



Kodak

InSite Prepress Portal

System
Version 5.0

Customer Quick Start Guide
English

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What Is InSite Prepress Portal?

The Kodak® InSite™ Prepress Portal system is a Web portal to the prepress environment that lets printers and their customers work with print jobs over the Internet. Prepress Portal helps to manage the proofing, correction, and approval process so that it is more efficient.

What's Changed in Version 5.0

InSite is renamed to InSite Prepress Portal, and is now easier to use. As a result, some features have moved. If you're familiar with InSite 4.5, use the table below to find your favorite features in Prepress Portal 5.0.

To find this InSite 4.5 feature:	In Prepress Portal 5.0, do this:
Job Administration	<ul style="list-style-type: none">▪ In the Jobs view, on the job Summary tab, click Edit Properties.
Job History	<ul style="list-style-type: none">▪ In the Jobs view, click the History tab. Under Show, select Transactions.
Job Information Sheet	<ul style="list-style-type: none">▪ To create, view, or edit a Job Info sheet, in the Jobs view, click the Summary tab.▪ To view revisions to a Job Info sheet, in the Jobs view, click the History tab. Under Show, select Info Sheets.
Admin User Rights	<ul style="list-style-type: none">▪ To create or modify users, or to assign roles, in the Jobs view, on the Summary tab, click Manage Access.

Logging In to Prepress Portal

Prerequisite: You must have a high-speed Internet connection (64 kilobits per second (kbps) or higher).

Important: For correct functioning of Prepress Portal software on a Mac® computer, you must allow files to open after downloading. To do this, start the Safari software and choose **Preferences** from the Safari menu. On the **General** tab, ensure that the **Open "safe" files after downloading** option is selected.

For a complete list of supported operating systems and Web browsers, contact your printer to obtain a copy of the *InSite Client Configuration* technical bulletin.

To log in to Prepress Portal:

1. Type the printer's Prepress Portal home page address.

A screenshot of a browser address bar. The text 'http://myprintcompany.com' is entered in the address field. To the left of the text is the word 'Address' in a smaller font. To the right of the text is a small downward-pointing arrow icon.

2. On the Login page, type your user name and password, and select a language. The default language is English.
3. Click **Login**.

A screenshot of the Prepress Portal login form. It consists of three input fields and a button. The first field is labeled 'Username:' and contains the text 'BertL'. The second field is labeled 'Password:' and contains five black dots. The third field is labeled 'Language:' and has a dropdown menu with 'English' selected. Below these fields is a blue button with the text 'Login'.

Getting Help

For complete instructions on performing an action in the Prepress Portal software, see the online help.

To display the online help:

- In the software, beside your name, click ?



Checking Your System Configuration

You can check that your system is configured properly to run all Prepress Portal features successfully.

Prepress Portal runs a diagnostic test on your system, including verifying the version of Sun™ Java™ software that is installed and any proxy settings. The results are reported to you. If there are problems, you can send the details to your system administrator in an e-mail message.

The first time that you log in to Prepress Portal, check your computer to ensure compatibility.

There are two ways to check your system configuration:

- On the Login page, click **System Diagnostics**.

A screenshot of a login form. It includes fields for Username (containing 'BertL'), Password (masked with dots), and Language (set to 'English'). A 'Login' button is located below the password field. Below the login form, there are two links: 'System Diagnostics' and 'Forgot Your Password?'. The 'System Diagnostics' link is highlighted with a blue box.

- If you are already logged in, on the footer of any page, click **System Diagnostics**.

[System Diagnostics](#) | [Privacy](#) | [Terms](#) |

Changing Your Password

The printer may require strong passwords for logging in to the Prepress Portal software. Strong passwords have at least eight characters and a combination of different types of characters. All users can change their own passwords.

For guidelines on creating strong passwords, see the Prepress Portal Help.

To change your password:

- In the software, click your name.



- Click **Change Password**.
- Type your current password and your new password in the boxes that appear.

A screenshot of a 'User Information' form. The form has a title 'User Information' and a horizontal line below it. It contains four fields, each with a red asterisk indicating a required field: 'Unique Username' (containing 'bert'), 'Your current password', 'New Password', and 'Confirm Password'. Each field is represented by a text input box.

- Click **Update**.

Logging Off of Prepress Portal

- In the software, beside your name, click **X**



Understanding Roles

The actions that you can perform in the Prepress Portal software depend on your *roles*. Roles are collections of user rights. For example, the Review role includes the rights to annotate and download PDF proofs. If you cannot perform an action described in this guide, you may not have the required roles or rights. Contact your printer or system administrator for assistance.

Viewing Your Jobs

From the User Home view you can see an overview of your most recent jobs.

To view a job:

- Click the job name. In the **Status** list, select a job status to filter the jobs. In the **Search** box, type a job name to search the list.

Jobs
Upload print job files and collaboratively proof pages.

Status: All Active 2 Jobs Search Jobs

Name	Creation Date	Pages Requiring Approval	Pages Awaiting Correction
SportShop brochure <small>20 pages</small>	6/17/2007 9:20:15 AM	17	1
4 page, 4 color (SportsShop brochure) <small>4 pages</small>	6/17/2007 11:53:41 AM	4	0

Each job has four tabs: **Summary**, **Pages**, **Downloads**, and **History**. You can view different job information, and perform different actions, on each of the four job tabs.

Note: The tabs that you see depend on your Job Role rights. If you do not see the **Downloads** tab, your Job Role does not include Downloads rights.

Summary Tab

Jobs open by default on the **Summary** tab. The **Summary** tab provides basic information about the job, including approval summary, signatures, reviewers, file transfers, information sheet, notes, job code, project code, and creation date.

From the **Summary** tab, you can edit the job properties, manage access rights, upload files, and open Smart Review.

Created: 6/17/2007 9:20:15 AM

[Edit Properties](#)
[Manage Access](#)

Summary | Pages | Downloads | History

Upload Files... | Smart Review

▼ Approval Summary

Total: [20](#)
Requiring Approval: [17](#)
Approved: [1](#)
Rejected: [1](#)
Awaiting Correction: [1](#)

▼ Signatures

There are no signatures for this job.

▼ Reviewers

[Bert Landry: 1](#)
[Astrid Benqtsson: 1](#)
[Adrien Gauthier: 1](#)

File Transfer

▼ Info Sheet [Create](#)

There is no Info Sheet for this job.

▼ Notes [Add Note](#)

Show
All Notes

No notes have been added for this job.

Tip: Click these arrows to show or hide information for each area.

Pages Tab

Click the **Pages** tab to see page thumbnails, and other page information. Change the appearance of the pages on the **Pages** tab by filtering the pages, changing the thumbnail size, or choosing between Gallery view, List view, or HTML preview. You can upload files, open Smart Review, manage page groups, download files, review pages, and approve or reject pages.

Filter the pages.

Choose from Gallery view, List view, or preview the pages quickly in HTML format.

Set the thumbnail size.

Select a page to perform actions on it, such as requesting approval or review.

Downloads Tab

The **Downloads** tab shows the files that you can download.

History Tab

The **History** tab shows who made changes to pages, what changes were made, and the date and time of the changes.

You can choose to view the history for transactions, uploads, or changes to the information sheet.

Uploading Files to Your Printer

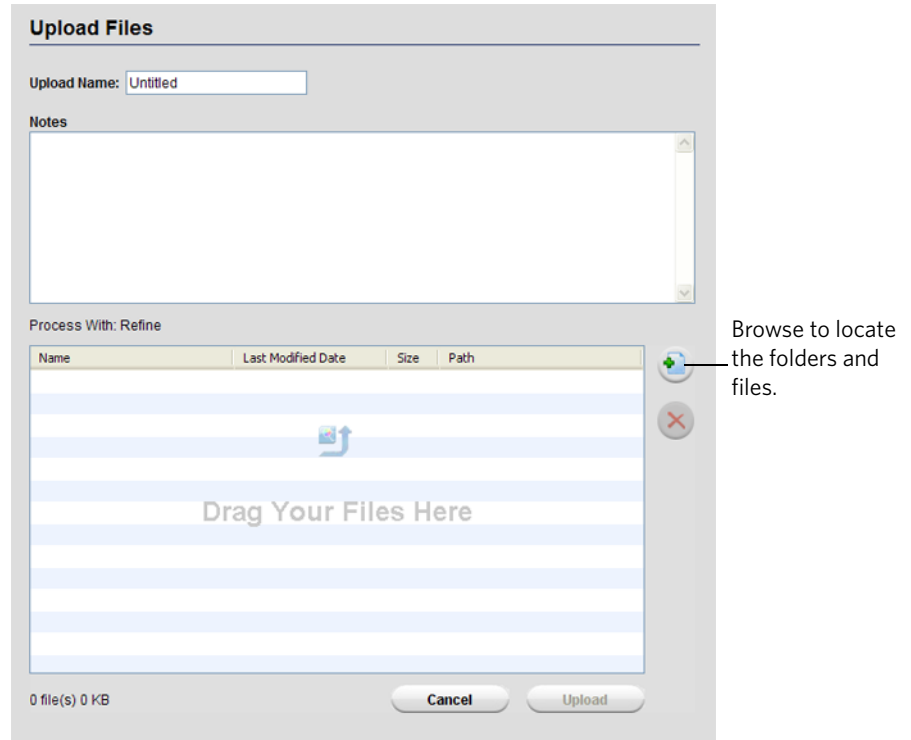
When you upload files or folders to Prepress Portal, they are copied to a folder under that job on your printer's job server.

Prerequisite: Your Job Role must include Upload rights.

Note: If you have Upload rights but are unable to upload files, talk to your system administrator or contact your printer.

To upload files to your printer:

1. In the Jobs view, click the name of the job that you want to upload files into.
2. On the **Summary** tab, click **Upload Files**.
3. Drag the files or folders you want to add from your desktop (or network) into the Upload Files dialog box, or browse to locate the folders and files.



4. If desired, type a name for the upload and type a note describing the upload. The note appears in the job's Summary tab and in the email notification sent to users who are notified when files are uploaded.
5. Click **Upload**.
6. When the upload is complete, the **Upload Processing** window appears. You can close the window and processing will continue.

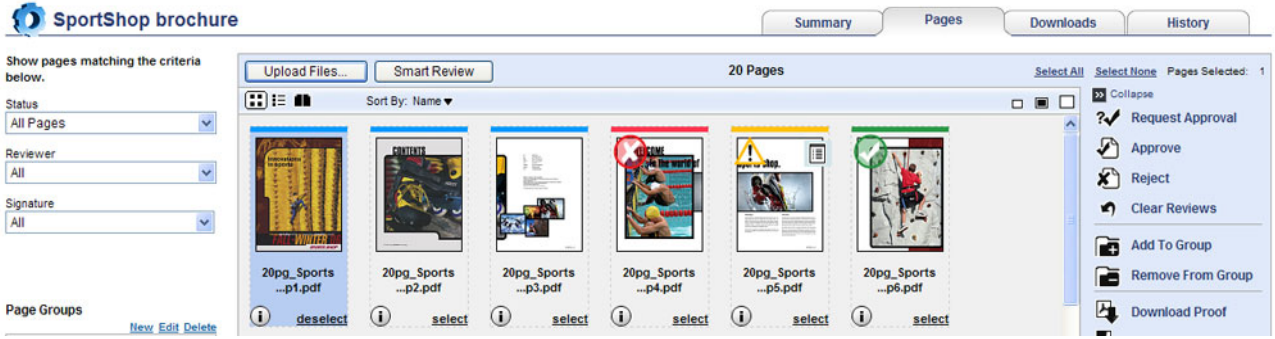
Asking Users to Review or Give Final Approval

On the **Pages** tab, you can select specific users to review specific pages or to give final approval for printing.

To request a review or final approval:

1. In the Jobs view, locate the job that you want, and click the **Pages** tab.
2. Click **select** under the pages that you want reviewed or given final approval, or click **Select All**.

3. Click **Request Approval**.



4. Select the people or groups who you want to review the pages or give final approval. To change the type of review, click the review label.

Request Approval

Comment for reviewers:

Reviewers

Selected Pages

Groups

Customer Users

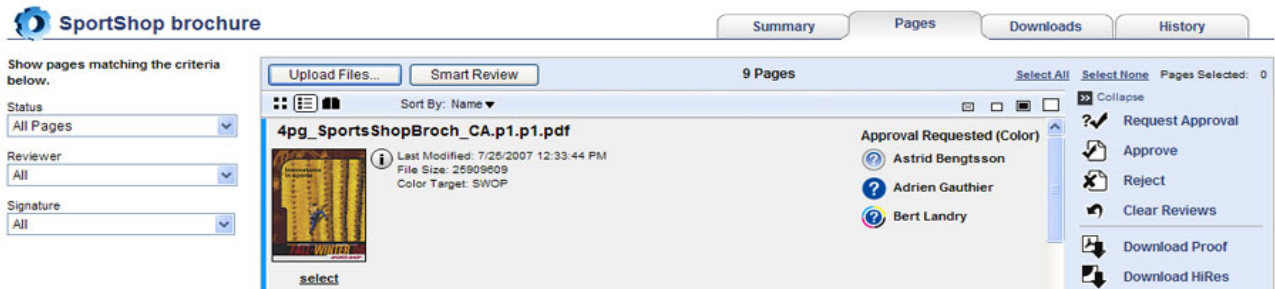
Astrid can only review the pages. Adrien needs to give final approval.

Click the review label to change the type of review.

 A screenshot of the 'Request Approval' dialog box. It features a text area for 'Comment for reviewers'. Below are sections for 'Reviewers' and 'Selected Pages'. The 'Reviewers' section has a list of users with checkboxes and review labels: 'Adrien Gauthier (adrien)' with 'Final Approval', 'Astrid Bengtsson (Astrid)' with 'Review', and 'Bert Landry (bert)' with 'Approve Color'. The 'Selected Pages' section shows '20pg_SportsShop_US.p1.pdf' is selected. At the bottom are 'Cancel' and 'Request Approval' buttons. Annotations with lines point to the 'Review' label for Astrid and the 'Final Approval' label for Adrien.

5. Click **Request Approval**.

List view in the **Pages** tab now shows who you requested reviews or final approval from for each page.



Annotating Pages in Smart Review

If you receive an email notification to review or approve pages, click the link in the email message and log in to Prepress Portal. The job's **Pages** tab appears. Click **Smart Review** or click the image thumbnail.

Select the page you want to review and click **Smart Review**, or simply click the page thumbnail.

The screenshot shows the 'SportShop brochure' interface in the Prepress Portal. The 'Pages' tab is selected, showing a grid of 20 pages. The first page is selected, and the 'Smart Review' button is visible. The interface includes filters for Status, Reviewer, and Signature, and a sidebar with actions like 'Request Approval', 'Approve', 'Reject', 'Clear Reviews', 'Add To Group', 'Remove From Group', and 'Download Proof'.

Click **Close** to end the Smart Review session.

If corrections are necessary, use the annotation tools to mark your changes.

Choose Thumbnail or List view.

Dock or undock the page list.

If you review the page and it is not OK or corrections are needed, click **Reject Page**.

To indicate that your review is OK, or that the page is OK, click **Approve Page**.



To view a different page, click the page thumbnail.

Use the navigation tools to zoom, pan, or rotate the image, and to switch between pages.

Click the navigation panel to quickly move around the page.

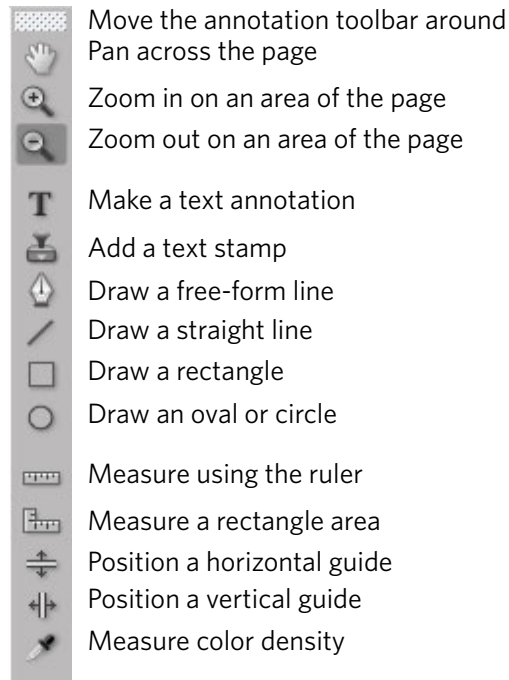
Note: This is an individual Smart Review session.

Smart Review Tools

The annotation tools that are available depend on your Job Role rights. If a tool that you need to use is not available, ensure that your Job Role includes the Annotate right.

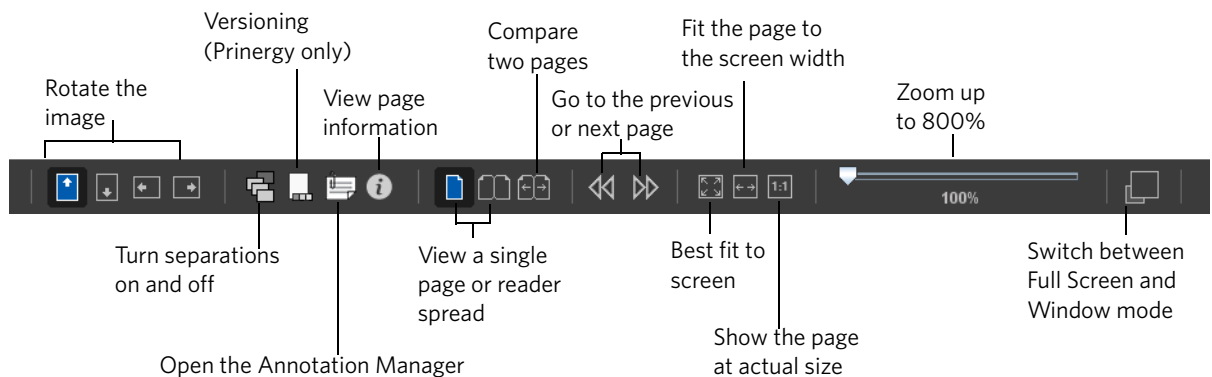
Annotation Tools

The annotation tools appear on the right side when you open Smart Review. Grey highlighting indicates the tool is in use.



Navigation Tools

The navigation tools appear below the Smart Review screen, except when you are in Full Screen mode. To show the navigation tools in Full Screen mode, move the mouse.



Joining a Group Session

When two or more people review the same page at the same time, it is known as a *group session*. The number of Smart Review users who are currently viewing the job appears in the upper-right corner of Smart Review. You can join in a group session at any time.

Note: The icon beside a reviewer's name indicates whether that person is using a calibrated monitor:




Reviewer's monitor is color-calibrated.



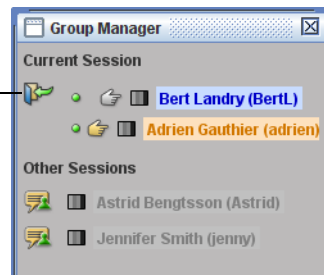
Reviewer's monitor is not color-calibrated.

To join or leave a group session:

- Do one of the following:
 - In the upper-right corner of Smart Review, click the **Group Manager** icon 
 - From the **Window** menu, select **Group Manager**.
- Click **Join Session**.



- To leave the session, click **Leave Session**.



Tip: To open a chat window, from the **Window** menu, select **Chat**.

Requesting Corrections to a Page

If you think a page can be corrected, annotate the page in Smart Review and request corrections. To approve or reject a page, see page 13.

Prerequisite: Your Job Role must contain the Approval right to request corrections.

To request corrections to a page:

1. In Smart Review, click **Reject Page**.
2. Enter a comment to explain the corrections you are requesting.

3. Click **OK**.

Note: When corrections are requested on a page, an email notification is sent to the CSR and anyone else who asked to receive these notifications.

Approving or Rejecting a Page

When you are satisfied with a page, you can approve it. Reject a page if there are problems with the page that you don't think can be corrected. To request corrections to a page, see the preceding section.

Prerequisite: Your Job Role must include the Give Final Approval right to approve or reject pages.

To approve or reject a page:

1. From the **Summary** tab, click the **Pages** tab.
2. Click **Select** under the pages that you want to approve or reject, or click **Select All**.

3. Click **Approve** or **Reject**.

Note: You can also click **Approve Page** or **Reject Page** from Smart Review.



4. Do one of the following steps:

- To approve the pages, select **Give Final Approval For Pages**.
- To reject the pages, select **Reject Pages**.

If needed, add a comment or change the selected page. Click **OK**.

Approve Pages

Comments

Set Pages To Reviewed - OK

Give Final Approval For Pages

Selected Pages

4pg_SportsShopBroch_US.p1.pdf

Reject Pages

Comments

Set Pages To Reviewed - Not OK

Reject Pages

Selected Pages

4pg_SportsShopBroch_US.p1.pdf

Note: When a page is approved or rejected, an email notification is sent to the CSR and anyone else who asked to receive these notifications.

Setting Up Users and User Groups

Create a user account for each person who will use Prepress Portal. This enables accurate tracking of who performed actions on a particular job.

Create groups to streamline the process of setting job access and requesting user reviews when there are many people with different roles and responsibilities working on jobs. For example, if you have one group of users who only review pages, create a Review Only group.

A customer user can belong to more than one group. When creating a user or user group, you specify the roles. You can add, change, or remove a user's roles whenever required.

To create a new user:

1. Click **Administration**.




2. Click **Create User**.



3. Type the user information and assign roles to the user. If required, set the expiration date and job access, and click **Create**.

Important: Always complete the boxes that have red asterisks (*). Each user must have a valid e-mail address on the form.

 **Create User**
✔ Email user about new account

Fields marked with * are required


User Information	User Roles						
<p>Unique Username * sam</p> <p>Password * [.....] Confirm Password * [.....]</p> <p>First Name * Sam Init. [] Last Name * Morely</p>	<p>Customer: Top Printing <i>User has access to specified jobs in this customer.</i></p> <p>Admin Role: Customer User [v] ⓘ</p> <p><input checked="" type="checkbox"/> Allow access to all current and future jobs</p> <p>Default Job Role: Reviewer [v] ⓘ</p>						
<p>Email Options</p> <p>Email * sam.morely@topprinting.com Email Language English [v]</p> <p><input type="checkbox"/> Disable all Email notifications <input type="checkbox"/> Disable event notifications Subscribe to Events</p>							
<p>Contact Information</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Title</td> <td style="width: 50%;">Office Phone</td> </tr> <tr> <td>Cell</td> <td>Home Phone</td> </tr> <tr> <td>Pager</td> <td>Fax</td> </tr> </table>		Title	Office Phone	Cell	Home Phone	Pager	Fax
Title	Office Phone						
Cell	Home Phone						
Pager	Fax						
<p>Expiry</p> <p><input checked="" type="radio"/> Account Does Not Expire <input type="radio"/> Account Expires In <input type="text" value="0"/> Day(s)</p>							
<p>Cancel Create</p>							

To create a new user group:

1. Click **Administration**.



2. Click **Create User Group**.

 **Administration**
[v]

General Information [Edit](#)

Top Printing
 123 First Street
 Imagination, California, United States
 98765
 Phone: (123) 555-5123
 Fax: (123) 555-5124
 Website: [www.topprinting.com](#)
 Customer CSR: [Jennifer Smith](#)

Smart Review Annotation Stamps [Edit](#)

None

Users And Groups
[Manage Access](#) [Create User](#) [Create User Group](#)

- Type a name for the group, select the members who should belong to the group, and assign appropriate roles. Click **Create**.

Important: Always complete the boxes that have red asterisks (*). Each user must have a valid e-mail address on the form.

Create User Group
Fields marked with * are required

Group Information

Group Name *

Members

Select All Select None

- 1 ユーザー (じゅんこ)
- Adrien Gauthier (adrien)
- Asne Ullmann (asne)
- Astrid Bengtsson (Astrid)
- Benedikt Bauer (benedikt)
- Bert Landry (bert)
- Fujisaki Yoko (yoko)
- Graphic Designer (graphy)
- Hannu Meri (hannu)
- Jennifer Brown (Jennifer)
- Jill Ferrier (jill)

Group Roles

Customer: Top Printing
User has access to specified jobs in this customer.

Admin Role

Allow access to all current and future jobs

Default Job Role

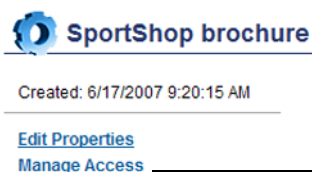
Cancel Create

Managing Access to Jobs

You can control who can work on your jobs. You may want to restrict access for a particular user for specific jobs. To do this, you *manage access*.

To add a user's access to a specific job:

- In the Jobs Home view, click the desired job.
- On the **Summary** tab, click **Manage Access**.



- Under **Job Role** for the user, change the role to **Reviewer**.

Manage Access: SportShop brochure

Click on a role name to choose a different role. ** indicates that the role is inherited.

User/Group Name	Job Role
Approval (group)	None
1 ユーザー (じゅんこ)	Reviewer *
Adrien Gauthier (adrien)	Approver **
Asne Ullmann (asne)	Reviewer *

Click the role name to see a list of available roles.

- Click **Apply**.

