



Resources for Portfolio Administrators

ESSENTIAL:

Manage Your Catalogs and Assets

- + Getting Started with Portfolio ([PDF](#))
- + Create Catalogs for Your Assets ([Video](#)) (3:04) ([KBA](#)) ([HelpDoc](#))
- + Get Organized With Folders and Galleries ([Video](#)) (4:12)

Manage User Access

- + Expand Access by Adding Users to Your Catalog ([KBA](#))
- + Assign Users to Catalog Roles ([KBA](#))

Share Assets

- + Share Assets With Others ([Video](#)) (2:27)

Help Users With Their Common Questions

- + Portfolio Client Overview ([Video](#)) (3:46)
- + Add Assets to Portfolio ([Video](#)) (4:38)
- + Find Your Assets Quickly ([Video](#)) (4:17)
- + Increase asset findability with Metadata and Keywords ([Video](#)) (4:06)

Optional Add-Ons

- + Build a Branded Portal to Publically Share Your Assets ([Video](#)) (5:14)

Take Control of Keywords and Search

- + Standardize Your Search Terms With Master Keywords ([KBA](#))
- + Supercharge Your Keywording with AI ([Video](#)) (2:55) ([KBA](#))
- + Create Custom Metadata Fields ([Video](#)) (3:10)

Reference

- + Client User Guide – In Depth ([PDF](#))