



Kodak

InSite Prepress Portal

System
Version 5.5

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.

Logging On to Prepress Portal

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

Important: On a Mac® computer that is running Apple Safari™ software, you must allow files to open 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 <http://ecentral.graphics.kodak.com/>.

1. In your browser, type the address of your printer's Prepress Portal home page.
2. On the Login page, type your user name and password, and select a language.
3. Click **Login**.

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 ?



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.

- If you are already logged in, on the footer of any page, click **System Diagnostics**.
- If you are not already logged in, on the Login page, click **System Diagnostics**.

Username:

Password:

Language:

[System Diagnostics](#)

[Forgot Your Password?](#)

Changing Your Password

You can change your own password. Your printer 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. In the software, in the top-right corner of the toolbar, click your name.



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

User Information

Unique Username *

Your current password *

New Password *

Confirm Password *

4. Click **Update**.

Logging Off of Prepress Portal

- In the software, in the top-right corner of the toolbar, 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.

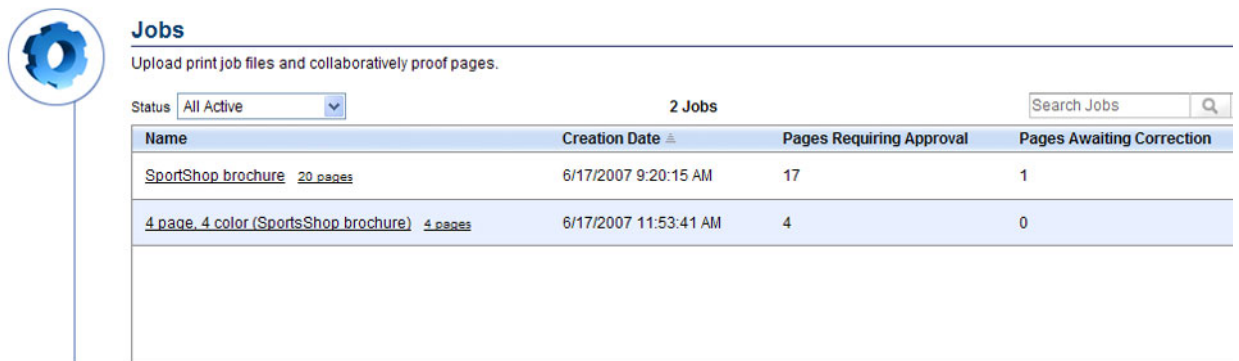
If you cannot perform an action described in this guide, you may not have the required roles or rights. Contact your printer or system administrator for assistance.

Finding and Viewing Your Jobs

On the home page you can see an overview of your most recent jobs.

- If you see the job that you want to work on, click the job name to open the job.
- If you don't see the job that you want to work on, filter or search the job list:
 - In the **Status** list, select a job status to filter the job list.
 - In the **Search** box, type a job name to search the list.

Click on the job name to open the job.



Jobs

Upload print job files and collaboratively proof pages.

Status:

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 the rights associated with your job role. If you do not see the **Downloads** tab, your job role does not include Downloads rights.

Summary Tab

When you click on a job name, the job opens on the **Summary** tab. The **Summary** tab provides basic information about the job. On this tab, you perform job-level tasks, such as editing the job properties, or managing access to the job.

The screenshot shows the 'Sport Shop Brochure' job page. At the top, there are tabs for 'Summary', 'Pages', 'Downloads', and 'History'. Below the tabs, there are buttons for 'Upload Files...', 'Smart Review', and 'Preview'. On the left side, there is a sidebar with the job name and metadata: 'Created: 6/6/2008 3:44:41 PM', 'Status: Active', and 'Type: Pre-Production'. Below this, there are links for 'Edit Properties' and 'Manage Access'. The main content area is divided into several sections, each with a collapse/expand triangle icon: 'Approval Summary' (Total: 20, Requiring Approval: 17, Approved: 1, Rejected: 1, Awaiting Correction: 1), 'Info Sheet' (with a 'Create' button), 'Signatures' (There are no signatures for this job.), 'Reviewers' (listing Bert Landry: 1, Annie Approver: 1, and Adrien Gauthier: 1), and 'File Transfer'. There is also a 'Notes' section with an 'Add Note' button, stating 'No notes have been added for this job.'

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

Pages Tab

Click the **Pages** tab to see page thumbnails and other information about the pages in the job. Change the pages you see by filtering the pages or 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.

Filter the pages.

Choose Gallery view or 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 of transactions, uploads, or changes to the job information sheet.

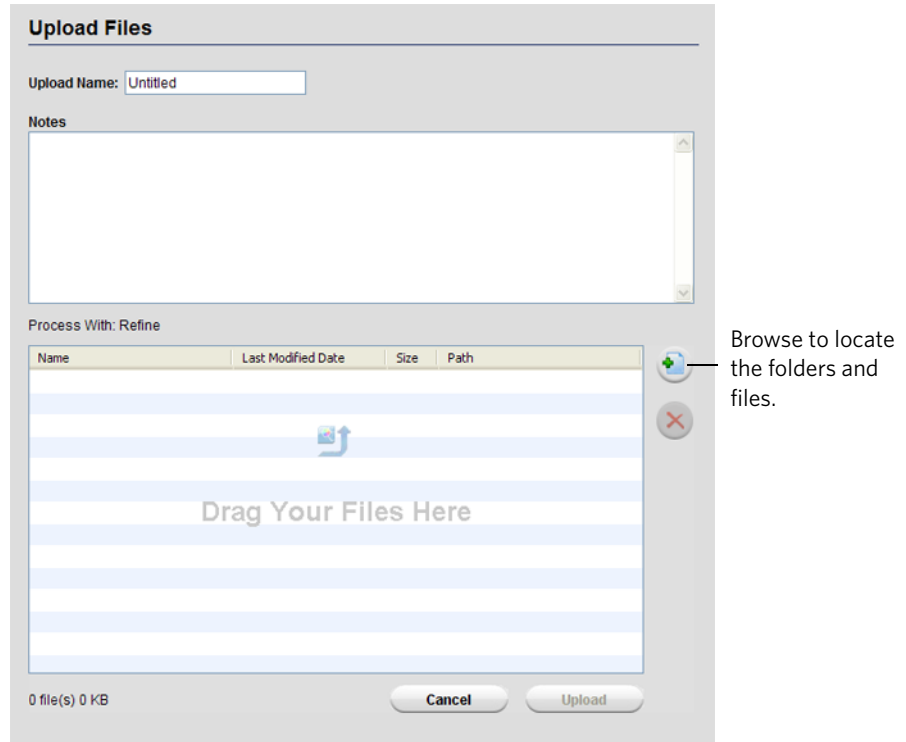
Uploading Files or Folders to Your Printer

When you upload files or folders to Prepress Portal, they are copied to 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.

1. In the Jobs view, click the name of the job 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. If desired, type a name for the upload and type a note describing the upload. The note appears on the job's **Summary** tab and in the e-mail 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 pages for specific users to review or to give final approval for printing.

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

- 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

20pg_SportsShop_US.p1.pdf

Groups

Select All Select None

Approval

Customer Users

Select All Select None

1 ユーザー (じゅんこ)

Adrien Gauthier (adrien) Final Approval

Asne Ullmann (asne)

Astrid Bengtsson (Astrid) Review

Benedikt Bauer (benedikt)

Bert Landry (bert) Approve Color

Fujisaki Yoko (yoko)

Cancel Request Approval

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

Click the review label to change the type of review.

- Click **Request Approval**.

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

Sport Shop Brochure

Summary Pages Downloads History

Show pages matching the criteria below.

Status: All Pages

Reviewer: All

Signature: All

Upload Files... Arrange Pages Preview Smart Review

Select All Select None Pages Selected: 0

View: Sort By: Name

Thumbnail: Collapse

20 Pages

20pg_SportsShop_US.p1.pdf

Last Modified: 6/6/2008 3:53:05 PM
File Size: 35712826
Color Target (Job): SWOP

Approval Requested (Color Required)

- Bert Landry
- Adrien Gauthier
- Annie Approver

Request Approval

Approve

Reject

Clear Reviews

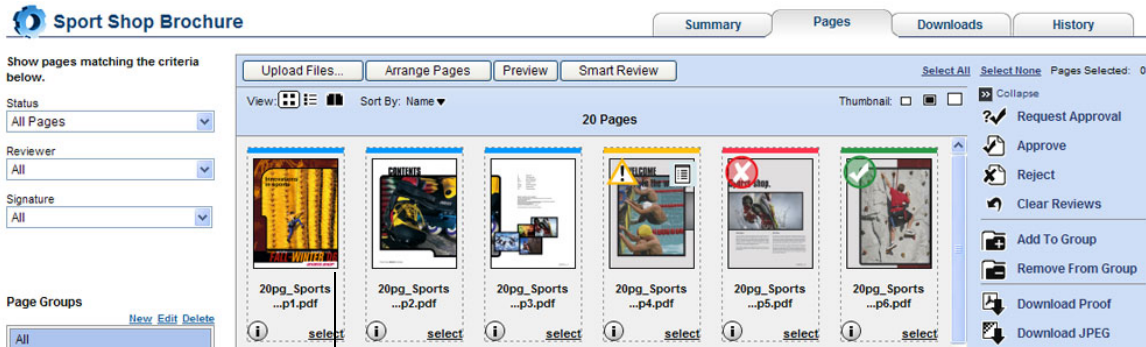
Add To Group

Remove From Group

select

Annotating Pages in Smart Review

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



Click the page thumbnail to view the page in Smart Review.

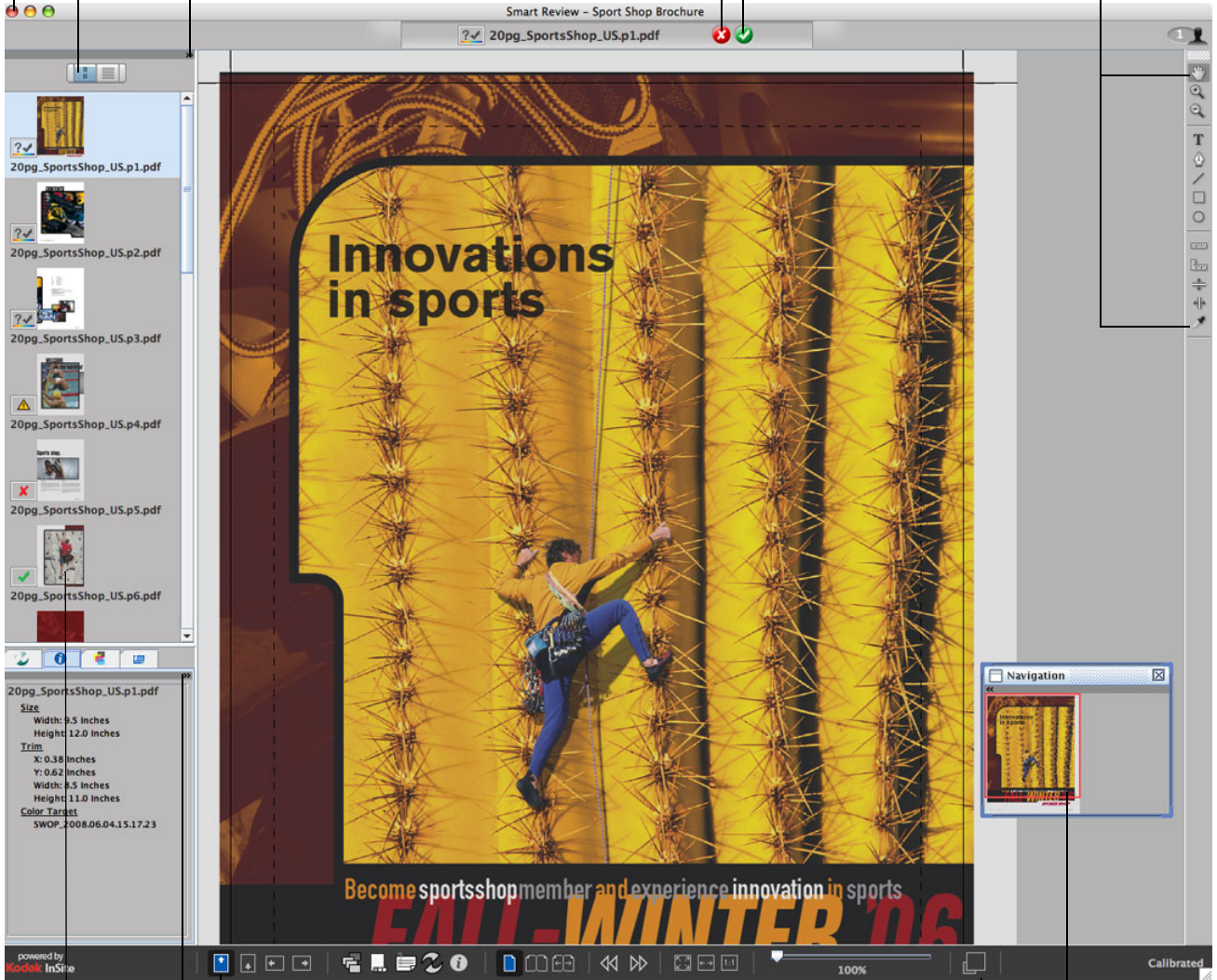
Click **Close** to end the Smart Review session.

If you review a page and it is OK, click **Approve Page**.

Choose Thumbnail or List view. Undock the page list.

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

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



To view a different page, click the page thumbnail.

Undock the selected panel.

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

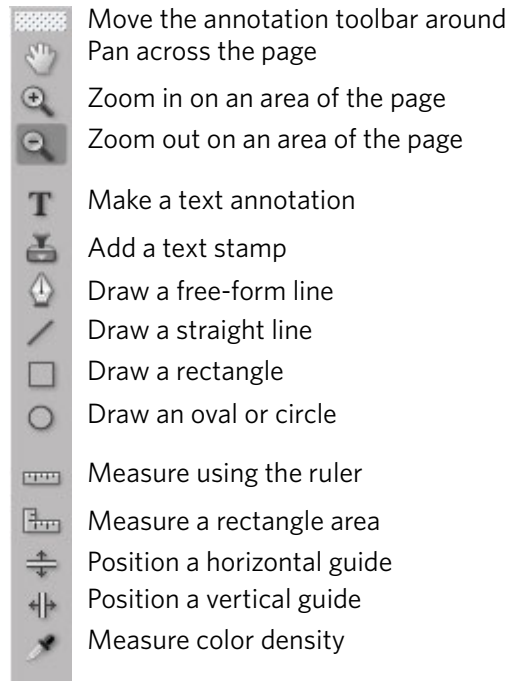
Click the navigation panel to quickly move around the page.

Smart Review Tools

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

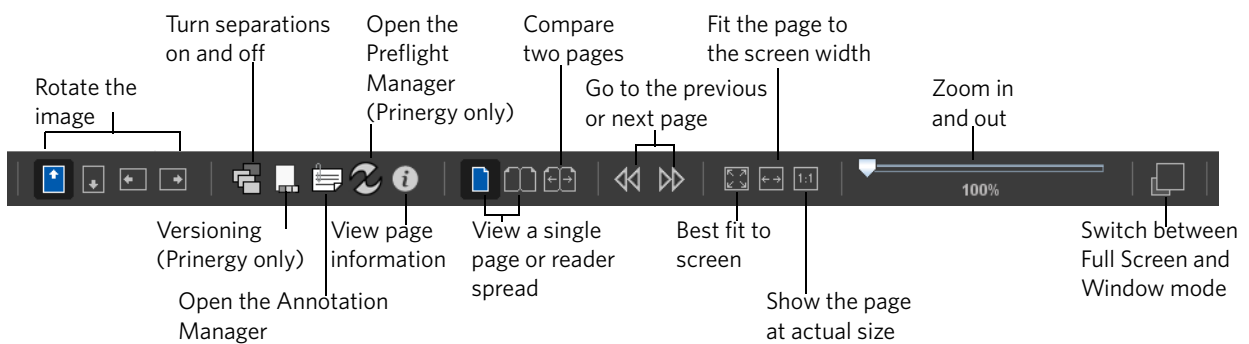
Annotation Tools

The annotation tools appear on the right side of the window when you open Smart Review. Grey highlighting indicates that 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.



Working in 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. 

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



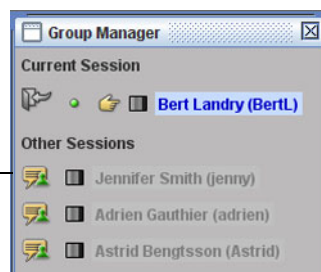
Reviewer's monitor is color-calibrated.



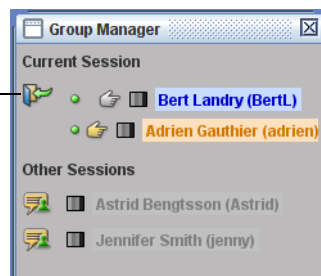
Reviewer's monitor is not color-calibrated.

You can join in a group session at any time.

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



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



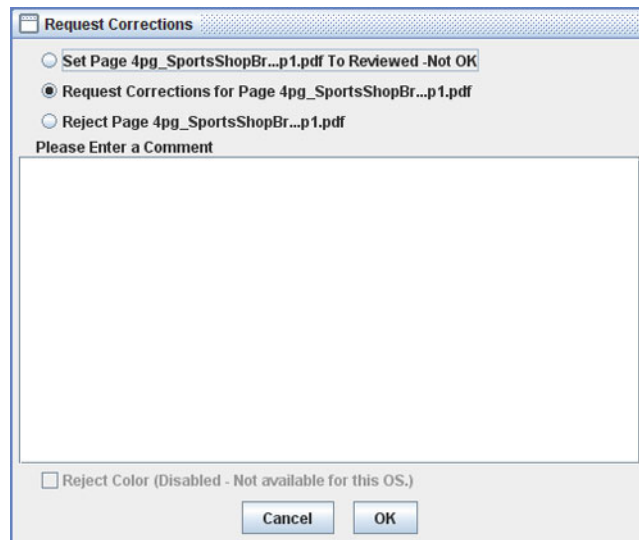
Tip: To open a chat window, from the **Window** menu, select **Chat**.

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 12.

Prerequisite: Your job role must contain the Give Final Approval right.

1. In Smart Review, click **Reject Page**.
2. Ensure the **Request Corrections** option is selected, and enter a comment to explain the corrections you are requesting.



3. Click **OK**.

Note: When corrections are requested on a page, an e-mail notification is sent to the Customer Service Representative (CSR) and anyone else who asked to receive these notifications.

Approving or Rejecting a Page

When you are satisfied with a page, approve it. Reject a page if there are problems with it that cannot be corrected—for example, if it is the wrong page. To request corrections to a page, see the preceding section.

Note: You can also approve or reject pages from Smart Review.

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

1. With the job open, 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**.

4. Perform one of the following actions:
 - 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	Selected Pages
<input type="radio"/> Set Pages To Reviewed - OK <input checked="" type="radio"/> Give Final Approval For Pages <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>	<input checked="" type="checkbox"/> 4pg_SportsShopBroch_US.p1.pdf

Reject Pages

Comments	Selected Pages
<input type="radio"/> Set Pages To Reviewed - Not OK <input checked="" type="radio"/> Reject Pages <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>	<input checked="" type="checkbox"/> 4pg_SportsShopBroch_US.p1.pdf

Cancel OK

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

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.

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**.

The screenshot shows the 'Administration' page with a navigation bar at the top. Below the navigation bar, there are three main sections: 'General Information', 'Smart Review Annotation Stamps', and 'Users And Groups'. The 'General Information' section is expanded, showing details for 'Top Printing' including address, customer number, and CSR. The 'Smart Review Annotation Stamps' section shows 'None'. The 'Users And Groups' section at the bottom contains four buttons: 'Import Users', 'Manage Access', 'Create User', and 'Create User Group'. The 'Create User' button is highlighted with a red box, and a line connects it to the next step.

3. Type the user information and assign roles to the user. Click **Create**.

The screenshot shows the 'Create User' form. At the top, there is a red warning message: 'Fields marked with * are required'. On the right, there is a checked checkbox for 'Email user about new account'. The form is divided into several sections:

- User Information:** Includes fields for 'Unique Username *' (filled with 'sam'), 'Password *', 'Confirm Password *', 'First Name *' (filled with 'Sam'), 'Last Name *' (filled with 'Morely'), and an 'Init.' field.
- Email Options:** Includes 'Email *' (filled with 'sam.morely@topprinting.com'), 'Email Language' (set to 'English'), and checkboxes for 'Disable all Email notifications' and 'Disable event notifications'. There is a 'Subscribe to Events' button.
- Contact Information:** Includes fields for 'Title', 'Office Phone', 'Cell', 'Home Phone', 'Pager', and 'Fax'.
- Expiry:** Includes radio buttons for 'Account Does Not Expire' (selected) and 'Account Expires In' (set to '0' days).
- User Roles:** Shows 'Customer: Top Printing' with a note 'User has access to specified jobs in this customer.'. It includes an 'Admin Role' dropdown (set to 'Customer User'), a checked checkbox for 'Allow access to all current and future jobs', and a 'Default Job Role' dropdown (set to 'Reviewer').

At the bottom right, there are 'Cancel' and 'Create' buttons.

Creating User Groups

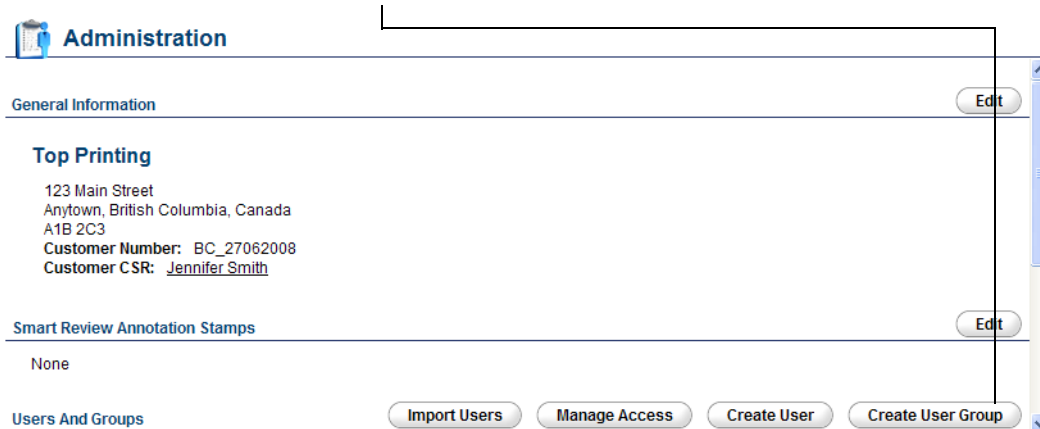
Create groups to streamline the process of setting job access and requesting user reviews when there are many people with different roles and responsibilities working on jobs. For example, if you have one group of users who only review pages, create a Review Only group.

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.

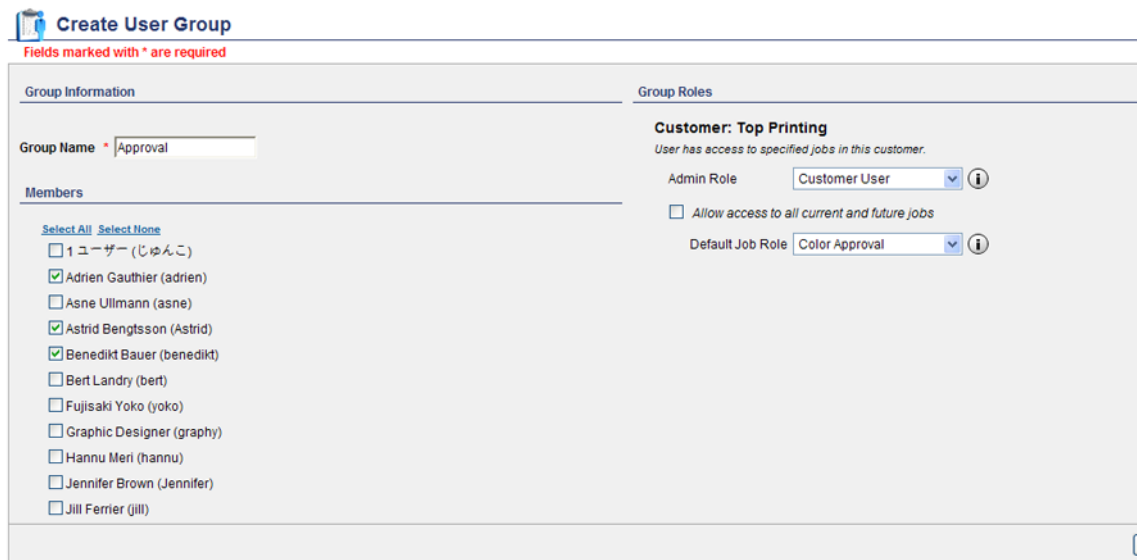
1. On the toolbar, click **Administration**.



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. Click **Create**.



Managing Access to Jobs

You can control who can work on your jobs. You may want to give a particular user access to specific jobs, but not all jobs. To do this, you *manage access*.

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

1. In the Jobs view, click the name of the job that you want to work with.
2. On the **Summary** tab, click **Manage Access**.



3. Under **Job Role** for the user, change the role as needed.

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.

4. Click **Apply**.