, and YCCK. Anything else will be labeled as "unknown."
Color Profile	The embedded model of the color space for the device or application that created the image file. Examples: sRGB, Adobe RGB (1998), or a profile for a calibrated monitor.
Number of Pages	The number of pages in a multi-page document.

Catalog Information fields

These fields provide information about an asset's catalog record. They are always present and cannot be modified by users.

FIELD NAME	DESCRIPTION
Cataloged	The date and time that the asset was first cataloged in Portfolio.
Cataloged By	The user name of the person who cataloged the asset in Portfolio.
Changed	The date and time that the asset was recently changed.
Changed By	The user name of the person who most recently changed the asset.
Item ID	The unique ID of the asset in the catalog.
Thumbnail Size	The size of the asset's thumbnail in the Portfolio catalog. This is always 256 pixels. (In older versions of Portfolio this could also be 32 or 112 pixels.)

Other fields

In addition to the above searchable fields, Portfolio extracts a variety of metadata from files. These types of metadata include IPTC and EXIF metadata (usually included in digital photos and other image files), GPS location fields from digital photos and videos, geographic metadata from GIS files (such as MrSID files), Extensis Font Sense metadata in certain Adobe files from uses with Suitcase Fusion or Universal Type Server, movie-specific metadata included in a variety of video and animation files, and MS Office metadata, incorporated into Microsoft Office and compatible documents. Most of these fields can be used in your searches; the field names will start with IPTC, EXIF, Geo, Extensis Font Sense, GPS, Movie, or MS (for Office file metadata).

Clearing Search Results

After searching, there are different ways to clear the search results, whether you used QuickFind or Advanced Find.

By default, clearing the search results displays the first page of available items in the catalog, gallery or folder that is currently selected in the **Organizers** panel.

To clear QuickFind results from the main window:
- Select a different organizer in the **Organizers** panel.
- Click **Clear Results** ⊗ in the right end of the **QuickFind** field.

To clear Advanced Find results from the main window:
- Click **Reset Search** at the bottom of the **Advanced Find** panel.

Editing Assets

Portfolio provides multiple methods for modifying assets in your catalogs.

You can add, change, and remove metadata; in a Vault catalog, you can check an asset out to edit, then check it back in as a new version of the original.

What is Metadata?

Metadata describes the content, structure, and purpose of an asset, and helps other Portfolio users quickly and easily locate specific assets or types of assets.

For this reason it is important to have relevant metadata attached to your assets.

The most common form of metadata is the keyword; keywords allow for fast searching to locate similar or related assets.

You can add multiple keywords to your assets that will help users quickly locate the assets they need.
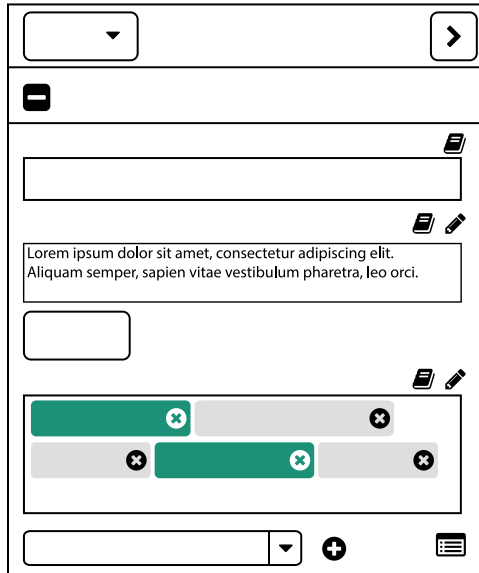
In addition to Keywords, Portfolio supports many other types of metadata, some of which is derived directly from the file when it is imported (such as location data for photographs).

A Catalog Administrator can also require you to add certain metadata when you add assets to the catalog.

Asset Properties and Metadata

Portfolio stores very detailed information about every file that you catalog. This information includes data that is collected during the cataloging process, such as each file's type, creation date, size, image dimensions, and other properties. It also includes metadata information included in files or that you may add to a Portfolio asset, such as a description or keywords.

All of this information can be displayed in the **Properties** panel on the right side of the Portfolio Web or Desktop window.

If the **Properties** panel is not visible, show it by clicking ◁ at the top right of the main window. If you want to hide the **Properties** panel, click ▷ at the top right of the panel.

All data entry tasks such as populating keywords or metadata fields are done in the **Properties** panel.

Choosing properties to view

By default, the **Properties** panel displays all of the properties for a selected asset.

The Properties panel is organized into groups of fields in several categories, such as **Basic**, **File Info**, and **Movie**.

To view the fields in a category, click **+** next to the category name.

To hide the fields in a category, click **–** next to its name.

Filtering the list of fields

You may find that you regularly access certain properties, and rarely or never use others.

Instead of displaying all available fields, you can specify a set of fields that you want to display, and the order they are listed in.

To filter the list of fields in the Properties panel:
1. Open the **Properties** panel if it isn't already displayed.
2. Choose **Edit Fields** from the drop-down menu ⊞▾.
3. Drag field names from the list of **All Fields** on the left into the list on the right.
   To remove a field name from the list of **Selected Fields**, drag it off the list.
   You can reorder the list of fields by dragging the field names up or down in the list.
4. Click **Save** to save the list of **Filtered Fields**.

You can switch between displaying **All Fields** and **My Filtered Fields** using the drop-down menu ⊞▾ at the top of the **Properties** panel.

The menu may also include other sets of field lists that you can choose; users with Catalog Administrator or Publisher access to the catalog can create these preset lists. See **Field Preset Lists** on page 10.

Understanding field types

Information is stored in Portfolio catalogs in multiple fields. Field types vary depending upon the type of data that they can store. It's important to understand the different field types so that you can better add and edit asset properties.

Date/Time

A Date/Time field allows you to enter date and/or time values into your assets. The Catalog Administrator can elect to have Time values not displayed. Date/Time fields can include multiple values, and can be configured as a predefined list.

> NOTE: Times are always assumed when searching on Date/Time fields. That is, if a time value has been entered into the field (either by extraction from the source file when the item was cataloged, or by entering a time in the field) and then hidden by the Catalog Administrator, the time will still be noted by Portfolio when a search is generated. For example: Searching for "07/04/2017" will not find an item which contains "07/04/2017 3:00 PM" because the request is interpreted as "07/04/201712:00:00."

Decimal

In a Decimal field, you can enter numeric values with a precision up to 8 decimal places. Decimal fields can include multiple values, and be configured as a predefined list.

Number

Number fields can include one or multiple values, and can be configured as a predefined list.

Text

The Text field is designed for single-line text values. A Text field value can be up to 2000 characters long. Text fields can include multiple values, and be configured as a predefined list. Text fields cannot contain multi-lined text; for multi-line text, use a Text Block field.

Text Block

Text Blocks are multi-lined fields that can be any length. This field type allows you to add multiple lines of text to items; you can include line breaks or carriage returns. Text blocks are word-indexed, allowing even these longer fields to be searched extremely quickly. The Text Block field cannot be sorted or phrase-searched. The **Description** field is an example of a Text Block field.

Boolean

A Boolean field is used to indicate a True/False, Yes/No, On/Off, or similar condition.

Editing asset properties

When you edit an asset property, Portfolio updates the asset's record in the catalog. For file types that support the embedding of metadata, Portfolio also embeds the changed properties into the original file.

ICON	MEANING
📕	This icon indicates metadata that is extracted from one or more asset fields. A property displaying only this icon will be read-only for all Portfolio users.
✏️	This icon indicates metadata that is embedded in a field of an asset file.

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

To edit a property for a single asset:
1. Select an asset in the main window.
2. In the **Properties** panel, locate the information that you want to update.
   Fields are grouped together by category. To display properties within a category, click **+** next to the category name.
3. Edit the field's value. How you edit a field depends on its type:
   Single value field (such as Photoshop Label): Type the new text and press ENTER.
   Text Block (such as Description): Edit the text and click **Submit**.
   Multi-valued field (such as Keywords): To add a new value, click **Show Master List**, select one or more values in the **Master List**, then click **Apply Values**. You may be allowed to add unlisted values; if there is a text entry field below the list of values, type a new entry into it and press ENTER.

To edit properties for multiple assets:
1. Select several assets in the main window.
2. In the **Properties** panel, locate the field that you want to update.
3. Edit field values. How you edit a field depends on its type:
   Single value field (Such as Photoshop Label): Type the new text into the field.
   Text Block (such as Description): Edit the text then choose either the **Append** or **Replace** option below the field.
   Multi-valued field (such as Keywords): Click ⊗ to delete a value from the list of values. To add a new value, click **Show Master List**, select one or more values in the **Master List**, then click **Apply Values**. You may be allowed to add unlisted values; if there is a text entry field below the list of values, type a new entry into it and press ENTER.
   As you edit a field, the main catalog display darkens to indicate there are changed property values that have not been submitted.
4. Edit additional fields as necessary using the instructions above.
5. When you have completed your edits, click **Submit** below the **Properties** panel.

Editing properties for many assets

When you want to edit the properties for more than 100 assets, Portfolio Web and Desktop provide a special Batch Edit mode.

Batch Edit mode uses an editing dialog gives you more room to view properties and more options for editing.

To enter Batch Edit mode:
1. Select more than 100 assets.
2. Click **Edit Fields for Batch of Assets** in the **Properties** panel.

> **TIP:** You can also enter Batch Edit mode for fewer assets; select the assets and click 🖉 at the bottom of the **Properties** panel.

Batch Edit options

The dialog lists only those fields that are common to all selected assets.

For short text fields (such as **Description Writer**) or field groups (such as an **URL/Name** pair), use the pop-up menu next to the field or field group to:
- **Set:** Set the selected assets to use the entered text for this field or field group;
- **Clear:** Clear this field or field group in the selected assets.

For long text fields, such as the **Description**, use the options below the field to:
- **Append:** Enter text and append it to existing text in this field in the selected assets;
- **Replace:** Enter text to replace existing text in this field in the selected assets;
- **Delete All:** Delete all text in this field in the selected assets.

For **Keywords** and other multi-value fields, use the pop-up menu below the field to:
- **Add:** Add a new value to the field in the selected assets;
- **Remove:** Remove a value from the field in the selected assets;
- **Clear:** Clear the field in the selected assets;
- **Replace:** Replace a value in the field with a new value in the selected assets.

Keyword and multi-value field editing is especially robust; in one operation you can add new values, remove old values, and replace some values with others.

The **Edit Fields** dialog shows which fields have been modified in the **Pending Edits** list on the right.

To cancel the batch edit operation, click **Cancel**.

To accept all your edits and add them to the database (and embed them in any embeddable fields), click **Submit**.

Photoshop Rating

Photoshop Rating is a default field that holds a numeric value from 0 to 5. While the name of this field indicates its origin in Adobe-specific metadata, it is convenient to use this field as a general rating for any type of asset.

The Portfolio Web and Desktop clients expose this metadata as a star rating. Wherever you display the **Photoshop Rating** field, you will see five stars in a line.

☆ ☆ ☆ ☆ ☆

The stars are also displayed in the **Preview** window.

You can edit the rating by dragging through or clicking on the desired star.

Property changes and asset versions

In a vault-based catalog, editing asset properties causes Portfolio to create a new asset version. However, if you continue editing properties for the same asset within a short period of time, the changes will all be reflected in a single asset version.

To see the different versions of an asset, click the lock icon 🔒/🔓 on the asset and choose **Versions** from the pop-up menu.

Checking on the status of your update

When you edit the properties of multiple assets at once, your changes are submitted as a "job" to Portfolio. To check on the status of a job, click **Jobs** in the Status bar.

JPEG 2000 metadata

Portfolio (version 3.6.1 and later) can extract and embed metadata in JPEG 2000 images.

FILE EXTENSION	CAN EXTRACT METADATA	CAN EMBED METADATA	CAN CREATE THUMBNAIL
.j2c	✔	✘	✔
.j2k	✔	✘	✔
.jp2	✔	✔	✔
.jpc	?	?	?
.jpf	✔	✔	✔
.jpm	✔	✔	✘
.jpx	✔	✔	✔

The .jpc extension is typically used for images with an embedded code stream; this is not a common format and so has not been well-tested in Portfolio. If you can provide example images in this format, please use the **Feedback** 💬 button at the top of the main client window to contact us.

Keywords

Keywords are descriptive words and phrases that you can assign to assets to make organizing and locating them easier.

Keywords can come from several sources, including metadata embedded within the file which is read in when the file is cataloged, path-based information gleaned from each cataloged file's location on disk, as well as being added manually.

Keywords are best used to describe the contents of a file (such as elements of an image, feelings or actions invoked or depicted in a photo, or topics discussed in a word processing document).

Smart Keywords
Portfolio offers the Smart Keywords service for automatically assigning keywords to images based on content.

To use this feature:
1. Select one or more assets or an organizer.
2. Right-click the selected asset and choose **Suggest Smart Keywords**.
3. Choose one or more categories and languages.
   The available languages and categories are determined by your Catalog Administrator.
4. Portfolio will add keywords based on image content to each selected asset.
   The maximum number of keywords returned is determined by your Catalog Administrator.

Smart keywords appear in green tags to distinguish them from manually-entered keywords.

> **NOTES**
> - The Smart Keywords feature is only available to you if your Portfolio account type has the appropriate access.
> - Your Catalog Administrator may have enabled an option to add Smart Keywords to assets as they are cataloged.

How Smart Keywords work
Smart Keywords utilizes an online image analysis service. When you submit an asset to the service, Portfolio anonymously sends a small version of the image to a remote server, which identifies elements in the image and sends back keywords based on the image content.

Tips for smarter Smart Keywords
If you intend to use Smart Keywords on your assets, here are some suggestions for using them efficiently.

- **Don't use Smart Keywords if your catalog only allows you to choose keywords from a predefined list.**
  Unless your predefined list is very large, you can probably easily choose appropriate keywords from the list.

- **Don't use Smart Keywords if your image is simple.**
  If you can easily identify several keywords to add manually, this will probably be sufficient for most purposes.

- **Use Smart Keywords before manually entering keywords.**
  If you have entered a keyword that is also returned as a potential smart keyword, the duplicate smart keyword will not be used, reducing the number of smart keywords added to your asset.

- **Don't use Smart Keywords more than once per asset!**
  You won't get more or better results on a second submission.

- **Don't use Smart Keywords on assets other than flat images.**
  Returned values for videos, panoramic images, and documents will be of limited value.

- **Only choose one language for Smart Keywords.**
  Chances are that the same keywords will be returned in all chosen languages; if you have a reason to add smart keywords from a different language, then choose only that language.

Editing keywords
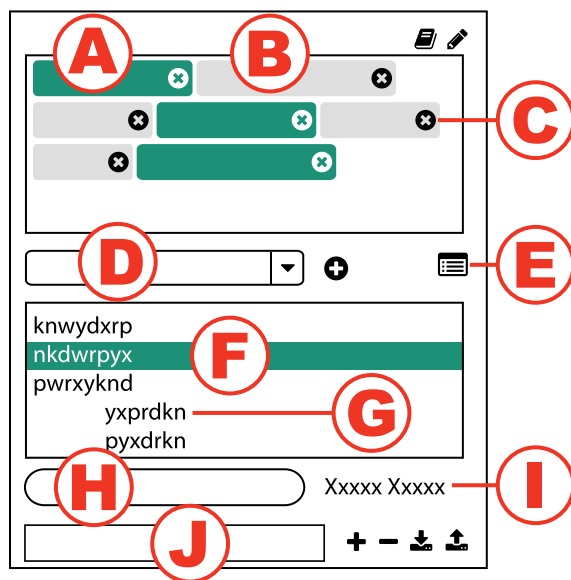
The **Keywords** field

A. **Smart Keyword tag:** Smart Keywords are shown in color to differentiate them from manual keywords.
B. **Keyword tag:** Keywords are listed individually, in alphabetical order.
C. **Delete keyword:** Click ⊗ to delete the keyword from the selected assets.
D. **New keyword entry:** Type a new keyword here and press `ENTER`.
E. **Show/Hide Master List:** Click to show (or hide) the Master List of keywords.
F. **Master List:** Keywords specified by the Catalog Administrator for use with the current catalog.
G. **Hierarchical keyword:** Master List keywords can be organized using a parent/child structure.
H. **Filter:** Type some text to limit the Master List to displaying only keywords containing that text.
 I. **Apply Values:** Add keywords selected in the Master List to the selected assets.
 J. **Edit Predefined List:** Enter a new keyword to add to the Master List.

To add or remove keywords associated with an asset, first make sure the **Keywords** field is displayed in the **Properties** pane.

When you select an asset in the main window, the **Keywords** field will show the keywords associated with that asset.

Adding keywords from the Master List
Click the **Master List** ▤ icon to display the list of pre-defined keywords for the current catalog.

Some Master List keywords are **hierarchical:** multiple keywords organized in a group. These keyword groups consist of a parent and child keywords. Click the triangle to display the subordinate or "child" keywords. (When you add a child keyword, its parent will also be added.)

To add a keyword, double-click its entry in the list.

To add multiple keywords, select them in the list and click **Apply Values**.

Adding keywords manually

To add a new keyword, type it into the field immediately below the **Keywords** field and press `RETURN` or `ENTER`.

NOTE: Your Catalog Administrator has the option to disallow entering keywords not included in the Master List.

Removing keywords

To remove a keyword from an asset, click the ⊗ icon in the (xxxxxx ⊗) keyword tag.

Working with multiple assets

You can modify the keywords associated with multiple assets at once by selecting more than one asset in the main window.

To work with all assets in the selected organizer, make sure no assets are selected. (This is useful for adding keywords; when you have no assets selected, no keywords are displayed in the **Keywords** field, so you cannot delete keywords using this shortcut.)

Each keyword in the **Keywords** field will include a value in parentheses indicating how many of the selected assets that keyword is associated with.

Managing the Master List

If you are the Catalog Administrator, you can update the Master List for a catalog from Portfolio Administration or from the **Properties** panel of Portfolio Web or Desktop.

- **To show the Master List,** click ▤ below the **Keywords** list.
- **To add a new keyword,** click in the **Edit Predefined List** field, type the new keyword and press `ENTER` or click **+**.
- **To remove a keyword from the Master List,** select it and press `DELETE` or click **–**.
- **To add a keyword as a child,** select the parent, click in the **Edit Predefined List** field, type the new child keyword and press `ENTER` or click **+**.
- **To import a list of keywords,** click ⬆.
- When you are done modifying the Master List, click ▤.

Keyword text file format

To create a keyword file to import, use NotePad on Windows or TextEdit on macOS. If you are using TextEdit, be sure the file format is plain text; choose **Format > Make Plain Text**.

- Enter one keyword phrase per line.
- Press the ENTER or RETURN key at the end of each line.
  NOTE: On macOS, some text editors treat the ENTER key (in the numeric keypad) differently from the RETURN key. Press the RETURN key after each line.
- To add a child keyword, press TAB before typing the keyword.

NOTE: Some text editors will see the TAB as a signal to indent the next line. If this happens and you do not want to enter additional children, just delete the leading tab character.

In the following example, the phrase **space programs** is one keyword, with children **mercury**, **gemini**, and **apollo**. The keyword **apollo** also has children: **apollo-soyuz**, **lunar landings**, and **skylab**. (The ¶ represents the end of a line, and → represents a tab character.)

> space programs¶
> →mercury¶
> →gemini¶
> →apollo¶
> →→apollo-soyuz¶
> →→lunar landings¶
> →→skylab¶

Importing metadata from a text file

> **NOTE:** Do not use this feature to migrate data from older versions of Portfolio Server to Portfolio 1.0 or newer. For data migration assistance, see **Technical Support** on page 60 to create a support case.

You can apply metadata to a large number of previously-cataloged assets by importing the metadata in the form of a tab-delimited text file.

This text file can be created manually or can be exported from another system, such as a database or spreadsheet.

The text file consists of a header line followed by a separate line of metadata for each file.

The header line consists of the key field followed by the names of the fields to be imported. The key field is a field name whose data identifies the Portfolio asset or assets that will receive the imported metadata.

Example spreadsheet:

	A	B	C	D
1	FILENAME	CREATED	KEYWORDS	
2	red-porsche-911.jpg	2014-09-06	automobile|car|porsche|sportscar|red|coupe	
3	blue-apartment-complex.jpg	2013-12-27	building|residential|apartments|blue	
4				

Details
The key field identifies which asset or assets to apply metadata to. The key field can be any of the
following:

- Filename
- Item ID
- Path
- Directory Path
- A custom field name

Path identifies the full path to a file, while **Directory Path** identifies a folder that contains one or
more files. Use **Path** to identify a specific file, and **Directory Path** to identify all files in a folder.

If multiple assets have the same value in the key field (for example, assets with the same **Filename**
or **Directory Path**), the imported metadata will be applied to all of them.

Imported data will replace existing data. Any field that is not listed in the imported text file will be
left untouched. Empty fields in the import file are ignored.

Imported data will be embedded in original files if this is specified for the field being imported.
Previously-existing embedded data will be replaced.

Multiple values can be included for fields that support them; use the vertical bar | character to
separate values.

If a field has a pre-defined list of values but is not restricted to using only those values, the data is
imported but is not added to the list of values.

If a field has a pre-defined list of values and is restricted to using only those values, the data is
only imported if all values in the import field exist in the pre-defined list. If there is a non-
matching value, no data is added for that import field.

Imported data must match the field type it is imported into. Text fields and Text Block fields can
contain any data. Some field types require a specific format:

- Date/Time values must be specified as YYYY-MM-DD or YYYY-MM-DDThh:mm:ss, where
  YYYY is the 4-digit year, MM the two-digit month, and DD the two-digit day of the month.
  The letter T indicates that the time is included; hh is the 2-digit hour (00–23), mm is minutes
  (00–59), and ss is seconds (00–59).
- Decimal and Number fields can have a maximum of 19 digits. For Decimal fields, the
  imported value will use the precision specified for the field in the catalog, regardless of the
  number of digits in the import file.
- Boolean fields in the import file can only use the values true or false.

Importing
To import metadata from a text file:

1. Right-click on any organizer.
2. Choose **Import Field Values** from the shortcut menu.
3. Select the text file to import and click **Open**.

Exporting metadata to a text file

You can export the metadata for assets to a tab-delimited text file that can be imported into Portfolio or another system. This requires that you have Catalog Administrator access, or have Editor or Publisher access with permission to Import/Export Metadata.

The exported text file consists of a header line followed by a separate line of metadata for each asset.

The header line consists of the names of the fields that are exported, separated by tabs. The first field exported is RID, which represents each asset's unique ID within Portfolio.

All fields of your catalog are exported, except Thumbnail, Document Text, and Thumbnail Size.

For fields that include multiple values (such as Keywords), values are separated by a vertical bar **|** character.

To export metadata:
1. Right-click on an organizer, a gallery, folder, or group of selected assets.
2. Choose **Export Field Values** from the shortcut menu.

Checking out assets

When you have a vault-based catalog, you can check an asset out in order to make changes to it, then check it back in.

When an asset is checked out, nobody else can make changes to the asset, including changing its properties.

When the asset is checked back in, a new version of the asset is created so that your catalog maintains a history of changes made to assets.

To check out an asset:
1. Select the asset in the main window.
2. Click the lock 🔒/🔓 icon and choose **Check Out**.

When you have marked assets to be checked out, you can download them at any time.

To check out multiple assets:
1. Select the assets in the main window.
2. Right-click in the selection and choose **Check Out Selection**.

Downloading checked out assets
1. Select the assets to download in the main window.
2. Click **Downloads** in the main toolbar and choose **Download Originals**.
3. Portfolio will download the selected assets.
   If you have selected a single asset, it will be downloaded as a normal file. If you have selected multiple assets, they will be downloaded in a .ZIP file.

For more information about jobs, see **Jobs** on page 52.

Checking an asset back in

When you have finished making changes to an asset and want to return it to the catalog, you need to check it back in.

To check in a single asset:
1. Click the checked out ⬚ icon below the asset's thumbnail and choose **Check In**.
2. In the dialog, enter a comment about the edits made to the asset while it was checked out.
3. To upload the modified file, click **Select Files**, then select the file to upload.
   The selected file must have the same name as the file that was checked out.
   You can check the asset in without selecting a replacement file; in that case, any comments that you enter will be added to the asset version.
4. Click **Check In**.

To check in multiple assets:
1. In the main window, select the assets to be checked in.
2. Right-click in the selection and choose **Check In Selection**.
3. In the dialog, enter a comment about the changes made to the files while they were checked out.
4. To upload modified files, click **Select Files**, then select the files to upload.
   The files you select must have the same names as selected assets. If you do not upload a file for one or more of the selected assets, a version of those assets will be created, and the comments you entered will be added to those versions, but the actual files will not be changed.

Changing your mind

If you have checked an asset out but decided you don't need to change it, you can revert the checkout.
1. Click the checked out ⬚ icon below the asset's thumbnail and choose **Revert Check Out**.
2. In the prompt, click **OK** to revert the asset to the state it was in when you checked it out.

NOTE: Reverting a checked out asset will also revert any changes you made to the asset properties while it was checked out. If this was not your intent, you can check the asset in without uploading a file.

Asset versions

When you make a change to an asset in a vault-based catalog, Portfolio will automatically create a version of the asset.

This means that when you check out and edit an image, video, or document, then check it back in, the unedited copy is still available should you need to return to it.

For more information about checking out assets for editing, see **Checking out assets** on the previous page.

An asset version is also created when you edit an asset's properties. To avoid creating an overabundance of asset versions, Portfolio will create one version that includes all the property edits that you make within a certain span of time.

For more information about editing an asset's properties, see **Editing asset properties** on page 33.

To view an asset's versions, click the lock icon 🔒/🔓 below the asset's thumbnail and choose **Versions** from the menu.

To retrieve a specific version of an asset, click the lock icon, choose **Versions**, then click ⬇ next to the desired version.

Reverting to a previous version

In order to revert to a previous version of an asset, you need to download the desired version (see above), then add it to the catalog.

We suggest that you perform these steps:

1. Download the desired version of the asset.
2. Modify the description of the current asset to indicate it is not to be used.
3. Lock the current asset so that it cannot be used or modified. (See **Locking assets** below.)
4. Catalog the downloaded version of the asset.

Instead of locking the current version of the asset, you could delete it from the catalog; doing this will delete it and all previous versions. (See **Deleting assets** on the next page.)

Locking assets

If you need to keep an asset in your catalog, but make it unavailable for modification or use, you can lock the asset.

This might be necessary if, for example, your license for using an asset has expired but you need to retain the asset for historical reasons.

- **To lock assets,** select one or more assets in the main window, right-click one of the assets and choose **Lock Selection**.
- **Another way to lock an asset** is to click the lock icon 🔒/🔓 below the asset's thumbnail in the main window and choose **Lock** from the menu.
- **To lock all the assets in an organizer,** right-click on the organizer and choose **Lock Contents**.

You can unlock assets the same way you lock them: right-click on selected assets, click the lock icon 🔒/🔓 for a single asset, or right-click on an organizer.

Deleting assets

Options for deleting assets vary depending on the type of catalog you are using (vault or Watch Folder) and what organizer you are viewing (**All Assets**, a built-in organizer, or a gallery).

Deleting from a vault catalog

When you delete assets from a vault catalog, they are also permanently deleted from the vault. If you need to retain vault assets, download the originals before you delete them from the catalog. See **Downloading files** on page 46.

NOTE: You cannot delete locked assets. Unlock them first. See **Locking assets** on the previous page.

- **To delete all assets from a vault catalog,** right-click on the **All Assets** organizer 🧰 and choose **Delete Contents** from the shortcut menu.
  In the dialog, check the box labeled **Delete original files from the Vault and the Catalog**, then click **Delete**.
- **To delete individual assets from a vault catalog,** select the assets in a built-in organizer (**All Assets**, **Flagged Assets**, or **Checked Out Assets**), right-click one of the selected assets, and choose **Delete Selection** from the shortcut menu.
  Check **Delete original files from the Vault and the Catalog**, then click **Delete**.
- **To delete individual assets from a gallery,** click the gallery, select the assets, right-click within the selection and choose **Delete Selection**.
  In the dialog, check **Delete assets from <gallery>** and **Delete original files from the Vault and the Catalog**, then click **Delete**.
  If you want to retain the assets in the Vault and Catalog but just remove them from the gallery, do not check **Delete original files from the Vault and Catalog**.
- **To delete all assets in a gallery,** right-click on the gallery and choose **Delete Contents**.
  Check **Delete assets from <gallery>** and **Delete original files from the Vault and Catalog**, then click **Delete**.
  This deletes the assets but does not remove the gallery.

Deleting from a Watch Folder catalog

When you delete assets from a Watch Folder catalog, you can optionally remove them from disk as well.

- **To delete all assets from a catalog,** right-click on the **All Assets** organizer 💼 and choose **Delete Contents** from the shortcut menu.
- **To delete individual assets from the catalog,** select the assets, right-click in the selection and choose **Delete Selection** from the shortcut menu.
- **To delete all assets in a gallery,** right-click on the gallery and choose **Delete Contents**.

In the resulting dialog, check the boxes corresponding to what you want to remove:

- If you only check **Delete assets from <gallery>** the assets will be removed from the gallery but not from the catalog (this option is only present if you are viewing assets in a gallery and not a built-in organizer).
- If you also check **Delete assets from catalog**, the assets will be removed from the catalog but the files will remain on disk.
- If you check **Delete original files from disk**, then the original files will be permanently deleted.

Click **Delete** to have Portfolio delete the assets.

> **NOTE:** If you do not delete a file, and it exists in a Watch Folder, the file will be re-cataloged. If you don't want this to happen, either manually remove the file from the Watch Folder, or delete it when you remove the asset.

Output

Portfolio Web can be used to collect assets in your catalog for download, as well as converting files from one format to another.

The **Download** menu allows you to download original files, run Convert Presets and download the resulting converted files, or create Convert Presets.

The **Batch Process** command allows you to create, run, or modify Convert Presets, rename files, and download or catalog the resulting files.

You can also download or crop and download a derivative version of an image from **Preview** mode.

> **NOTE:** Depending upon your access level, you may not be able to download files or perform a Batch Process. See your Catalog Administrator for details about your **Access Levels** on page 12.

Downloading files

You can download original files, or download a converted version of an asset.

To download original files:
- Select one or more assets and choose **Download Originals** from the **Downloads** menu;
- Select one or more assets, right-click a selected asset, and choose **Download Selection** from the shortcut menu;
- Right-click an organizer and choose **Download Contents** from the shortcut menu.

To download converted files:
- Select one or more assets and click **Batch Process**;
- Select one or more assets, right-click a selected asset, and choose **Batch Process Selection** from the shortcut menu;
- Right-click an organizer and choose **Batch Process Contents** from the shortcut menu.

This opens the **Batch Process** dialog. Select conversion settings or a Convert Preset and click **Batch Process**.

Learn more about **Batch Process** on page 49.

Learn more about **Convert Presets** on the next page.

If you have selected multiple files to download or convert, Portfolio will compress them into a .ZIP archive.

If you have selected a single file, Portfolio will download the file without compression.

Files will be downloaded to your default Downloads folder.

Crop and download from Preview

In **Preview** mode, you can download or crop and download a derivative version of an image.

To download an image, click ⊕ and choose the file format for the derivative image.

To crop and download an image, click ⊠, select the area to crop, then click ⊕ and choose the file format.

Convert Presets

A Convert Preset is a group of settings, such as file type and resolution, that you can save if you frequently convert files using those settings. For example, you may frequently create JPG files that are 320x240 pixels in size for use on a web page. By saving a preset with these values, you can convert and download files with one click.

Convert Presets can be used to download files using one click, or as part of a Batch Process operation, where you can also choose to rename files or add them to your catalog.

To create presets, click **Batch Process** on the main toolbar.

NOTE: In the **Batch Process** dialog, all preset options are in the **Convert** section.

To create a new preset:
1. Modify the conversion settings (see below).
2. Click **+** next to the **Presets** drop-down menu.
3. Enter a name for the preset and click **Save** .
4. Click **Cancel** to close the **Batch Process** dialog.

The new preset will be available from the **Download** menu and in the **Batch Process** dialog.

Conversion settings

- Choose a file format for the conversion from the **Format** drop-down menu.
  When you choose a format, the format options change. For example, for the TIFF format, Compression Type and Byte Order options are available; for JPEG, only the Quality parameter can be changed.
  If you have a Media Engine license, you will have several additional formats available for conversion.
- Choose a color mode for the converted files: RGB, CMYK, or Grayscale.
- Check **Change Resolution** to specify a new resolution for the converted files.
- Check **Resize** to resize the converted files.
  Percent: The percent value is based on the original image, where 100% is the size of the original. The output file is scaled the same percentage in both dimensions and retains the aspect ratio of the original.
  Fit Within: Enter a height and width for converted files to be resized to fit. For original files whose aspect ratio (ratio of width to height) is lower than the output aspect ratio, the converted file will be resized so that the shorter side is the same dimension as the target dimension, otherwise the longer side will be sized to fit the output dimension. The resulting output will be the same as the specified size in one dimension, and the same or smaller in the other, retaining the aspect ratio of the original. No portion of the image will be lost.

Modifying and deleting presets

If you need to tweak a preset:

1. Click **Batch Process**.
2. Choose the preset from the **Presets** drop-down menu.
3. Make changes to the settings.
4. Click the **Update** ✏ button, then click **Update** in the Save Preset dialog.
5. Click **Cancel** to close the dialog.

To delete a preset:

1. Click **Batch Process**.
2. Choose the preset from the **Presets** drop-down menu.
3. Click –.
4. Click **Cancel** to close the dialog.

Batch Process

The Batch Process command allows you to perform transformations on multiple assets, then either download the results or add them to the catalog, optionally replacing the originals.

To process a group of assets:
- Select one or more assets and click **Batch Process**;
- Select one or more assets, right-click a selected asset, and choose **Batch Process Selection** from the shortcut menu;
- Right-click an organizer and choose **Batch Process Contents** from the shortcut menu.

This will open the **Batch Process** dialog.

The **Batch Process** dialog is separated into three sections: **Convert**, **Rename**, and **Destination**.

The **Convert** and **Rename** sections are optional; the **Destination** section must have a selection made before a Batch Process operation can proceed.

Once you have specified settings for the Batch Process command, click **Batch Process** to proceed. Progress will be displayed in the **Status** bar at the bottom of the main window.

Batch conversion settings

To convert files from the original format to a new format, check the box labeled **Convert**, then choose conversion settings.

You can choose a Convert Preset from the **Presets** drop-down menu, or apply custom settings.

See **Convert Presets** on page 47 for more about conversion settings and for information on creating your own presets.

Renaming options

To rename files, check the box labeled **Rename**, then set options for the new file names.

File names are constructed in three parts: a front, middle, and end. Choose an option for each part from a drop-down menu. Options for the three parts are **None**, **Filename**, **Text**, and **Number From**.

- **None** means that part is not used in the new filename.
- **Filename** uses the original filename as part of the new filename.
- **Text** allows you to add specific text (up to 31 characters) to the new filename.
- **Number From** allows you to add a number to the new filename, starting at a specified value and incrementing for each new filename.
  To use a certain number of digits, include leading zeroes in your starting value.

For example, setting the three parts to **None**, **Text: Portfolio-**, and **Number From: 001** will result in filenames such as Portfolio-001.jpg, Portfolio-002.jpg, and so on.

Destination options

The destination indicates where the converted, renamed files should be saved.

- **Download the new files:** The files will be downloaded to your computer.
- **Place the new files in the same folder as the original files:** Each converted, renamed file will be saved where its original counterpart is. If the new file's name conflicts with an existing file, the new file's name will be modified automatically.
  Check **Add the new images to the Catalog** to have the new files added to the catalog, leaving the originals in place also.
- **Replace the original files with the new files:** Each original file will be deleted from disk, the new file will be saved to the same location, and the original catalog record will be modified and associated with the new file.

PDF Contact Sheets

A Portfolio Contact Sheet is similar to its photographic counterpart in that it contains small versions of your images. For the Portfolio Contact Sheet, you can specify the page size, choose the number of images to appear on a page, add header and footer information, and determine which catalog fields are printed with each image.

To create a contact sheet, choose assets in the main window, then click **Make PDF**.

In the **Make PDF** window, choose a preset from the **Presets** pop-up menu.

You can change the **Page Size**, **Grid** layout, and **Header** and **Footer** text as desired.

To save your settings as a PDF preset, click **+**, enter a name, then click **Save**.

To generate and download the PDF, click **Make PDF**.

Image fields

The fields that are included with each image in the contact sheet are the same fields that are displayed in the main window. See **The Field Chooser** on page 10 for details.

NOTE: Contact sheets have limited space for text associated with images, so not all fields displayed in your view may appear in the contact sheet.

Jobs

Access job status by clicking the **Jobs** button in the **Status** bar at the bottom of the window.

The **Jobs** menu displays the status of all Portfolio tasks for your user account, including **Add Assets**, **Download**, and **Batch Process** commands.

The **Jobs** button will show a badge **1** indicating the number of jobs that have been processed since the last time you clicked the button.

As Portfolio processes a command, it adds an entry to the **Jobs** menu.

Successful jobs are indicated with a ✅, and failed jobs are indicated with a ⚠️.

Click the download icon ⬇️ to download the results of a job.

To see details about a failed job, select it from the **Jobs** menu.

Completed jobs are listed in the **Jobs** menu for 24 hours, unless you clear them prior to that time.

NetPublish

NetPublish allows users with Catalog Administrator access to publish the contents of a gallery to a website, hosted on the Portfolio server system.

You can publish a FastSite with just a couple of clicks, or you can customize your site quickly using the Site Builder.

FastSite

To publish a site:
1. Select a gallery or the **All Assets** organizer.
   NetPublish will not publish a site from a folder or other built-in organizer, including the **Flagged Assets** organizer.
2. Click **NetPublish** in the toolbar.
   The default site option is **Create New Site**.
   The default FastSite for your selected gallery is shown in miniature in the right side of the NetPublish Site Builder window.
3. Click **Publish Now**.

The FastSite will be published to the Portfolio system, and the window will show a link to your new site. Click the link to open your site. Copy the URL for future reference.

You can edit your FastSite later to customize it.

Site Builder

To publish a custom website based on your gallery, use the NetPublish Site Builder. Select a gallery, click **NetPublish**, then select **Create New Site**.

> **NOTE:** You cannot publish the **Flagged Assets** organizer as a NetPublish website.

Instead of a new site, you can also:
- Select **Edit Existing Site**, choose a previously-published site from the pop-up menu, make changes to the site, then click **Publish Now** to update the site.
- Select **Copy Existing Site**, choose a previously-published site, make changes to the site (including the **Site Name**), then click **Publish Now**.

In the Site Builder window, you can customize your site. Options for customization are in the left side of the window; the right side shows a live view of how your site will look with the selected options.

Once you have changed settings, click **Publish Now** to publish your customized site. The window will display a link to your new site. Click the link to open your site. Copy the URL for future reference.

Your Portfolio administrator can configure NetPublish to offer a secure SSL connection using the HTTPS protocol.

While the NetPublish Site Builder will not reflect this when you publish your site, users can connect using either the standard HTTP protocol on port 8085, or the secure HTTPS protocol on port 8095.

Example:
Published site: http://1.2.3.4:8085/mysite
Secure site: https://1.2.3.4:8095/mysite

New Site

- **To create a new site,** select **Create New Site**. Enter a name for your website. (This name will be used in the URL of the site when it is published but is not displayed as part of the site itself.)
- **To edit a site,** select **Edit Existing Site** then choose a site from the pop-up list.
- **To modify a copy of a previously-published site,** select **Copy Existing Site** then choose a site from the pop-up list.
  Be sure to change the name of the copied site to avoid replacing the original.

Security

Only users with web access to your Portfolio server system will be able to access your website.

- **To allow anyone with access to visit your site,** select **No Login Required**.
- **To restrict access to only those people you choose,** select **Site Password** and enter a password.
  Visitors will be prompted and will not be allowed entry if they do not have the correct password.
- **To restrict access to specific Portfolio users,** select **User Accounts**, click **Manage Users**, and select the users you want to have access to your site.
  To quickly select all users, click the box at the top left of the **Manage Users** dialog.
  To deselect all users, click the box again.
  Visitors will be prompted for their Portfolio username and password and will not be allowed entry if they do not have an allowed account.

Expiration

You can set your NetPublish site to automatically expire, and optionally delete the site files when it expires.

To set an expiration date for the site, select **Site Expires On**, then use the calendar to select the expiration date.

The default option is to take the site offline when it has expired; to delete the site files, select **Delete Site**.

> NOTE: Deleting the site files will not affect the assets in your catalog.

Branding

If you want to use a different graphic as a banner for your site, click **Browse** and select an image. If you create a custom banner graphic, it should be a PNG format file, 1920 pixels wide by 200 pixels tall.

- **To link your banner graphic to a website,** enter the URL in the **Banner Link** field.
  Visitors who click the banner will be taken to your website in a new tab or window.
- **To set a custom favicon (address bar icon) for your website,** click **Browse** and choose the desired image.
  16×16 ICO-format files work in most browsers.

To use a different color theme with your website, click **Color Theme** and choose a new theme.

To create a new color theme:
1. Click **Color Theme** and choose **Custom**.
2. For each color option, click the color swatch and choose a color, or delete the color value and type a new value.
3. When you've made your changes, click **Save as Theme**, enter a theme name, and press ENTER.

Request Access

If you have set **Security** options for your site, you can allow potential visitors to request access.

To allow visitors to request access, select **Accept website access requests**, click **Access Request Form** and specify the information you want potential visitors to send to you, then enter one or more email addresses to send access requests to.

Search and Sort

To allow your NetPublish site to suggest search terms to a user as they type, check **Suggest Search Terms**.

NOTE: Since a published site includes keywords from all assets in a gallery, NetPublish could suggest terms associated with assets that are not available on the site.

To set the default sort field and order, select a field from the pop-up list, then click the arrow to specify the sort order.

To include an Advanced Search option in your NetPublish site, check **Allow Advanced Search**, then click **Choose Fields** to specify up to 12 fields a visitor can search on.

Grid Fields

By default, your NetPublish website displays an asset's filename under each thumbnail. You can use the **Grid Fields** setting to add more fields to the display.

To specify different fields for your NetPublish site:
1. Click **Grid Fields** to display the available options.
2. Select **Set Metadata Fields**, then click **Choose Fields**.
3. In the **Grid Fields** dialog:
   - Choose a field from the **Available Metadata** list, then click **Add** ▶ to add it to the **Selected Metadata** list.
   - To remove a field from the **Selected Metadata** list, select it and click **Remove** ◀.
   - To rearrange the **Selected Metadata** list, select a field name and click **Move Up** ⏶ or **Move Down** ⏷ to move the field within the list.
4. Click **Save** to save the settings for your NetPublish site.
5. Publish your site.

A visitor to your NetPublish site can see the field name of a field by moving the mouse over a specific field value then pausing until the field name is displayed.

Details

Each file on your website can be viewed in a detail page that shows more information about the file.

To selected the metadata displayed in a file's detail page, select **Set Metadata Fields** and click **Choose Fields**.

In the **Select Metadata** window, you can add or remove fields and set the order in which they will be displayed.

The default fields displayed are **Filename**, **File Size**, **Keywords**, and **Description**.

Asset Protection

To add a watermark to downloaded files, select **Apply watermark to all assets** and click **Create New Watermark**.

The **Create Watermark** window allows you to enter up to three lines of text, select a font style, size, and color, set its transparency, and select a position or tiling option for the watermark.

The watermark will be added to downloaded original or derivative files that are in any of these formats: BMP, GIF, JPG/JPEG, PNG, TGA, or TIF/TIFF.

Examples:
- If your visitors are only allowed to download JPEG versions of assets, then all downloaded files will show your watermark. This can include non-image files that can be represented with a JPEG preview, such as PDFs and Microsoft Word documents.
- If your visitors are allowed to download original or derivative versions of assets, then any original files in the above formats will display your watermark, and any downloaded derivative files in the above formats will also show the watermark. Original files in other formats, such as PSD or DOCX, will not be watermarked.

Download

To allow users to download content, select **Allow content to be downloaded.**

To only allow visitors to download JPEG versions of assets, select **Download as JPEG.** To allow visitors to download original assets or convert to other formats, select **Download Originals and Derivatives.**

NOTE: The derivative file types that a NetPublish site user can download are JPEG, TIFF, GIF or PNG.

Feedback and Sharing

- **To allow visitors to send feedback,** select **Enable Feedback** and enter one or more email addresses that you want feedback sent to.
- **To allow visitors to copy item links,** select **Enable Copy Link.**

Reporting

To enable data collection for reporting through Portfolio Administration, select **Collect site data.**

You can specify the number of days that data is retained, from 1 through 365.

Terms of Service

You can specify a "Terms of Service" agreement that is displayed each time a user visits your NetPublish site.

To specify a Terms of Service agreement:
1. Click **Terms of Service**.
2. Check the box labeled **Show Terms of Service**.
3. Enter or paste your text into the text box.
4. Publish your site.

Each time a user visits your NetPublish site, they will need to click **Accept** to have access to the site.

Managing NetPublish sites

A Catalog Administrator can use the Portfolio Administration application to manage NetPublish sites that have been published from Portfolio Web or Desktop.

To manage NetPublish sites, click NetPublish in the functions list on the left.

In the NetPublish workspace, the list of sites available is on the left.
- **To view a site's details,** select it in the list.
- **To take a site offline,** uncheck the box in the **Online** column.
- **To change how users can access a site,** select the site, then choose a new **Access** option in the **Site Details** on the right.
  - **No login required:** Anyone can view your site.
  - **Site password:** Access to the site is restricted to users that have the password. The password can be set when the site is published or you can enter a password here.
  - **User accounts:** Access to the site is restricted to selected catalog members, who log in using their Portfolio login ID and password.
    Click **Manage Users** to select which users have access. To quickly select all users, click the box at the top left of the **Manage Users** dialog. To deselect all users, click the box again. Check **Allow account requests** and enter an email address to allow users to request access to the published site.
- **To set an expiration date for the published site,** check **Site expires on** and choose a date from the pop-up calendar.
  To delete the site files when it expires, select **Delete permanently on expiration**.
- **To gather reporting data for the site,** check **Collect site data** and specify the number of days to retain report data.
- **To delete the selected site,** click **Delete Site**.
- **To save changes made to the site,** click **Submit**.

Contacting Extensis

Extensis

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Portland, OR 97201
Web: https://www.extensis.com

Extensis Europe

Suite 18, Newton House
Kings Park Road, Moulton Park
Northampton NN3 6LG, United Kingdom

Customer Service

Web: https://www.extensis.com/contact/
Support Form: https://help.extensis.com/hc/en-us/requests/new/

Sales

Web: https://www.extensis.com/contact-us-form/ (all regions)
We also work with resellers around the world; **find one near you**.

Celartem, Inc.

Web: http://www.celartem.com/en/

Extensis: https://www.extensis.com

Customer Service: https://www.extensis.com/contact/

Support Form: https://help.extensis.com/hc/en-us/requests/new/

Sales: https://www.extensis.com/contact-us-form/

Resellers: https://www.extensis.com/resellers/

Celartem: http://www.celartem.com/en/

Technical Support

Technical support for current products is available through the **Extensis website**.

Extensis also maintains a searchable **Knowledge Base** of in-depth articles on various technical topics.

Creating a tech support case

If you are experiencing a problem with a current product, you can submit a tech support case using this **Support Form**.

Provide as much of the following information as you can:
- Product name and version number;
- Your company name;
- Your account number;
- Computer operating system version;
- Other details about your computer system, including RAM, hard drive size and free space, and processor type and speed;
- A description of the problem, including any error message that might be displayed;
- Your email address.

Support Policy

Extensis provides full support for the current version of all shipping products. In addition, Extensis provides limited support for older products up to one year after the product version is no longer offered for sale. For complete details see **Support Services**.

For details on currently supported products, see:
- **Portfolio Support Guide**
- **Universal Type Server Support Guide**
- **Universal Type Client Support Guide**
- **Suitcase Fusion Support Guide**

Support: https://www.extensis.com/support/

Knowledge Base: https://help.extensis.com/hc/en-us/

Support Form: https://help.extensis.com/hc/en-us/requests/new/

Support Services: https://www.extensis.com/support/support-policy/

Portfolio Support Guide: https://www.extensis.com/support/portfolio-support-guide/

Universal Type Server Support Guide: https://www.extensis.com/support/universal-type-server-support-guide/

Universal Type Client Support Guide: https://www.extensis.com/support/universal-type-client-support-guide/

Suitcase Fusion Support Guide: https://www.extensis.com/support/suitcase-fusion-support-guide/

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