



PORTFOLIOTM

USER GUIDE

VERSION 3.0

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1—Getting Started

Welcome to Portfolio 3.0, a simple but efficient cataloging tool that organizes all your creative work into browsable, on-line libraries. This chapter describes new features since Fetch 1.5, basic concepts, how to install Portfolio, getting started with catalogs and converting Fetch catalogs for use in Portfolio.

Using this manual

Once you've read through this chapter and understand the basic cataloging concepts, you can proceed to the remaining chapters in this manual:

- For detailed information on using Portfolio's cataloging features, see Chapter 2, "Using Catalogs."
- For information on creating and managing catalogs for yourself or others, see Chapter 3, "Creating and Managing Catalogs."
- For details on catalog maintenance and administering catalogs for a workgroup, see Chapter 4, "Catalog Administration."
- For Portfolio hotkeys and shortcuts, see Appendix A.
- For helpful Portfolio case studies, see Appendix B.

Portfolio 3.0 is a fully cross-platform product. While most features work identically on the Macintosh and in Windows, a few minor differences do exist. We've placed icons in the left margin of this manual to alert you to those situations:



This icon indicates a feature available only in the Macintosh version of Portfolio or a section that pertains to Macintosh functionality.



This icon indicates a feature available only in the Windows version of Portfolio or a section that pertains to Windows functionality.

What's new in Portfolio version 3.0

Portfolio 3.0 is the next stage of Extensis Fetch, the longtime cataloging standard for creative professionals. More than simply a new version of an existing product, Portfolio takes the Fetch technology to a new, more powerful level.

If you used Fetch in the past, you'll still get all the powerful features you're accustomed to. In addition, Portfolio includes the following improvements and new features:

Cross-platform functionality

Portfolio is the first truly cross-platform cataloging product available. This means that the same catalog file can be used simultaneously in Windows or on the Macintosh, with no conversion required.

Translator support

Portfolio uses a translator system that allows it to read and display approximately 30 different image formats. This is particularly important for cross-platform use, where Windows applications cannot always use the thumbnail image and keywords many Macintosh applications store in their files.

Multi-user access

Portfolio uses a new database engine designed to handle cross-platform data. Additionally, the database uses "record-level locking," which lets multiple users add and edit items in a catalog simultaneously.

Redesigned interface

The Portfolio interface has been redesigned for a more intuitive user experience. This allows you to quickly and easily access more information.

Customizable views

You can now specify which fields are displayed in a Gallery window, both in the Thumbnail and List views. This lets you easily view only the information that's important to you.

In addition, you can alter the background color, text color, font, and thumbnail size of your Gallery windows, as well as rotate thumbnails so that you can view scanned images in their proper orientations.

Improved keywords

You now have greater control over keywords, especially when working with multiple items at once. The "Edit Keywords" dialog box has been revised to let you view the keywords associated with more than one item simultaneously.

Master Keyword List

Portfolio includes the Master Keyword List, a predefined list of keywords created by the catalog administrator. By restricting users to adding only keywords from this list to an item, administrators can guarantee that only accepted keywords are used within a catalog. The floating Master Keyword Palette lets users assign keywords to one or more items simply by dropping them onto item thumbnails.

Multiple security levels

Portfolio offers four levels of security, allowing catalog administrators to restrict access to specific catalog functions.

Custom fields

Traditionally, catalogs have been limited to a fixed number of information fields such as keywords and descriptions. Portfolio lets you create an unlimited number of custom fields to provide context for your catalog information. For example, if you create a Photographer field and a Location field, you can search the Location field for “Washington” without fear of finding photos taken by a photographer named Washington.

Multiple catalogs

Portfolio can open any number of catalogs simultaneously, allowing you to quickly copy items from one catalog to another without losing keywords, descriptions and other vital information.

Gallery enhancements

Portfolio Galleries can contain any set of items, not just a set resulting from a search. Multiple Galleries can be open simultaneously, and you can add items to one Gallery by dragging them from another Gallery. Galleries can also be saved, which allows distinct sets of items to be opened as a group; saved Galleries also retain custom formatting.

Portfolio concepts

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

Portfolio catalogs store thumbnail images rather than full document and image files, and create pointers to the original files. Because Portfolio does not store the files themselves, using a catalog is fast and efficient.

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

- An unlimited number of *keywords* that let you easily search a catalog.
- A *description* (up to 32,000 characters long) that lets you store important or useful information about the file.
- Data in *custom fields*.

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

Note: If you need to make your catalogs available to users who don't have Portfolio, you may want to consider the Portfolio Content Publisher's Toolkit and Portfolio read-only browser, also available from Extensis. For details on this product, call (800) 796-9798.

Installing Portfolio

Installing Portfolio is simple—the installer application does all the work for you, and puts all the Portfolio files where they belong on your hard disk.

System requirements

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

- 68030-based Macintosh or newer (including Power Macintosh and compatibles), or 486/33 or higher IBM or 100% compatible PC
- Mac OS 7.5 or later, or Windows 95 or NT 4.0 or later
- 6MB of application RAM minimum
- 20MB free hard disk space



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



Macintosh installation

Before installing, restart your Macintosh with all extensions off (except for your CD-ROM extensions).

To install Portfolio on your Macintosh:

1. Insert the Extensis CD-ROM into your CD-ROM drive.

Note: Other Extensis products are available for you to install from this CD. These are full working versions of Extensis products that you can run in Demo mode. Call Extensis at (800) 796-9798 to purchase a serial number that will allow you to use these programs with no time restrictions.

2. Open the Portfolio folder.

3. Double-click the installer icon.

The Introduction dialog box appears.

4. Click “Continue.”

The Welcome dialog box appears. Release notes and special instructions are displayed in this window. It is important that you read these release notes since they contain information not included in the manual. You should save or print these release notes before continuing the installation.

5. Click “Continue.”

The Installation dialog box appears.

6. Click “Install.”

The Disk Selection dialog box appears. The dialog box requests that you select the disk on which you want Portfolio installed.

7. Select the disk and folder where you want Portfolio installed.

8. Click “Install.”

Once installation is complete, the successful installation dialog box appears. The installer will prompt you to restart your computer if necessary.



Windows installation

Before installing, be sure to turn off any anti-virus software.

To install Portfolio in Windows:

1. Insert the Extensis CD-ROM into your CD-ROM drive.

Note: Other Extensis products are available for you to install from this CD. These are full working versions of Extensis products that you can run in Demo mode. Call Extensis at (800) 796-9798 to purchase a serial number that will allow you to use these programs with no time restrictions.

2. Open the Portfolio folder.

3. Double-click the Setup icon.

The Portfolio Setup dialog box appears.

4. Click “Next.”

5. Select the disk and directory where you want Portfolio installed.

If you want to change from the default location, click “Browse” and choose a new disk and/or directory.

6. Click “Next.”

Portfolio is installed to the location you specified.

7. Click “Finish” to launch Portfolio and view the ReadMe file.

Registering Portfolio

It is important to register your copy of Extensis Portfolio so that you are eligible for technical support, information regarding new versions, products, discounts and special offers on new products.

Portfolio includes electronic registration. The first time you launch Portfolio after installing it, a personalization dialog box appears. Enter your name, company and Portfolio registration number. Your product registration number is located on this manual. If you choose not to personalize your copy, Portfolio will run in a 60-day demonstration mode. A dialog box will remind you of how many days are remaining in the demonstration mode each time you launch Portfolio.

Once you have personalized Portfolio, a dialog box appears asking if you would like to register. To register, click the "Register Extensis Portfolio" button; an electronic registration screen appears. After you've completed the registration screen, a Market Research screen and a System Configuration screen appear. The Market Research screen asks basic questions that enable us to better understand your needs. The System Configuration screen provides a "snapshot" of your system configuration that enables Extensis to support you more effectively. Sending this information is optional; if you do not wish to send it to Extensis, select the checkbox at the bottom of these screens.

To use electronic registration, you must have a modem connected to your computer. Portfolio will dial the number automatically, and the call is toll-free. If you do not have a modem, you can print the registration screen and register either by faxing it to (503) 274-0530 or mailing it in the postage-paid envelope provided. If you don't have access to a printer, you can still register by filling out the registration sheet located at the end of this manual.

Using Technical Support

For questions regarding Portfolio, please refer to this manual first—it describes all of Portfolio's features and basic operations. In addition, you can find frequently asked questions and troubleshooting tips on the Portfolio page of the Extensis World Wide Web site, at www.extensis.com.

If you have a problem that is not addressed in this manual or on the Extensis Web site, technical support is available at (503) 274-7030, Monday through Friday 8:00 a.m. to 5:00 p.m. Pacific time.

Extensis provides free support to registered users on a limited basis, and extended support is also available. For information on extended support, please visit our Web site or call Extensis Technical Support at (503) 274-7030.

Suggestions

We'd love to hear your comments about Portfolio. For your convenience, a suggestion sheet is included at the end of this manual. Please fax, mail, or e-mail your comments and suggestions to Extensis.

Getting started cataloging your files

Now that you've installed Portfolio, you'd probably like to catalog one or more of your files to see how Portfolio displays them.

To catalog your files:



1. Double-click the Portfolio icon.

A dialog box appears, prompting you to open an existing catalog or create a new one. Since you have not yet created a catalog, select “Create a new Portfolio catalog” and click “OK.” A directory dialog box appears.

Note: If you don't have any files to catalog yet, you may want to select “Open an existing Portfolio catalog” instead, and open the sample catalog included with Portfolio. See “Using the sample catalog” later in this chapter for details.

2. Specify a name and location for your catalog, then click “Save.”

Portfolio creates a catalog file, which it stores on your hard drive. The catalog's Gallery window opens.

3. Drag and drop selected files or folders into the catalog.

Select a file or folder from the Finder or Explorer and drag it into the Gallery window. When the window is highlighted, release the file or folder. The “Catalog Properties” dialog box appears with the Options tab open.

4. Click “OK.”

The “Catalog Properties” dialog box lets you choose a variety of options when you catalog files. For this procedure, as for most files, the default settings should be fine. (For more information about adding and updating options, see “Setting catalog update options” in Chapter 3, “Creating and Managing Catalogs.”)

Next, the Cataloging Status window appears. This window shows the files as they are being added to the catalog. In this window, you'll see a small picture (or thumbnail) of each file, as well as the number of files that were cataloged and their locations.

5. View your files.

You should now see all the files that you cataloged in the Gallery window. If you cataloged files that do not contain thumbnails (such as text files), you will see a file icon instead of the thumbnail.

The items in the Gallery window are only references to the actual, or “source” files. The files themselves can be stored anywhere. However, to accomplish certain tasks in Portfolio you will need access to the source files.

Using the sample catalog

If you have not yet cataloged your own files, or if you'd like to work with other file types (such as movies and sounds) that you may not yet have, you can use the Portfolio sample catalog. A Sample Catalog folder was placed in your Extensis Portfolio folder during installation.

Note: The Sample Catalog folder contains the catalog, but not its associated files. Those files are located on the Extensis CD-ROM from which you installed Portfolio.

To open the sample catalog:

- 1. Insert the Extensis CD-ROM into your CD drive.**
- 2. Double-click the Sample Catalog icon in the Sample Catalog folder located in your Extensis Portfolio folder.**

The catalog's Gallery window appears.



Converting Fetch catalogs

You can convert Fetch version 1.5 catalogs or Fetch 1.2 multi-user catalogs for use in Portfolio 3.0 on the Macintosh.

To convert a Fetch catalog:

- 1. Open Portfolio.**
- 2. Choose "Open..." from the File menu.**

A directory dialog box appears.
- 3. Locate the Fetch catalog you want to convert and click "Open."**

A dialog box appears, asking if you want to convert the Fetch catalog to Portfolio format.
- 4. Click "OK."**

A second directory dialog box appears.
- 5. Specify a name and location for the converted catalog and click "Save."**

The catalog is converted to Portfolio 3.0 format and saved in the location you specified. You can now use it in Portfolio. The earlier catalog is preserved in its original location.

2—Using Catalogs

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

This chapter assumes that you have an existing catalog with which to work. If you do not, you can use the Sample Catalog installed in your Portfolio folder; see “Using the Sample Catalog” in Chapter 1, “Getting Started,” for details.

Opening Portfolio

You can open Portfolio and a catalog in any of three ways.

To open Portfolio:

- **Drag a catalog icon onto the Portfolio application icon until both icons are highlighted, then release.**

or

- **Double-click a catalog icon.**

or

- **Double-click the Portfolio icon, then choose “Open...” from the File menu.**



If you have set a default catalog, double-clicking the Portfolio icon automatically opens that catalog. If not, you are prompted to create a new catalog or open an existing one.

The catalog opens to the Gallery window, where you can open one or more Preview windows and Item Properties dialog boxes that let you view more information about individual items. The Gallery window can also function as a temporary work space for items collected from different searches.

Note: If you open a protected catalog, you must enter the appropriate access password to view and modify the catalog items. If the catalog won't open, another user may have it open in Administrator mode, or with the Portfolio browser. See “Catalog access levels” in Chapter 4, “Catalog Administration,” for details.

Windows and dialog boxes in Portfolio

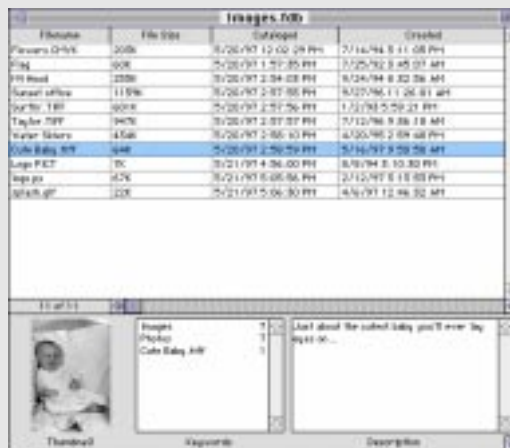
Find window: Lets you describe what you want Portfolio to display in the Gallery window, whether you want all the items in the catalog or only items meeting particular criteria. For more information on searching, see “Searching a catalog” later in this chapter.



Gallery window/Thumbnail view: Shows a separate thumbnail image of each item, with item information below the thumbnail. For more information about the Gallery window, see “Using Gallery windows” later in this chapter.

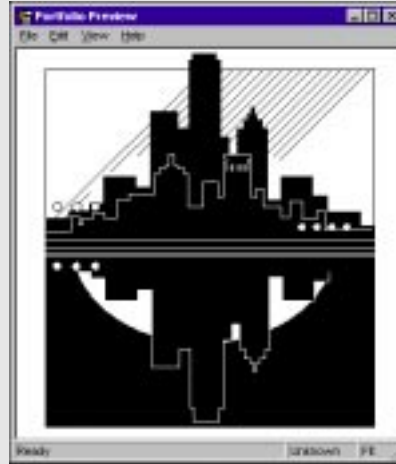


Gallery window/List view: Lists the items currently in the Gallery, one row for each item. Also shows the thumbnail, keyword list, and description for the selected item. For more information about the Gallery window, see “Using Gallery windows” later in this chapter.



Windows and dialog boxes in Portfolio (continued)

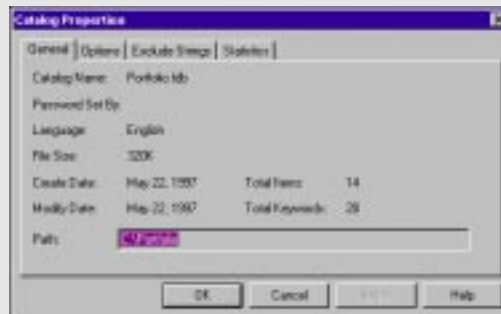
Preview window: Displays a full-size preview of the item (unless "scale-to-fit" is selected). Portfolio must be able to locate the source file before displaying the preview. For more information about previewing catalog items, see "Previewing an item" later in this chapter.



Item Properties dialog box: Displays all of the information about an item that the Portfolio database contains, or that can be read from the source file. To learn more about the Item Properties dialog box, see "Viewing item or catalog information" later in this chapter.



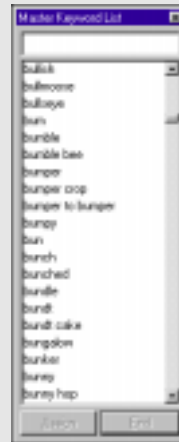
Catalog Properties dialog box: Provides summary information about the entire catalog. For more information about the Catalog Properties window, see "Viewing item or catalog information" later in this chapter.



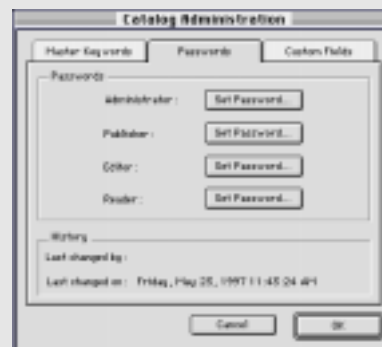
Windows and dialog boxes in Portfolio (continued)

Master Keywords Palette:

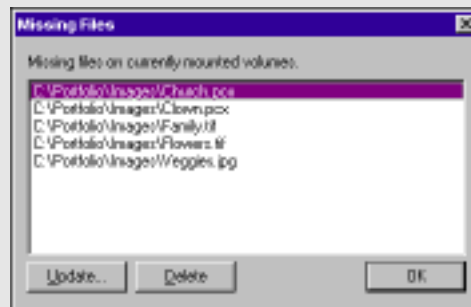
Allows you to view the Master Keywords for all items in a catalog. The palette displays Master Keywords alphabetically, and can be placed anywhere onscreen. For more information, see “Viewing keywords” in Chapter 3, “Creating and Managing Catalogs.”



Catalog Administration dialog box: Allows catalog administrators to create and maintain Master Keywords, assign catalog passwords and define custom fields. See Chapter 4, “Catalog Administration,” for details on administering Portfolio catalogs.



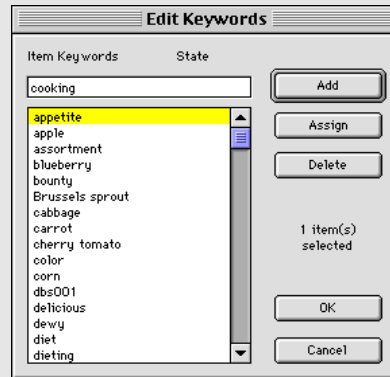
Missing Files dialog box: Lists the file references in a Portfolio catalog that are no longer valid. See Chapter 4, “Catalog Administration,” for details on finding missing files.



Windows and dialog boxes in Portfolio (continued)

Edit Keywords dialog box:

Allows you to edit item keywords for one or more items at a time. You can add keywords to and remove keywords from more than one item, and you can quickly assign a keyword to several items at once. See “Entering and editing keywords manually” in Chapter 3, “Creating and Managing Catalogs.”



Customize Gallery dialog box:

Allows you to change the layout of a Catalog's Gallery windows. You can specify precisely the information you want to display in both the Thumbnail and List views, including any information in custom fields. In addition, you can alter thumbnail size and appearance, set a different background color for the window and more. See “Customizing Gallery windows” later in this chapter.





The Portfolio toolbar

The Windows version of Portfolio includes a toolbar on the application window. The toolbar makes many of Portfolio's commonly used features available at the touch of a button, and provides access to QuickFind, a fast way to find items in a catalog without opening the Find window.

You can leave the toolbar on the Portfolio application window, or you can "tear" it off as a free-floating palette. The toolbar features are described in detail below.

The Portfolio Toolbar	
<p>A New: Click to create a new catalog.</p> <p>B Open: Click to open an existing catalog.</p> <p>C Always on Top: Click to keep the Portfolio application window frontmost, even when another application is active.</p> <p>D Help: Click to open the Portfolio online Help index.</p> <p>E QuickFind combination box: Type a word to match in a search, or choose a previously entered word. QuickFind uses the "starts with" search criteria; see "Searching a catalog" later in this chapter for more information.</p> <p>F QuickFind: Click to perform a search on the word in the QuickFind combination box, and displays the results in the current Gallery. (You can set QuickFind results to appear in new Galleries; see "Setting preferences" later in this chapter for details.)</p> <p>G Find: Click to open the Find window.</p> <p>H New Gallery: Click to create a new Gallery window for the active catalog.</p> <p>I Saved Galleries: Click to open and choose from a list of saved Galleries for the active catalog.</p> <p>J Saved Finds: Click to open and choose from a list of saved finds for the active catalog.</p>	<p>The screenshot shows a horizontal toolbar with the following elements from left to right: a 'New' button (A), an 'Open' button (B), an 'Always on Top' button (C), a 'Help' button (D), a search input field (E), a 'QuickFind' button (F), a 'Find' button (G), a 'New Gallery' button (H), a 'Saved Galleries' button (I), and a 'Saved Finds' button (J). The search input field (E) contains a dropdown arrow on its right side.</p>

Searching a catalog

Use the Find window to tell Portfolio which catalog items you want to see. You can search any field, including custom fields (see “Using custom fields” in Chapter 3, “Creating and Managing Catalogs,” for more information on custom fields).

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

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

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

To display the entire contents of a catalog:

- Choose “Find All” from the Catalog menu.

or

- Click “Find All” in the Find window.

To find specific items in a catalog:

1. Choose “Find...” from the Catalog menu.

Portfolio opens the Find window and displays the default saved find.

2. Use the Find window as shown on the following page to describe what you are looking for, then click “Find.”

Portfolio lets you search for various attributes of an item, including filename, keyword, file size and so on. See the table later in this section for descriptions of the attributes you can use in your search.

The Find window

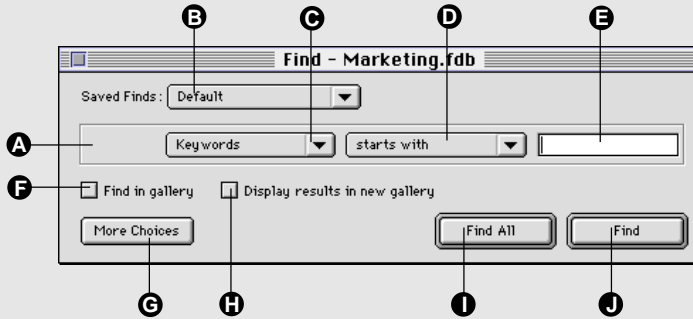
Enter a single search description for a simple search.

- A** Search criteria.
- B** Specify whether to save the search criteria for later use. See "Saving finds" later in this chapter for details.
- C** Choose the search criteria. (If you are searching by volume, it doesn't need to be mounted before starting the search.)
- D** Choose an option to focus the search criteria.
- E** Type a word or part of a word to search for here.
- F** Check to search only the open gallery window.
- G** Click to expand the number of search criteria.
- H** Check to display the search results in a new gallery window.
- I** Click to find all items.
- J** Click to start the search.

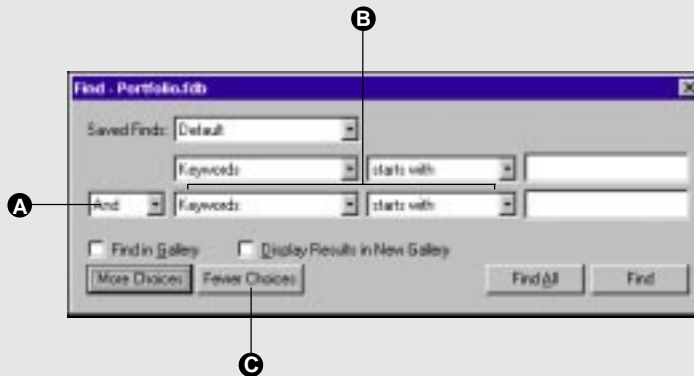
Click "More Choices..." in the basic Find window to display the expanded window. Click as many as four times to add more criteria fields.

- A** Choose "and" to narrow the search; "or" to broaden it.
- B** Choose the additional search criteria.
- C** Click to reduce the number of search criteria.

Use the basic Find window for a simple search



Use the expanded Find window for a more complex search



Portfolio search criteria options

This option...	Finds...
Cataloged*	The date an item was first cataloged in Portfolio
Created*	The date the item was created
Extension Win*	(Windows only) The item's three-character file extension
Description	The item's file description
File Size	The item's file size
Filename*	The item's name
Keywords*	Any keywords assigned in Portfolio
Last Modified	The date of the item's last modification
Last Updated	The date the item was last updated in the catalog
Creator Mac	(Macintosh only) The four-character file creator code for the item
File Type Mac*	(Macintosh only) The four-character file type code for the item
Path	The file path (location) for the item
Short Filename Win	(Windows only) The eight-character filename for the item
Volume*	The physical drive or disk on which the item resides
<i>Custom Fields</i>	Any custom fields that have been created for the current catalog

*These fields are indexed for faster searching.

Streamlining your searches

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

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

Searching more efficiently

Searches performed on *indexed fields* are always faster because Portfolio uses indexes built into the database; on the Macintosh, indexed fields appear in bold in the search criteria pop-up menu. When you search on indexed fields, choose “matches” from the modifier pop-up menu for the fastest searches, or “starts with” for searches that are nearly as fast.

Other types of searches may be somewhat slower because Portfolio must examine every entry in the catalog:

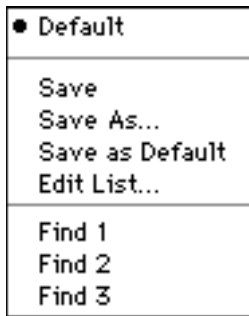
- Searching on file type or volume is slower when there is a large number of items that match your search criteria.
- Searching on keyword or filename using “contains” or “ends with” can be slower when the catalog is large.

Volumes referenced in the catalog need not be mounted before you search.

Saving finds

If you routinely use a particular set of items in a catalog, you can name and save a find that retrieves those items.

Your saved finds appear in the Saved Finds pop-up menu in the Find window. Whenever you want to use a saved find, choose its name from the menu.



To save a find:

1. **Set up your search in the Find window.**
2. **Choose “Save As...” from the Saved Finds pop-up menu.**
3. **Type a name for the new definition in the “Find Name” dialog box that appears.**
4. **Click “OK” to return to the Find window.**

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

Using the default find

You can edit the default find so that it retrieves the items you use most often. Portfolio carries out the default find the first time you open a catalog after starting the application or whenever you choose “Default” from the Saved Finds pop-up menu.

To change the default find:

1. **Set up the search you want to use as the default in the Find window.**
2. **Choose “Save as Default” from the Saved Finds pop-up menu.**

You can change the default find as often as you want.

Editing saved finds

You can change the criteria of your saved finds, rename them, duplicate them or delete them. You cannot rename or delete the default find.

To change the attributes of a saved find:

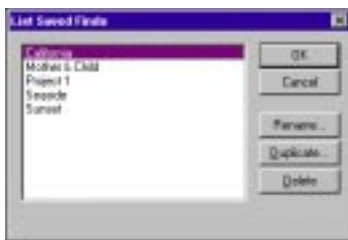
1. Choose the find you want to change from the Saved Finds pop-up menu.
2. Modify the search criteria and choose “Save” from the Saved Finds pop-up menu.

The new search criteria are applied to the saved find.

To rename or delete a saved find:

1. Choose “Edit List...” from the Saved Finds pop-up menu in the Find window.

The “Saved Finds” dialog box appears.



2. Select the saved find you want to edit in the list.
3. Click the appropriate button to rename, duplicate or delete the find.
4. Click “OK” to return to the Find window.

The changes are made to the saved find.

Using Gallery windows

Portfolio displays catalog items in *Gallery windows*. You can see Gallery windows in Thumbnail view for visual browsing, or List view for text browsing (List view can display more information about the items).

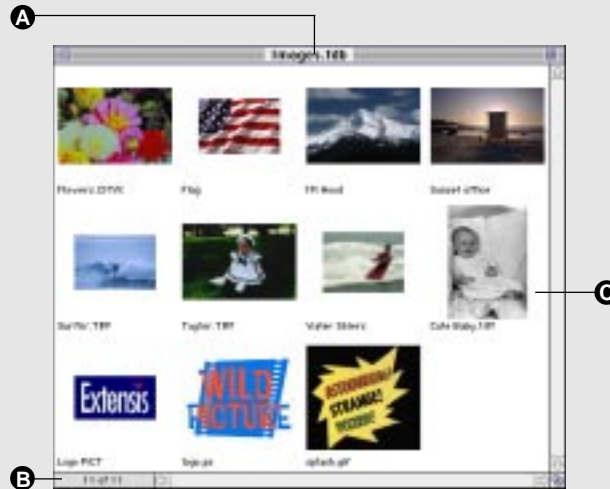
In either view, you can scroll and select items to preview, print, edit, or use in other documents. You can customize Gallery window appearance for both Thumbnail and List views; see “Customizing Gallery windows” later in this chapter for details.

You can also save Gallery windows for future use once they contain the items you want. See “Saving Gallery windows” later in this chapter for details.

Gallery views

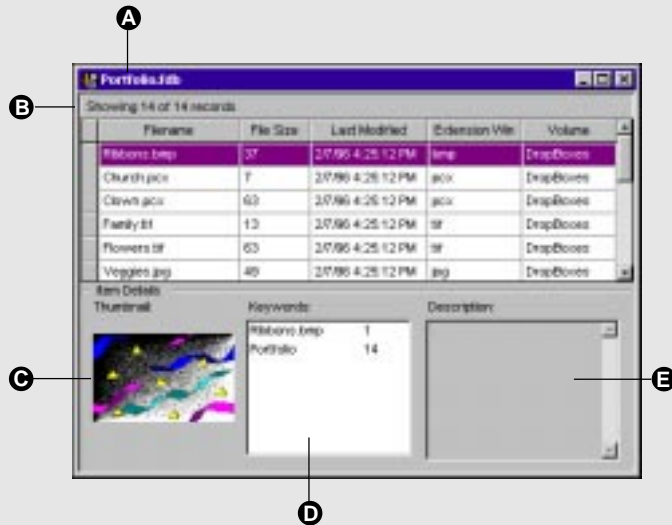
Thumbnail view shows a small thumbnail image and minimal text information for each item in the window. Resize the window to see more or fewer thumbnails at once. Scroll to see thumbnails not currently visible.

- A** Displays the name of the open catalog, and the number of the current Gallery.
- B** Displays the number of items found from the latest search.
- C** Displays the thumbnails or icons of the items in the catalog, along with information about each item.



List view lists the items in the catalog in the top half of the window, and shows a thumbnail, keyword list, and description of the selected item in the bottom half. Scroll the list box to see items not currently visible.

- A** Displays the name of the open catalog.
- B** Displays the number of items found in the latest search.
- C** Displays the selected item's thumbnail.
- D** Displays the selected item's keyword list (double-click a keyword in this list to do a quick search for that keyword).
- E** Displays the selected item's description.



Portfolio Gallery options

To do this...	Follow this procedure...
Sort the items in the window	Click a column heading (List View) or choose one of the “by” commands from the View menu. The default is the order in which the items were added to the catalog; catalogs cannot be sorted on unindexed fields. The List view reverts to “view by order” after each search.
Select an item	Click its row (List View) or thumbnail (Thumbnail View). To add another item to the selection, press Command (Macintosh) or Ctrl (Windows) and click the item. To select all items between the last and current item, press Shift and click on the item.
Preview an item	Select the item, then double-click its thumbnail or choose “Preview Original...” from the Item menu.
Display an item’s properties	Select the item and choose “Item Properties...” from the Item menu.
Edit an item’s source file	Select the item and choose “Edit Original” from the Item menu.
Edit an item’s keyword list	Select the item, choose “Item Properties...” from the Item menu and edit the keywords in the Keywords tab.
Edit multiple items’ keyword lists	Select the items, then choose “Edit Keywords...” from the Item menu.
Copy items into another Gallery	Drag the thumbnail or row and drop it in the other Gallery window. If the Gallery window belongs to another catalog, the item is copied to the catalog (unless it already exists).
Reorder items in the Gallery window	Drag the thumbnail and drop it where you want the item to appear.

Customizing Gallery windows

You can change the layout of a Catalog’s Gallery windows. This allows you to display precisely the information you want in both the Thumbnail and List views, including information in custom fields.



To customize Gallery windows:

1. Choose “Customize...” from the View menu.
The “Customize Gallery” dialog box appears. Depending on the Gallery window’s current view, the Thumbnail or List tab is open.
2. Select the options you want.
The view options are described in the table below.
3. Click “Apply” to apply the changes you made to the current view, without closing the “Customize View” dialog box.
4. Click “OK” to apply the changes you made and close the “Customize View” dialog box.

Note: Click “Save Defaults” if you want to save the current settings as the default layout. The layout is used for all new Galleries.

Gallery customization options

Option	Choices	Description
Types	Font Size Style	Sets the display font for the view. Sets the font size for the view. Sets the font style for the view.
Thumbnail	Size Space Between Background Color Text Color	Sets the size of the thumbnails in Thumbnail view. (This setting affects only the display of the thumbnail, not its original size.) Sets the number of pixels between thumbnails in Thumbnail view. Sets the window background color in Thumbnail view. Sets the color of the text in Thumbnail view.
List	Background Color Text Color	Sets the window background color in List view. Sets the color of the text in List view.
Fields list		A scrolling list of all available fields in the catalog. Select a field name to have it appear in the current view. On the Macintosh, drag field names to rearrange their order in the list; in Windows, use the "Move Up" and "Move Down" buttons. In Thumbnail view, the Filename field is selected by default. In List view, the Filename, File Size, Last Modified, Volume and File Type (Mac) or Extension (Win) fields are selected by default.

Saving Gallery windows

Once a Gallery window contains the items you want in the layout you want, you can save the window for future use. For instance, you may want to create a Gallery of items to show to prospective clients.

To save a Gallery:



- 1. Make sure the Gallery window contains all the items you want, in the layout you want.**

You can find items to add to the current Gallery window, or to create a new window; see "Searching a catalog" earlier in this chapter for details. See the preceding section, "Customizing Gallery windows," for information on changing Gallery window layouts.
- 2. Choose "Save Gallery..." from the Catalog menu.**

The "Save Gallery" dialog box appears.
- 3. Type a name for the Gallery window and click "OK."**

The Gallery window is saved for later use.

Tip

If you open a saved Gallery that contains items that have been deleted from the catalog since the last time the Gallery was saved, an “Item Deleted” icon appears in place of the items’ thumbnails. Choose “Refresh” from the Catalog menu to remove these icons from the Gallery.



Note: The name you specify for the Gallery does not appear at the top of the Gallery window. Instead, each Gallery for a catalog is numbered in the order in which it was created, and that number appears in the window’s title bar with the catalog name.

To open a saved Gallery:

1. Choose “List Galleries...” from the Catalog menu.

The “Saved Galleries” dialog box appears.

2. Select the Gallery you want to open in the list box, then click “Open.”

The Gallery window you selected opens. (You can also double-click a Gallery name to open it and automatically close the dialog box.)

3. Click “Done” to close the “Saved Galleries” dialog box.

To edit a saved Gallery:

1. Choose “List Galleries...” from the Catalog menu.

The “Saved Galleries” dialog box appears.

2. Select the Gallery you want to edit.

3. Click “Rename...” to rename the selected Gallery, or click “Delete” to remove the saved Gallery from the catalog.

4. Click “Done” to close the “Saved Galleries” dialog box.

Using default Galleries

You can set up your catalog so that a specific gallery is displayed when the catalog is initially opened. This is known as the default gallery.

To create a default Gallery:

1. Make sure the Gallery window contains all the items you want, in the layout you want.

You can find items to add to the current Gallery window, or to create a new window; see “Searching a catalog” earlier in this chapter for details. See the preceding section, “Customizing Gallery windows,” for information on changing Gallery window layouts.

2. Choose “Save Gallery...” from the Catalog menu.

The “Save Gallery” dialog box appears.

3. Type “Default” in the “Save Gallery” dialog and click “OK.”

Previewing an item

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

Before displaying an item in a Preview window, Portfolio must be able to locate the item's source file—that is, the original file from which the catalog entry was made. Portfolio alerts you when a source file cannot be located.

To preview an item:

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

or

- **Select the item, then choose “Preview Original...” from the Item menu.**

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

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



Previewing multimedia files in Windows

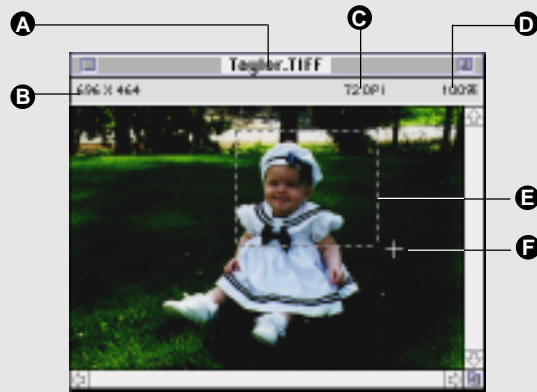
Instead of opening a Preview window for movies, sounds and 3D images, Portfolio uses Windows' built-in player applications for multimedia files. This applies to the following file types:

- .avi—Windows video files
- .mov—QuickTime movie files
- .snd—Macintosh sound files
- .aif—Apple AIFF sound files
- .wav—Windows sound files
- .mid—MIDI sound files

Previewing still images

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

- A File name of the item in the window
- B Image size in pixels *(Not available for all file types)*
- C Image resolution *(Not available for all file types)*
- D Current magnification
- E Partial image selection area
- F Preview window cursor

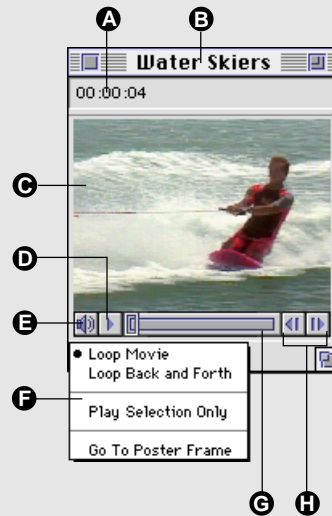


To do this...	Follow this procedure...
Select a portion of the image	Drag a box around the area.
Select the whole image	Choose "Select All" from the Edit menu.
Increase magnification	Press Shift and click the image.
Decrease magnification	Press Option (Macintosh) or Ctrl (Windows) and click the image.
Return the image to actual size	Press Shift+Option (Macintosh) or Shift+Ctrl (Windows) and click the image.
Increase both magnification and window size	Choose "Zoom In" from the Item menu.
Decrease both magnification and window size	Choose "Zoom Out" from the Item menu.
Return image to actual size (100%) and adjust window size to fit	Choose "Actual Size" from Item menu.
Edit the image's source file	Select the item and choose "Edit Original..." from the Item menu.
Create a copy of the image file	Choose "Copy Original..." from the Item menu.
Copy the image to the Clipboard	Choose "Copy" from the Edit menu.
View the item's properties	Choose "Item Properties..." from the Item menu.

Previewing movies (Macintosh)

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

- A Movie duration
- B Filename of the movie in the window
- C Movie window
- D Play button
- E Volume control (if movie has sound)
- F Options drop-down menu
- G Control bar
- H Step buttons



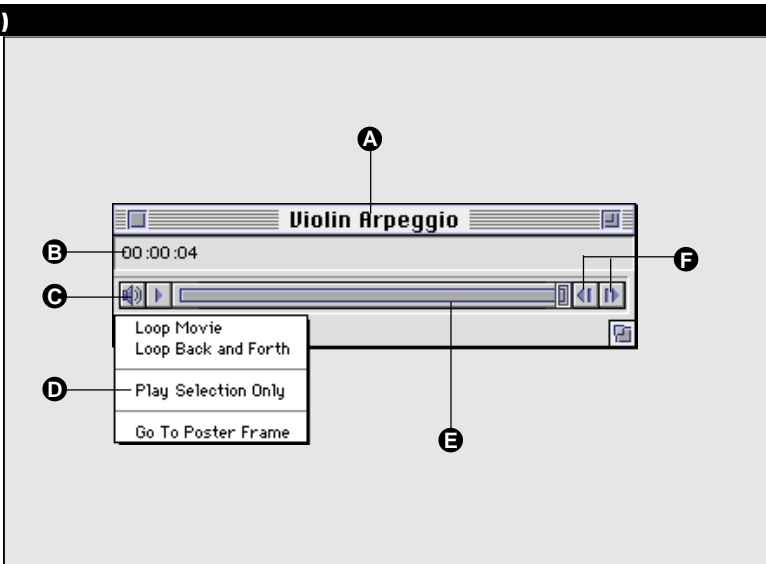
To do this...	Follow this procedure...
Select part of the movie	Press Shift and drag within the control bar (selected frames appear highlighted).
Play or pause the movie	Click the play button or press the spacebar. You can also double-click the movie to play and click it to pause.
Control playback speed	Press Control and click either of the step buttons.
Step forward or backward one frame	Click the forward or backward step button, or press the right or left arrow key.
Increase or decrease volume	Click the volume control and adjust the slider, or use the up and down arrow keys.
Edit the movie's source file	Choose "Edit Original" from the Item menu.
Create a copy of the movie file	Choose "Copy Original..." from the Item menu.
Copy the movie to the Clipboard	Choose "Copy" from the Edit menu.
View the movie's properties	Choose "Item Properties..." from the Item menu.

Previewing sounds (Macintosh)

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

- A Filename of the sound in the window
- B Sound duration
- C Volume control
- D Sound pop-up menu
- E Control bar
- F Step buttons

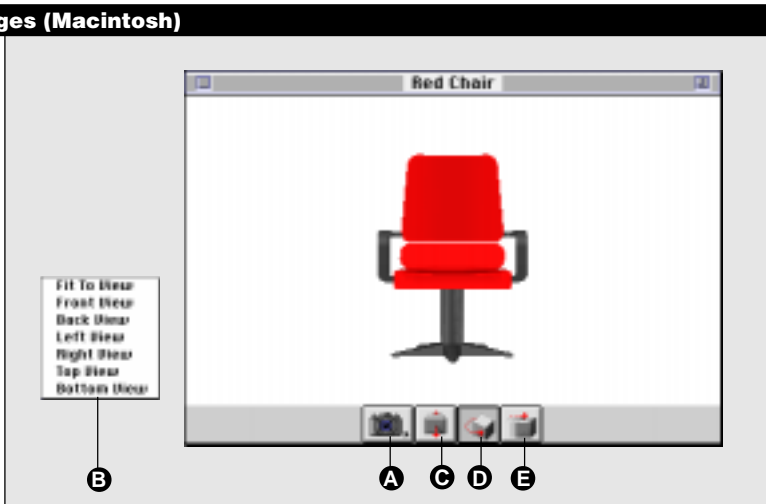
All of the procedures for movies also work for sounds.



Previewing QuickDraw 3D images (Macintosh)

A QuickDraw 3D image is a three-dimensional drawing that can be cataloged with Portfolio (available only on Power Macintosh or compatible).

- A Click to select a particular view from a pop-up menu.
- B Views pop-up menu.
- C Click to enlarge (magnify) or reduce the image in the window.
- D Click to spin the model in 3D space.
- E Click to move the object around inside the window.



Important

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

Tip

To edit the source file in an application other than its creator, press Option (Macintosh) or Shift (Windows) while choosing “Edit Original...” from the Item menu. Choose the application you want to open it in from the directory dialog box that appears. The new application becomes the one that Portfolio associates with the file type until you change it again.

Working with an item’s source file

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

- Switch to another program to edit the source file (the original file to which the catalog entry points).
- Move, copy, or delete the source file.
- Copy the item to the Clipboard, switch to another program, and paste the item in a document.
- Find out more information about the item.
- Print thumbnails or the item itself.

To edit an item’s source file:

1. **Select the item in the Gallery window, or open a Preview window for the item.**
2. **Choose “Edit Original...” from the Item menu.**

Portfolio remembers the name and location of the application last used to edit the source file for any item of the same type and creator. If necessary, you will be prompted to choose an application and to specify where the application is located.

Portfolio opens the application, which in turn opens the source file for editing.

3. **Make the changes you want, save the file, and quit the application.**

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

To copy a source file:

1. **Select the item and choose “Copy Original...” from the Item menu.**
2. **In the file directory dialog box, locate and open the folder where you want the copy to go.**
3. **Click “Save.” Portfolio copies the source file into the folder you specified.**

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

To move a source file:

1. Select the item in the Gallery window.
2. Choose “Move Original...” from the Item menu.
3. In the file directory dialog box, locate and select the folder you want the original file moved to.
4. Click the “Select” button at the bottom of the directory dialog box.

Portfolio moves the source file into the folder you specified.

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

Portfolio automatically updates the catalog after you move a file.

Warning!

Be very careful when using the “Delete Original...” command to delete source files—the files are deleted immediately. Once you confirm the deletion within Portfolio, the files cannot be recovered.

To delete a source file:

1. Select the item in the Gallery window.
2. Choose “Delete Original...” from the Item menu.
3. Click “Cancel” if you change your mind or “OK” to confirm that you want to delete the file.

Using Portfolio with other products

You’ll find that Portfolio works directly with many products to make cataloging fast and easy. This section describes how to use Portfolio with various products.

QuarkXPress 3.31 and above

You can transfer cataloged images to your QuarkXPress documents, and save thumbnails of your documents for use in Portfolio catalogs.



Note: On the Macintosh, Portfolio includes two very helpful Quark XTensions in the Portfolio Quark XTensions folder. “Extensis QX-Drag&Drop” allows you to place images from Portfolio into Quark documents (see below). “Visions Edge Preview Editor Lite” allows you to save a full-color thumbnail of your Quark document. Refer to the accompanying instructions for help. (Extensis cannot offer technical support for Preview Editor Lite.)

To transfer images in Portfolio to QuarkXPress:



Note: On the Macintosh, the QX–Drag&Drop XTension (in your Portfolio Extras folder) must be installed in Quark’s XTension folder.

1. **From an open Portfolio catalog, select the image(s) you wish to drop into your QuarkXPress document.**
2. **Drag and drop the images into your open Quark document.**

Each image is placed in a new picture box at the cursor location in the document.



To attach a thumbnail in QuarkXPress:

1. **When saving a QuarkXPress document, make sure that “Include Preview” is selected in the QuarkXPress Save dialog box.**

This will save a black-and-white thumbnail of the first page of your Quark document.

Adobe PageMaker 6.5

You can transfer cataloged images to your PageMaker documents, and save thumbnails of your documents for use in Portfolio catalogs.

To transfer images in Portfolio to PageMaker 6.5:

1. **Select the images in Portfolio.**
2. **Drag the images to your PageMaker document.**



To include a thumbnail and preview in PageMaker:

- **Choose “Save As...” from PageMaker’s File menu, and select Save Preview in the “Save As...” dialog box.**

When you save the file, a thumbnail and preview are created from the first page of the document.



Adobe Photoshop 3.0 and 4.0

You can save thumbnails, keywords and captions from your Photoshop documents for use in Portfolio catalogs.

To include a thumbnail and preview in Photoshop:

1. **Choose “General...” from the Preferences submenu in Photoshop’s File menu.**
2. **Click “More.”**
3. **In the Image Previews section of the dialog box, select “Always Save.”**
4. **Click “OK.”**

To include keywords and captions in Photoshop:

1. Select “File Info” from Photoshop’s File menu.
2. Enter your caption in the caption field.
3. Click “Next” to switch to the “Keywords” panel.
4. Click “OK” to close the dialog box.



Adobe Illustrator 7.0

Illustrator automatically saves a thumbnail that Portfolio can display.



Macromedia Freehand 7.0

You can save thumbnails and previews of your Freehand files for use in Portfolio.

To attach a thumbnail and preview in Freehand:

1. Choose “Preferences...” from Freehand’s File menu.
2. Select “Importing/Exporting.”
3. Select “Include Fetch™ preview.”

When you save the file, a vector thumbnail and preview are created, increasing the size of your file. If your file has small dimensions, contains tiled fills, or is crowded with many objects, select “Bitmap Fetch™ preview size” to minimize the increase.



Adobe Persuasion 4.0

Persuasion automatically creates a thumbnail and preview for your file from the first slide.

Using items in other applications

Portfolio lets you use item source files in other publications or presentations. For example, you might include a Freehand illustration in a PageMaker publication or import a QuickTime movie into a Persuasion presentation. You can drag and drop items between applications, or copy them to the Clipboard to paste into other documents.

Dragging and dropping items into other applications



On the Macintosh, you can drag items from Gallery windows into any application that accepts items dragged from other applications. Extensis provides drag and drop support for some applications that do not currently provide this capability (such as QuarkXPress).



In Windows, Portfolio lets you drag and drop items from Gallery windows into any application that supports OLE drag-and-drop. Check your application’s documentation for information on OLE drag-and-drop support.

To drag and drop an item:

- 1. In Portfolio, select an item (or several items) in a Gallery window.**
- 2. Drag and drop the item(s) into an open document in the receiving application.**

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

Copying items

Copying an item from Portfolio and pasting it into another application places the entire source file (or the selected portion of it) into the receiving document. You can use this method to transfer any catalog item to another application, whether or not that application is "Portfolio aware." The receiving document increases in file size by the size of the original file, or the selected portion of the file.

The file format of the items you copy may change when placed on the clipboard—for instance, copying an image from a Preview window copies the file as a PICT on the Macintosh and as a Bitmap (BMP) in Windows. The format change depends on the item's original file type. If you need to preserve the image's original format, you must manually import the image into the application.

To copy an item:

- 1. In Portfolio, open the item's Preview window.**
- 2. Choose "Copy" from the Edit menu.**
- 3. In the receiving application, choose "Paste" or "Paste Special" from the Edit menu.**

Choosing "Paste Special" allows you to specify a file format for the item you are pasting.

Viewing item properties

When you want to know more about an individual item than Portfolio displays in either the Thumbnail or List view, select the item and choose “Item Properties...” from the Item menu. The “Item Properties” dialog box described below appears. You can have as many “Item Properties” dialog boxes open as memory permits.

The Item Properties dialog box

The Item Properties dialog box contains four tabs that display detailed information about an item.

A The General tab displays information about the item's source file. You can edit the item's description in this tab; see “Using descriptions” in Chapter 3 for more information.

B The Keywords tab displays the keywords associated with the item and the Master Keywords list. See “Using keywords” in Chapter 3 for details on keywords.

C The Fields tab displays all of the custom fields associated with the item. You can change editable field values in this tab. See “Using custom fields” in Chapter 3 for details.

The image shows three screenshots of the 'Item Properties' dialog box for an item named 'v-GARDI.JPG'.
Screenshot A: The 'General' tab is active, showing fields for Name, Location, File Type, Creation Date, File Size, File Date, File Path, and Resolution. A description field is also present.
Screenshot B: The 'Keywords' tab is active, showing a list of keywords associated with the item and a 'Master Keyword List' on the right.
Screenshot C: The 'Fields' tab is active, showing a list of custom fields with their names and values.

To do this...	Follow this procedure...
Open an Item Properties dialog box	Select one or more items in either view and choose “Item Properties...” from the Item menu.
Edit the item description	Enter or change the description in the “Description” field of the General tab.
Add a keyword to the item	Type a keyword in the text field above the Keyword list in the Keywords tab, then click “Add.” The new keyword is added to the item, unless “Allow Only Keywords from Master Keyword List” is selected in the Master Keywords tab of the “Catalog Administration” dialog box and the keyword is not in the list.
Add a Master Keyword to the item	Select one or more keywords in the Master Keyword list in the Keywords tab, then click “Assign.” The selected keywords are assigned to the item.
Remove a keyword from the item	Select one or more keywords in the Keyword list in the Keywords tab, then click “Remove.” The selected keywords are removed from the item.
Edit a field value for the item	Select the field you want to edit in the Fields tab, then click “Edit.” Type the new value in the dialog box that appears, then click “OK.” The new value is applied to the item.

Viewing catalog properties

When you want to know more about an entire catalog, open the catalog and choose “Catalog Properties...” from the Catalog menu. The “Catalog Properties” dialog box described below appears. You can have as many “Catalog Properties” dialog boxes open as memory permits.

The Catalog Properties dialog box

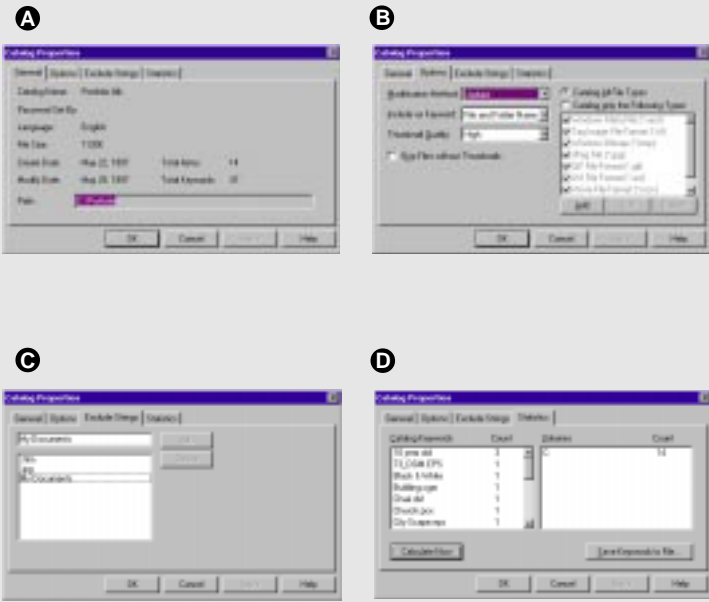
The Catalog Properties dialog box contains four tabs that display detailed information about a catalog.

A The General tab displays the catalog name; creator name; language; size; creation date; number of items; number of keywords; and pathname.

B The Options tab includes options related to how items are added or updated in the catalog. See “Setting catalog update options” in Chapter 3, “Creating and Managing Catalogs,” for more information.

C The Exclude (Exclude Strings in Windows) tab allows you to exclude certain files when adding or updating files to the catalog. See “Excluding files” in Chapter 3, “Creating and Managing Catalogs,” for complete information.

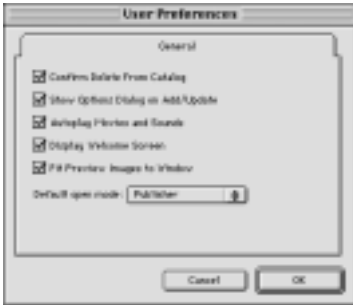
D The Statistics tab shows the keywords in use by the catalog, and displays the number of items associated with each keyword. See “Viewing keywords” in Chapter 3, “Creating and Managing Catalogs,” for more information.



To do this...	Follow this procedure...
Open Catalog Properties dialog box	Choose “Catalog Properties...” from the Catalog menu.
Generate a list of catalog keywords	Click “Calculate...” in the Statistics tab. The keywords appear in the “Keywords” list box, along with the number of times they appear in the catalog.
Find all items with a specific keyword	Double-click that keyword in the “Keywords” list box in the Statistics tab.
Export the catalog’s keyword list	Click “Export Keywords” in the Statistics tab, then specify a filename and location in the directory dialog box that appears.
Find all items on a specific volume	Double-click the volume in the “Volumes” list box in the Statistics tab.

Setting preferences

You can customize Portfolio to suit your working style and work more productively by setting preferences using the “Preferences...” command in the Edit menu.



To set or change preferences:

1. Choose “Preferences...” from the Edit menu.

The “User Preferences” dialog box appears.

2. Select the options you want.

The Portfolio preferences are described in the table below.

3. Click “OK.”

Portfolio preferences

This option...	Does this...
Confirm Delete from Catalog	When selected, the “Confirm Delete” dialog box appears when you delete an item from the catalog.
Show Options Dialog on Add/Update	When selected, the “Options” tab of the “Catalog Properties” dialog box appears when you add items to or update items in a catalog.
Autoplay Movies and Sounds	When selected, movie and sound files are played automatically in Preview windows; you don’t need to click the Play button.
Display Welcome Screen	When selected, a dialog box prompting you to create a new catalog or open an existing one appears when you launch Portfolio.
Fit Preview Images to Window	When selected, images are automatically scaled to fit Preview windows. When unchecked, images appear at 100% and scroll bars appear in the window to allow you to view the entire image.
QuickFind Opens New Gallery (Windows only)	When selected, the results of searches performed using the QuickFind button on the toolbar appear in new Gallery windows. If unchecked, the search results replace the contents of the current Gallery.
Default Open Mode	Choose the access level with which Portfolio will open the catalog (Reader, Editor, Publisher, or Administrator; see “Catalog access levels” in Chapter 4, “Catalog Administration,” for more information on access levels).

Printing catalog items

Although you will typically find and select a catalog item either to edit the source file or use it in another document, you might want to print from the catalog itself—to show to a client, for example, or to evaluate items for possible use in a document.

When you choose “Print...” from the File menu, Portfolio prints the contents of the active window. To print thumbnails or a list of catalog items, print from the Gallery window. To print a single full-size image, print from a Preview window.

When you choose “Print...”, the resulting dialog box reflects the active window:

- If the active window is a Preview window, you see a standard “Print” dialog box that contains no special options for Portfolio.
- If the active window is a Gallery window, the print dialog box includes the options described in the table below.

Gallery window printing options

This option	Choices	Prints this...
Header		A text header centered at the top of the page. The header appears in the same font as the Gallery window display.
Footer		A text footer centered at the bottom of the page. The footer appears in the same font as the Gallery window display.
Number Pages		Page numbers on each printed page. Enter a starting page number in the “Number Pages From” text box if you don’t want the first page to be 1.
Print Using...	Actual Images Thumbnails in Catalog	Prints thumbnails using the original source files if available. This option generally yields a higher-quality output, but can be time intensive because Portfolio must open and process each item’s source file when creating its thumbnail. Thumbnails in the catalog are substituted for any actual images that are not found. Always prints from the thumbnail images available in the catalog.
Quality	Best Better Good	Provides the highest-quality output and the slowest print times. Provides medium-quality output at moderate print times. Provides the lowest-quality output but the fastest print times.

Troubleshooting printing problems

- “Print Using Actual Images” with Quality set to “Best” is a printer-intensive task. Some printers are not equipped with enough memory to support the amount of data being downloaded to the printer. If you experience problems, try switching to the “Better” or “Good” setting.
- Thumbnails rotated in the catalog are printed at their original orientation when using “Print Using Actual Images”

3—Creating and Managing Catalogs

This chapter describes how to create and modify Portfolio catalogs. To carry out most of the procedures described, you must have Publisher access to the open catalog. See Chapter 4, “Catalog Administration,” for more information on catalog access privileges.

Specifying a default catalog

You can specify a default Portfolio catalog. The default catalog opens automatically when you first start Portfolio.

To specify a default catalog:

1. **Open or create the catalog you want to use as the default.**
2. **Choose “Set Default Catalog” from the File menu.**

A checkmark appears in front of the menu command. To deselect the catalog, just choose “Set Default Catalog” a second time or specify another catalog as the default.

Creating a new catalog

New catalogs created from within Portfolio are empty. To add items, see “Adding and updating items in a catalog” later in this chapter.

Note: You’ll notice that the Portfolio catalogs you create have an “.fdb” filename extension, even on the Macintosh. This is to ensure cross-platform access to your catalogs. Portfolio also creates a supporting file for each catalog; this file has an “.adm” extension, and cannot be opened on its own.

To create a new catalog:

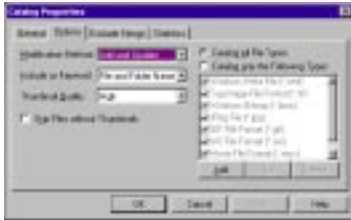
1. **Choose “New...” from the File menu.**
2. **Specify a name and location for the new catalog in the directory dialog box that opens, then click “Save.”**

Portfolio creates the catalog and opens a blank Gallery window.

3. **Add items to the catalog as described in “Adding and updating items in a catalog” later in this chapter.**

Adding and updating items in a catalog

You can easily add items to a catalog from within Portfolio, or from the desktop or folders. In addition, you can update the catalog after you’ve made changes to your files or moved or deleted files.



When using the “Add Items...” command from the Catalog menu, a directory dialog box appears allowing you to locate and select the files, folders, or volumes that you want to add to the open catalog.

When you add to a catalog, Portfolio displays the Options tab of the “Catalog Properties” dialog box so that you can change options before continuing. When you click “OK,” Portfolio adds the items and presents status screens so you can track the progress.

To add catalog items:

1. **Launch Portfolio and open a catalog.**
2. **Choose “Add Items...” from the Catalog menu, or select files directly and drag them into the Gallery window.**
A directory dialog box appears if you chose “Add Items...”
3. **Locate the file, folder, or volume that you want to add. The volume that contains the files must be mounted.**

Tip

Portfolio's default settings are adequate for cataloging most files under most circumstances. You can change these options at any time, return to the original defaults, or create your own. For more information about these options, see “Setting catalog update options” later in this chapter.

The Catalog Properties dialog box appears only if “Show options dialog on Add/Update” is selected in the “User Preferences” dialog box. By default, this option is selected, so you will see the Catalog Properties dialog box until you reset your preferences.

To add...	Follow this procedure...
A single file	Select the file and drag it into the Gallery window. Or, in the directory dialog box, select the file you want and click “Open.”
All files in a folder or a volume	Drag the folder into the Gallery window. Or, in the directory dialog box, select the file or folder you want and click “Folder.”
All files and subfolders within a folder or volume	Drag the folder with subfolders into the Gallery window. Or, in the directory dialog box, select the folder or volume you want, select the “Include Subfolders” option and click “Folder.”
Files whose file types are not listed	Select the “Catalog All Types” option when the Options tab of the “Catalog Properties” dialog box appears.

4. **If you used the “Add Items...” command, click “OK” in the directory dialog box.**

The Options tab of the Catalog Properties dialog box appears.

5. **Review and change any settings.**

Choose an option from the “Modify Method” pop-up menu to specify how to add or update the files.

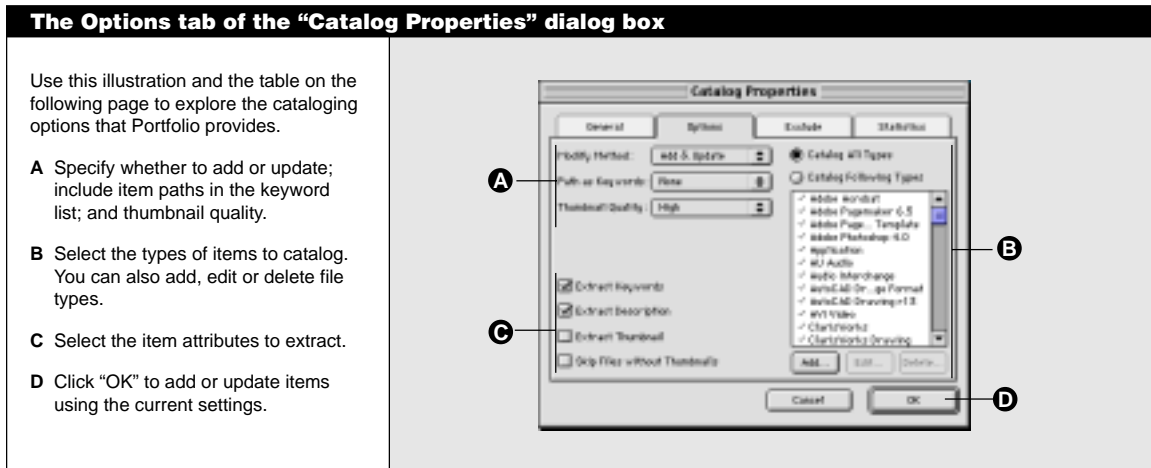
6. **Click “OK.”**

Portfolio scans the volume containing the source files, displays the “Cataloging Status” dialog box, and examines each file before adding it to the catalog.

To update catalog items:

1. Launch Portfolio and open a catalog.
2. Choose “Update Items” from the Catalog menu, or select files directly and drag them into the Gallery window.

Portfolio searches for the source file of each item and updates it in the catalog. If a source file cannot be found, you are prompted to locate it manually.



Setting cataloging options

Unless you set your preferences otherwise, Portfolio displays the “Catalog Properties” dialog box whenever you add items to an open catalog by:

- Choosing “Add Items...” from the Catalog menu.
- Dragging items into a Gallery window from the desktop or a folder.

If you prefer not to see this dialog box in these circumstances, choose “Preferences...” from the Edit menu, then deselect “Show Options Dialog on Add/Update” in the “User Preferences” dialog box.

Cataloging options

Option	Choices	Description
Modify Method	Add Update Add and Update Add Unconditionally Update Unconditionally	Adds items only if they do not already exist. Ignores items if they already exist. Updates items only if there have been changes. Ignores items if they do not exist in the catalog. Adds items if they do not already exist and updates items if they already exist. Adds items even if they already exist. Updates items even if there have been no changes. Use this setting to regenerate thumbnails when an item's newly created thumbnail is not being displayed in the catalog.
Include Pathname	None File Name File & Folder Name Path Name Path Name with Volume	Filenames and pathnames are not added to the keyword list. Adds the item's filename to the keyword list. Adds the item's filename and immediate folder name to the keyword list. Adds the item's filename and all of its folder names, but ignores the volume name. Adds the item's full path, including filename, all folder names and volume name.
Thumbnail Quality	High Medium Low	Creates high-resolution thumbnail. Creates medium-resolution thumbnail. Creates low-resolution thumbnail.
File Types	Catalog All Types Catalog Following Types Add... Edit... Delete	Catalog all file types. Catalogs only the file types that are selected in the list box. To select or deselect a file type, click its name. Click to add a new file type to the supported file types list. See "Adding a file type" later in this chapter for details. Click to modify the selected file type. Click to delete the selected file type from the supported file types list.
Extract Keywords (Macintosh Only)		Looks for and extracts any keywords saved with source files.
Extract Description (Macintosh Only)		Looks for and extracts any description saved with source files.
Extract Thumbnail (Macintosh Only)		Looks for and extracts any preview image saved with source files. (If you are adding or updating QuickTime movies, we recommend that you do not use this option. You will get a larger thumbnail for the movie if you let Portfolio create it rather than extract it.)
Skip Files Without Thumbnails		Does not catalog files that Portfolio cannot find or create thumbnails for.

Excluding files

As you build and modify catalogs, you can tell Portfolio to skip files of a certain type or name.

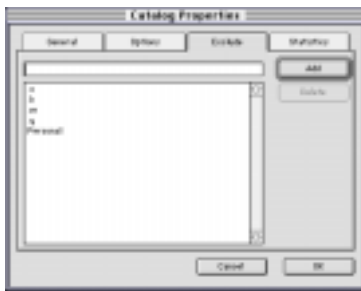
- If you want to skip files of a specific type, you can deselect or delete that file type in the file types list box located in the Options tab of the “Catalog Properties” dialog box, as described in “Setting catalog update options” earlier in this chapter. (For more information about file types and Portfolio, see “Adding a file type” later in this chapter.)
- If you want to skip files with a specific file name, you can create an *exclusions list*.

You create an exclusions list by specifying an explicit set of file names. This list is stored in the catalog.

To add items to the exclusions list:

1. Choose “Catalog Properties...” from the Catalog menu.

The “Catalog Properties” dialog box appears with the General tab open..



2. Open the Exclude tab.

The following table describes the options in the Exclude tab.

To...	Do this...
Add an entry	Type the filename you want into the text box, then click “Add.” Letter case is irrelevant. Portfolio searches each pathname for the text string you enter. For example, if you enter “ext,” Portfolio excludes the file “EXTRA.GIF” as well as “extensis_logo.eps.” Likewise, all files in the “Extreme” folder will be excluded.

Delete an entry	Select it in the list box, then click “Delete.”
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3. When you have made all the changes you want, click “OK” to save the exclusions list.

Adding a file type

When you add items to a catalog, you’ll notice that the Options tab of the “Catalog Properties” dialog box lists the types of files Portfolio recognizes. While you can easily modify this list, it’s important to remember that Portfolio can recognize and catalog *any* file type, whether it’s in the list or not. It’s simply a matter of selecting the “Catalog All Types” option button above the list when adding items.

Still, there may be times when you want to add file types to this list, or remove file types from it altogether. For example, you might want to add the file type for an application you use frequently, but whose file type is not currently supported.

Depending on the file types of the items you add, Portfolio will either generate a thumbnail for an item, extract a thumbnail from its source file, or display a file icon rather than a thumbnail.

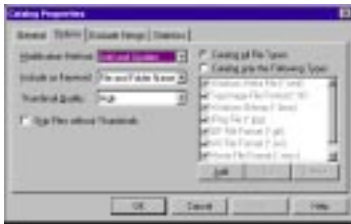
To modify the list of file types:

1. Choose “Catalog Properties...” from the Catalog menu.

The “Catalog Properties” dialog box appears.

2. Select the Options tab.

The following table describes the file type options.



To...	Do this...
Add a file type	Click “Add...”; the “File Type” dialog box appears. In the Extension text box, type the three-letter file extension for the Windows file type you are adding. In the Mac File Type text box, enter the four-letter code for the Macintosh file type you want to add. In the Description text box, type a description. Select “Store in Catalog” if you want the file type to be added to the list stored with the Catalog file (so others can use the settings). Select “Store in Preferences” if you want the file type to be added to the list stored in the Portfolio Preferences file. When all settings are correct, click “OK.”
Edit a file type's settings	Select it in the file type list box, then click “Edit...”; the “File Type” dialog box appears. Change the settings you want, then click “OK.”
Remove a file type	Select it in the file type list box, then click “Delete.” File types that you delete are removed from the list altogether; if you just want a file type to not be added to your catalog, deselect the checkbox in front of its name.



Tip

To add a file type when you are not sure of its extension or type, click “Same As...”. In the directory dialog box that appears, select an example of the type of file that you want to add, then click “Open.” Click “OK” in the “File Type” dialog box.

3. Click “OK” to close the dialog box and save the revised list.

Supported file types

The following tables list the file types Portfolio generates thumbnails for, separated by raster and vector/text formats.

Raster file types for which Portfolio generates thumbnails

Macintosh File Type	Windows Extension	Format
BMPp	.bmp <i>or</i> .dib	Windows and OS/2 bitmap
FPIX	.fpx	FlashPix
GIFf	.gif	Graphics Interchange Format (GIF)
JPEG	.jpg	Joint Photo Experts Group (JPEG)
PCDI	.pcd	Kodak Photo CD
PICT	.pct	Macintosh picture
	.pcx	PC PaintBrush
PNGf	.png	Portable Network Graphics
8BPS	.psd	Adobe Photoshop 2.5–4.0
	.ras	SUN Raster
TPIC	.tga	Truevision Targa (TGA/TARGA)
TIFF	.tif	Tagged Image File Format

Vector and text file types for which Portfolio generates thumbnails

Macintosh File Type	Windows Extension	Format
	.ai	Adobe Illustrator 3.0 - 6.0
	.cdr	CorelDRAW 3.0–7.0 drawing
	.cgm <i>or</i> .ctm	Computer Graphics Metafile
	.ch3 <i>or</i> .sy3	Harvard Graphics 3.0
	.cmx	CorelDRAW Presentation Exchange 5.0
	.drw	Micrografx drawing
	.dsf	Micrografx Designer 6.0
	.dwg	AutoCAD drawing r12–13
	.dxf	AutoCAD drawing Interchange
EPSF	.eps	Encapsulated Postscript
	.fmv	Frame Vector Metafile

(continued)

Vector and text file types for which Portfolio generates thumbnails (*continued*)

Macintosh File Type	Windows Extension	Format
	.hgl	Hewlett-Packard Graphics Language
PDF	.pdf	Adobe Acrobat
	.pic	Lotus 1-2-3 graphic
SLD3	.ppt	Microsoft PowerPoint 2.0–4.0
	.ps	PostScript Interpretive
	.wmf	Microsoft Windows Metafile
	.wpg	WordPerfect Graphics 1.0–20

Multimedia formats supported by Portfolio

Macintosh File Type	Windows Extension	Format
MooV	.mov	QuickTime Movie
	.avi	AVI Video (Windows only)
AIFF	.aif	AIFF Sound file
WAVE	.wav	WAVE Sound file
MIDI	.mid	MIDI Sound file
sfil	.snd	Macintosh Sound file
3DMF	.3dmf	QuickDraw 3D Metafile

The next table lists Macintosh file types that *may* have thumbnails available for Portfolio to extract. For more information, refer to the documentation for the applications in the table.

Macintosh file types from which Portfolio extracts thumbnails

Macintosh File Type	Format
CWGR	ClarisWorks 3.0–4.0 drawing
CWPT	ClarisWorks 3.0–4.0 painting
drw5	Deneba Canvas 5.0
AGD2	Macromedia Freehand 7.0
AB65	Adobe PageMaker 6.5
MuAd	Multi-Ad Creator
..CT	SciTex CT
XDOC	QuarkXPress

Using keywords

Each item in a catalog has certain information associated with it, such as filename, file type, volume, and so on. Each item can also have one or more keywords associated with it. A *keyword* is a word or phrase that you associate with a particular item, and a good keyword list can be a valuable tool for finding the material you need in a catalog.

In addition, a catalog can include a preset list of *Master Keywords*. Master Keywords can help maintain consistent keywords among the items in a catalog, or across catalogs; see Chapter 4, “Catalog Administration,” for information on maintaining the list of Master Keywords.

Each item can have an unlimited list of keywords associated with it. In a network environment, a catalog administrator can control who is allowed to edit keyword lists for each catalog (see “Catalog access levels” in Chapter 4, “Catalog Administration,” for details).

Tip

You can customize Gallery windows to show keywords in thumbnail view; see “Customizing Gallery windows” in Chapter 2, “Using Catalogs,” for details.

Item keywords also appear at the bottom of Gallery windows in List view.

Viewing keywords

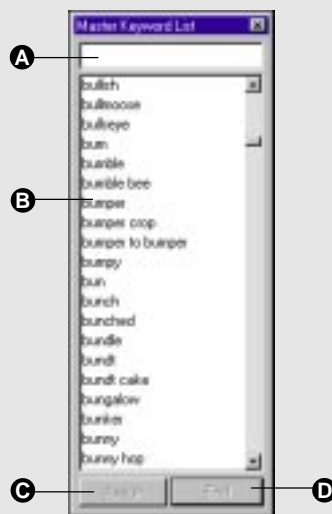
You can view keywords and Master Keywords in several ways:

- In the Master Keywords Palette
- In the Item Properties dialog box
- In the Catalog Properties dialog box

The Master Keywords Palette

The Master Keywords palette displays a catalog’s Master Keywords alphabetically, and can be resized and placed anywhere onscreen.

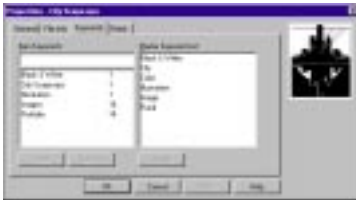
- A** Type a Master Keyword name to find that keyword quickly. This is useful for large Master Keyword lists, when scrolling would be time-consuming.
- B** The catalog’s Master Keywords appear in this list box. Drag Master Keywords from the palette and drop them in Gallery windows to assign them to any selected items.
- C** Click to assign the selected Master Keyword(s) to the selected item(s) in a Gallery window.
- D** Click to find all instances of the selected Master Keyword (or just double-click the keyword). The search results appear in the current Gallery window.



To display the keywords for an item:

1. Select the item, then choose “Item Properties...” from the Item menu.

The “Item Properties” dialog box appears.



2. Select the Keywords tab.

The item’s keywords appear in a list box on the left. Master Keywords appear on the right.

3. Click “OK” when you are finished viewing the keywords.

To display the keywords for an entire catalog:

1. Choose “Catalog Properties...” from the Catalog menu.

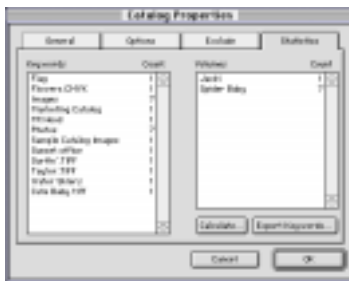
The “Catalog Properties” dialog box appears.

2. Select the Statistics tab.

3. Click “Calculate....”

The keywords for all items in the catalog and the number of occurrences of each keyword appear in the list box on the left.

Note: You can export the catalog’s item keywords to a text file by clicking “Export Keywords....” This is useful if you want to import those keywords into the catalog’s Master Keywords list.



Extracting keywords from source files

Portfolio examines all source files for keywords created in their native applications when you add them to or update them in a catalog. The “Extract Keywords” option must be selected in the Options tab of the “Catalog Properties” dialog box for this to occur; see “Setting catalog-ing options” earlier in this chapter for details.

As Portfolio catalogs items, extracted keywords are added to the keyword list for each item that contained them. Unless “None” is selected in the “Include Pathname” pop-up menu in the Options tab of the “Catalog Properties” dialog box, Portfolio adds the filename and folder name of each item as keywords.

Entering and editing keywords manually

In addition to extracting keywords from source files, you can enter them into a catalog manually and edit both extracted and manually entered keywords. You can also enter Master Keywords, provided you have administrative privileges—see Chapter 4, “Catalog Administration,” for details.

To enter keywords manually:

1. Select the item to which you want to add keywords, then choose “Item Properties...” from the Item menu.

The “Item Properties” dialog box appears.

2. Select the Keywords tab.
3. Type a keyword in the text box, then click “Add.”

The keyword is added to the Keywords list.

Note: If the catalog administrator has restricted keyword additions to only those in the Master Keyword list, Portfolio checks your additions against the list and notifies you of any “illegal” keywords. See “Entering Master Keywords” in Chapter 4, “Catalog Administration,” for more information.

4. Continue adding keywords, then click “OK.”

You can use the “Edit Keywords...” dialog box to edit item keywords. For instance, if you ever need to remove a keyword from more than one item, you can do so in one swift action rather than individually.

To edit a keyword list:

1. Select the item(s) for which you want to edit keywords, then choose “Edit Keywords...” from the Item menu.

The “Edit Keywords” dialog box appears.

The options in the “Edit Keywords” dialog box are described below:



To...	Do this...
Add a new keyword	Type a keyword in the text box, then click “Add.” The keyword is added to the keyword list when you click “OK.”
Assign a keyword	Select the keyword in the list, then click “Assign.” The keyword is assigned to any selected items that it was not previously assigned to.
Delete a keyword	Select a keyword in the Keyword list box, then click “Delete.” The keyword is removed from the list and any selected items when you click “OK.”

3. Click “OK” to save the changes to the item’s keywords list.

To abandon the changes you made to the keywords, click “Cancel.”

Note: You can select more than one keyword at a time for deletion, and you can add as many keywords as you want before clicking “OK.”

Tip

To enter the same description for a number of different items, you can use the Clipboard. For example, if you scan a number of images using the same scanner settings, you can enter the description of the settings in the description field for one of the items, then “Copy” to copy the description to the Clipboard. From the Clipboard, you can paste the same description into the description field for each of the remaining items.

Using descriptions

In addition to adding keywords to any item, you can add a *description* up to 32,000 characters long. You can use the description field to keep track of any information about the source file that you might find useful or important. For example, the description for a photo image could include notes about who took the original photograph, copyright, and agency or contact information.

If the original application provides a way for you to enter and save descriptive text with the source file, Portfolio can extract this information automatically as it catalogs the item on the Macintosh. Otherwise, you can add or edit a description after cataloging. In a network environment, a catalog administrator can control who edits descriptions. For details on catalog administration, see “Setting catalog privileges” in Chapter 4, “Catalog Administration.”



Extracting descriptions from source files

Portfolio examines all source files for descriptions created in their native applications when you add them to or update them in a catalog. The “Extract Description” option must be selected in the Options tab of the “Catalog Properties” dialog box for this to occur (see “Setting catalog update options” earlier in this chapter for more information).

Entering and editing descriptions manually

In addition to extracting descriptions from source files, you can enter them into a catalog manually. You can also edit both extracted and manually entered descriptions.

To enter or edit a description manually:

1. Select the item to which you want to add a description, then choose “Item Properties...” from the Item menu.

The “Item Properties” dialog box appears with the General tab selected.

2. Type a description in the Description text box, then click “OK.”

The description is added to the item.

Note: If the Description text box is unavailable, you do not have permission to edit descriptions for items in the open catalog. If you are working in a network environment, check with your catalog administrator.



Using custom fields

If custom fields have been defined for a catalog, you can change their *values* (or contents). For example, you can add photographers' names to the "Photographer" field in a catalog of photographic images. Some custom fields even allow more than one entry, so you could enter the number of times an image has been published in a single field.

Note: You must have Editor access or above to a catalog in order to change its custom field values. To define new custom fields, you require Administrator access. See "Catalog access levels" and "Adding custom fields" in Chapter 4, "Catalog Administration," for complete details.

To use custom fields:

1. **Select an item in a Gallery window and choose "Item Properties..." from the Item menu.**

The "Item Properties" dialog box appears with the General tab open.



2. **Open the Fields tab.**

All custom fields for the catalog appear in the list box.

3. **Select the field you want to change, then click "Edit..."**

The "Edit" dialog box for the field type appears.



4. **Type the appropriate value in the text box and click "OK."**

If you enter a value that is incorrect for the field type, clicking "OK" produces no result. You must re-enter the proper value type.

5. **Click "OK" to close the "Item Properties" dialog box.**

Replacing keywords and custom field values

You can easily replace keywords and custom field values in your Portfolio catalogs. For example, if you need to modify a keyword for several items in a catalog, you can do so automatically. Similarly, if the print date for a collection of images slips by a week, you can replace the incorrect date in the “Publish Date” field for all the images in the catalog at once.

To replace keywords and custom field values:

1. Choose “Replace...” from the Catalog menu.

The “Find and Replace” dialog box appears.

2. Select the keyword or field to search in the “Fields to Search” pop-up menu.

The pop-up menu lists all of the custom fields defined for the catalog, as well as a keywords option.

3. Enter the keyword or value you want to replace in the “Find” text box.

If you are replacing a custom field value, be sure to enter an appropriate value for the field you selected in step 2.

Note: If you are replacing keywords in a multi-user catalog, the catalog must allow keyword addition or no action is taken. Check with your catalog Administrator or see “Entering Master Keywords” in Chapter 4, “Catalog Administration,” for more information.

4. Enter the replacement keyword or value in the “Replace With” text box.

5. Select the appropriate option button for your search.

You can search only the selected items in the Gallery, or the entire Gallery.

6. Click “OK.”

Portfolio searches for and replaces all instances of the keyword or custom field value you specified. A dialog box appears informing you of the number of replacements performed.



Tip

You can also use the Find and Replace feature to enter the same custom field values for a number of different items. Just select the items you want to add the value to and choose “Replace...” from the Catalog menu. Select the appropriate custom field from the pop-up menu, leave the “Find” text box blank and enter the new value in the “Replace With” text box. Select the “Search selected items” option button and click “OK.” The new value is added to the custom field for each item you selected.

4—Catalog Administration

This chapter describes how to maintain Portfolio catalogs and how to use catalog functions in a multi-user environment.

Maintaining a catalog

Catalogs—especially large ones—that are heavily used and frequently updated can become out-of-date. In addition to routinely backing up all catalogs and source files (and keeping the backups in a safe place), it is a good idea to perform other housecleaning tasks regularly as well. Portfolio provides the catalog manager or administrator with tools that can help with routine catalog maintenance.

Exporting catalogs as text files

The “Export...” command in the File menu lets you save a text representation of catalog items. Exporting is a useful way of keeping track of the items in a catalog outside of Portfolio.

To export a catalog as a text file:

1. **Select the items you want to export.**
2. **Choose “Export...” from the File menu.**
A directory dialog box appears.
3. **Specify a name and location for the export file, then click “Export.”**

The catalog is exported to the text file you specified.

Tip

You can also remove an item from a Gallery by selecting it and pressing Delete. To remove the item from the catalog, press Option+Delete (Macintosh) or Ctrl+Delete (Windows).



Removing items from a catalog

The “Delete Items...” command lets you clear a catalog of unwanted or out-of-date items or references.

To remove specific items from a catalog:

1. **Select the items you want to delete in the Gallery window.**
2. **Choose “Delete Items...” from the Catalog menu.**

The “Delete Items” dialog box appears.

3. **Select “Delete from Catalog” and click “OK.”**

Note: Select “Delete from Gallery” if you want to remove the item from the Gallery window only. The item remains in the catalog when you click “OK.”

Checking for missing files

You can easily determine if any file references in a Portfolio catalog are no longer valid.

Note: Portfolio searches for missing files on mounted volumes only. If a volume containing item source files is not mounted, Portfolio will not detect the files.

To check for missing files:

1. **Open the catalog.**
2. **Choose “Missing Files...” from the Catalog menu.**

Portfolio checks the catalog and lists all missing files in the Missing Files dialog box.

3. **Select the files you want to update and click “Update...”.**

You can also delete files you no longer want in the catalog by selecting them and clicking “Delete.”



Recovering damaged catalogs

Should you ever have trouble opening a Portfolio catalog and suspect that it may have been damaged, you may be able to recover it.

To recover a catalog:

1. **Choose “Recover...” from the File menu.**

A directory dialog box appears.

2. **Locate the catalog you want to recover and click “Open.”**

A second directory dialog box appears.

3. **Type a new name for the recovered catalog, select where you want to save it and click “Save.”**

A dialog appears as Portfolio checks the catalog and performs any necessary repairs. When the recovery is complete, a recovery report dialog box appears to provide details of the items that were and were not recovered.



4. **Click “OK.”**

When the recovery is finished, open the recovered catalog to make sure that all its items are intact.

Tip

For more information about network access to Portfolio catalogs, see “Using Portfolio on a network” later in this chapter. If you need to know a password for a catalog and are unsure of who the Administrator is, open the General tab of the “Catalog Properties” dialog box to see the name of the administrator.

Tip

You can change the catalog access level you're using by choosing “Access...” from the Catalog menu, and entering the proper password in the dialog box that appears. Note that you cannot change to Administrator level if other users are also using a shared catalog.

Catalog access levels

A Portfolio catalog is *protected* if a password is required in order to use it. There are four access levels that can be established for a catalog: Administrator, Publisher, Editor and Reader. Each level can have its own password.

The Administrator level is usually assigned to the catalog creator alone. This level allows access to all catalog functions, including creating and editing custom fields. The Administrator is responsible for setting all access level passwords, and is the only user who can change the passwords. In addition, the Administrator is the only user who can create or modify a catalog’s Master Keyword list, as well as specify whether other users can add their own keywords to the catalog.

Note: A shared catalog cannot be accessed by other users when it is in use by its Administrator. Consequently, you cannot switch to Administrator level if other users also have the catalog open.

Portfolio access levels are inherited; that is, the Administrator level includes the privileges of all other levels (in addition to its other privileges), the Publisher level includes the privileges of the Editor and Reader levels, and so on.

Catalog access levels

Feature	Reader	Editor	Publisher	Administrator
View a catalog	✓	✓	✓	✓
Search a catalog	✓	✓	✓	✓
Preview items	✓	✓	✓	✓
Copy item source files	✓	✓	✓	✓
Edit descriptions, keywords and custom field values		✓	✓	✓
Save Galleries			✓	✓
Save finds			✓	✓
Update items			✓	✓
Add items			✓	✓
Move item source files			✓	✓
Delete item source files			✓	✓
Define custom fields				✓
Assign passwords				✓

Setting catalog passwords

Multiple users can use a catalog simultaneously across a network, within the restrictions of their access privileges. Therefore, password protection is strongly recommended when a catalog is available to multiple users. Protection is not necessary, however, if you are the single user of a catalog on your own computer.

You can set passwords when you first create a catalog, or if you have Administrator privileges for another catalog.

To set or change catalog passwords:

1. Open the catalog.

2. Choose “Administration...” from the Catalog menu.

The Catalog Administration dialog box appears with the Keywording tab open.

3. Open the Passwords tab.

4. Click “Set Password...” in the “Administrator” field.

The “Set Password” dialog box appears.

5. Type the new password in each text box, then click “OK.”

You enter the new password a second time to verify that it is correct. Passwords must be between 4 and 12 characters in length.

6. Repeat steps 4 and 5 for the other passwords you want to set (Publisher, Editor or Reader).

Note: Even if you only set a Reader password, users logging in as Editor or Publisher will need that Reader password to gain access to the catalog.

7. Click “OK” to close the Catalog Administration dialog box and save the new password(s).

8. Close the catalog and reopen it to put the password(s) into effect.

Once a catalog is password-protected, a passwords dialog box appears when the catalog is opened. Users can then choose their access level from the Access Mode pop-up menu, enter the correct password and click “OK” to open the catalog.

Note: You can specify a catalog’s default access level in the General tab of the “User Preferences” dialog box. See “Setting preferences” in Chapter 2, “Using Catalogs,” for details.



Tip

To remove password protection from a catalog access level, open the “Set Password” dialog box, leave the “New” and “Confirm” fields blank, then click “OK.”



Entering Master Keywords

Establishing a Master Keyword list for a catalog can help you maintain consistent keywords among the items in the catalog, or across catalogs. With a Master Keyword list, you can ensure that only the keywords in the list are used in the catalog.

You can enter Master Keywords manually, or you can import them from an existing text file.

Note: Master Keywords are not dynamic. That is, when you change or delete a Master Keyword in the “Catalog Administration” dialog box, that Master Keyword is not automatically changed in any items to which it’s been applied.

To enter Master Keywords:

1. Choose “Administration...” from the Catalog menu.

The “Catalog Administration” dialog box appears with the Keywording tab open. The options in this tab are described below.



Tip

You can export a catalog’s keywords from the Statistics tab of the “Catalog Properties” dialog box, or create a text file of keywords in a word processing application, then import those keywords into the Master Keywords list in the “Catalog Administration” dialog box.

To...	Do this...
Add a Master Keyword	Type a keyword in the text box, then click “Add.” The keyword is added to the Master Keywords list.
Delete a Master Keyword	Select a Master Keyword in the list box, then click “Delete.” The keyword is removed from the list only; not from items to which it is applied.
Rename a Master Keyword	Select a keyword in the list, click “Rename,” and type a new name for the keyword. The keyword is renamed in the list only; not in items to which it is applied.
Import Master Keywords	Click “Import.” Locate and select the text file containing the Master Keyword list to import in the directory dialog box, then click “Open.” The keywords in the file are added to the catalog’s Master Keywords list.
Export Master Keywords	Click “Export.” Specify a filename and location for the exported Master Keyword list in the directory dialog box that appears, then click “Save.” The file is exported as a text file with carriage returns separating each keyword, and is available for use in other Portfolio catalogs.
Restrict keyword entry	Select “Allow Only Keywords from Master Keyword List”. Users can only select keywords from the Master Keyword list for catalog items.

2. Continue adding Master Keywords, then click “OK.”

Parsing keyword phrases

Portfolio offers an option that allows keyword phrases (keywords consisting of more than one word) to be parsed into individual keywords. For example, adding the keyword phrase “Mother and child” with keyword phrase parsing on would result in “Mother and child”, “Mother”, “and”, and “child” being added to the item.

The advantage of parsing keyword phrases is it allows the user to do a very fast “starts with” or “matches” search on words that would otherwise not be found without using a “contains” search. In the example above, searching on “starts with child” will only return the item if keyword parsing is on. The disadvantage is more keywords in the list and, hence, an increase in catalog size.

To enable or disable keyword phrase parsing:

Tip

It is recommended that the Keyword Phrase Parsing option be set when the catalog is created (it is on by default) and then never changed. Changing this setting after items have been added to a catalog can result in inconsistent search results, since some items will contain parsed keywords and others will not.

1. Choose “Administration...” from the Catalog menu.
The “Catalog Administration” dialog box appears with the Keywording tab open.
2. Check the “Parse Keyword Phrases” checkbox to turn keyword parsing on.
3. Click “OK” to close the “Catalog Administration” dialog box.

Adding custom fields

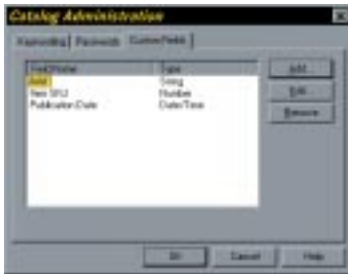
Portfolio catalogs consist of a number of predefined fields. These system fields, such as Filename, Path, Created and so on, categorize the file information for each item in a catalog, allowing you to search for specific items based on that information.

In addition to the system fields, you can define custom fields to hold specialized information about catalog items. For instance, you might want to add a field for Web site URLs to a catalog of GIF files, or a “Photographer” field to a catalog of photographic images.

There are four custom field types from which you can choose:

- Date/Time, for date and/or time values. You could use this field type to create a custom field for image publication dates.
- Decimal, for decimal point numeric values. This field type would be useful for custom fields containing stock image prices.
- Number, for regular numeric values. This field type is ideal for custom fields containing catalog part or stock numbers.
- String, for text values. This field type can be used for any number of custom fields, including photographer or artist names.

Note: You must have Administrator access to a catalog in order to add custom fields. Users with Editor access privileges and above can edit custom field values; see “Using custom fields” in Chapter 3, “Creating and Managing Catalogs,” for details on editing custom field values.



To add custom fields to a catalog:

1. Choose “Administration...” from the Catalog menu.

The “Catalog Administration” dialog box appears with the Keywording tab open.

2. Open the Custom Fields tab.

3. Click “Add...”

The “Custom Field Definition” dialog box appears.

4. Type a name for the field in the “Name:” text box.

5. Choose the field type from the “Type:” pop-up menu.

The field type determines the values that can be entered into this field. Field types cannot be changed once they are defined.

6. If you chose “String” in step 5, specify the maximum number of characters allowable in the field in the “Length” text box. If you chose “Decimal,” specify how many places are allowable after the decimal point.

7. Select the appropriate remaining options in the dialog box.

The options are described below.

To...	Do this...
Make the field sortable	Select “Indexed.” The field is added to the list of sortable fields that appears when you choose “by Other...” from the View menu. Searching is also faster on indexed fields.
Allow multiple field entries	Select “Multiple Values.” Different users can specify their own values for this field in a multi-user catalog. This is useful if, for example, a user wants to list all instances of an image’s publication in a single field.

8. Click “OK” to define the custom field.

9. Click “OK” to close the “Catalog Administration” dialog box.

Using Portfolio on a network

A single Portfolio catalog can contain references to source files on multiple hard disks, network servers, CD-ROM discs, or removable disks, whether these media are mounted or not. When Portfolio needs to retrieve a source file that resides on a network volume, it automatically mounts that volume, prompting for a volume password when required.

If a source file is stored on removable media, such as floppy disks or CD-ROMs, Portfolio prompts for the disk by name. Portfolio also prompts for source files that have been moved or renamed.

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

Network security protection

Your organization is authorized to use as many copies of Portfolio as designated in your site license agreement. When you run Portfolio on a network, the application checks the network to see how many copies of Portfolio with the same serial number are running. If the program finds that more duplicate serial numbers are in use than are in the site license agreement, an alert box appears. Click "OK" to close the alert box. Another user must quit Portfolio before you can launch the copy that you want to use.

If you did not purchase a Portfolio site license, only one copy of Portfolio per serial number may be in use on your network.

Network access to catalogs and source files

For access to the...	The folder that contains it...
Catalog	Must be located in folders to which catalog Administrators have network-level read and write access. Users with Publisher and Editor access also need network-level read and write access to add, update and delete items. Other users need at least read access.
Source files	Can be located in folders to which different users have different levels of network access: <i>No access</i> Allows users to search, print thumbnails, view thumbnails, edit keywords or descriptions (if permitted), or view most item information. <i>Read access</i> Allows users to get full item information, preview, print images, copy items to the Clipboard, or copy source files. <i>Write access</i> Allows users to edit, move, or delete source files (with the proper Portfolio access privileges).

Tip

If someone deletes an item from a multiuser catalog and that item is in one or more of your saved Galleries, an “Item Deleted” icon appears in place of the item thumbnail. Choose “Refresh” from the Catalog menu to remove these icons from the Gallery.

Tip

In cross-platform environments, be sure that network server and volume names are the same for each network path. This allows Portfolio to locate files between platforms.

Network environment concerns

In a typical network scenario, many users would open Portfolio, locate items they want, and leave Portfolio running in the background while they switch to other applications to edit source files, work on other documents, read e-mail, and so forth. Meanwhile, at any given time, only some of those users would be actively using the catalog to search for and preview items they might be interested in, while fewer still might be adding or updating items, keywords, or descriptions.

The greater the number of users who have a catalog open, the slower individual searches will be, depending on what tasks the users are performing in Portfolio. The speed of the network and the server can also affect the performance of Portfolio.

If a computer’s system crashes or is shut down while its user has a shared catalog open, Portfolio will examine the catalog for damage and temporarily make other users wait until the verification is complete. Therefore, users should always close and quit to exit a catalog rather than shut off or restart their systems.

If you want to limit who can write to or read from a catalog, you can set passwords as described in “Catalog access levels” earlier in this chapter. Whether or not your catalog is password-protected, it is essential that you also set up the network access conditions described in the table below.

Managing source files

There are many ways to organize the source files for items in a Portfolio catalog. Each strategy has advantages and disadvantages, but considering the options and planning ahead can save you time in the long run and significantly increase Portfolio’s usefulness to you and your workgroup.

One of the key benefits of using Portfolio is that you do not need to remember where a source file is located or what it is called. However, because Portfolio can use filenames, folder names, or entire pathnames as keywords, and because you can then use those keywords to help in searching, a rational plan for naming and organizing files and folders is helpful.

Each workgroup must ultimately decide what works best for its own situation based on how the group works and how work flows through it. Here are a few suggestions that might help in your planning.

Organizing source files

One of the most obvious ways to organize files into folders is to set up a series of folders for each project, client, or category (for example, travel, business or architecture). Within a folder, use subfolders to partition related files appropriately.

Another approach is to organize files into folders by file type, by parent application, or by department of origin (for example, Marketing, Sales or Publications).

Once you've organized your files into folders, it's easy to include the files into Portfolio catalogs.

Naming source files

Use naming and organizing strategies together to make the most of keyword searching in Portfolio. Once you have decided how to organize your files, consider the following alternatives for naming them:

- Use file extensions to indicate file type. This is very important when using Portfolio in a cross-platform environment, where you'll want to keep Windows file naming restrictions in mind when naming Macintosh files.
- Use number or alphabetic prefixes to help sort items in ways that matter for the kinds of files you use. For example, you might use frame numbers for images from a single photo shoot or counter or time code readings for sounds, movies, or images digitized from video or audio tape.

Appendix A: Portfolio Shortcuts

This appendix lists the Portfolio menu command hotkeys and keyboard shortcuts for both the Macintosh and Windows. For an online reference to more shortcuts, refer to Portfolio's online Help.

Menu command hotkeys

To do this...	Macintosh Hotkey	Windows Hotkey
Create a new catalog	Command+N	Ctrl+N
Open an existing catalog	Command+O	Ctrl+O
Print a Gallery	Command+P	Ctrl+P
Cut	Command+X	Ctrl+X
Copy	Command+C	Ctrl+C
Paste	Command+V	Ctrl+V
Select all items in a catalog	Command+A	Ctrl+A
Open/close the Master Keywords palette	Command+K	Ctrl+K
View Gallery in Thumbnail view	Command+T	Ctrl+T
View Gallery in List view	Command+L	Ctrl+L
Find specific items in a catalog	Command+F	Ctrl+F
Find all items in a catalog	Command+'	Ctrl+'
Add items to a catalog	Command+E	Ctrl+E
Update items in a catalog	Command+U	Ctrl+U
View catalog properties	Command+J	Ctrl+J
View item properties	Command+I	Alt+Enter
Preview an item's source file	Command+B	Ctrl+B
Edit an item's source file (with last selected editing application)	Command+M	Ctrl+M
Create a new Gallery	Command+G	Ctrl+G
Close a catalog	Command+W	Ctrl+W

(continued)

Menu command hotkeys (continued)

To do this...	Macintosh Hotkey	Windows Hotkey
Customize a Gallery	Command+D	Ctrl+D
Save a Gallery	Command+S	Ctrl+S
List all saved Galleries	Command+;	Ctrl+Q
Rotate a thumbnail 90° clockwise	Command+]	Ctrl+]
Rotate a thumbnail 90° counter-clockwise	Command+[Ctrl+[
Quit Portfolio	Command-Q	Alt+F4
Refresh a Gallery window	Command+R	Ctrl+R
Edit item keywords	Command+Y	Ctrl+Y
Perform catalog administration tasks	Command+H	Ctrl+H

Navigational shortcuts

To do this...	Press...	Notes
Move one item to the right in a Gallery window	Right-arrow key	Not available in List view
Move one item to the left in a Gallery window	Left-arrow key	Not available in List view
Move one item down in a Gallery window	Down-arrow key	
Move one item up in a Gallery window	Up-arrow key	
Scroll down one screen in a Gallery window	Page Down	
Scroll up one screen in a Gallery window	Page Up	
Go to the top of a Gallery window	Home (Macintosh) Ctrl+Home (Windows)	
Go to the bottom of a Gallery window	End (Macintosh) Ctrl+End (Windows)	
Go to the first item in a Gallery window row	Home	Windows only; Thumbnail view only
Go to the last item in a Gallery window row	End	Windows only; Thumbnail view only

Functional shortcuts

To...	Do this...
Preview an item	Double-click the item in either Gallery window view Double-click the item thumbnail in List view Double-click the item thumbnail in the "Item Properties" dialog box
Search for items based on a keyword	Double-click the keyword in List view Double-click the keyword in the "Item Properties" dialog box Double-click the keyword in the "Catalog Properties" dialog box Double-click the keyword in the Master Keywords Palette
Remove an item from a Gallery window	Select the item and press Delete
Remove an item from a catalog	Select the item and press Option+Delete (Macintosh) Select the item and press Ctrl+Delete (Windows)
Regenerate a thumbnail for an item	Select the item and hold down the Option key (Macintosh) or Shift key (Windows) while choosing "Update Items" from the "Catalog" menu.

Appendix B: Portfolio Case Studies

This appendix provides three scenarios designed to help you better use Portfolio in your workplace. While none of the scenarios may fit your exact work patterns, you can easily apply elements of each in order to use Portfolio to its best advantage.

Scenario 1

The art department for a hardware manufacturer has a large digital collection of company and product logos, product photographs, catalog layout documents, and so on. The department consists of 10 artists and designers, each of whom stores files on his or her local hard drive, or on the department file server.

Once a week, all of these files are backed up onto removable cartridge drives by the department administrative assistant.

The art department staff are primarily Macintosh users. However, one designer uses a PC, and the department administrative assistant uses both a Macintosh and a PC. Other groups within the company, who regularly need access to the art department files, are PC users.

Problem

The company staff has no way of knowing what images and documents they have or where they are located: when sharing files, they must take the time to track down what they need. And while the art department administrative assistant knows that each backup cartridge contains a week's worth of files, determining what each disk contains or what each file on it represents also takes time.

Solution

The administrative assistant indexes the contents of the cartridge drives into a single Portfolio catalog, adding new items and updating existing ones each week after the files are backed up. The assistant assigns keywords and descriptions to the items (if the artist or designer didn't do so in the source files), and creates custom fields to record which product, season, catalog, and so on the images and documents pertain to.

Each employee who needs access to the files has a copy of Portfolio. The administrative assistant, acting as catalog administrator, gives the them Reader access privileges so that they can search the catalog but not modify it.

Scenario 2

A digital imaging company that sells royalty-free photographs and illustrations to both Macintosh and Windows users.

Problem

The company president wants to create a comprehensive, easy-to-distribute electronic catalog of all their images. The catalog must include image thumbnails, part numbers, prices and collection names and volumes.

Solution

The company's creative director creates a Portfolio catalog containing all of the images, with corresponding custom fields for part numbers, prices and collection names and volumes. The creative director then customizes the Thumbnail view to display these custom fields, then saves that view as the default Gallery.

The company licenses the Extensis Portfolio Content Publisher's Toolkit to obtain read-only browser versions of Portfolio, and the rights to distribute them. The catalog, which can be viewed by both Macintosh and Windows users, is distributed to prospective buyers along with the Portfolio browsers.

Note: For details on the Portfolio Content Publisher's Toolkit and the read-only browser version of Portfolio, call (800) 796-9798.

Scenario 3

An individual designer who has created images in various formats for her clients, as well as a collection of royalty-free artwork and stock photographs on CD-ROM.

Problem

The designer needs to keep track of all of her files, but doesn't really need to share this index with anyone else.

Solution

The designer uses Portfolio to catalog all of the image files contained on various Zip disks, CDs and her Macintosh hard drive. She creates custom fields to indicate which of her work was used for which client, and where and when they were published.

Using the Portfolio Content Publisher's Toolkit and read-only browser versions of Portfolio, she could also create and distribute a catalog as an electronic portfolio for prospective clients.

Note: For details on the Portfolio Content Publisher's Toolkit and the read-only browser version of Portfolio, call (800) 796-9798.

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