



# InSite Prepress Portal

System

Version 7.0

## Quick Start Guide

English

DRAFT

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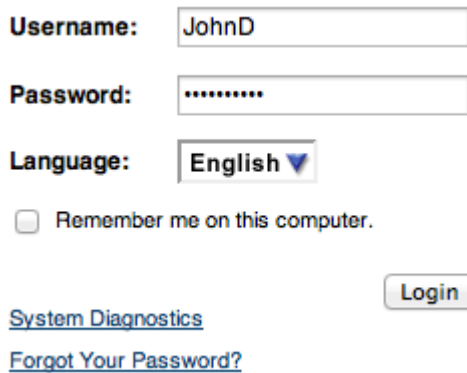
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## What is InSite Prepress Portal?

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 and off

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



The screenshot shows a login form with the following elements:

- Username:** A text input field containing "JohnD".
- Password:** A text input field containing seven asterisks "\*\*\*\*\*".
- Language:** A dropdown menu showing "English" with a downward arrow.
- Remember me on this computer.
- Login** button.
- [System Diagnostics](#) link.
- [Forgot Your Password?](#) link.

2. Type your user name and password, select a language, and click **Login**.
3. To log off, click **Logout** in the top-right corner of the toolbar.

## Checking your system configuration

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

- Click **System Diagnostics** to run a diagnostic check of your system and view a report.

For a complete list of supported operating systems and web browsers, see the *InSite Client Configuration* document.

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## Getting help

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

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



## 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.

To check which actions you are able to perform, check your roles and the selected user rights.

1. Click your name on the toolbar.
2. In the **User Roles** area, view your assigned roles.
3. Click **(i)** to view the selected user rights for the role.



## Creating users

Create a user account for each person who will use Prepress Portal.

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

1. As a customer user, if you have access to more than one customer, select the desired customer, to whom you want to add a user.
2. On the toolbar, select **Administration**.



3. Under the **Administration**, in the **Users And Groups** area, click **Create User**.

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

User/Group Name	Admin Role	Default Job Role
-----------------	------------	------------------

4. 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		User Roles	
<b>Unique Username *</b>	RobertD	<b>Customer: Top Printing</b>	<i>User has access to specified jobs in this customer.</i>
<b>Password *</b>	.....	<b>Admin Role</b>	Customer User ⓘ
<b>Confirm Password *</b>	.....	<input type="checkbox"/> Allow access to all current and future jobs	
<b>First Name *</b>	Robert	<b>Default Job Role</b>	Approver ⓘ
<b>Init.</b>			
<b>Last Name *</b>	Doe		
<b>Email Options</b>			
<b>Email *</b>		<b>Email Language</b>	English ⓘ
<input type="checkbox"/> Disable all Email notifications		<input type="checkbox"/> Disable event notifications	<input type="button" value="Subscribe to Events"/>
<b>Contact Information</b>			
<b>Title</b>		<b>Office Phone</b>	
<b>Cell</b>		<b>Home Phone</b>	
		<input type="button" value="Cancel"/> <input type="button" value="Create"/>	

5. Click **Create**.

## Creating user groups

You can also create user 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 more information about creating user groups, see the *InSite Prepress Portal Help*.

## Creating a job

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

1. In the **Overview** area, click **Create Job**.



2. As a customer user, if you have access to more than one customer, select the desired customer, for whom you want to create a job.

- Type a job name. If desired, type a job description, job code, or project code.

## Create Job

### Job Info

Job Name:

Description:

Job Code:

Project Code:

Job Template: (none)

### Notes

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### Job Access | [Add Existing Users](#)

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

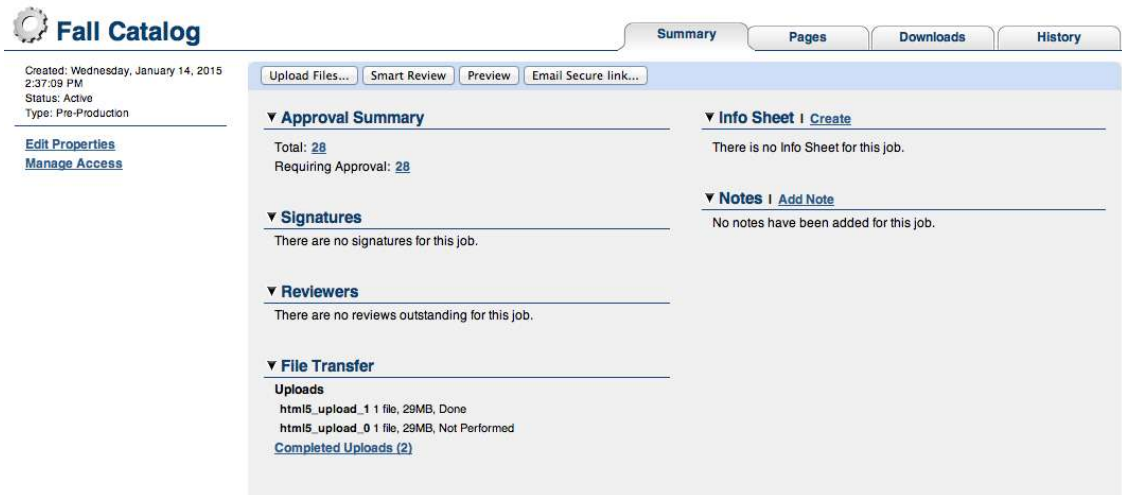
User/Group Name	Job Role
<a href="#">John Doe (JohnD)</a>	Administrator **
<a href="#">Robert Doe (RobertD)</a>	Administrator *

- To allow other users to access to the job, in the **Job Access** area, click **Add Existing Users** and set their desired job role.
- Click **Create**.

## Viewing jobs

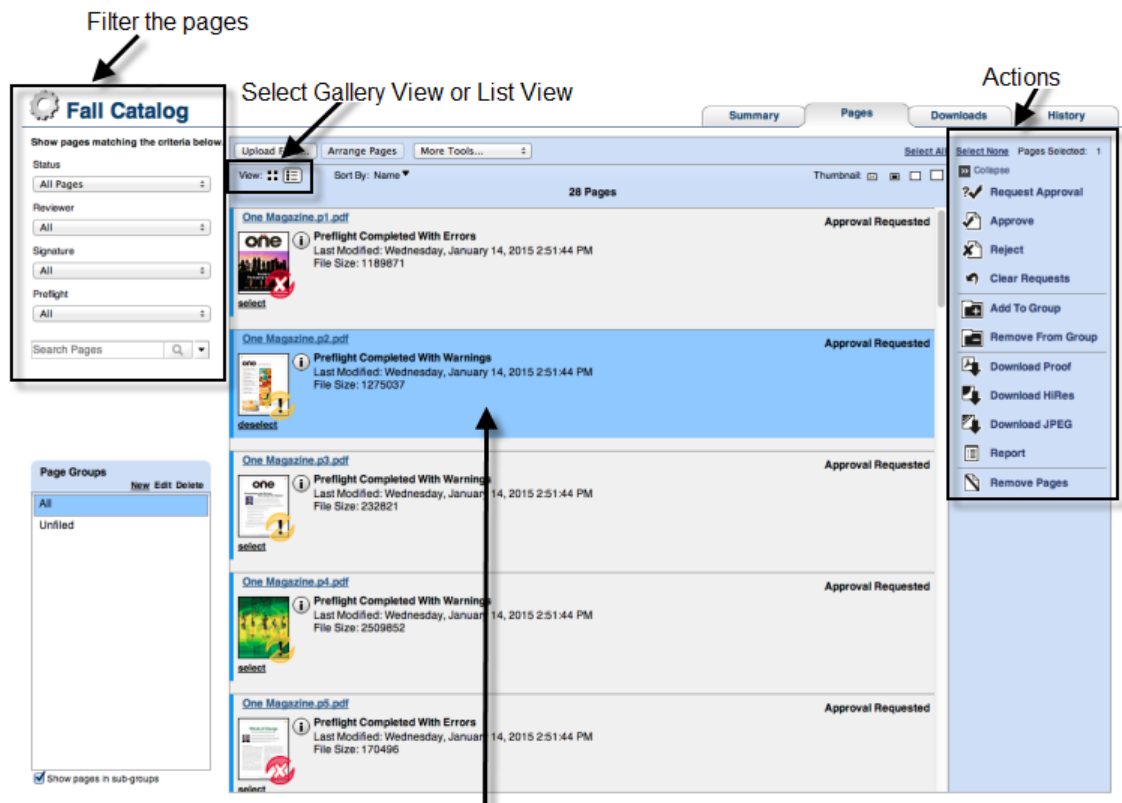
On the **Jobs** view, you can search for jobs and filter jobs, based on their status.

- To open a job, click the job name.
  - Each job contains four tabs: **Summary**, **Pages**, **Downloads**, and **History**. You can view different job information and perform different actions on each of the four job tabs.
  - The **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.



- The **Pages** tab:

This tab displays page thumbnails and other information about the pages in the job. You can filter pages to display, view who has been asked to review or approve pages, and perform actions to pages.



Select pages to perform actions on them, such as requesting approval or review

- The **Downloads** tab  
This tab displays the files that you can download.
- The **History** tab



This tab displays the history of actions performed on the job. You can view four categories of history information: **Transactions**, **Uploads**, **Info Sheets**, and **Secure Links**.

## Managing user access to jobs

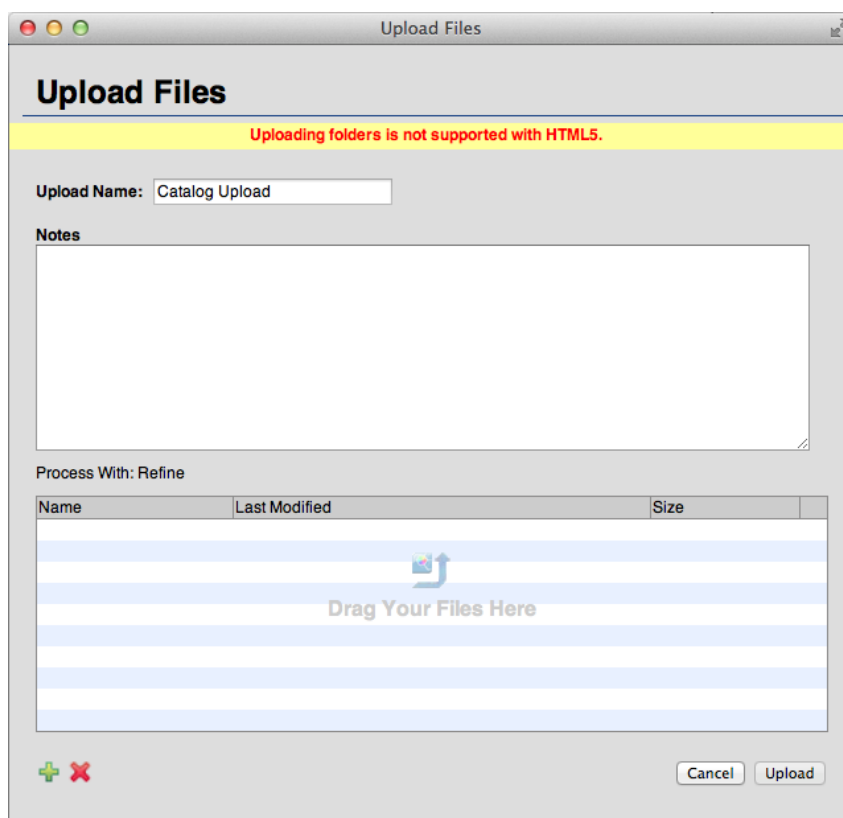
You can control which users can work with specific jobs.

- On the **Summary** tab, select **Manage Access**.

For more information about managing user access to jobs, see the *InSite Prepress Portal Help*.

## Uploading files

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 from your desktop or network into the Upload Files dialog box, or browse (the + button) to locate the files.
4. If the job is enabled for processing and if the **Process With** list appears, select an upload processing rule. Otherwise the files will be processed based on the default rule listed.
5. If desired, type a name for the upload and type a note describing the upload.
6. Click **Upload**.  
The Upload window appears to show the upload status information.

7. Click **Close**.

If the job is enabled for processing, the Upload Processing window displays the progress of the processing. You can still close the window; processing will continue.

## Asking users to review or approve pages

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

1. In the **Jobs** view, click the name of the job.
2. On the **Pages** tab, click 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. Next to each name, select **Final Approval** or **Review**.

**Request Approval**

Comment for reviewers:

**Reviewers**

**Customer Users**  
Select All Select None

<input type="checkbox"/>	CEC Test (cec)
<input checked="" type="checkbox"/>	James Robson (James)
<input checked="" type="checkbox"/>	Mishon Eberly (mishon)
<input checked="" type="checkbox"/>	Patrick Kerr (PKERR)
<input type="checkbox"/>	John Doe (JohnD)
<input type="checkbox"/>	Robert Doe (RobertD)




**Selected Pages**

<input checked="" type="checkbox"/>	One Magazine.p1.pdf
<input checked="" type="checkbox"/>	One Magazine.p2.pdf
<input checked="" type="checkbox"/>	One Magazine.p3.pdf
<input checked="" type="checkbox"/>	One Magazine.p4.pdf
<input checked="" type="checkbox"/>	One Magazine.p5.pdf

Cancel Request Approval

5. Click **Request Approval**.

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

<p><b>One Magazine.p1.pdf</b></p>  <p><b>Preflight Completed With Errors</b> Last Modified: Wednesday, January 14, 2015 2:51:44 PM File Size: 1189871</p> <p><a href="#">select</a></p>	<p><b>Approval Requested</b></p> <ul style="list-style-type: none"> <li>James Robson</li> <li>Mishon Eberly</li> <li>Patrick Kerr</li> </ul>
<p><b>One Magazine.p2.pdf</b></p>  <p><b>Preflight Completed With Warnings</b> Last Modified: Wednesday, January 14, 2015 2:51:44 PM File Size: 1275037</p> <p><a href="#">select</a></p>	<p><b>Approval Requested</b></p> <ul style="list-style-type: none"> <li>James Robson</li> <li>Mishon Eberly</li> <li>Patrick Kerr</li> </ul>
<p><b>One Magazine.p3.pdf</b></p>  <p><b>Preflight Completed With Warnings</b></p>	<p><b>Approval Requested</b></p> <ul style="list-style-type: none"> <li>James Robson</li> </ul>

Note: The details of the requested approvals are displayed only in **List View**. The **Gallery View** does not display them.

## Viewing pages in Smart Review

- On the job's **Pages** tab, click **Smart Review** or click the page. The pages open in Smart Review.

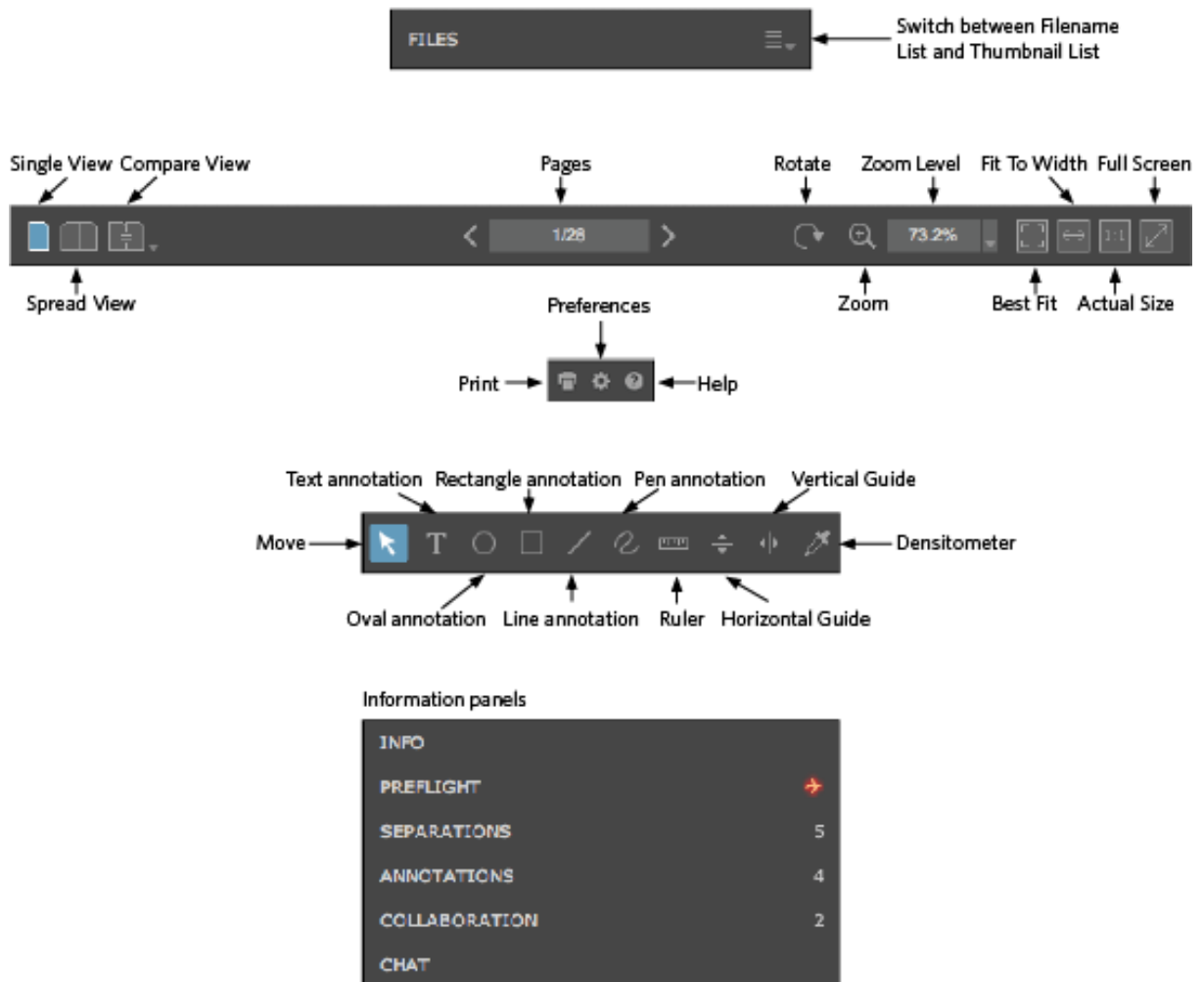


The screenshot illustrates the Smart Review interface for a magazine page. The interface is divided into several key areas:

- 1**: A file list on the left side showing a series of PDF files named "One Magazine.p1.pdf" through "One Magazine.p27.pdf".
- 2**: The main preview area displaying a magazine page layout. The page features the "Kodak one" logo at the top, a city skyline image, and the text "Kodak's Packaging Solutions". Below the image are four columns of text: "Accelerate speed to market", "Maximize design efficiency", "Drive competitive advantage", and "Optimize print quality".
- 3**: The top toolbar of the preview area, which includes navigation and zoom controls.
- 4**: The right-hand sidebar containing various tool panels, including "INFO", "PREFLIGHT", "SEPARATIONS", "ANNOTATIONS", "COLLABORATION", and "CHAT".
- 5**: A specific section within the "SEPARATIONS" panel, showing a list of color separations for "One Magazine.p1.pdf": All, Cyan, Magenta, Yellow, Black, and PANTONE 1235 C. Each item has a checkbox.
- 6**: A small toolbar at the bottom center of the preview area, containing icons for a checkmark, a person, and a red X.

Number	Area in the Review window
1	Files list
2	Canvas area
3	View and zoom tools
4	Annotation toolbar
5	Information panels (provide detailed information about the file, such as separations and annotation details)
6	Approval and user status panel

## Smart Review tools



## Annotating pages in Smart Review

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

- While you are reviewing or approving the pages, select the desired annotations tool to annotate the pages.



## Working in a collaboration session

Multiple users can work on the same file at the same time. It is known as a collaboration session.

For more information about working in a collaboration session, see the *InSite Prepress Portal Help*.



## Reviewing and approving pages

You can review, approve, or reject pages in Smart Review or on the job's Pages tab. In Smart Review, you can also request corrections for pages. In Smart Review, you can review OK or approve only one page at a time. On the job's **Pages** tab, you can review OK or approve multiple pages at once.


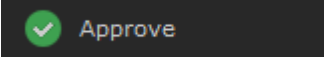

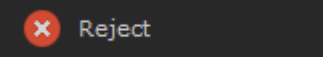

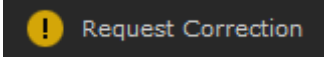
**Requirements:** Your job role must include the Give Final Approval right for approving or rejecting pages.

### Smart Review

- Reviewing

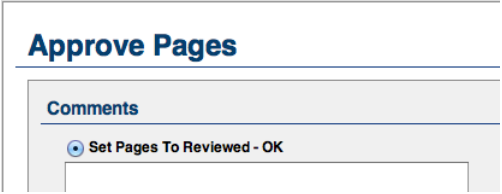
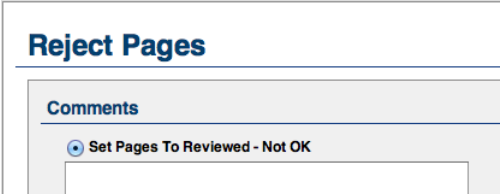
Review - OK	Review - Not OK
<p>a. Click <b>Approve</b>.</p>  <p>b. (Optional) Type a comment in the <b>Comment</b> box.</p> <p>c. Click <b>Apply</b>.</p>	<p>a. Click <b>Reject</b>.</p>  <p>b. (Optional) Type a comment in the <b>Comment</b> box.</p> <p>c. Click <b>Apply</b>.</p>

- Approving

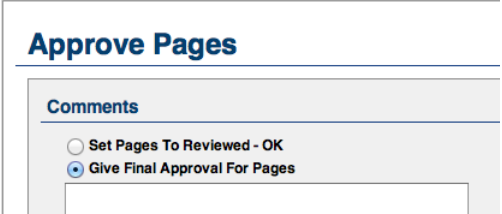
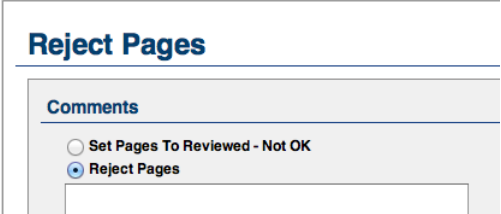
Set Final Approval	Reject	Request Correction
<p>a. Click <b>Approve</b>.</p>  <p>b. Select <b>Approve</b>.</p>  <p>c. (Optional) Type a comment in the <b>Comment</b> box.</p> <p>d. Click <b>Apply</b>.</p>	<p>a. Click <b>Reject</b>.</p>  <p>b. Select <b>Reject</b>.</p>  <p>c. (Optional) Type a comment in the <b>Comment</b> box.</p> <p>d. Click <b>Apply</b>.</p>	<p>a. Click <b>Reject</b>.</p>  <p>b. Select <b>Request Correction</b>.</p>  <p>c. (Optional) Type a comment in the <b>Comment</b> box.</p> <p>d. Click <b>Apply</b>.</p>

## Pages tab

- Reviewing

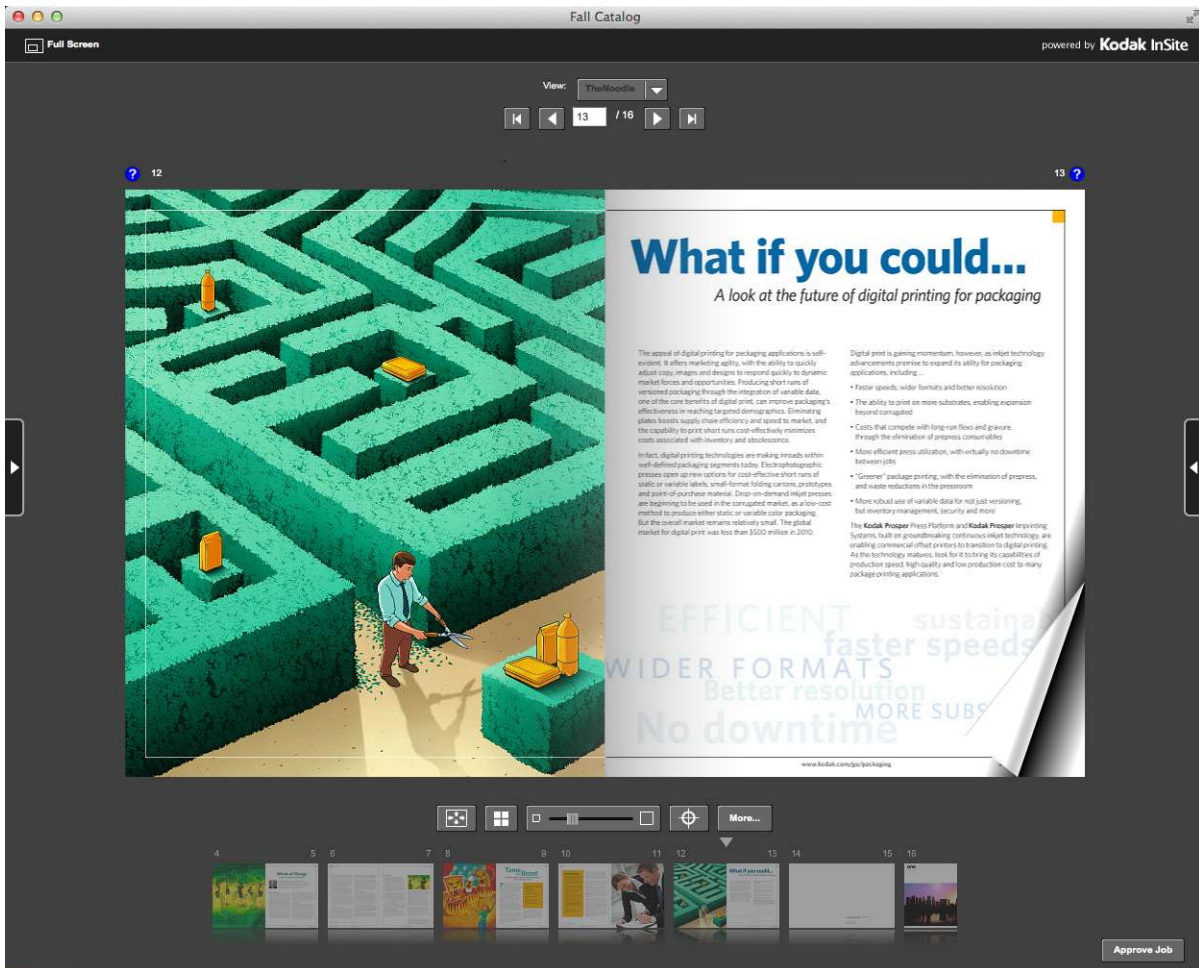
Review - OK	Review - Not OK
<p>a. Click <b>Approve</b>.</p>  <p>b. (Optional) Type a comment in the <b>Comments</b> box.</p> <p>c. Click <b>OK</b>.</p>	<p>a. Click <b>Reject</b>.</p>  <p>b. (Optional) Type a comment in the <b>Comments</b> box.</p> <p>c. Click <b>OK</b>.</p>

- Approving

Set Final Approval	Reject
<p>a. Click <b>Approve</b>.</p> <p>b. Select <b>Give Final Approval For Pages</b>.</p>  <p>c. (Optional) Type a comment in the <b>Comments</b> box.</p> <p>d. Click <b>OK</b>.</p>	<p>a. Click <b>Reject</b>.</p> <p>b. Select <b>Reject Pages</b>.</p>  <p>c. (Optional) Type a comment in the <b>Comments</b> box.</p> <p>d. Click <b>OK</b>.</p>

## Viewing pages in Preview

Preview is a tool that enables you to preview pages with page arrangement. You can also perform approve or reject pages actions; but you cannot review pages.



For more information about the Preview tool, see the *InSite Prepress Portal Help*.

## 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.

For more information about creating secure links, see the *InSite Prepress Portal Help*.