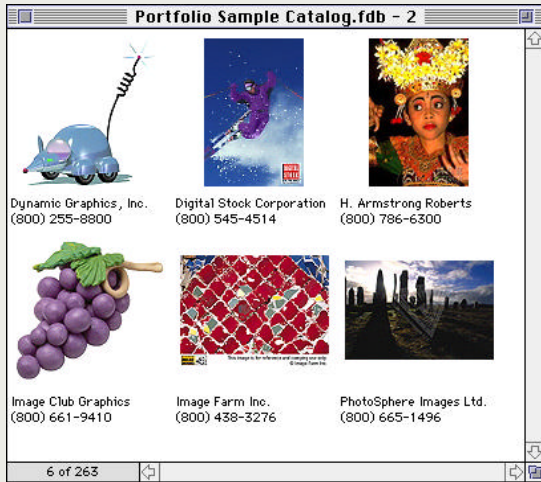
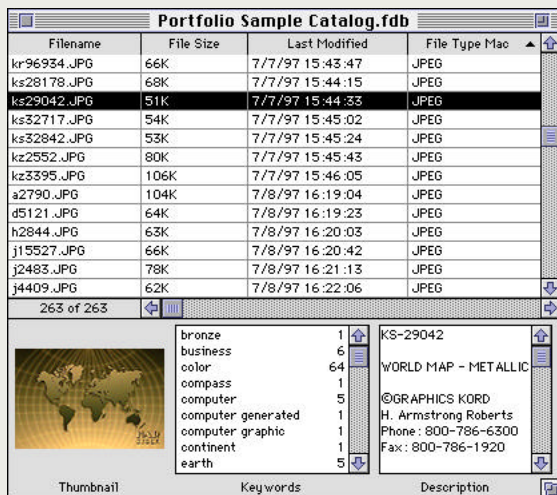


# UP AND RUNNING WITH THE PORTFOLIO 3.0 BROWSER

# WELCOME TO EXTENSIS PORTFOLIO!



BROWSING CATALOG ITEMS IN THUMBNAIL VIEW



BROWSING CATALOG ITEMS IN LIST VIEW

## WHAT IS EXTENSIS PORTFOLIO™?

Portfolio is an electronic media cataloging tool that gives you quick, easy, and efficient ways to organize, browse, manage, retrieve, and use files containing digital data.

Portfolio catalogs all types of digital files and images, regardless of the file format, file location, or the application used to create the file. Cataloged files can be viewed as thumbnails or by list, and information about the image file, such as size, type, creation date, location, and other data are available at the click of a button.

Keywords and other search criteria help you quickly locate, access, and reuse your digital files. And handy drag and drop functions give you easy ways to transfer, copy, or place cataloged images.

## HOW CAN PORTFOLIO HELP ME?

Portfolio makes quick work of finding and retrieving images.

Use Portfolio to keep visual catalogs of:

- All the art and photographs used in a newsletter, brochure, manual, or presentation.
- Artwork, pictures, scans, movies, sounds, and even 3D images that you may want to use repeatedly in different projects, including all your stock and royalty free art on CD-ROM disks.
- Artwork created by your family for use in greeting cards, letters, and holiday projects.
- Miscellaneous pieces of clip art for quick and convenient reference and use.

Or use catalogs to visually distinguish similar images, such as different sizes, colors, or content of a masthead or logo, or where filenames alone are not enough to describe images. And it's really simple to do—simply drag and drop your files into open Portfolio windows to create, add to, and update catalogs. You can even drag and drop items right from the catalog into documents that you create in other programs that support this feature, such as QuarkXPress, PageMaker 6.5, and CorelDraw. And because Portfolio catalogs capture only a thumbnail image of each cataloged file and not the file itself (keeping instead a “link” to the file's location), cataloging images with Portfolio takes up much less space than copying images into a scrapbook.

## HOW CAN THIS GUIDE HELP ME?

If you're new to the Portfolio Browser, you can use this guide as a quick way to get “up and running.” But even if you're an old hand at using Portfolio catalogs, you may find some exciting new features here. When you've finished with this guide, you'll know enough about Portfolio to use the catalogs on this CD, and you'll be aware of some of the more commonly used features. To learn more about Portfolio and the many options and features available, refer to the Extensis Portfolio PDF or visit the Extensis website at [www.extensis.com](http://www.extensis.com).

# UP AND RUNNING WITH PORTFOLIO 3.0

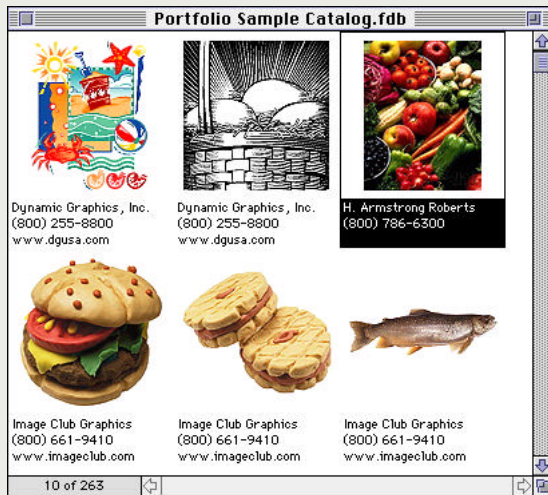
# BROWSING CATALOGS

## OPENING A CATALOG

To open Portfolio, simply double-click on the catalog icon you wish to view, drag a catalog over the Portfolio icon, or double-click the Portfolio Browser application.

## DISPLAYING ALL CATALOG ITEMS

By default when Portfolio has opened your catalog, Portfolio displays all the items in that catalog. In the example shown here, notice the name displayed at the top is Portfolio Sample Catalog.fdb. In the lower left corner of this window is the number of items contained in this gallery and in the catalog as a whole. A gallery is any window containing items from the catalog and it may contain all or any subset of the items in the catalog.



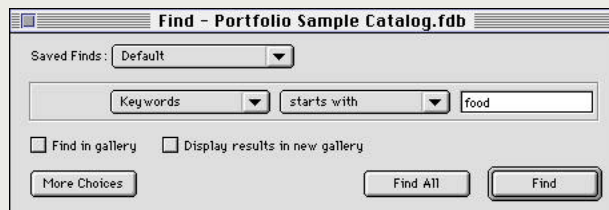
## DISPLAYING SELECTED CATALOG ITEMS

Use the Find window to search for and select particular items of interest. For example, say we're interested in finding some pictures for a newsletter we're writing, and that our newsletter focuses on eating and nutrition. We know that some of the items in our catalog relate to food, and that when our catalog was created these items were given appropriate "keywords" so we could find them easily. One of the keywords we created was "food."

Using the Find window, we select the appropriate search criteria. In this case we select: Find items whose Keyword ▼ starts with ▼ then enter the word food in the search-word box and click "Find." *Note: the arrow (▼) lets you know that you can "click and hold for more choices."* You can access the Find window at any time with Cmd-F Mac, Ctrl-F Windows, or by selecting Find from the Catalog menu.

When the search for all items with the keyword "food" is complete, Portfolio displays them in the Gallery window in whatever view was last used (in this case, Thumbnail View). In our example, Portfolio indicates (in the lower left corner of the window) that 10 items with the keyword "food" were found.

If our search resulted in too many items, or we didn't find the item(s) we were looking for, we could generate a new search. We could try using a different keyword, or use the drop-down menus to change search criteria options, or we could click "More Choices" to add search criteria and narrow the search. There are numerous search options available, including searching by Filename, using And/Or, using Does/Does Not match, etc. For a more detailed description of the search criteria and choices available, refer to the Online Help.



## PREVIEWING CATALOG ITEMS

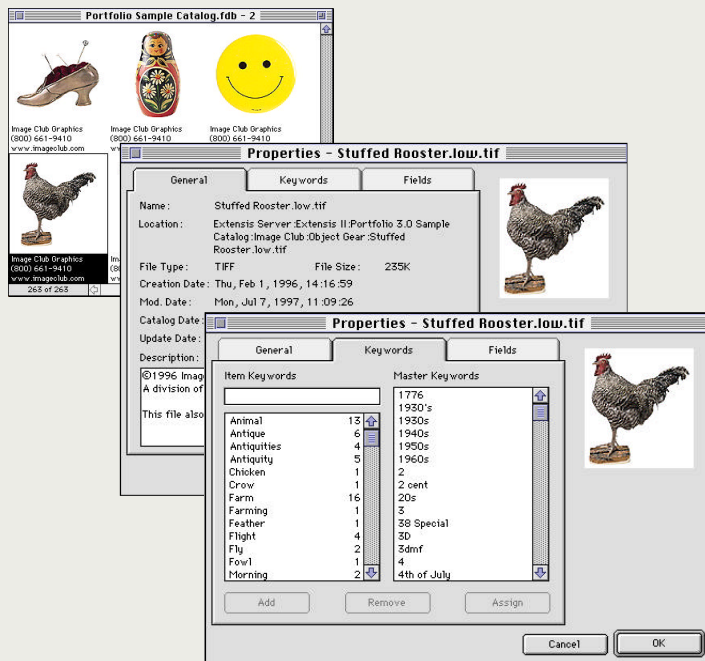
Once you've located an item of interest, there are a number of things you can do with it, including looking at a larger view of it. This larger view is called a "Preview." To Preview an item, simply double-click its thumbnail.

In our example, we found a picture of vegetables. We double-clicked in the image area of the thumbnail and Portfolio displayed our picture in a Preview window.

## VIEWING ITEM INFORMATION

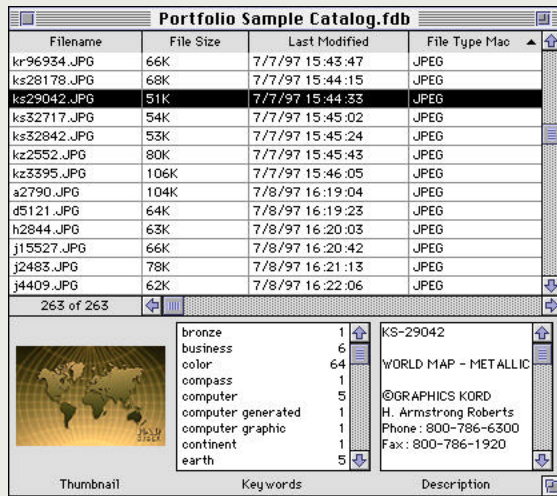
Selecting Item Properties from the item menu (Cmd-I Mac, Alt-Enter Windows) displays information about the currently selected item. This tabbed dialog displays detailed information about the image, including its filename, type, size, creation date, modification date, pathname, keywords, and description and any custom field information.

In our example, the item description indicates that this is a stock art image from Image Club Graphics and that it is available in high resolution TIFF format. Item Properties also shows all keywords assigned to the item on the Keywords tab. The number beside each keyword indicates how many items in the catalog have been assigned that same keyword. *Note: Double-clicking on any keyword in the keyword list initiates a search for all items with that keyword. When the search is complete, the found items are displayed in the Gallery window.*



## UP AND RUNNING WITH PORTFOLIO 3.0

# WORKING WITH CATALOG ITEMS



## DISPLAYING AN ITEM IN LIST VIEW

Although viewing lists of images in Thumbnail View allows you to see many images at a glance, the amount of information about the item that can be displayed along with the thumbnails is limited. To see more information “at a glance,” try List View. To switch to List View select List from the View menu or Cmd-L Mac, Ctrl-L Windows. You can also scroll up and down in any of the windows displayed in Gallery List View, and resize the Gallery window as needed.

## USING IMAGES IN DOCUMENTS

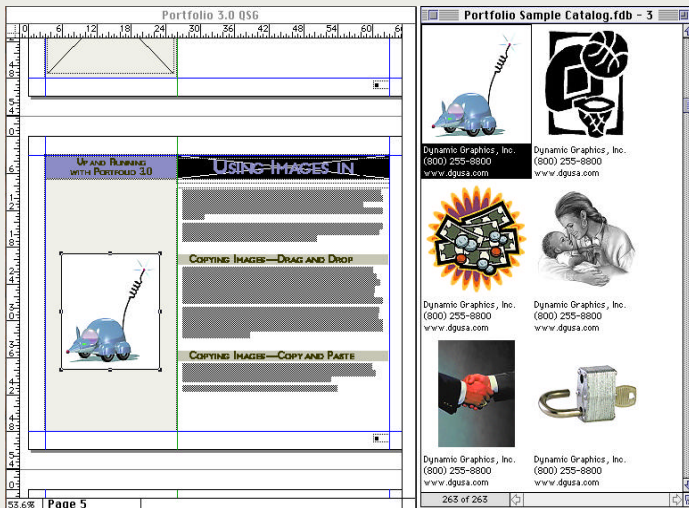
One of the greatest values of a catalog is the ability to search for and see image files without opening the application that created them, and be able to instantly copy those images to other documents right from the catalog list. For example, you might place a photograph modified in Adobe Photoshop into a newsletter created in QuarkXPress, or you might want to place a movie created in QuickTime into your presentation created in Adobe Persuasion.

Portfolio makes the entire process very easy. Once you’ve selected an image, you can copy it to another document by dragging (if the application can accept dragged images).

## COPYING IMAGES—DRAG AND DROP

Some applications, such as PageMaker 6.5 and ClarisWorks, accept images dragged from other applications. Others, such as QuarkXPress, normally cannot. However, Extensis is developing plug-ins to make this feature available in other applications. One such plug-in from Extensis, a Quark XTension named “QX-Drag&Drop” is provided free of charge with Portfolio. This file is placed in the Portfolio Extras folder located in the Portfolio application folder when Portfolio is installed. To use this Quark XTension, launch the installer and follow the instructions. After installation, the drag and drop feature will be activated the next time you launch QuarkXPress.

To drag and drop an image from a Portfolio catalog into a QuarkXPress document, simply open to either Gallery view (Thumbnail or List Text), and drag the item into your document. The necessary picture box will be created and placed inside the Quark document at the location of the cursor. Portfolio automatically passes link information to Quark about the file’s location (refer to Quark documentation for more information about linked files).



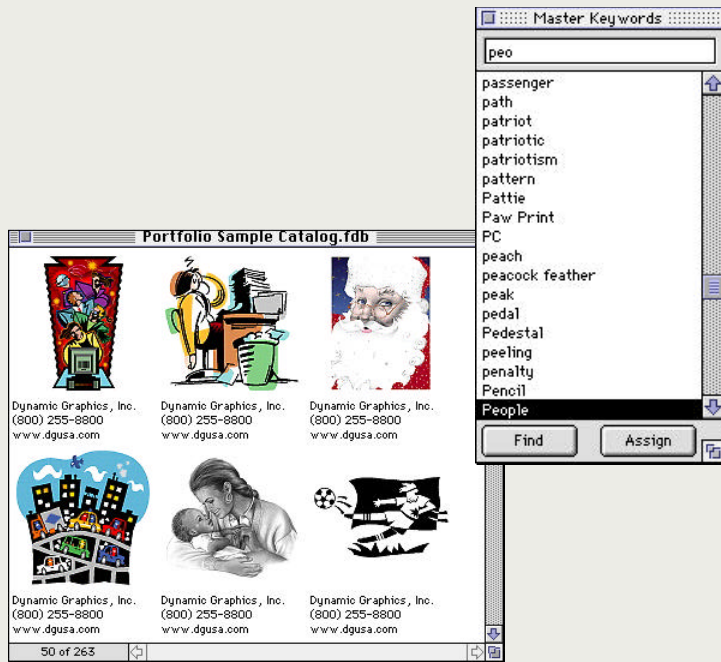
## UP AND RUNNING WITH PORTFOLIO 3.0

# WORKING WITH CATALOGS

## KEYWORDS & MASTER KEYWORD PALETTE

Keywords are an important key in your ability to search for and find cataloged items.

The Master Keyword Palette is a floating palette. To open the palette, select the “Master Keywords Palette” command from the View menu. You can quickly search for items in the catalog that contain specific keywords by double-clicking on a keyword in the palette. In this example, we double-clicked on the keyword People. To quickly scroll through a long keyword list to the keyword People, type the first few letters of People in the text box at the top of the Master Keyword Palette.



## LAUNCHING OTHER APPLICATIONS

You can launch the application which created (or can read or edit) a cataloged item directly from Portfolio. For example, you might want to modify photographs using Adobe PhotoShop, or make changes to illustrations using Adobe Illustrator. Or you might want to view a PDF file in your catalog without leaving Portfolio. Portfolio utilizes the operating system (Macintosh Easy Open Mac, Registry Windows) to determine which application to launch for each type of file in your catalog.

To launch an application: Select the item you wish to edit (or view) then choose “Edit Original” from the Item menu, or use the keyboard shortcut Cmd-M Mac, Ctrl-M Windows. Portfolio will launch the application you have chosen, and then open the selected catalog item. If no application has been set for this filetype, a dialog box will be displayed so that you can select an appropriate application. To specify a different application to use when selecting Edit Original for any file type, hold down the Option key Mac, Shift key Windows when selecting Edit Original.

## UP AND RUNNING WITH PORTFOLIO 3.0

EXTENSIS CORPORATION  
1800 S.W. First Avenue, Suite 500  
Portland, OR 97201  
Phone: 503-274-2020  
Fax: 503-274-0530  
E-mail: [info@extensis.com](mailto:info@extensis.com)  
Internet: <http://www.extensis.com>

CUSTOMER SERVICE  
Phone: 800-796-9798  
E-mail: [sales@extensis.com](mailto:sales@extensis.com)

TECHNICAL SUPPORT  
Phone: 503-274-7030  
Monday–Friday, 8am–5pm Pacific  
E-mail: [support@extensis.com](mailto:support@extensis.com)



## FOR MORE INFORMATION

### LEARNING MORE ABOUT PORTFOLIO

We've covered a number of Portfolio features in this guide, but the information presented was necessarily limited. There's much more information available both on the features presented here, and on the many helpful features and options that we didn't mention. We invite you to take advantage of the following additional information sources covering Extensis Portfolio:

- Help—available from the menu bar
- ReadMe—a text file located in your Portfolio application folder with late-breaking information
- Website—visit [www.extensis.com](http://www.extensis.com) for more information

### FULL VERSION OF PORTFOLIO

For information on the full version of Portfolio, or for site license information, contact us at 800-796-9798, or send e-mail to [sales@extensis.com](mailto:sales@extensis.com)

### OTHER PRODUCTS FROM EXTENSIS

In addition to Extensis Portfolio, Extensis offers an array of application-specific products that extend the capabilities of popular graphics and layout applications. Extending the capabilities of such award-winning programs as QuarkXPress, Adobe Photoshop, Adobe Illustrator, Adobe PageMaker, and Macromedia FreeHand enables advertising and design professionals, production artists, and desktop publishers, as well as multimedia developers, graphic, game, world wide web designers, digital imagers, and photographers to maximize their investment in their graphics application software.