Kodak

InSite Prepress Portal

System

Version 6.0

Quick Start Guide

English

2009-12-16

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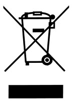

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1

Accessing Prepress Portal

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.

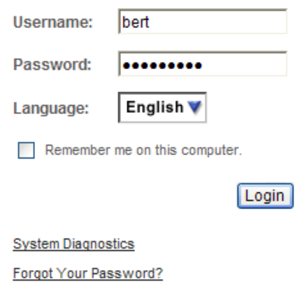
Checking your system configuration

You can check that your system is configured properly to run all Prepress Portal features successfully. If you run the test after you log into Prepress Portal, and there are problems, you can send the details to your system administrator in an e-mail message.

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

1. Open a Web browser, and type the address (URL) of the Prepress Portal server.

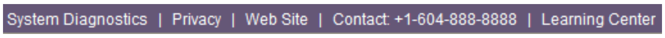
   If you do not have the Web address, contact your service provider.
2. On the Login page, click **System Diagnostics**.



Username: bert
Password: ●●●●●●●●●
Language: English ▼
☐ Remember me on this computer.
Login
System Diagnostics
Forgot Your Password?

   Prepress Portal runs a diagnostic check of your system and displays a report.

Tip: The **System Diagnostics** button also appears in the footer of all Prepress Portal Web pages.



System Diagnostics | Privacy | Web Site | Contact: +1-604-888-8888 | Learning Center

Logging on and off

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

On a Apple Mac® computer that is running the Apple Safari™ software, you must allow files to open automatically after downloading. In the Safari software, select **Preferences**. On the **General** tab, select **Open "safe" files after downloading**.

For a complete list of supported operating systems and Web browsers, see the *InSite Client Configuration* technical bulletin, available from Kodak eCentral®, the Internet portal at https://ecentral.kodak.com/.

1. Open a Web browser, and type the address (URL) of the Prepress Portal server.

   If you do not have the Web address, contact your service provider.
2. On the Login page, type your user name and password, and select a language.
3. Click **Login**.
4. To log off, click **Logout** in the top-right corner of the toolbar.

Bert Landry
Help
Logout

Getting help

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

➢ In the software, in the top-right corner of the toolbar, click **Help**.

Changing your password

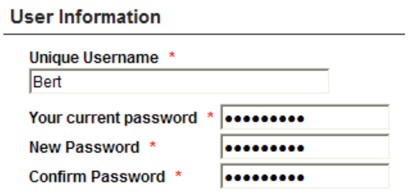
All users can change their own passwords.

Your company may require strong passwords for logging in to Prepress Portal. Strong passwords have at least eight characters and a combination of different types of characters.

1. To edit your user profile, click your name in the top-right corner of the toolbar.

Bert Landry
Help
Logout

2. Click **Change Password**.
3. Type your current password and your new password in the boxes.



User Information

Unique Username * Bert

Your current password * •••••••••

New Password * •••••••••

Confirm Password * •••••••••

4. Click **Update**.

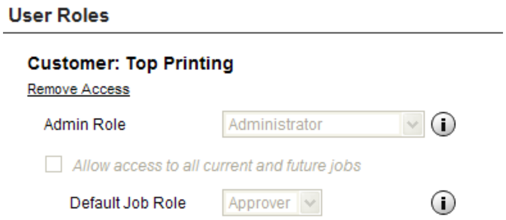
Viewing your roles

The actions that you can perform in Prepress Portal depend on the roles that you are assigned. Roles are collections of user rights.

For example, if you have the customer role of Customer Administrator role and the job role of Approver, you can create new user accounts and approve pages.

If you cannot perform an action, check your roles to ensure that they include the required user rights.

1. Click your name on the toolbar.
2. In the **User Roles** area, view your assigned roles.



User Roles

Customer: Top Printing

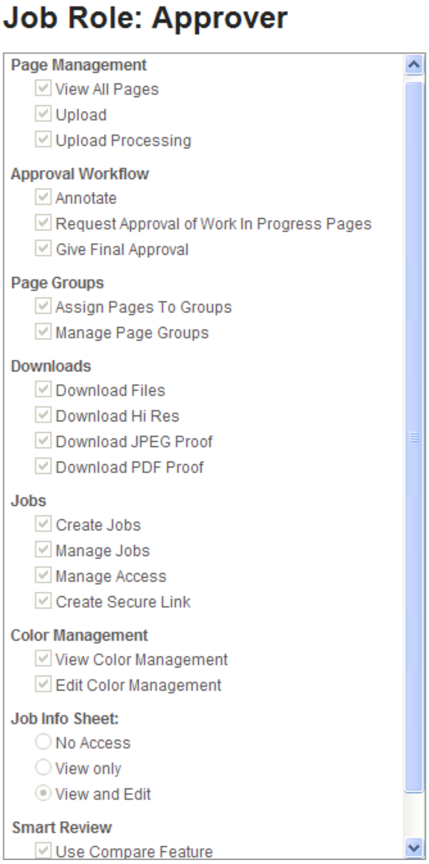
Remove Access

Admin Role: Administrator

☐ *Allow access to all current and future jobs*

Default Job Role: Approver

3. Click **i** to view the user rights contained in the role.



Job Role: Approver

Page Management
- ☑ View All Pages
- ☑ Upload
- ☑ Upload Processing

Approval Workflow
- ☑ Annotate
- ☑ Request Approval of Work In Progress Pages
- ☑ Give Final Approval

Page Groups
- ☑ Assign Pages To Groups
- ☑ Manage Page Groups

Downloads
- ☑ Download Files
- ☑ Download Hi Res
- ☑ Download JPEG Proof
- ☑ Download PDF Proof

Jobs
- ☑ Create Jobs
- ☑ Manage Jobs
- ☑ Manage Access
- ☑ Create Secure Link

Color Management
- ☑ View Color Management
- ☑ Edit Color Management

Job Info Sheet:
- ○ No Access
- ○ View only
- ● View and Edit

Smart Review
- ☑ Use Compare Feature

2

Setting up other users

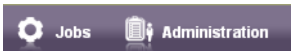
Creating users

Create a user account for each person who will use Prepress Portal. This enables you to accurately track who performed actions on a particular job.

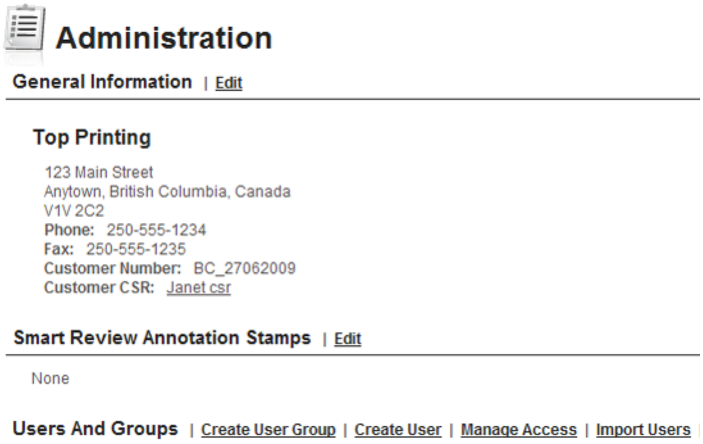
Requirements: Your customer role must include the Modify Customer right and the View Users right.

You can add, change, or remove a user's roles whenever required. For information about creating multiple users at once, see the Prepress Portal Help.

1. On the toolbar, click **Administration**.



2. Click **Create User**.



Administration

General Information | Edit

Top Printing

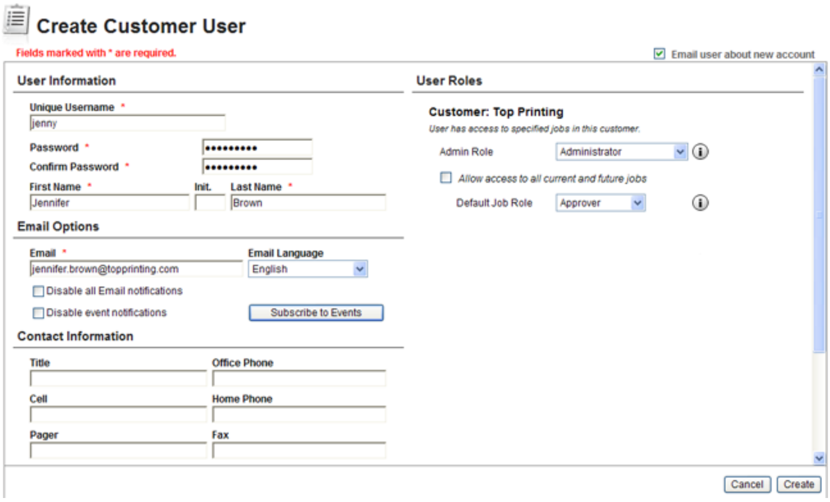
123 Main Street
Anytown, British Columbia, Canada
V1V 2C2
Phone: 250-555-1234
Fax: 250-555-1235
Customer Number: BC_27062009
Customer CSR: Janet csr

Smart Review Annotation Stamps | Edit

None

Users And Groups | Create User Group | Create User | Manage Access | Import Users

3. Type the user information and assign roles to the user.



Create Customer User

Fields marked with * are required.

☑ Email user about new account

User Information

Unique Username *: jenny

Password *: •••••••••

Confirm Password *: •••••••••

First Name *: Jennifer

Init.:

Last Name *: Brown

Email Options

Email *: jennifer.brown@topprinting.com

Email Language: English

☐ Disable all Email notifications

☐ Disable event notifications

Contact Information

Title:

Office Phone:

Cell:

Home Phone:

Pager:

Fax:

User Roles

Customer: Top Printing

User has access to specified jobs in this customer.

Admin Role: Administrator

☐ *Allow access to all current and future jobs*

Default Job Role: Approver

4. Click **Create**.

Creating user groups

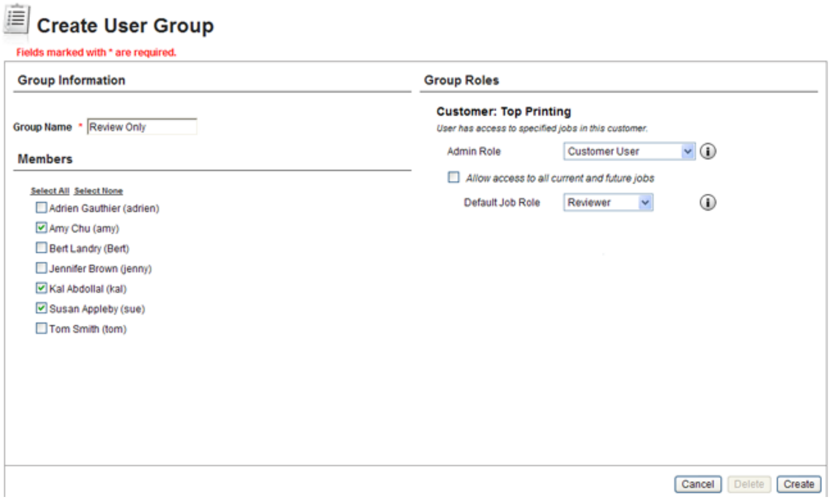
Create groups to streamline the process of setting job access and requesting user reviews when there are many people with different roles and responsibilities working on jobs. For example, if you have one group of users who only review pages, create a Review Only group.

Requirements: Your customer role must include the Modify Customer right and the View Users right.

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 group's roles whenever required.

1. On the toolbar, click **Administration**.
2. Click **Create User Group**.

3. Type a name for the group, select the members who should belong to the group, and assign appropriate roles.



Create User Group

Fields marked with * are required.

Group Information

Group Name * Review Only

Members

Select All Select None

☐ Adrien Gauthier (adrien)
☑ Amy Chu (amy)
☐ Bert Landry (Bert)
☐ Jennifer Brown (jenny)
☑ Kal Abdollal (kal)
☑ Susan Appleby (sue)
☐ Tom Smith (tom)

Group 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

4. Click **Create**.

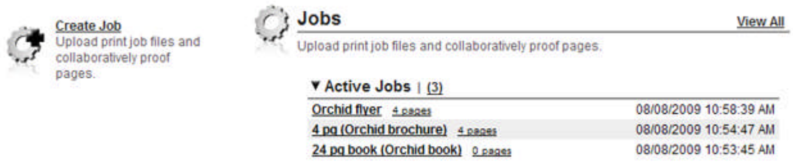
3

Working with jobs

Creating a job

Requirements: Your job role must include the Create Jobs right.

1. On the home page, click **Create Job**.



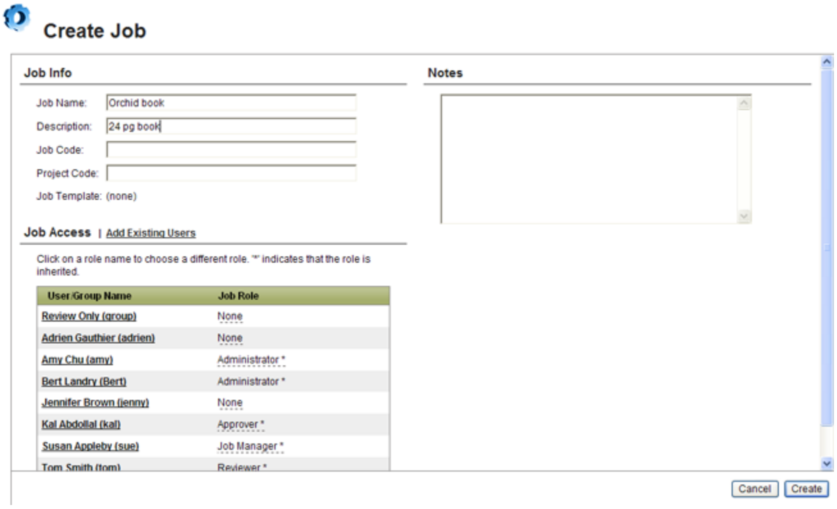
Create Job
Upload print job files and collaboratively proof pages.

Jobs
Upload print job files and collaboratively proof pages.

▼ Active Jobs | (3)

Orchid flyer	4 pages	08/08/2009 10:58:39 AM
4 pg (Orchid brochure)	4 pages	08/08/2009 10:54:47 AM
24 pg book (Orchid book)	0 pages	08/08/2009 10:53:45 AM

2. Type a job name. If desired, type a job description, job code, or project code.
3. To allow other users to access to the job, click **Add Existing Users**, select the check box beside the name of each user who needs access, and select a job role for each user.



Create Job

Job Info

Job Name: Orchid book
Description: 24 pg book
Job Code:
Project Code:
Job Template: (none)

Notes

Job Access | Add Existing Users

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

User/Group Name	Job Role
Review Only (group)	None
Adrien Gauthier (adrien)	None
Amy Chu (amy)	Administrator *
Bert Landry (Bert)	Administrator *
Jennifer Brown (jenny)	None
Kal Abdollal (kal)	Approver *
Susan Appleby (sue)	Job Manager *
Tom Smith (tom)	Reviewer *

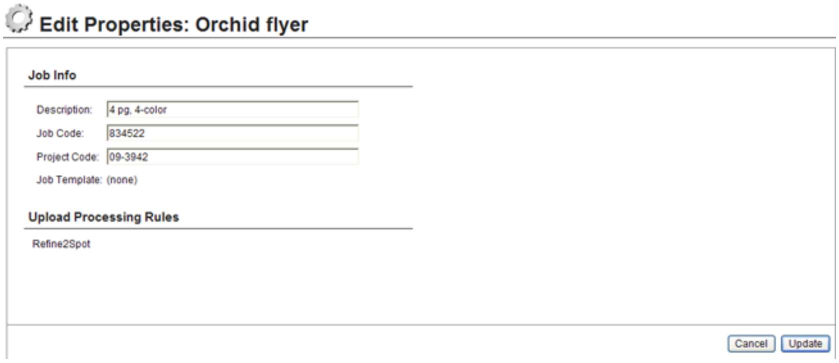
4. Click **Create**.

Editing job properties

Requirements: All users can edit the job's description, job code, and project code, and view the upload processing rules that are assigned to the job. You must be a staff user to add or remove upload processing rules.

1. On the job's **Summary** tab, click **Edit Properties**.

2. In the **Job Info** area, modify the job's description, job code, and project code. You can also view any job template that is assigned.



Edit Properties: Orchid flyer

Job Info

Description: 4 pg, 4-color
Job Code: 834522
Project Code: 09-3942
Job Template: (none)

Upload Processing Rules

Refine2Spot

3. In the **Upload Processing Rules** area, you can view the rules that are enabled for this job.

   Only staff users can enable and disable rules.

   When a user upload files, the files are processed automatically using the enabled processing rule. If more than one rule is enabled, the user selects a rule before uploading the files.

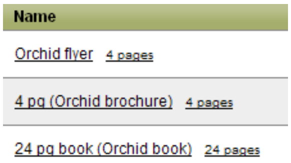
Finding and viewing jobs

On the home page, you can search for jobs and filter your view of jobs. After you select a job, you can view summary information, the job pages, the history of actions taken in the job, and a list of files that you can download.

Requirements: Your job role must include the View All Pages right and the Download Files right.

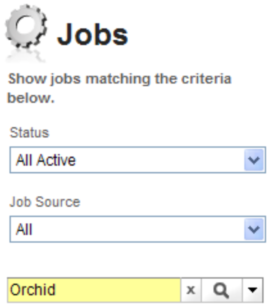
Note: If your job role does not include the View All Pages right, the **Pages** tab does not appear. If your job role does not include the Download Files right, the **Downloads** tab does not appear.

1. In the **Jobs** view, find and open the job by performing one of the following actions:
   - Click the job name in the list of recent jobs.

Name
Orchid flyer 4 pages
4 pg (Orchid brochure) 4 pages
24 pg book (Orchid book) 24 pages

   - In the **Status** list, select a job status to filter the job list, and then click the job name.
   - In the **Search Jobs** box, type a job name to search the list, and then click the job name.



Jobs

Show jobs matching the criteria below.

Status: All Active

Job Source: All

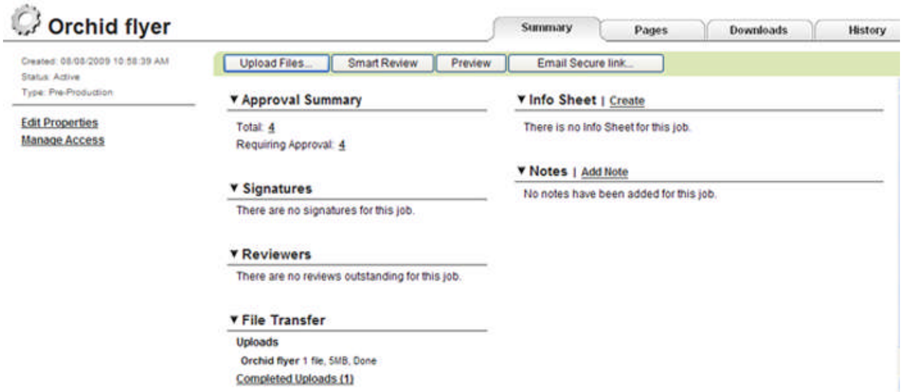
Orchid

The Job view contains four tabs: Summary, Pages, Downloads, and History. The tabs that you see depend the rights associated with your job role.

2. View details about the job.

   Summary tab: This tab provides basic information about the job and allows you to perform job-level tasks, such as editing the job properties or managing access to the job.

   Tip: Click the triangles to show or hide information for each area.



Orchid flyer

Created: 08/08/2009 10:58:39 AM
Status: Active
Type: Pre-Production

▼ Approval Summary

Total: 4
Requiring Approval: 4

▼ Signatures

There are no signatures for this job.

▼ Reviewers

There are no reviews outstanding for this job.

▼ File Transfer

Uploads
Orchid flyer 1 file, 5MB, Done
Completed Uploads (1)

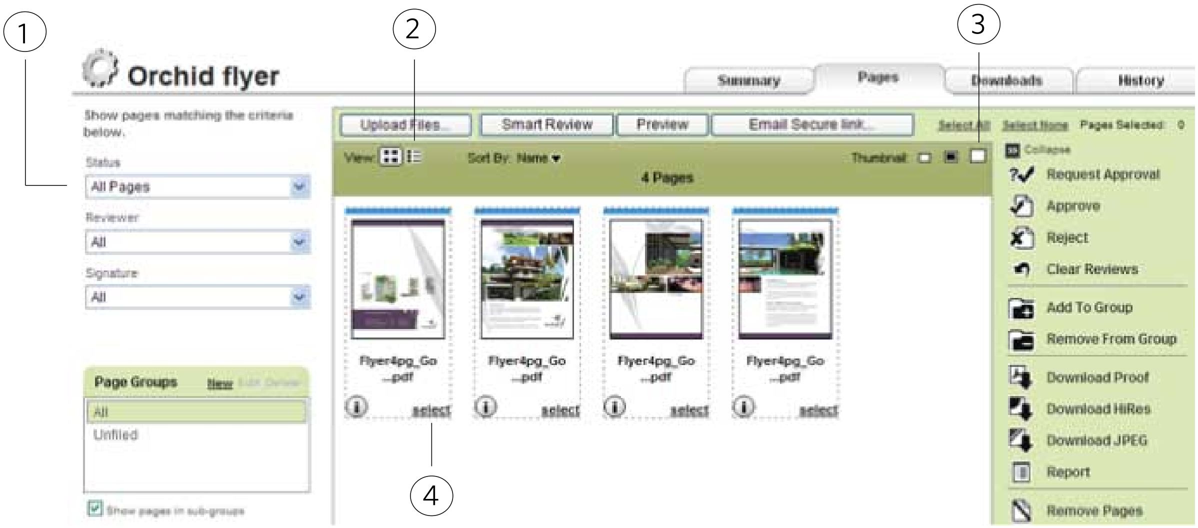
▼ Info Sheet | Create

There is no Info Sheet for this job.

▼ Notes | Add Note

No notes have been added for this job.

   Pages tab: This tab displays page thumbnails and other information about the pages in the job. Change the pages you see by filtering the pages or by selecting a page group. Set the appearance of the pages by changing the thumbnail size or the view. Select pages to perform actions on them, such as requesting reviews.


1
2
3
4
Orchid flyer
Summary
Pages
Downloads
History
Show pages matching the criteria below.
Status
All Pages
Reviewer
All
Signature
All
Page Groups
New
All
Unfiled
Show pages in sub-groups
Upload Files...
Smart Review
Preview
Email Secure link...
Select All
Select None
Pages Selected: 0
View:
Sort By: Name
Thumbnail:
4 Pages
Flyer4pg_Go...pdf
select
Collapse
Request Approval
Approve
Reject
Clear Reviews
Add To Group
Remove From Group
Download Proof
Download HiRes
Download JPEG
Report
Remove Pages

1	Filter the pages.
2	The current view is **Gallery View**. Click **List View** to see who has been asked to review or approve each page.
3	The current thumbnail size is medium. Select a check box to change the size.
4	Select a page to perform actions on it, such as requesting approval or review.

Downloads tab: This tab displays the files that you can download.

History tab: This tab displays who made changes to pages, what changes were made, and the date and time of the changes. You can choose to view the history of files uploaded, changes to the job information sheet, and a list of secure links that have been created for this job.

Managing user access to jobs

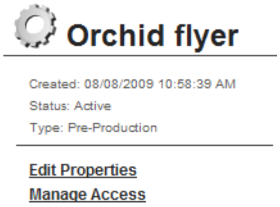
You can control which users can work with specific jobs within Prepress Portal. To do this, you *manage access*.

Requirements: Your job role must include the Manage Access right.

Managing access is not the same as assigning user roles. Access is the user's ability to work on certain jobs. User roles are the specific actions that the user can do while working in a specific job within a specific customer account. You can assign a user different roles for each job that they have access to.

1. In the **Jobs** view, click the name of the job that you want to work with.

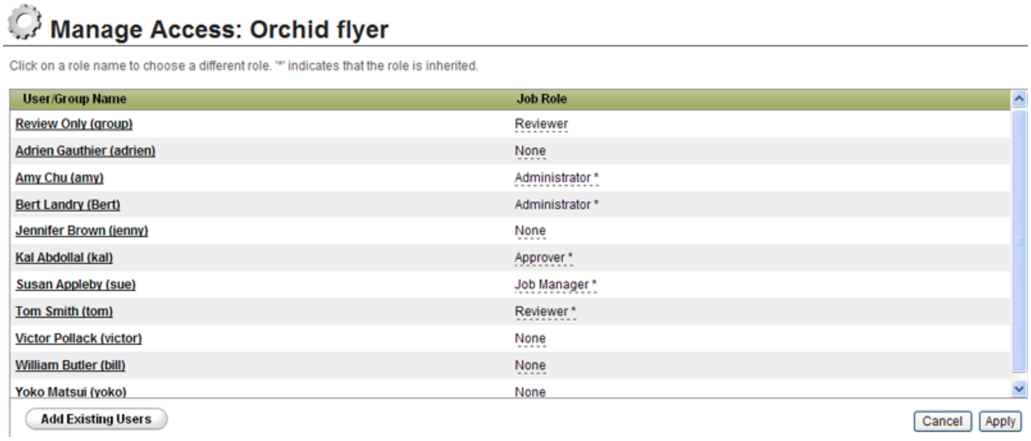
2. Click **Manage Access**.



Orchid flyer

Created: 08/08/2009 10:58:39 AM
Status: Active
Type: Pre-Production

3. To modify user access to the job, perform either of the following steps:
   - In the **Job Role** column, select a job role beside each user who should have access to this job. Select **None** beside each user who should not have access to this job.
   - If you have access to another customer's account and you want to an give their users access to the job (for example, to a graphic designer who works for several customers), click **Add Existing Users**. Expand the customer's name, select the check box beside each user who should have access to the job, and click **Select**.
4. Click **Apply**.



Manage Access: Orchid flyer

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

User/Group Name	Job Role
Review Only (group)	Reviewer
Adrien Gauthier (adrien)	None
Amy Chu (amy)	Administrator *
Bert Landry (Bert)	Administrator *
Jennifer Brown (jenny)	None
Kal Abdollal (kal)	Approver *
Susan Appleby (sue)	Job Manager *
Tom Smith (tom)	Reviewer *
Victor Pollack (victor)	None
William Butler (bill)	None
Yoko Matsui (yoko)	None

4

Working with pages

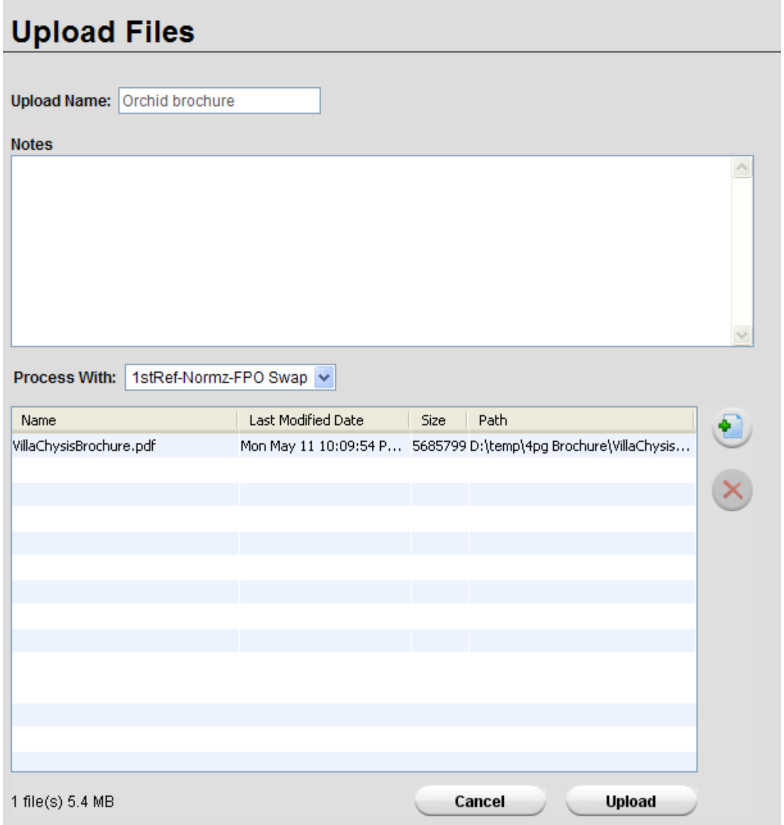
Uploading files or folders

When you upload files or folders to Prepress Portal, they become available for others to download. If the job is enabled for processing, the files also become available for review and approval.

Requirements: Your job role must include the Upload right.

1. In the **Jobs** view, click the name of the job that you want to work with.
2. On the **Summary** tab, click **Upload Files**.
3. Drag files or folders from your desktop or network into the Upload Files dialog box, or browse to locate the folders and files.
4. In the **Process With** box, select an upload processing rule.
5. If desired, type a name for the upload and type a note describing the upload.

   The note appears on the **Summary** tab and in the e-mail notification sent to users who are notified when files are uploaded.



Upload Files

Upload Name: Orchid brochure

Notes

Process With: 1stRef-Normz-FPO Swap

Name	Last Modified Date	Size	Path
VillaChysisBrochure.pdf	Mon May 11 10:09:54 P…	5685799	D:\temp\4pg Brochure\VillaChysis…

1 file(s) 5.4 MB

6. Click **Upload**.

   If you have a job role that includes the Upload Processing right, and if the job is enabled for processing, the Upload Processing window appears when the upload is finished. You can close the window; processing will continue.

Creating secure links

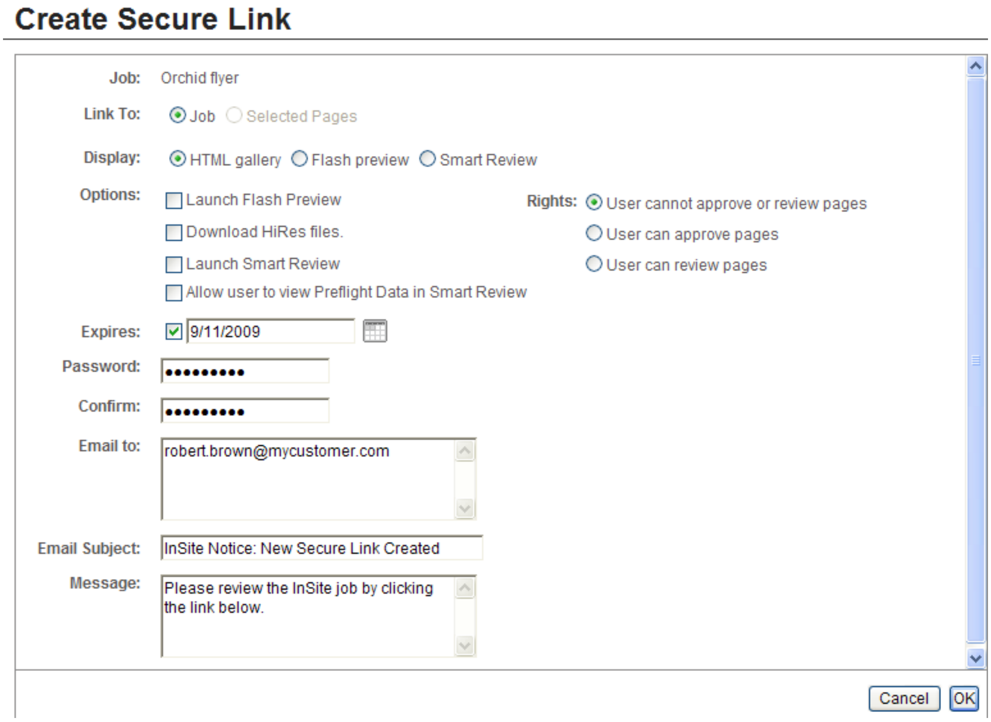
You can set up an e-mail link to the pages in a job that doesn't require the user to have a Prepress Portal account. The Secure Link feature opens a view directly into the pages that you want the user to review or approve.

Requirements: Your job role must include the Create Secure Link right.

1. On the job's **Summary** tab or **Pages** tab, click **Email Secure link**.
2. In the **Initial View** area, select how the pages will display when the user first clicks the e-mail link. For example, you can have them appear in gallery view, in a Adobe Flash® preview (where the user can flip pages) or in Smart Review (for full review capabilities).
3. If you want the user to be able to review or approve pages, select **User can review pages** or **User can approve pages**

4. Set a password that the user must enter to access the pages.

   Send the password to the user in a separate e-mail; do not include it in the secure link e-mail message.
5. Type the e-mail addresses of the users that you want to receive a secure link.



Create Secure Link

Job: Orchid flyer

Link To: ● Job ○ Selected Pages

Display: ● HTML gallery ○ Flash preview ○ Smart Review

Options: ☐ Launch Flash Preview ☐ Download HiRes files. ☐ Launch Smart Review ☐ Allow user to view Preflight Data in Smart Review

Rights: ● User cannot approve or review pages ○ User can approve pages ○ User can review pages

Expires: ☑ 9/11/2009

Password: •••••••••

Confirm: •••••••••

Email to: robert.brown@mycustomer.com

Email Subject: InSite Notice: New Secure Link Created

Message: Please review the InSite job by clicking the link below.

6. Click **OK**.

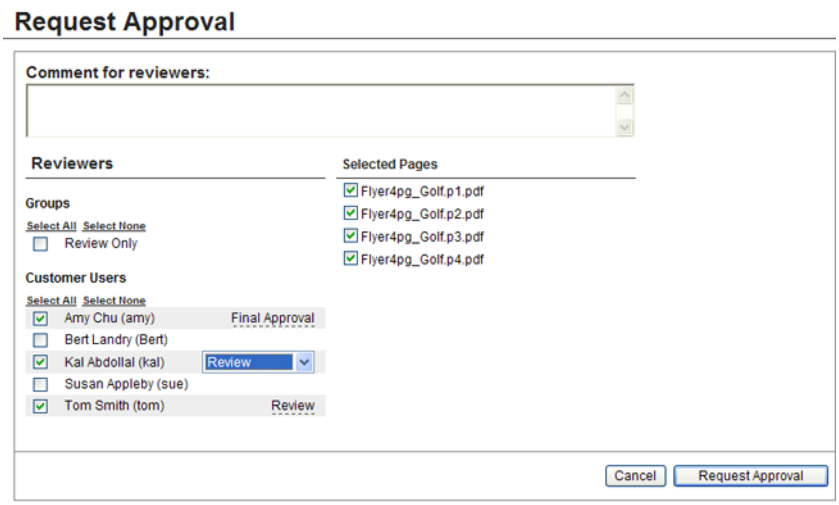
Asking users to review or approve pages

You can ask users to review pages or to give final approval for printing.

Requirements: Your job role must include the Request Approval of Work In Progress Pages right.

1. In the **Jobs** view, click the name of the job.
2. On the **Pages** tab, click **select** under the pages that you want reviewed or approved, or click **Select All**.
3. Click **Request Approval**.

4. Select the people or groups who you want to review or approve the pages. Beside each name, select **Final Approval** or **Review**.



Request Approval

Comment for reviewers:

Reviewers

Groups

☐ Review Only

Customer Users

☑ Amy Chu (amy) Final Approval
☐ Bert Landry (Bert)
☑ Kal Abdollal (kal) Review
☐ Susan Appleby (sue)
☑ Tom Smith (tom) Review

Selected Pages

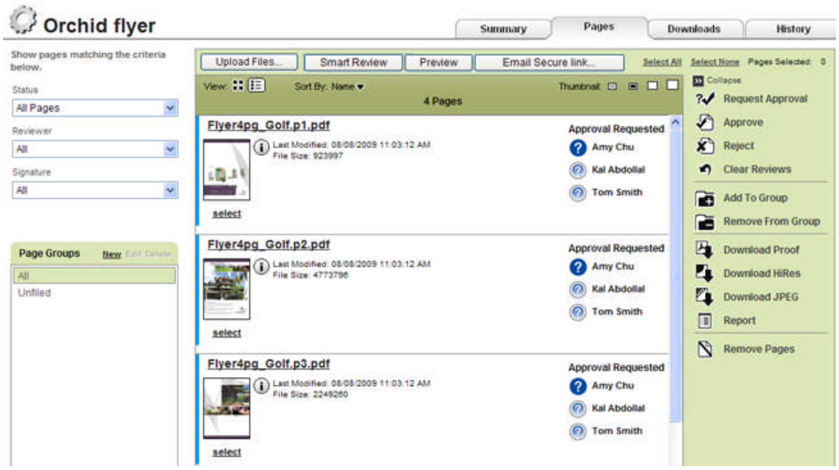
☑ Flyer4pg_Golf.p1.pdf
☑ Flyer4pg_Golf.p2.pdf
☑ Flyer4pg_Golf.p3.pdf
☑ Flyer4pg_Golf.p4.pdf

Select All Select None
Select All Select None
Cancel
Request Approval

5. Click **Request Approval**.

The **Pages** tab now shows the users who have been asked to review or approve each page.

Note: You must click **List View** ☰ to see details of the requested approvals.



Orchid flyer

Show pages matching the criteria below.

Status: All Pages
Reviewer: All
Signature: All

Page Groups
All
Unfiled

4 Pages

Flyer4pg_Golf.p1.pdf
Last Modified: 08/08/2009 11:03:12 AM
File Size: 923997
Approval Requested
Amy Chu
Kal Abdollal
Tom Smith

Flyer4pg_Golf.p2.pdf
Last Modified: 08/08/2009 11:03:12 AM
File Size: 4773796
Approval Requested
Amy Chu
Kal Abdollal
Tom Smith

Flyer4pg_Golf.p3.pdf
Last Modified: 08/08/2009 11:03:12 AM
File Size: 2249260
Approval Requested
Amy Chu
Kal Abdollal
Tom Smith

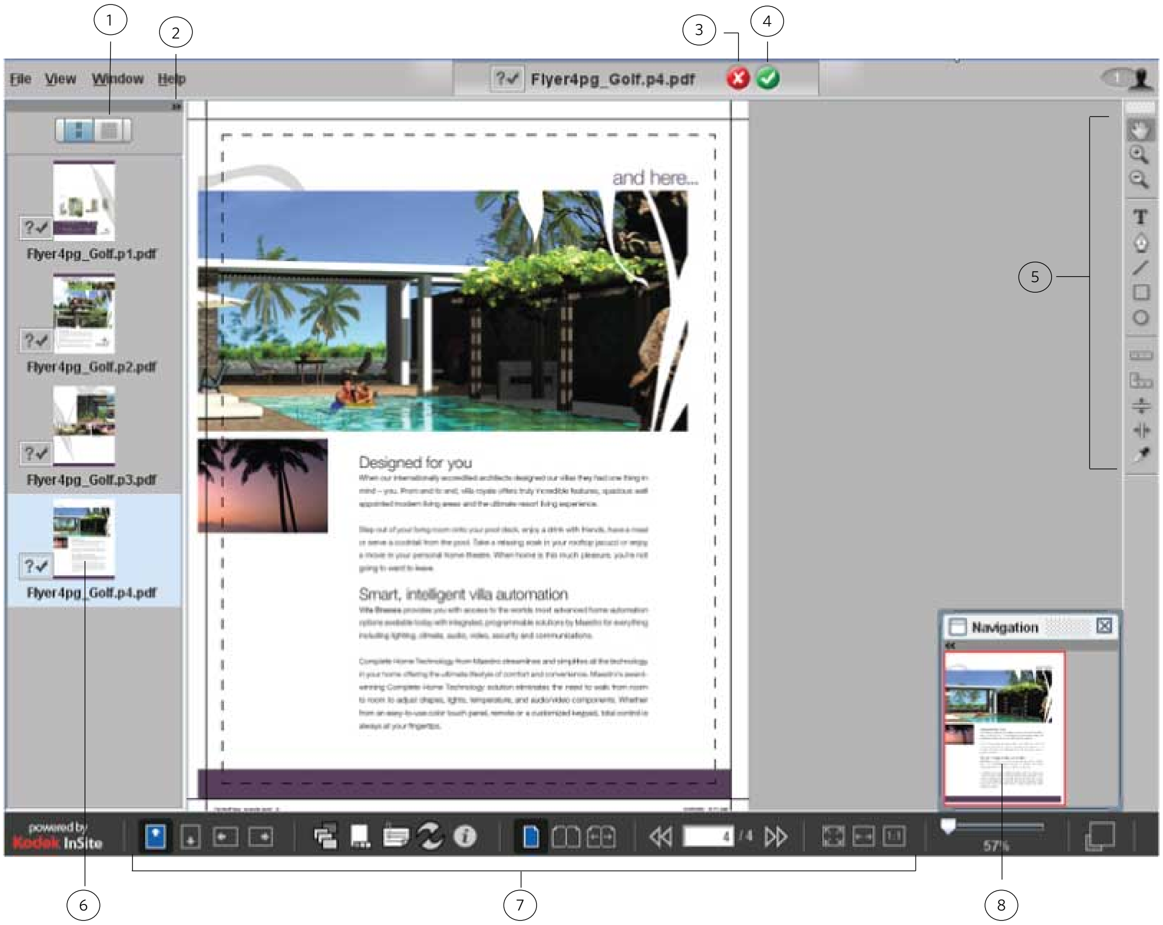
Pages Selected: 0

Summary
Pages
Downloads
History
Upload Files...
Smart Review
Preview
Email Secure link...
Select All
Select None
View:
Sort By: Name
Thumbnail:
New Edit Delete
select
select
select
Collapse
Request Approval
Approve
Reject
Clear Reviews
Add To Group
Remove From Group
Download Proof
Download HiRes
Download JPEG
Report
Remove Pages

Annotating pages in Smart Review

Requirements: Your job role must include the Annotate right.

➢ On the job's **Pages** tab, click **Smart Review** or click an image thumbnail.
The pages open in Smart Review.


1
2
3
4
5
6
7
8
File
View
Window
Help
Flyer4pg_Golf.p4.pdf
Flyer4pg_Golf.p1.pdf
Flyer4pg_Golf.p2.pdf
Flyer4pg_Golf.p3.pdf
Flyer4pg_Golf.p4.pdf
Navigation
powered by Kodak InSite
4 /4
57%

1	The current view is **Thumbnail View**. Click here to change to **List View**.
2	Undock the page list.
3	If you review the page and it is not OK, or corrections are needed, click **Reject Page**.
4	If you review the page and it is OK, click **Approve Page**.
5	If corrections are needed, use the annotation tools to mark your changes.
6	To view a different page, click the page thumbnail.
7	Use the navigation tools to zoom, pan, or rotate the image, and to switch between pages.
8	Drag the thumbnail on the navigation panel to move around the page.

Smart Review tools

Your job role determines which Smart Review tools are available to you.

Annotation tools

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

✋	Pan across the page
⊕	Zoom in on an area of the page
⊖	Zoom out on an area of the page
T	Make a text annotation
⏏	Add a text stamp
✒	Draw a free-form line
╱	Draw a straight line
□	Draw a rectangle
○	Draw an oval or circle
📏	Measure using a ruler
📐	Measure a rectangle area
⇕	Position a horizontal guide
⇔	Position a vertical guide
✎	Measure color density

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.

↑ ↓ ← →	Rotate the image
⧉	Turn separations on and off
🗋	View versions (Kodak Prinergy® only)
🗒	Open the Annotations Manager
↯	Open the Preflight Manager (Prinergy only)
ⓘ	View page information
▮	View a single page

▮▮	View a reader spread
⇆	Compare two pages
◀◀ ▶▶	Go to the previous page or the next page
⤢	Best fit to screen
↔	Fit the page to the screen width
1:1	Show the page at actual size
❐	Switch between Full Screen and Window mode

Working in a group session

When two or more people review the same page in Smart Review at the same time, it is known as a group session.

Requirements: Your job role must include the Annotate user right.

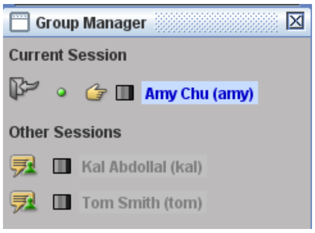
The number of users who are currently viewing the job appears in the upper-right corner of Smart Review.

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.

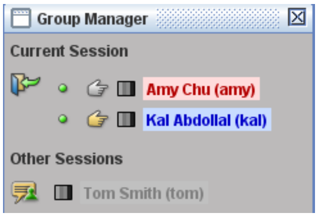
You can join a group session at any time.

1. From the **Window** menu, select **Group Manager**.
2. Click the **Join Session** 💬 icon.



You can chat with other users in the group session by selecting **WIndow** > **Chat**.

3. To leave the session, click the **Leave Session** ⚐ icon.



Group Manager

Current Session

Amy Chu (amy)

Kal Abdollal (kal)

Other Sessions

Tom Smith (tom)

Approving pages

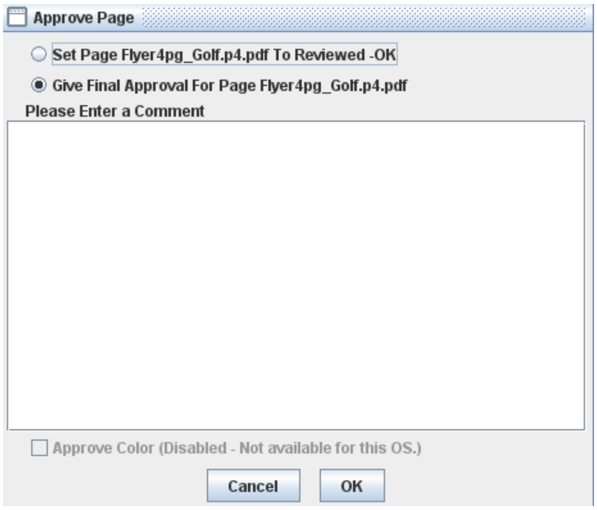
You can approve or reject pages in Smart Review or on the job's **Pages** tab. In Smart Review, you can also request corrections for pages.

Requirements: Your job role must include the Give Final Approval right.

In Smart Review, you can approve only one page at a time. On the job's **Pages** tab, you can approve multiple pages at once.

1. If you are approving a page in Smart Review, select the page, and click ✓.

   If you are approving pages on the job's **Pages** tab, select the pages, and click **Approve**.
2. Select one of the following options:
   - **Give Final Approval For Pages**: Select this option if all users have completed their reviews and the pages are ready for production. Users can no longer annotate the pages.
   - **Set Pages To Reviewed-OK**: Select this option if you have completed your review and have found no errors, but other users have not yet completed their reviews. Users can still annotate the pages.



Approve Page

○ Set Page Flyer4pg_Golf.p4.pdf To Reviewed -OK

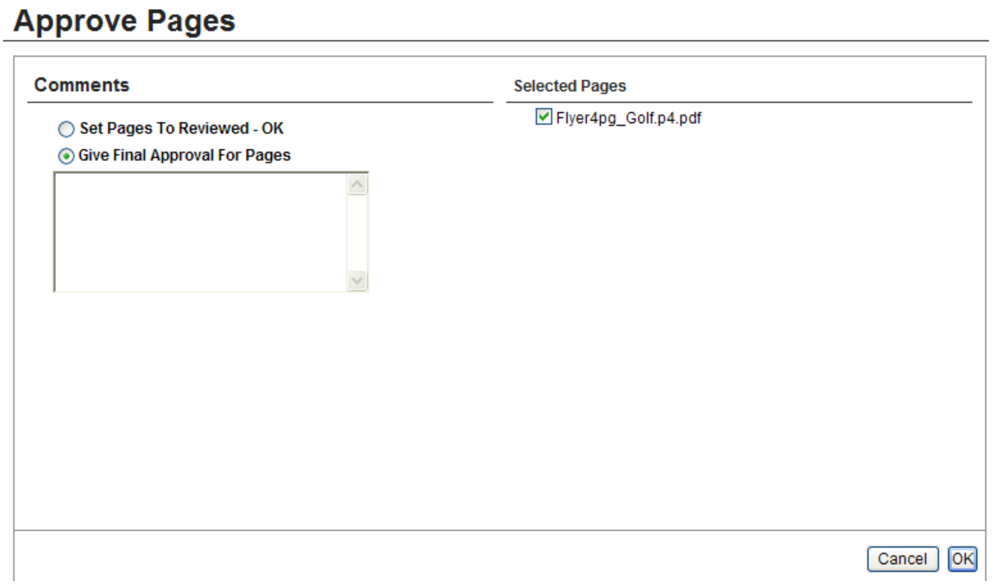
● Give Final Approval For Page Flyer4pg_Golf.p4.pdf

Please Enter a Comment

☐ Approve Color (Disabled - Not available for this OS.)

Cancel OK

Figure 1: Approving pages in Smart Review



Approve Pages

Comments

○ Set Pages To Reviewed - OK

● Give Final Approval For Pages

Selected Pages

☑ Flyer4pg_Golf.p4.pdf

Figure 2: Approving pages on the Pages tab

3. Click **OK**.

Rejecting pages or requesting corrections

You can reject pages in Smart Review or on the job's **Pages** tab. In Smart Review, you can also request corrections for pages.

Requirements: Your job role must include the Give Final Approval right.

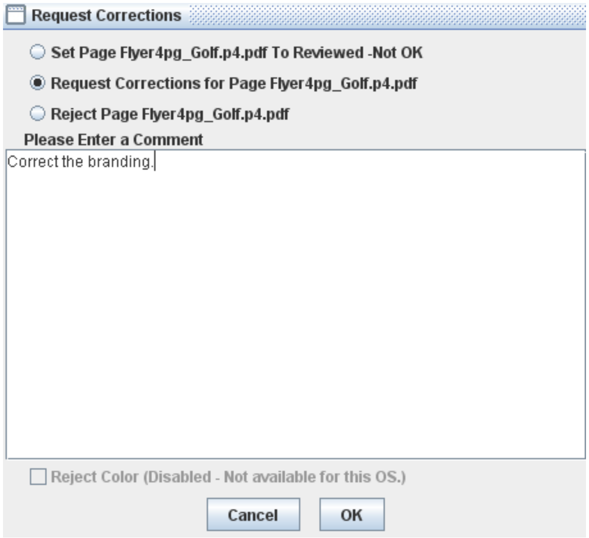
In Smart Review, you can reject and request corrections on only one page at a time. On the job's **Pages** tab, you can reject multiple pages at once.

1. If you are rejecting a page or requesting corrections in Smart Review, select the page, and click ✖.

   If you are rejecting pages on the job's **Pages** tab, select the pages, and click **Reject**.
2. Select one of the following options:
   - **Reject Pages**: Select this option if the pages contain errors that cannot be corrected—for example, the wrong files were uploaded. Users can no longer annotate the pages.
   - **Request Corrections for Page**: (Only available in Smart Review) Select this option if the page contains errors that can be corrected—for example, the text contains a typographical error. Users can no longer annotate the pages.

     An e-mail notification is sent to the customer CSR or job CSR, and to anyone else who asked to receive these notifications.
   - **Set Page To Reviewed-Not OK**: Select this option if you have completed your review and found errors in the page, but other

users have not yet completed their reviews. Users can still annotate the pages.



Request Corrections

○ Set Page Flyer4pg_Golf.p4.pdf To Reviewed -Not OK

● Request Corrections for Page Flyer4pg_Golf.p4.pdf

○ Reject Page Flyer4pg_Golf.p4.pdf

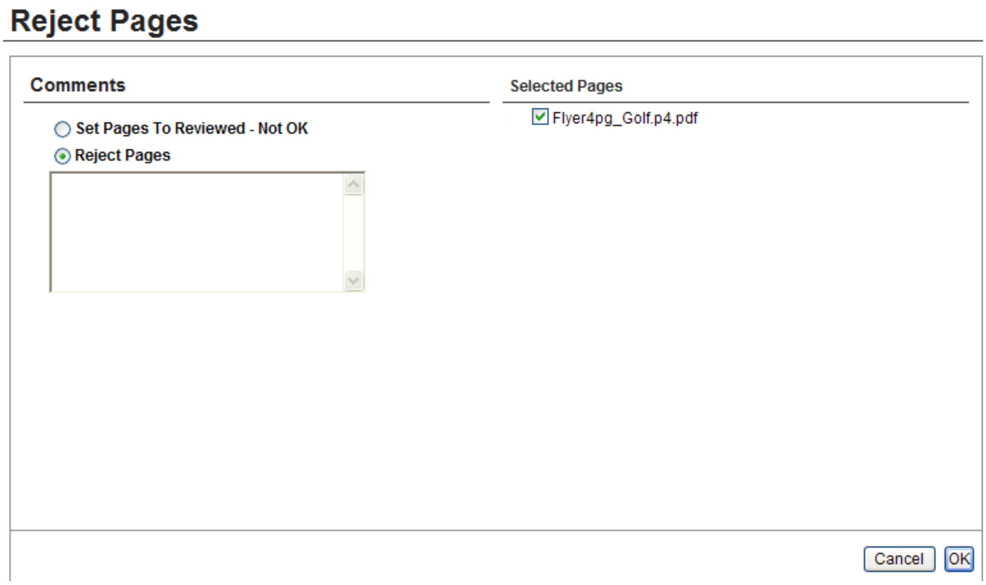
Please Enter a Comment

Correct the branding.

☐ Reject Color (Disabled - Not available for this OS.)

Figure 3: Requesting corrections in Smart Review

Figure 4: Rejecting pages on the Pages tab



Reject Pages

Comments

○ Set Pages To Reviewed - Not OK

● Reject Pages

Selected Pages

☑ Flyer4pg_Golf.p4.pdf

3. Click **OK**.

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