



Kodak

InSite Prepress Portal

System
Version 5.0

Customer Quick Start Guide
English

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Contents

What Is InSite Prepress Portal?	1
What's Changed in Version 5.0.....	1
Logging In to Prepress Portal.....	1
Getting Help.....	2
Checking Your System Configuration	2
Changing Your Password	3
Logging Off of Prepress Portal	4
Understanding Roles	4
Viewing Your Jobs.....	4
Uploading Files to Your Printer	6
Asking Users to Review or Give Final Approval	7
Annotating Pages in Smart Review.....	9
Smart Review Tools	11
Joining a Group Session	12
Requesting Corrections to a Page.....	12
Approving or Rejecting a Page.....	13
Setting Up Users and User Groups	15
Managing Access to Jobs.....	17

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

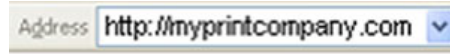
Prerequisite: You must have a high-speed Internet connection (64 kilobits per second (kbps) or higher).

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.



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' in white.

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**.

Username: BertL

Password: ●●●●

Language: English ▼

Login

[System Diagnostics](#)

[Forgot Your Password?](#)

- 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.

User Information

Unique Username *
bert

Your current password *

New Password *

Confirm Password *

- 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](#)

▼ 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.

File Transfer

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

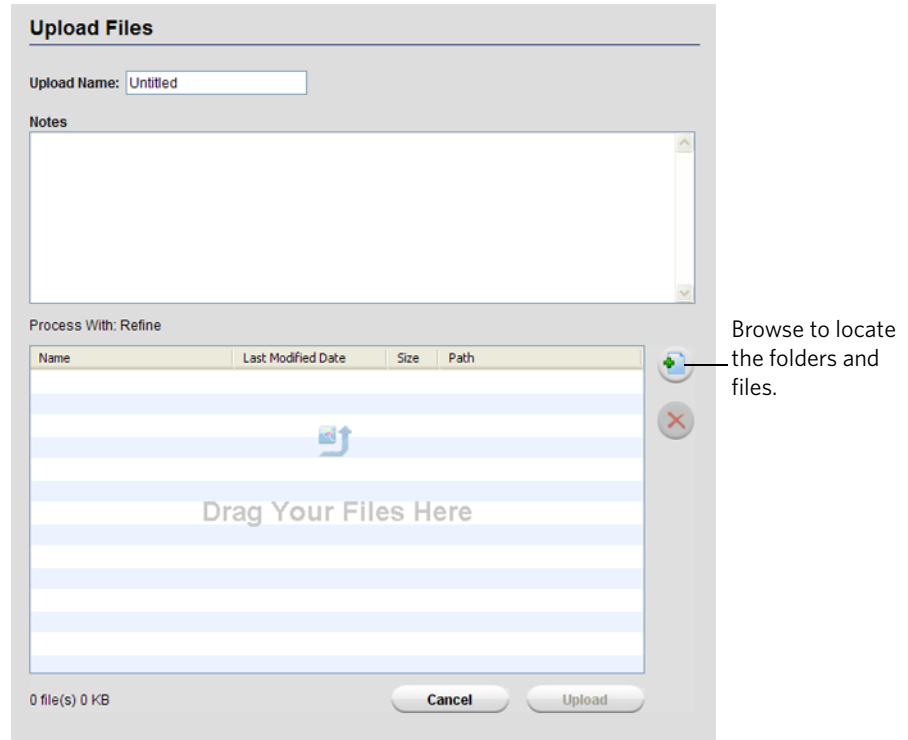
When you upload files or folders to Prepress Portal, they are copied to a folder under that job on your printer's job server.

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.

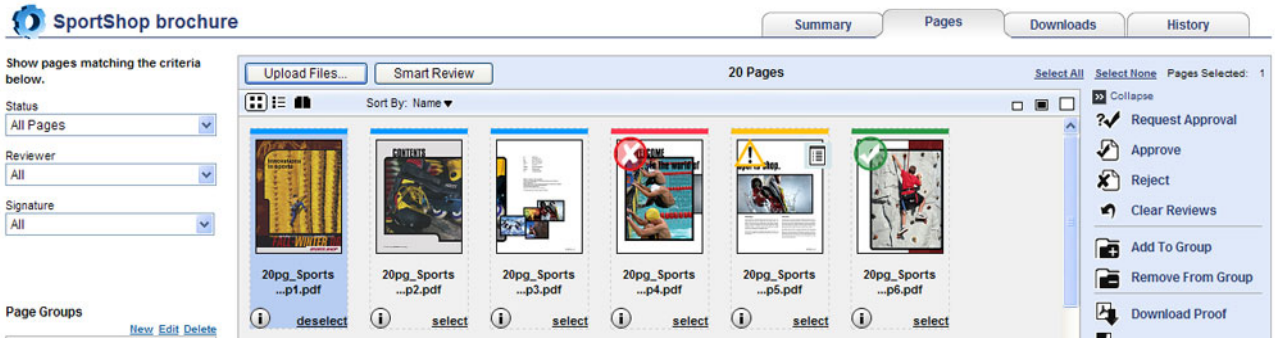
Asking Users to Review or Give Final Approval

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

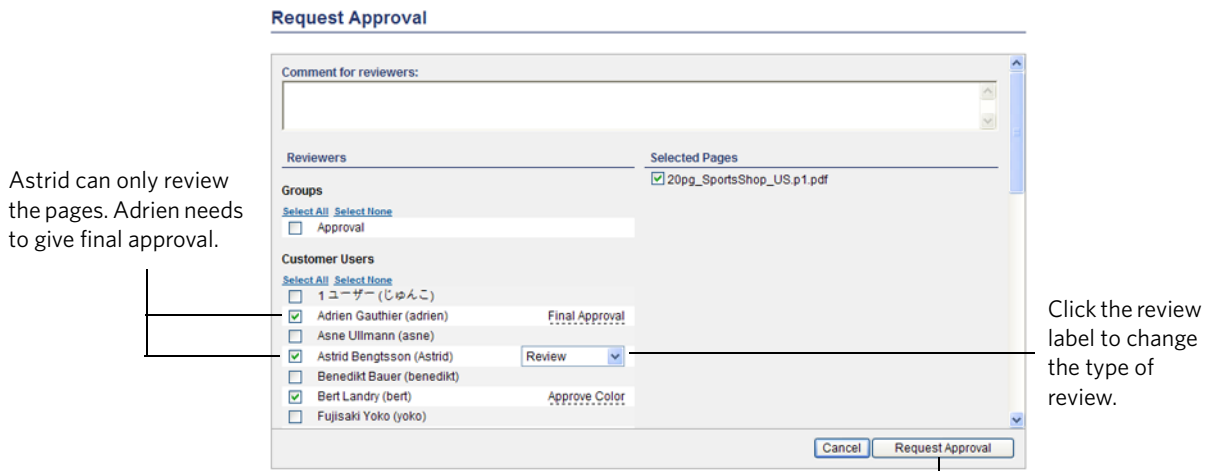
To request a review or final approval:

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**.

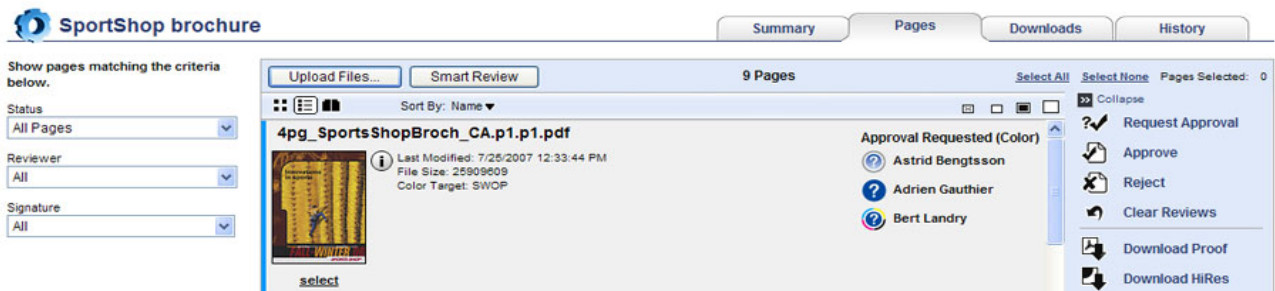


4. Select the people or groups who you want to review the pages or give final approval. To change the type of review, click the review label.



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 displays the Prepress Portal interface for a job titled "SportShop brochure". The interface includes a navigation bar with tabs for "Summary", "Pages", "Downloads", and "History". The "Pages" tab is active, showing a "Smart Review" section with "20 Pages" and "Pages Selected: 1".

On the left side, there are filters for "Status" (set to "All Pages"), "Reviewer" (set to "All"), and "Signature" (set to "All"). Below these are "Page Groups" with links for "New", "Edit", and "Delete".

The main area shows a grid of six page thumbnails, each with a "select" button below it. The thumbnails are labeled "20pg_Sports ...p1.pdf" through "20pg_Sports ...p6.pdf". The fourth thumbnail (p4.pdf) has a red "X" icon, and the sixth thumbnail (p6.pdf) has a green checkmark icon.

On the right side, there is a "Select All" and "Select None" button, and a "Pages Selected: 1" indicator. Below these are several action buttons: "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.

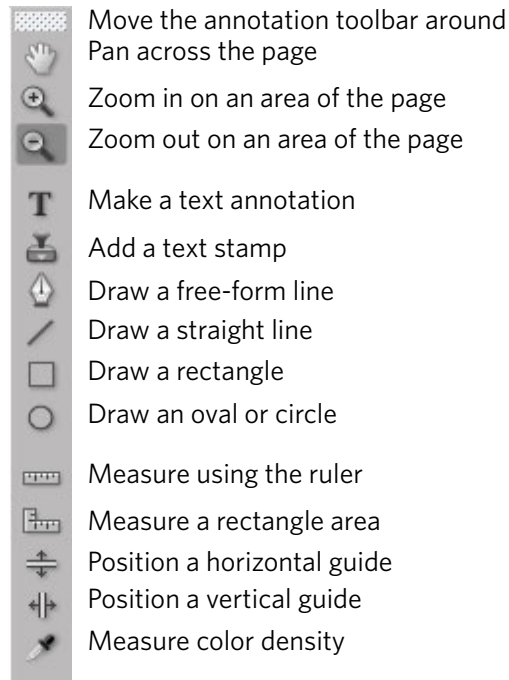
Note: This is an individual Smart Review session.

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.

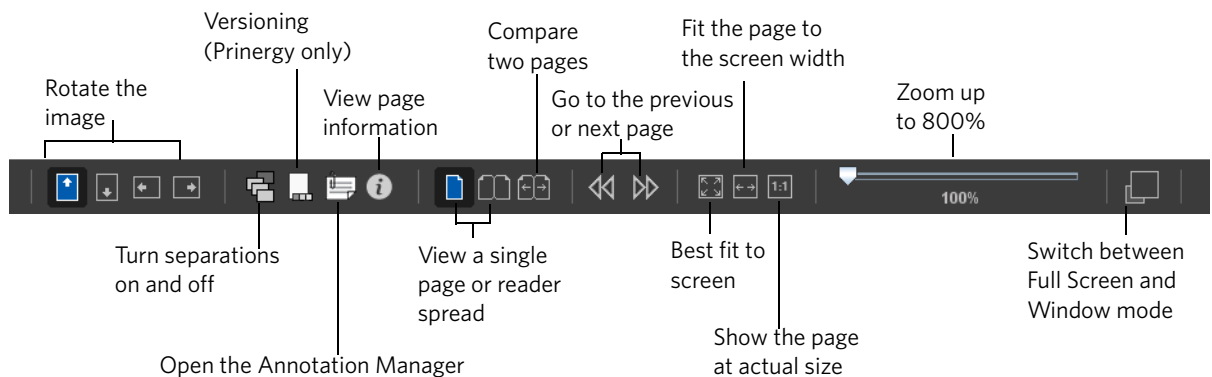
Annotation Tools

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.



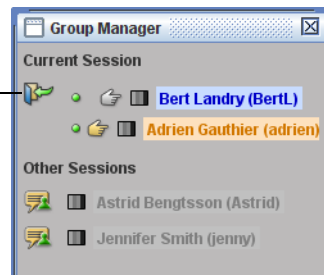
Reviewer's monitor is not color-calibrated.

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

Fields marked with * are required Email user about new account

User Information

Unique Username *
sam

Password *
.....

Confirm Password *
.....

First Name * Init. Last Name *
Sam Morely

User Roles

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

Admin Role: Customer User

Allow access to all current and future jobs

Default Job Role: Reviewer

Email Options

Email * Email Language
sam.morely@topprinting.com English

Disable all Email notifications
 Disable event notifications

Contact Information

Title	Office Phone
Cell	Home Phone
Pager	Fax

Expiry

Account Does Not Expire
 Account Expires In 0 Day(s)

To create a new user group:

1. Click **Administration**.



2. Click **Create User Group**.

Administration

General Information

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

None

Users And Groups

- 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

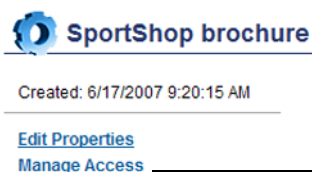
Cancel Create

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**.

