



**Kodak**

# InSite Prepress Portal

System  
Version 6.0

**Quick Start Guide**  
English

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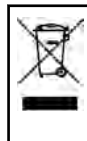
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# 1

## 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:

Password:

Language:

Remember me on this computer.

[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 \*

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  ⓘ

Allow access to all current and future jobs

Default Job Role  ⓘ

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

### Job Role: Approver

<b>Page Management</b> <input checked="" type="checkbox"/> View All Pages <input checked="" type="checkbox"/> Upload <input checked="" type="checkbox"/> Upload Processing
<b>Approval Workflow</b> <input checked="" type="checkbox"/> Annotate <input checked="" type="checkbox"/> Request Approval of Work In Progress Pages <input checked="" type="checkbox"/> Give Final Approval
<b>Page Groups</b> <input checked="" type="checkbox"/> Assign Pages To Groups <input checked="" type="checkbox"/> Manage Page Groups
<b>Downloads</b> <input checked="" type="checkbox"/> Download Files <input checked="" type="checkbox"/> Download Hi Res <input checked="" type="checkbox"/> Download JPEG Proof <input checked="" type="checkbox"/> Download PDF Proof
<b>Jobs</b> <input checked="" type="checkbox"/> Create Jobs <input checked="" type="checkbox"/> Manage Jobs <input checked="" type="checkbox"/> Manage Access <input checked="" type="checkbox"/> Create Secure Link
<b>Color Management</b> <input checked="" type="checkbox"/> View Color Management <input checked="" type="checkbox"/> Edit Color Management
<b>Job Info Sheet:</b> <input type="radio"/> No Access <input type="radio"/> View only <input checked="" type="radio"/> View and Edit
<b>Smart Review</b> <input checked="" type="checkbox"/> 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**.

A screenshot of the 'Administration' page in a web application. The page has a header with a document icon and the title 'Administration'. Below the header is a sub-section 'General Information' with an 'Edit' link. The main content area is titled 'Top Printing' and contains contact information: '123 Main Street, Anytown, British Columbia, Canada, V1V 2C2', 'Phone: 250-555-1234', 'Fax: 250-555-1235', 'Customer Number: BC\_27062009', and 'Customer CSR: Janet.csr'. Below this is another sub-section 'Smart Review Annotation Stamps' with an 'Edit' link and the text 'None'. At the bottom of the page is a navigation bar with links: 'Users And Groups', 'Create User Group', 'Create User', 'Manage Access', and 'Import Users'.

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

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 Roles
<p>Group Name * <input type="text"/> (Review Only)</p> <p><b>Members</b></p> <p><a href="#">Select All</a> <a href="#">Select None</a></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Adrien Gauthier (adrien)</li><li><input checked="" type="checkbox"/> Amy Chu (amy)</li><li><input type="checkbox"/> Bert Landry (Bert)</li><li><input type="checkbox"/> Jennifer Brown (jenny)</li><li><input checked="" type="checkbox"/> Kal Abdollat (kal)</li><li><input checked="" type="checkbox"/> Susan Appleby (sue)</li><li><input type="checkbox"/> Tom Smith (tom)</li></ul>	<p><b>Customer: Top Printing</b></p> <p>User has access to specified jobs in this customer.</p> <p>Admin Role <input type="text" value="Customer User"/> ⓘ</p> <p><input type="checkbox"/> Allow access to all current and future jobs</p> <p>Default Job Role <input type="text" value="Reviewer"/> ⓘ</p>
<p><input type="button" value="Cancel"/> <input type="button" value="Create"/> <input type="button" value="Create"/></p>	

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**.



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.



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**.

- 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

Cancel Update

- 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.

- 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
<a href="#">Orchid flyer</a> 4 pages
<a href="#">4 pg (Orchid brochure)</a> 4 pages
<a href="#">24 pg book (Orchid book)</a> 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

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

Summary | Pages | Downloads | History

Upload Files... Smart Review Preview Email Secure link...

▼ **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, 518B, 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	Filter the pages.
2	The current view is <b>Gallery View</b> . Click <b>List View</b> 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

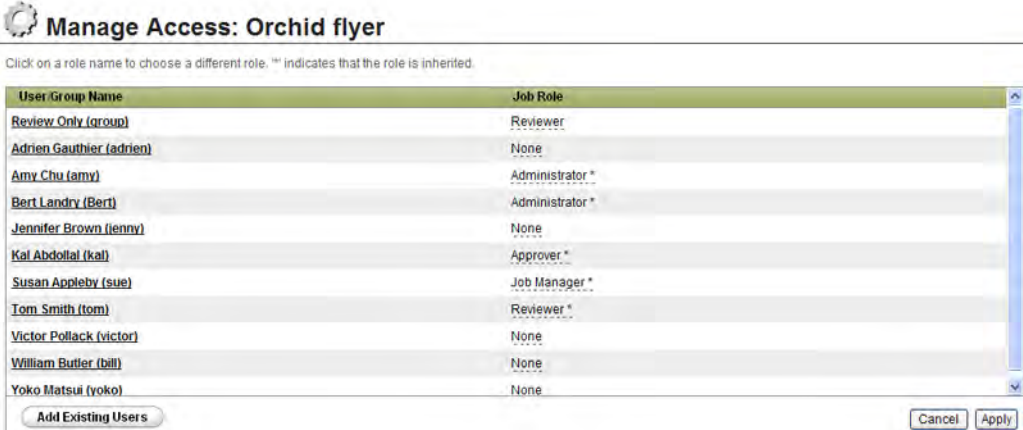
---

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

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 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
<a href="#">Review Only (group)</a>	<a href="#">Reviewer</a>
<a href="#">Adrien Gauthier (adrien)</a>	None
<a href="#">Amy Chu (amy)</a>	Administrator *
<a href="#">Bert Landry (Bert)</a>	Administrator *
<a href="#">Jennifer Brown (jenny)</a>	None
<a href="#">Kal Abdollal (kal)</a>	Approver *
<a href="#">Susan Appleby (sue)</a>	Job Manager *
<a href="#">Tom Smith (tom)</a>	Reviewer *
<a href="#">Victor Pollack (victor)</a>	None
<a href="#">William Butler (bill)</a>	None
<a href="#">Yoko Matsui (yoko)</a>	None



# 4

## Working with pages

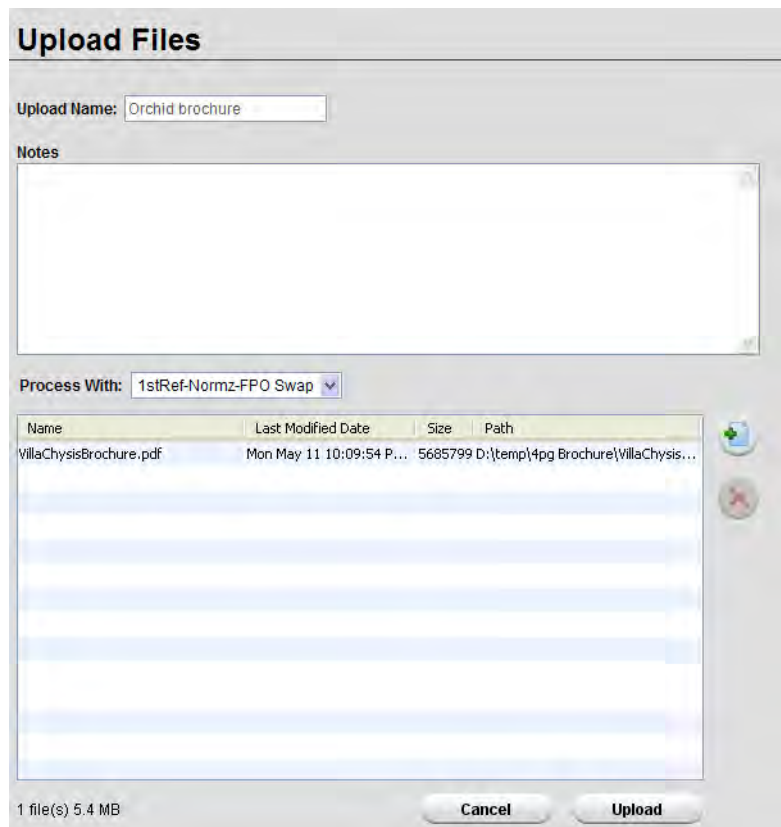
### Uploading files or folders

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.



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

The screenshot shows a 'Create Secure Link' dialog box with the following fields and options:

- 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:** [masked]
- Confirm:** [masked]
- 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.

Buttons: Cancel, OK

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**.

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

### Request Approval

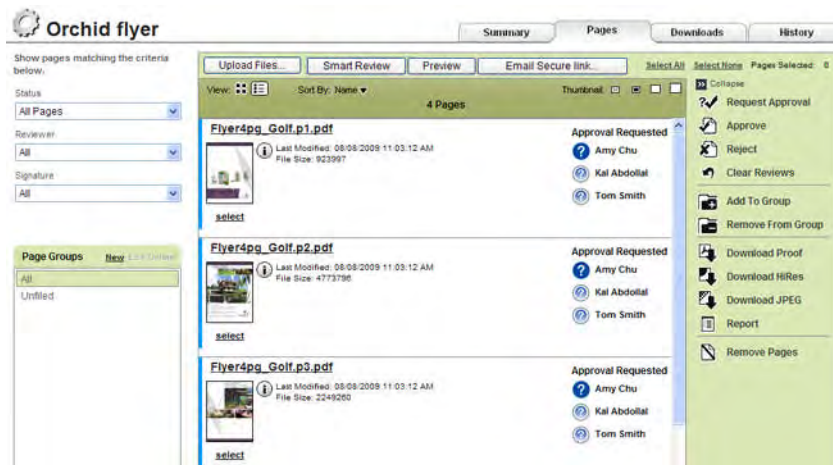
Comment for reviewers:

Reviewers	Selected Pages
<p><b>Groups</b></p> <p>Select All Select None</p> <p><input type="checkbox"/> Review Only</p>	<p><input checked="" type="checkbox"/> Flyer4pg_Golf.p1.pdf</p> <p><input checked="" type="checkbox"/> Flyer4pg_Golf.p2.pdf</p> <p><input checked="" type="checkbox"/> Flyer4pg_Golf.p3.pdf</p> <p><input checked="" type="checkbox"/> Flyer4pg_Golf.p4.pdf</p>
<p><b>Customer Users</b></p> <p>Select All Select None</p> <p><input checked="" type="checkbox"/> Amy Chu (amy) Final Approval</p> <p><input type="checkbox"/> Bert Landry (Bert)</p> <p><input checked="" type="checkbox"/> Kal Abdollal (kal) Review</p> <p><input type="checkbox"/> Susan Appleby (sue)</p> <p><input checked="" type="checkbox"/> Tom Smith (tom) Review</p>	

- Click **Request Approval**.

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

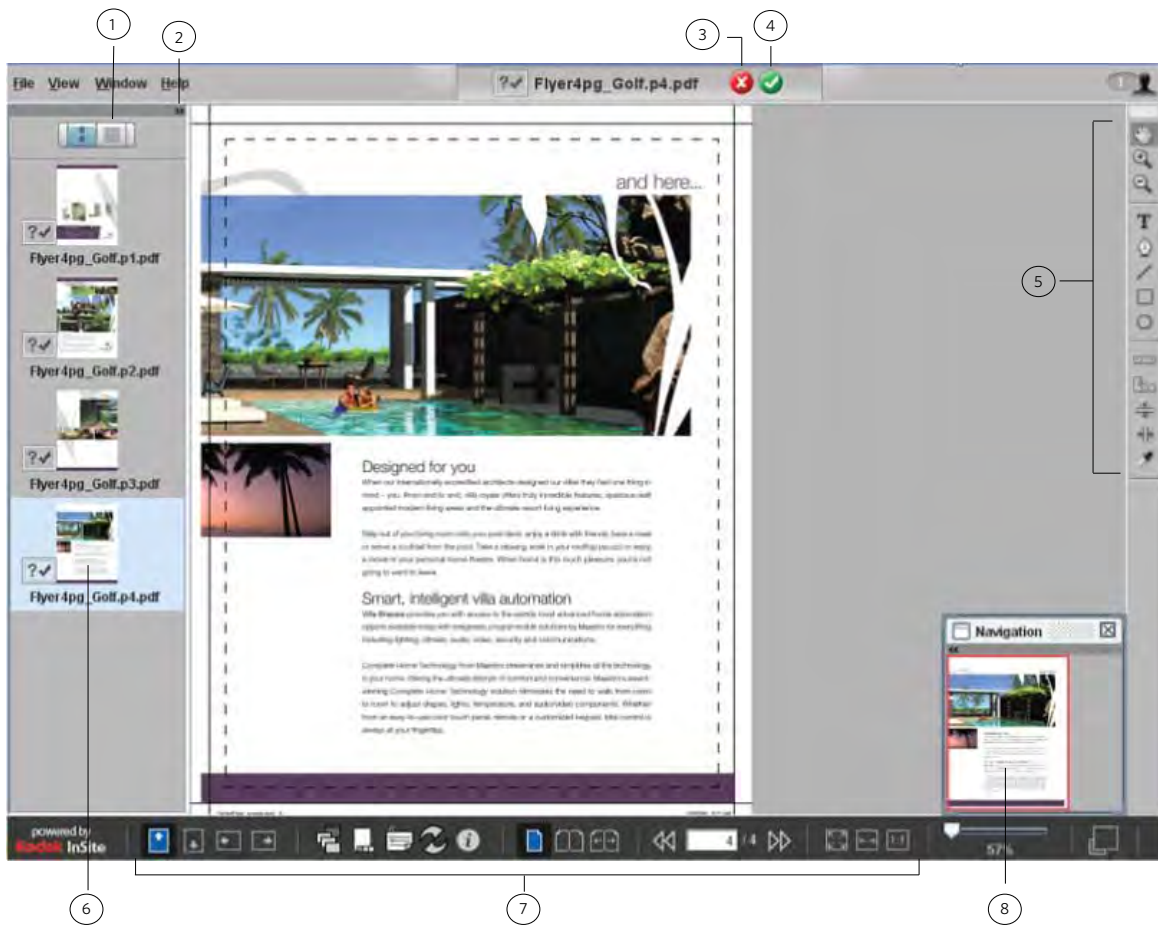
**Note:** You must click **List View** (≡) to see details of the requested approvals.



## 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	The current view is <b>Thumbnail View</b> . Click here to change to <b>List View</b> .
2	Undock the page list.
3	If you review the page and it is not OK, or corrections are needed, click <b>Reject Page</b> .
4	If you review the page and it is OK, click <b>Approve Page</b> .
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
	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
	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.

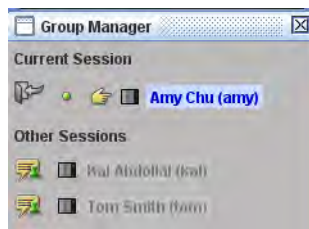


The icon beside a reviewer's name indicates whether that person is using a calibrated monitor.

	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**.

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




## 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.

- 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**.
- 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.

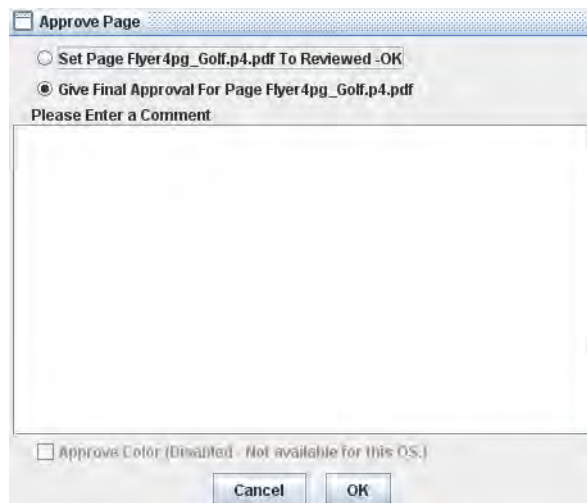


Figure 1: Approving pages in Smart Review

## Approve Pages

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.

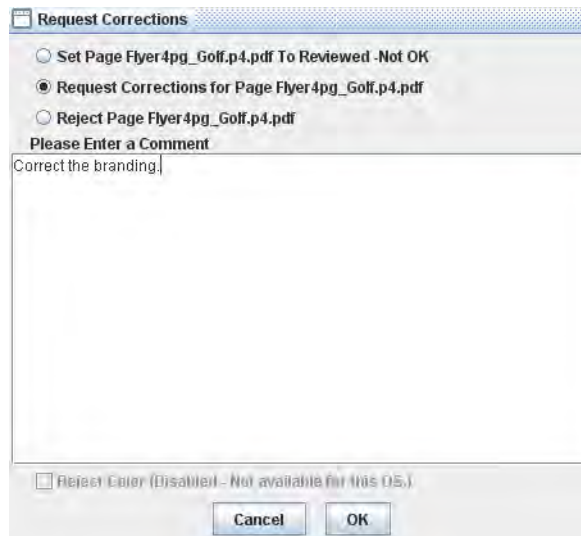
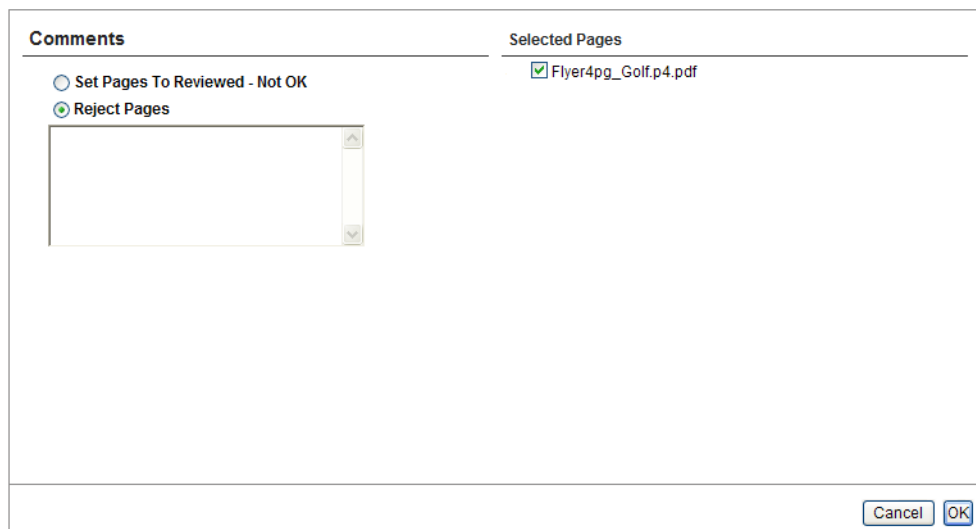


Figure 3: Requesting corrections in Smart Review

Figure 4: Rejecting pages on the Pages tab

## Reject Pages



3. Click **OK**.

# Kodak



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