



Resources for the IT Team

ESSENTIAL:

Get the Installers

- + [Portfolio Server](#) + [Desktop Client](#)
- + [\(Download installers here\)](#)

Install & License the Server

- + [Installation Prerequisites \(HelpDoc\)](#)
- + [Windows – Server Installation Guide \(Video\) \(3:20\)](#)
- + [Windows – Recommendations Checklist to Read Before You Install \(PDF\)](#)
- + [macOS – Server Installation Guide \(Video\) \(4:21\)](#)
- + [macOS – Recommendations Checklist to Read Before You Install \(PDF\)](#)
- + [Activate Your Portfolio License \(KBA\)](#)

Manage Your Users

- + [Create New Users \(Video\) \(5:55\) \(KBA\)](#)

Manage User Access

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

Maintenance and Protection

- + [Protect your data with Scheduled Backups \(HelpDoc\)](#)

Optional Add-Ons

- + [Activate Portfolio Flow for Mobile Uploading \(HelpDoc\)](#)

Reference: Configuration

- + [Configuration Simple Schematic \(PDF\)](#)
- + [Configuration Technical Schematic \(PDF\)](#)
- + [Reference: Server settings for Firewall, Reverse Proxy, SSL, etc. \(PDF\)](#)

Reference: Integration & Developer Resources

- + [Reference: Portfolio REST API \(HelpDoc\)](#)
- + [Developer Resources & Server Side Scripting \(Web Page\)](#)