PortfolioDAM

PORTFOLIO 4.2 FAQ

SECTION 1: ABOUT THE RELEASE

What is Portfolio 4.2?

Portfolio 4.2 is a maintenance and modernization release of Portfolio Server. It includes updates to all parts to the product with new installers for Portfolio Server, the Portfolio Media Engine, and the Portfolio Client (for MacOS and Windows)

It is the first public release by PortfolioDAM LLC (a division of Axle AI Inc) after the acquisition of the Portfolio product line from Extensis/Monotype.

Portfolio is a scalable Digital Asset Management (DAM) system designed to catalog, thumbnail and preview a broad range of commonly used image, graphic and document file formats. Portfolio is used by individual creatives, small teams and enterprise customers.

The Portfolio Server 4.2 November 2026 release updates a number of core components of the product and extends platform support.

What has changed since Portfolio 4.0.1?

Component or area	Change in 4.2
Licensing server	License validation now points to license.portfoliodam.com
Java Runtime Environment	Updated from Oracle JRE to Azul Zulu Java 8 (Zulu 8.5)
Apache Tomcat	Updated to Apache Tomcat 9.0.122
Logging framework	Migrated from Log4j 1.2.17 to Reload4j 1.2.26
Node.js	Updated from Node.js 8.9.2 to 8.9.4
Windows Server support	Adds support for Windows Server 2025
Portfolio Server host OS	Portfolio Server can now run on Windows desktop editions as well as Windows Server
Elasticsearch memory handling	New dynamic memory allocation to improve indexing and search performance

Are there any changes to the Portfolio User Interface?

The Portfolio client for MacOS and Windows is largely unchanged. Buttons that enabled Smart Keywording have been removed since this feature was deprecated by Extensis some years ago

Do I need to have my users trained on how to use Portfolio?

Although the Portfolio User interface is largely unchanged, refresher training is available via our integration and consulting team. Contact us for more information.

SECTION 2: LICENSING

How has licensing changed in Portfolio Server 4.2

When it comes to activating Portfolio Server 4.2, the license provision is tied to a new customer portal https://my.portfoliodam.com operated by PortfolioDAM LLC.

License credentials held by the old Extensis license server cannot be used to activate Portfolio Server 4.2.x You will need to contact support@portfoliodam.com to establish your product owner email address with Portfolio DAM's new licensing server.

Licensing provision for each subscription is bound to a single license holder's name/email address. Each Portfolio Server instance needs an account on https://my.portfoliodam.com to run, and that account needs to be tied to your license by our tech support team. The email address and password combination used to access the new portal then needs to be added to your instance of Portfolio via the Portfolio Server Admin interface.

What do I need to do on my network?

Portfolio Server needs a direct outbound connection to https://license.portfoliodam.com on TCP port 443 (speak with support@portfoliodam.com to change ports) to establish licensing. If your network uses a firewall, proxy, or outbound allow-list, add license.portfoliodam.com to the allow-list and exempt it from certificate inspection before licensing Portfolio Server 4.2. Licensing will fail if the server cannot reach this address.

My Portfolio Server doesn't have internet access.

To activate an 'air-gapped' Portfolio Server (where Internet access isn't available) contact PortfolioDAM support via email support@portfoliodam.com

Why has the licensing server changed?

The previous licensing server (cwsg.extensis.com) was operated by Extensis (the former developers of Portfolio) and also controlled access to that company's other products.

How do I update an older version of Portfolio Server?

For customers with older versions of Portfolio Server (3.6.3, 4.0 or 4.0.1) a license patch is available upon request.

When patching an existing Portfolio instance (prior to Portfolio 4.0.1), customers are required to log in and check their license provision via the customer portal.

Does the upgrade to 4.2 cost anything?

Portfolio 4.2 is available at no additional charge to customers with an active Portfolio subscription. Up to one free hour of tech support is included for an upgrade. After that, a flat fee of $950 will be charged for upgrade support.

SECTION 3: PLATFORM SUPPORT AND SYSTEM REQUIREMENTS

Which operating systems does Portfolio Server 4.2 support?

Portfolio Server 4.2 runs on Windows only. Windows Server 2025, 2022, 2019. Windows Server 2016 is supported until January 2027. Windows Server 2012 R2 is not supported in this release.

Portfolio Server 4.2 can now be installed on Windows 10 and Windows 11. Portfolio running on Windows desktop is a cost effective alternative for deployments with a small number of users and up to 50,000 assets.

Which components are included, and where do they run?

Component	Platforms
Portfolio Server 4.2	Windows (Windows Server and Windows desktop editions)
Portfolio Media Engine	Windows
Portfolio Desktop Client	Windows and macOS
Portfolio Web Client	Web browser, default port 8090
Portfolio Server Admin	Web browser, default port 8091

Is Portfolio Server 4.2 available for macOS?

We do not have a release date for Portfolio Server for macOS at this time. We do have plans to release Portfolio Server for macOS. Customers interested in this should contact richard@portfoliodam.com

Does the Desktop Client run on Apple Silicon Macs?

Yes, under Rosetta 2 emulation. Install Rosetta 2 before installing the Portfolio Desktop Client, or the client will not launch. Rosetta 2 can be installed from Terminal with `softwareupdate --install-rosetta`. See Apple's support article for details. Please note, native Apple Silicon support for the Desktop Client is in development but does not yet have a release date.

For full system requirements please check the Portfolio Server 4 Server Recommendations guide for CPU, drive space, and drive speed guidance. LINK HERE

SECTION 4: UPGRADING

Which versions can upgrade directly to 4.2?

Portfolio 4.0.1 upgrades directly to 4.2.

Is there an upgrade path from Portfolio Server 3.6.3?

Customers running Portfolio Server 3.6.3 or earlier must first upgrade to Portfolio Server 4.0 and then to 4.0.1. Contact support@portfoliodam.com if you need installers for an earlier version.

What should I do before upgrading?

Back up all catalogs and the server configuration, and store the backup outside the server being upgraded. Portfolio's built-in backup does not include original assets so back those up separately. Administrator rights on the server are required to install Windows services and prerequisites.

What are the upgrade options?

1. **In-place upgrade:** run the Portfolio 4.2 installer over an existing 4.0.1 installation on the same machine. Existing configuration and catalogs are preserved.
2. **Backup and restore:** take a full backup of a 4.0.1 catalog and configuration, install Portfolio Server 4.2 on a new machine, and restore the backup into it. This is the usual route when moving to new hardware.

Is anything needed after the upgrade?

A server restart may be needed after installing Portfolio Server 4.2. Catalogs restored from a backup will rebuild their search index, which can take some time on large catalogs.

How do I add my license details after upgrading?

See Licensing (Section 2) above

How do I know the upgrade has been successful?

The Portfolio Server Administration login page will show the Portfolio Server version number on the Portfolio Server admin interface. To check, open a web browser on the machine running Portfolio and type in 127.0.0.1:8091 (the default port for the Portfolio Server Admin). At the bottom of the screen you'll see the version number in small letters reading 4.2.0 and a date).

SECTION 5: KNOWN LIMITATIONS

Are there known issues in upgrading to Portfolio Server 4.2

The following apply to the 4.2 release:

- Portfolio Server 4.2 is not available for macOS or Apple Silicon. The Desktop Client runs on Apple Silicon under Rosetta 2. Native Apple Silicon support for Portfolio Server and the Desktop Client is planned.
- Some recent camera RAW formats are not yet supported.
- Portfolio Server 4.2 supports the MrSID format but does not include the MrSID Encode or Decode SDK.
- Portfolio 4.2 does not yet integrate with Axle AI Tags.
- Portfolio 4.2 does not yet integrate with Axle Connectr.
- Customers using Microsoft Edge have reported time out issues using the Portfolio WebClient (PORT26101)

SECTION 6: SUPPORT AND PROFESSIONAL SERVICES

Is technical support included with the upgrade?

Each customer upgrading to Portfolio 4.2 receives up to 1 hour of technical support for the upgrade at no additional charge.

What if I expect to need more help?

PortfolioDAM offers professional services to assist with training and migration. Contact us for more details.

How do I contact support?

Email support@portfoliodam.com.

SECTION 7: DOWNLOADS AND DOCUMENTATION

Where do I download Portfolio Server 4.2 and other components?

Download	Link	Size
Portfolio Server 4.2 (Windows)	PortfolioServer-4.2.0.zip	813MB
Portfolio External Media Engine (Windows)	PortfolioMediaEngine-4.2.0.zip	505MB
Portfolio Desktop Client 4.2 (macOS)	Portfolio-Desktop-4.2.0-mac.dmg	51MB
Portfolio Desktop Client 4.2 (Windows)	Portfolio-Desktop-4.2.0-Windows.zip	121MB

What is NetPublish?

NetPublish is an additional module licensed with Portfolio that allows users (with Publisher level access and higher), to create branded portals and microsites that enable access to other users who simply want to search, access and download content. NetPublish is licensed with Portfolio Server Enterprise subscriptions. For more information contact info@portfoliodam.com

What is the Portfolio Media Engine?

The Portfolio Media Engine moves media processing, such as generating previews, thumbnails and video proxies, off the Portfolio Server and onto a separate machine. That means the server stays responsive while large or complex files are processed, and processing power can grow with your library rather than competing with everyday searches and downloads. For more information contact info@portfoliodam.com

What is the Portfolio API?

The Portfolio API is a licensed add-on interface that lets developers integrate Portfolio Server catalogs, asset metadata, and media processing into custom workflows, web applications, to integrate Portfolio with other business systems. For more information contact info@portfoliodam.com

Where can I find documentation?

Portfolio documentation is at help.portfoliodam.com.

Before installing, we recommend reading the Portfolio Server 4 Recommendations (Windows) document in full. LINK