

Portfolio 7

Review by: Chuck Reisz

Portfolio 7 is manufactured and sold by: **Extensis, Inc., a Celartem company**

Introduction: Since Evaluating Portfolio 6 in July 2002, I have used it ever since for filing and retrieving photographs. The system is the best that I have experienced for filing and retrieving digital files along with all the information you care to record about those files.

Pricing: For this product review I installed and evaluated the Client Version of Portfolio 7. The Client version is licensed for a single computer. It retails for \$199.95. An upgrade version for users of Portfolio 4.0 or later is available for 99.95.

System Requirements: Portfolio 7 can be installed on a **Windows Operating System** or a **Macintosh System**. I have installed it on a PC with Windows operating system. The Version 7 has major increases in resource requirements. The minimum requirements for installing on a PC are Windows XP Home edition or Windows 2000 operating system with 256MB of RAM, 75MB of free hard disk space and QuickTime 6.4 or higher. Installation on a Macintosh System appears to require equivalent system resources.

Installation was very smooth and user friendly. No surprises were encountered. Portfolio does not have an uninstaller. It directs the user to use the Windows Operating System uninstaller.

Documentation: Portfolio 7 includes good documentation in both printed and on line forms. I personally find printed documentation to be very useful during the installation of a system.

The Target Audiences for Portfolio 7 is Business Professionals, Photographers and Artists, Graphic Design Professionals, Other Corporate Users and Content Publishers. Despite the fact that I do not fit into their defined target, I find the system very useful for my purposes.

System description: Portfolio by Extensis Inc. is a system intended to provide for filing, organizing, cataloging, retrieving, monitoring, and distributing digital data files. The primary emphasis appears to be on graphic files including but not limited to photos, works of art, movies and presentations. The system relieves the user from the tedious details of keeping digital files updated and organized.

Features: The framework of the system is the detail record and the information associated with that record. The amount of information that can be stored regarding a record seems to be endless. In my files, I include items such as file number, description and an unlimited number of keywords. The system generates the date when the item was last updated and the directory path of that record. The basic record also includes a

thumbnail view for fast reviews.

A catalog is the basic grouping of records. Catalogs can reside on a hard drive, on CD's or on any other storage device. The system keeps track of where catalogs are. A gallery is the secondary grouping of records. A gallery is a sub file of records that exist in one or more catalogs. A given record can be included in more than one gallery. The ease of maintaining files in catalogs and directories is an advantage of the system.

Portfolio's search capabilities are powerful. Searches can be performed on anything which is stored in regards to a digital file. I normally use keywords for searches and sometimes search description. Searches by items such as date modified or file size can also be executed. Searches are extremely fast.

Distribution of files is facilitated thru Portfolio's ability to create a CD of the files, galleries or catalogs of the desired records. Extensis provides a Portfolio Browser program that can be included on any Portfolio CD for use by the person receiving the CD. The browser can also be downloaded from the Extensis web site.

Other checking and maintenance capabilities are too numerous to mention but all of these features contribute to making Portfolio a quality system. The system can interface with many other common systems such as Microsoft Office.

After two years experience using Portfolio 6, I am a confirmed advocate of this system for managing my photo files and I am considering if I may want to expand my use of it to other type documents.

Portfolio provides so many ways to accomplish a task and so many options that it can be overwhelming to an amateur who may be implementing the system but as with many systems, the user usually falls into the pattern of using a subset of the capabilities. The browser is much simpler due to its limitation in features.

Portfolio 7 which has been released this year has some impressive features and improvements.

The user interface is more intuitive and user friendly. This is important in a system that is feature rich as Portfolio is. Portfolio allows for predefined collections of files which in turn supplies one click access to those subsets. **Customizable Tool Bars and Views**, new in Portfolio 7 takes the user friendly convenience one additional step.

The new **One Click CD/DVD publishing** is a great feature and makes the creation of CD's or DVD's for distribution work like a charm. The collect and burn CD feature does not require additional software. It is a self-contained function.

An **email with selected pictures** can be created and sent from within the Portfolio system. The photo can be sent in its original resolution or in either of two provided reduced resolutions.

Image Conversion of files into JPEG or Tiff formats can be made within Portfolio. As those conversions are made, changes can also be made in the image size, resolution and/or the color mode.

Other new and improved features in Version 7 include:

Metadata Control

Workflow Automation

Web Page Creation Wizard

Improved Screen Previews

User I.D. Support

Summary Opinion – Portfolio Version 7 provides some very good features that make great improvements to the system user. **I love the system improvements.** The minimum system requirements for the Windows version is a good size leap to Windows XP and 256 MB RAM. The Macintosh version appears to require an equivalent leap in system resources. I understood this resource requirement before setting out to review the system and I got no surprises there.

What I overlooked is that the **Browser version also requires Windows XP and a minimum of 256 MB of RAM.** At this point the greater resources required would be a major impediment as to who could use the CD's that are produced.

This limitation on the distribution of the files will probably continue to be a drawback to my conversion to Version 7 for another couple of years. This dilemma is a source of frustration until I can find a work around or until sufficient numbers of my "customers" are converted to newer computers.