InSite Prepress Portal

Version 7.0

Training Guide

English

2016-03-01

FCC compliance

Any Kodak equipment referred to in this document complies with the requirements in part 15 of the FCC Rules for a Class A digital device. Operation of the Kodak equipment in a residential area may cause unacceptable interference to radio and TV reception, requiring the operator to take whatever steps are necessary to correct the interference.

Equipment recycling

In the European Union, this symbol indicates that when the last user wishes to discard this product, it must be sent to appropriate facilities for recovery and recycling.

Contact your local Kodak representative or refer to http://www.kodak.com/go/recycle/ for additional information on the collection and recovery programs available for this product.

REACH

Please consult http://www.kodak.com/go/REACH for information about the presence of substances included on the candidate list according to article 59(1) of Regulation (EC) No. 1907/2006 (REACH).

http://graphics.kodak.com/

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Training description overview

Why you should complete this activity

The Kodak InSite Prepress Portal system training will be used and provided by field application specialists. The lesson plans and activities in this guide will enable the field application specialists to train Prepress Portal administrators and staff users. The training also describes how the customer users use Prepress Portal.

Target audience

One or more staff users who fulfill the following responsibilities in Prepress Portal:

- Maintain the server
- Manage and Administer staff users for the printer and brand sites
- Create and manage customer accounts and users
- Create and manage jobs
- Manage approval cycle for job between printer and print buyer

Time required

2 days

What you'll need

- At least one Microsoft Windows-based computer that has internet access to the Prepress Portal system and workflow software.
- Access to the Prepress Portal server as required.
- Copy all Activity Files needed by the customer to perform the Startup Assistance to your InSite server.

Prerequisites

Familiarity with the printer's job submission, job approval, and workflow process.

Location

A quiet space such as a conference room or spare room if possible, with computer access to the Prepress Portal server.

- In onsite SUA—an overhead projector is ideal if one is available. If not, a large monitor can be used.
- In remote SUA—each user can join the meeting from their own workstation.

Tips on how to conduct a session

- Provide lecture.
- Ask students to complete an activity.
- Give students the checklist so they can do a self-assessment.

Note: Because interruptions often occur at the printer's site, the modules can be completed in any order depending on the availability of staff.

Note: The review at the beginning of the day will cover the topics completed the previous day.

Pre-training discussion

Before you preform remote SUA, make sure that the InSite server is set up, configured with the Kodak Prinergy server, and available via RS.

Task	Lesson Plan
Identify the system configuration	• Which workflow is the customer using? Prinergy Workflow Prepress Portal 7.0.2 supports the following versions of Kodak software: ◦ Prinergy Workflow or Prinergy Workflow Packaging Automation Expansion Pack 7.0 ◦ InSite Creative Workflow 7.0
Set Expectations	• Identify whether this product is replacing an existing workflow. If so, identify the users and process currently used. • If this is a new workflow, identify what the printer hopes to achieve and identify staff who will be fulfilling the following responsibilities: ◦ Maintain the Prepress Portal system ◦ Manage and Administer staff users, brand sites, and create rules to process incoming pages ◦ Create and manage customer accounts and users ◦ Create and manage jobs ◦ Manage uploads and customer approvals • If possible, ask the printer to find some sample jobs that they want to use in Prepress Portal. • Hand out the On-site checklist for reference on topics that will be covered during the training session. • Go over sources of reference the student can use on their own time: Release Notes, System Administration Guide, and Help. • Review the procedure for contacting the Kodak Technical Response Center if problems arise. • Discuss the importance of knowing the business partner number for logging support calls.

MODULE 1

Configure the Prepress Portal environment

Table 1: System Administration

Task	Lesson Plan

Introduction	• State lesson objectives
	  ◦ Go over the hardware or VM configuration of the InSite Server.
	  ◦ Explain hardware/vm Startup and Shutdown procedures as well as the InSite Service and how it interacts with Prinergy.
	  ◦ If on a VM, explain using Remote Desktop to connect to the VM to restart the server.
	  ◦ Check hardware errors. If the customer purchased server hardware, provide information about Dell OpenManage and where to check for errors. Describe the front face of the server and the amber warnings, as well as the panel to check for errors.
	  ◦ Discuss the application of Microsoft Windows Updates.
	  ◦ Discuss getting help. The CEC and Partner Place.

Server Hardware	• Discuss the hardware configuration—RAM and hard drive storage configuration, version of windows OS as well as version of IPP. • Show the customer where the InSite software is installed, as well as where the `Inetpub` folder is.
Startup and Shutdown	• Explain how to start up and shut down the server or a virtual machine and provide the accounts for log on. • Explain the InSite service, provide the account it uses, and how it runs automatically.
Remote Desktop	• Explain how to use remote desktop to log on to the Virtual Machine if you need to restart the server, since VMware ESXi Client may not be accessible for the InSite Administrator.

Task	Lesson Plan
Check Hardware Errors	• Show the customer how the front panel displays errors. You can do this by removing one of the power plugs from the server but leaving the other power plugs plugged in to generate a power supply error. • Show the customer how to use the OpenManage software to check errors and find the service tag for their server if needed.
Discuss Windows Updates	• Explain the importance of keeping the system up to date with Windows Security Updates and how to apply them. • Explain that Prepress Portal servers are configured to automatically obtain a list of Microsoft Updates. When new Microsoft Updates are available, a Balloon Help icon appears in the System Tray area of the server's desktop. The notification appears whenever a user who has Administrator rights logs on to the server.
Discuss Updates for InSite Prepress Portal Software	• Updates are announced via Partner Place. Make sure that you are registered to Partner Place to receive these announcements. • Describe the steps for installing a software update. ◦ Explain how to run the Update installer. ◦ Explain the Backup/Restore Utility. ◦ Explain the InSite Configuration Utility, how it works, and when it needs to be run (after IPP updates and after Prinergy updates). ◦ See the *InSite Prepress Portal 7.0.2 Upgrade Guide* on Partner Place at https://partnerplace.kodak.com/.
Getting Help	• Show how to access the online documentation. • Show how to access the Kodak Service Knowledge Vault through Partner Place. • Help them register to Partner Place if they are not already registered. • Have the customer sign up for Portal Alerts on Partner Place. • Walk them through how to contact the Customer Engagement Center for assistance.

Task	Lesson Plan	Resources
Introduction	• State lesson objectives ◦ Modify the System Settings ◦ Monitor System Activity ◦ Maintain the System ◦ Access Documentation ◦ Discuss Updates for Microsoft Windows Security ◦ Discuss Updates for InSite Prepress Portal Software ◦ Set Up Enterprise Server for Enterprise Systems - if applicable • Ask the students to: State expectations, learning objectives, and related experience.	
Modify the System Settings	• Access the InSite Administration Home Page ◦ Connect to the InSite Administration home page on the server from another computer. ◦ **Ask the students to:** Take note of the URL and password that are used to access InSite Administration from another computer on the LAN. The information will be needed for the activity. • Printer information ◦ Enter the administrator e-mail address if it is not already complete. ◦ Verify that the InSite home page URL is complete and correct.	In the *InSite Prepress Portal 7.0 System Administration Guide*, see *Configuration settings*.

Task	Lesson Plan	Resources
	• Security ◦ Show where the Administrator password can be changed. Note the Administrator password. This is the password that the system administrator will use to first log onto Prepress Portal to create the first staff user. The default password after installation is `Cre<BPNumber>!` (BP is your business partner number). ◦ Set strong passwords if they are required for your workflow. ◦ Set the customer user and staff user timeout sessions based on the printer's workflow. ◦ Secure link timeout. ◦ Failed login attempts and duration the user is locked out. The recommended settings are 3 to 5 for attempts and 3-5 min for duration the user is locked out. You can remove the lock out at the user level via customer Administration area. ◦ Secure link password—remove the requirement to use a password when creating secure links. You have an option to select to use a password or not. • Workflow ◦ Provide an overview of the options that are available based on the printer's workflow. ◦ What is the difference between using the RIP for rendering and InSite Rendering (Default)? ◦ Default location where jobs are stored when created via InSite. You can have different job locations for specific customers, set in customer Administration. ◦ Page approval or review workflow—how do you want your customers to work, set the default for new customers, can adjust each customer as you determine the best workflow at a later date via customer Administration. • Rendering Options ◦ Turning these rendering options on or off will not affect existing pre-rendered pages. The settings are the same as the ones in the Adobe Acrobat software. • Optional Features ◦ Options selected here can affect the Prepress Portal user interface. ◦ Enable or disable the appropriate settings for your workflow. • Notification ◦ Set the e-mail notification time-out value that you prefer. • Upload Processing ◦ Enable upload processing rules. Upload processing rules are created in the Prepress Portal client. • If additional rendering engines are purchased, click **Distribution Server**.	

Task	Lesson Plan	Resources
	◦ If you are running the rendering engines only on the local server, set the local host to display the number of assigned licenses. ◦ If a distribution server is used, set the distribution server to display the number of assigned licenses. • Smart Review ◦ Set the default safety offsets. ◦ Create global Smart Review annotation stamps, as required. • Explain that Kodak PressProof (and PressProof Monitors) and Color Management are optional licensed features for Prepress Portal. • Learning Center—define where you want to store documents for your customers to access.	
Monitor System Activity	• Explain how to determine whether any Prepress Portal users are online. • Explain how to determine whether Prepress Portal is in the process of rendering pages or any active jobs. • Explain how to determine how often your customers have used Prepress Portal in the past. • Administration log enables you to view specific activities for the system instead of job specific.	
Maintain the System	• Explain maintenance and e-mail notification. • Send a maintenance notification e-mail to all users. • Create a message that will appear when Prepress Portal is unavailable.	In the *InSite Prepress Portal 7.0 System Administration Guide* see *Maintenance*.
Access Documentation	• Explain what documentation is available and how they can access it. • Explain how to access the help system. • Explain that more documentation is available on your Prepress Portal software DVD and on Partner Place at https://partnerplace.kodak.com/.	In the *InSite Prepress Portal 7.0 System Administration Guide* see *Overview*.
Discuss Updates for Microsoft Windows Security	• Explain that Prepress Portal servers are configured to automatically obtain a list of Microsoft Updates. When new Microsoft Updates are available, a Balloon Help icon appears in the System Tray area of the server's desktop. The notification appears whenever a user who has Administrator rights logs on to the server. • Apply critical Microsoft Windows Security updates to the Prepress Portal server. • Find out who will perform this task and ensure that person understands its importance.	In the *InSite Prepress Portal 7.0 System Administration Guide*, see *System security*.

Task	Lesson Plan	Resources
Discuss Updates for InSite Prepress Portal Software	• Determine whether a Prepress Portal update is available. • Describe the steps for installing a software update. ◦ See the *InSite Prepress Portal 7.0.2 Upgrade Guide* on Partner Place at https://partnerplace.kodak.com/.	In the *InSite Prepress Portal 7.0 Upgrade Guide* and in the *InSite 7.0 System Administration Guide*, see *Software updates*.

<table>
<tr><th>Task</th><th>Lesson Plan</th><th>Resources</th></tr>
<tr><td>Set Up Enterprise Server for Enterprise Systems</td><td>Connect to the InSite Administration page on the Enterprise server.
Click Configuration Settings.
Set up printer information.
Set up security.
Click Enterprise.
Determine whether you want to give local staff users access to all satellite sites.
Explain how to join a Prepress Portal satellite server to the Enterprise server and how to remove it.
If the Prepress Portal satellite server contains customer names and user names that are identical to names already in the Enterprise database, you will see an error message when joining a satellite server to an enterprise server. The conflicts must be resolved manually before the satellite server can join the Enterprise server.
Enable or disable the ability of staff users to see jobs on all the satellite Prepress Portal servers.
Enable or disable a customer user's ability to see jobs at all locations.

Note: If you are using a Secure Socket Layer (SSL) certificate, the certificate must be set when joining the Enterprise server on the Prepress Portal server.
If purchased, DMZ (Demilitarized Zone) configuration and SSL (Secure Sockets Layer) must exist in the enterprise and satellite server in an open topology. In a closed topology, DMZ and SSL only exist in the enterprise server.
Click System Activity.
Click Maintenance.</td><td>In the InSite Prepress Portal 7.0 System Administration Guide, see Appendix A—Prepress Portal Enterprise.</td></tr>
<tr><td>Wrap-up</td><td>Recapture the lesson activities and achievements.
Introduce the agenda of the next lesson.
Ask the students to: Review the InSite Prepress Portal 7.0.2 On-Site Training Checklist and list questions or concerns to review during the next class.
Ask the students to: Go to the activities section at the end of this document and complete Activity 1: InSite Prepress Portal Administration.
Ask the students to: Give feedback on pace of the training, and their individual progress, and concerns.</td><td>InSite Prepress Portal 7.0 On-Site Training Checklist</td></tr>
</table>

MODULE 2

Explore staff user role – site administration

Task	Lesson Plan	Resources

Introduction	• State lesson objectives
	  ○ Identify Login Page Concept
	  ○ Explain Roles and Rights
	  ○ Create Staff Users
	  ○ Create Themes
	  ○ Create Upload Processing Rules
	• Ask new students to: State their personal expectations, learning objectives and related experience	

Identify Login Page Concept	• Access the InSite Prepress Portal login page.
	• Have everyone that you are training take note of the URL; it will be needed for the activity.
	• Explain the login page. Explain which graphics can be changed.
	• Show the supported languages for Prepress Portal.
	• Perform a System Diagnostic test.
	  ○ Explain why this test is useful.
	• Log on as an Administrator. Have everyone that you are training take note of the Administrator password; it will be needed for the activity.
	• Show how to perform system diagnostics once logged into the software.
	  ○ Explain how diagnostics information can be e-mailed to the system administrator to help troubleshoot a customer connection.
	• Explain how lost passwords are handled.	

Explain Roles and Rights	• Explain System Roles. • Explain Customer Roles and which rights are intended for staff and customer users. • Explain Job Roles and which rights are intended for staff and customer users. • Create new Job roles based on the printer's workflow, if required.	In the *InSite Prepress Portal 7.0 System Administration Guide* see System setup.

Task	Lesson Plan	Resources
Create Staff Users	• Create a staff user with administrative rights in the System, Customer, and Job Roles. • Explain how e-mail notification preferences can be set. Explain the differences between directed and event-based e-mail notifications. • Subscribe the staff user to the appropriate Prepress Portal event. • Log off and log on as the staff user. Explain how this view is similar to that of the Administrator user. • (Optional) Explain how to add multiple staff users using an imported spreadsheet file if needed.	In the *InSite Prepress Portal 7.0 System Administration Guide* see System setup. Activity files are located on Services Knowledge Vault at https://services.kodak.com/.
Create Themes	• Create a new theme. • Explain the purpose of the **Based On**, **Service Name**, and the **Brand Filter** boxes. • In the **Images** area, click **Add New Image** to upload the images needed for your login and header images in your site theme. • In the **Login Panel HTML** box, replace `LoginGraphic.png` with the name of the image that you uploaded for the Login page. • In the **Welcome Message** box, type the message that you want users to see on the Login page. Explain where the welcome message appears. • In the **Header** box, replace `ISBanner58px.jpg` with the name of the image that you uploaded for the header and type the color code for the background color you want. • In the Footer area, customize existing footer links or create a new footer. Identify which items can be changed. • In the **Color Scheme** area, click **Modify** for each UI element that you want to customize. Show how to fix a wrong color. • In the **Terminology** area, for each term that you want to customize, click the underlined name of the term to open it for editing. Show what changes in the software. Explain who is responsible for language changes. • Click **Save and Preview** to view the theme created. • Explain how to assign a theme as a customer theme. • If the theme is ready for release, set it as the site theme for the printer. • Explain that you cannot change icons, icon locations, or font sizes, or move text within a theme.	In the *InSite Prepress Portal 7.0 System Administration Guide*, see *System setup*.
Create Upload Processing Rules	• Based on the printer's workflow, explain that upload processing rules can be assigned to each job or within a job template. Job creation is covered in Module 4: *Work with Jobs and Approval Workflow*. • Create upload processing rules that apply to the printer's workflow. • Explain that you can create multiple actions within a single upload processing rule.	In the *InSite Prepress Portal 7.0 System Administration Guide* see *System setup*.

<table>
<tr><th>Task</th><th>Lesson Plan</th><th>Resources</th></tr>
<tr><td></td><td>
<table>
<tr><th>Select this type of processing</th><th></th></tr>
<tr><td>Prinergy Refine</td><td>Files are processed using the Prinergy refine template that you select in the Process Template list.</td></tr>
<tr><td>Prinergy Workflow</td><td>Files are processed using the Prinergy workflow template that you select in the Workflow Template list</td></tr>
<tr><td>Copy Files</td><td>Files are copied to another location on your network, based on the UNC path you provide</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>Add an action to an existing upload processing rule.</td><td></td></tr>
<tr><td>Learning Center</td><td>Add content
Organize content
New Learning Center topic
Category and topic structure
Define who can view the topic
Add the link to the footer</td><td>In the InSite Prepress Portal 7.0 System Administration Guide see Learning Center.</td></tr>
<tr><td>Wrap-up</td><td>Recapture the lesson activities and achievements
Introduce the agenda of next lesson
Ask students to: Review the InSite Prepress Portal 7.0 On-Site Training Checklist and list questions or concerns to review during next class.
Ask students to: Go to the activities section at the end of this document and complete Activity 2: Staff User Role: Site Administration.
Ask students to: Give feedback on pace of the training, and their individual progress, and concerns.</td><td>InSite Prepress Portal 7.0 On-Site Training Checklist</td></tr>
</table>

MODULE 3

Explore staff user role - customer administration

Tasks	Lesson Plan	Resources
Introduction	• State lesson objectives ◦ Describe the Customer view ◦ Create Customer Accounts ◦ Create Customer Users ◦ Set Customer Theme • Ask new students to: State their personal expectations, learning objectives and related experience	
Describe the Customer View	• Explain the concept of customers. • On Prepress Portal Home, click **Customers**. • In the **Customers** view, explain that a list can be displayed of all customers or only customers assigned to a specific CSR. • Explain the **Customer Search** box. • Show how customer information can be changed.	

<table>
<tr><th>Tasks</th><th>Lesson Plan</th><th>Resources</th></tr>
<tr><td>Create Customer Accounts</td><td>

Explain how to create customer accounts.
Create a customer account called YourName_Training.
Explain that the staff user who creates the customer account is the assigned CSR to the account.

The staff user creating the account can also assign other staff users as customer CSR.
Staff users assigned as a customer CSR receive e-mail notifications for each customer that they are associated with.

Explain the differences for the generating job name options.
Explain job home locations.

If using a customer specific location for jobs, the job location must be a Prinergy Job volume.

Explain job group selection

If you want the jobs to be stored in specific groups on Prinergy Workflow, select the job group option.

Explain the advantages of configuring a customer account to use a job template. Creating and assigning job templates is covered in the next module.

Explain which job attributes can be part of a job template.

Explain the review and approval workflow settings.
Create customer specific Smart Review annotation stamps.

</td><td>In the InSite Prepress Portal 7.0 System Administration Guide, see Customer setup.</td></tr>
<tr><td>Create Customer Users</td><td>

Create a Customer user and assign different rights for the Admin and Default Job roles.
Select the Allow access to all current and future jobs option.
Explain how customers can change their passwords.
Subscribe the customer user to e-mail notifications that would be relevant to their role.
Explain the purpose for creating user groups.
Explain that user groups can be created manually and via customer user import.
Explain how to create multiple customer users, using a spreadsheet. Demonstrate if needed.
Log off Prepress Portal and log on as one of the customer users.
Explain that the customer interface displayed depends on the rights assigned to the customer user logging on.

</td><td>Activity files are located on the Services Knowledge Vault at https://services.kodak.com/.</td></tr>
</table>

Tasks	Lesson Plan	Resources
Set Customer Theme	• In the staff user's Home view, click **Themes**. • From the list of themes, click on the area for the theme you created, and click **Select Customer**. • Assign the theme to the customer account created above.	
Wrap-up	• Recapture the lesson activities and achievements • Introduce the agenda of next lesson • Ask students to: Review the *InSite Prepress Portal 7.0 On-Site Training Checklist* and list questions or concerns to review during the next class. • Ask students to: Go to the activities section at the end of this document and complete Activity 3: Staff User Role - Customer Administration. • Ask students to: Give feedback on pace of the training, and their individual progress, and concerns.	*InSite Prepress Portal 7.0 On-Site Training Checklist*

MODULE 4

Work with jobs and approval workflow

Tasks	Lesson Plan	Resources
Introduction	• State lesson objectives ◦ Describe the Job view ◦ Create Jobs ◦ Upload Files ◦ Troubleshoot Pages ◦ Work with Pages ◦ Explain Review and Approval Workflow ◦ Set Job Status ◦ Configure Job Templates for the Customer Account ◦ Configure upload processing with preflight in Prepress Portal ◦ View preflight errors and warnings in Smart Review ◦ Arrange Pages in a Job • **Ask new students to**: State their personal expectations, learning objectives and related experience.	
Describe the Job View	• Log on as a staff user. On the home page, click Jobs. • Explain Job Search. • Explain that jobs can be displayed by status or customer. • Explain job details that are displayed on the job page. • Explain job name details. ◦ The job name displayed in between brackets is the Prinergy job alias name. In the case where a description is entered, the description appears in front of the job name. For example, in Summer Brochure (ABC-003), ABC-003 is the job name, and Summer Brochure is the job description. • Explain how the Job view differs for a Staff user and a Customer user.	

<table>
<tr><th>Tasks</th><th>Lesson Plan</th><th>Resources</th></tr>
<tr><td>Create Jobs</td><td>

Click Job, and create a job for the customer account created.
Explain that depending on rights, a customer user can also create jobs.
Explain the Summary View.
Click Edit Properties.

Scroll down and under Upload Processing Rules, select an upload processing rule for the job.
In the View Options area, show how the staff user can use the following options to control how pages display in Prepress Portal: Show View Control, Show Sort By Control, and Override Page Safety Offset System Defaults.

In the Summary view, click Manage Access.

Select a user that does not have access to all jobs, and enable that user to have access to this job.
Select a customer user from a different customer account, and give that user to have access to this job.

In the Summary view, click Email Secure Link.
Note: To create Secure Links, you must have a job role that includes the Create Secure Link user right.

In the Initial View area, select how the pages will display when the user first clicks the e-mail link. You can have the uploaded files or the pages (when the pages are in the job) appear in gallery view, in preview (where the user can flip pages) or in Smart Review (for full review capabilities).
Select the options and rights you want the users to have for this job.
Set the expiration date of the Secure Link (Default is 30 days)
Set a password that the user must enter to access the pages.
Note: Send the password to the user in a separate e-mail; do not include it in the secure link e-mail message.
Type the e-mail addresses of the users that you want to receive a secure link.
Provide an e-mail subject and a message about this secure link and some instructions to the user

Explain how creating jobs differs for a staff user and a customer user.

Log on as the customer user and create a job.

</td><td>In the InSite Prepress Portal 7.0 System Quick Start Guide, see Working with Jobs</td></tr>
<tr><td>Upload Files</td><td>

Stay logged on as the customer user.
View all active jobs, and locate the job.
In the Summary view, upload files to the job.
The files are uploaded and should process correctly.

</td><td></td></tr>
</table>

Tasks	Lesson Plan	Resources
Work with Pages	• In the Jobs view, click the **Pages** tab. • Show how pages can be displayed using the Status and Reviewer options. • Change the view for the pages. • Explain the purpose of using page groups. Explain who can create and add pages to page groups. ○ Create page groups to organize your pages if, applicable. • Explain the options on the operations palette. • Show the use of Preview and how the user can interact with it. • Show how to create a secure link to review a few pages.	In the *InSite 7.0 System Quick Start Guide*, see *Working with Pages*

<table>
<tr><th>Tasks</th><th>Lesson Plan</th><th>Resources</th></tr>
<tr>
<td>Explain the Review and Kodak Approval Workflow</td>
<td>

Explain the review and approval cycle.
Explain the review and approval workflow and their implications for the customer users. Explain that you can have different workflows for different customers.
Select some pages, and click Request Approval of these pages.
Select desired users to review and give final approval on the pages.

Specify which user(s) will be reviewers only.
Specify which user will give final approval of the page.
Explain who receives e-mail notifications

On the Pages tab, select a page to open in Smart Review.
Show where Smart Review preferences are set.

Show how a user can control zoom levels on a page using the On Change Page Zoom To option.
Set the units of measurement.
Adjust the Default Annotation Color and explain that this is unique to your given user.

Explain and show the annotation tools available.

Identify the role and right you must have to annotate pages in Smart Review.

Explain and show the navigation tools available.
Show how to hide and show the page list and panels.
Show and explain how to use the following information panels: Info, Preflight, Separations, Annotations, Collaboration, and Chat.
Use compare mode to compare pages.

Explain that compare mode can be used on files with different names.
The number of pages that can be overwritten is specified in the Prinergy Administrator.

Explain how to set the Review and Approval page states (X and check mark icons) for a page.

View and annotate pages in Smart Review, both as an individual and in a group session.
Explain what actions can be performed while reviewing pages in Smart Review.
Explain the approval workflow which includes approve, request correction, or reject pages.

In the Pages tab, select some of the pages, and generate a report to display Smart Review annotations and comments.

</td>
<td>In the InSite Prepress Portal 7.0 System Administration Guide, see System setup.

Activity files for page review and compare mode are available on the Services Knowledge Vault at https://services.kodak.com/.</td>
</tr>
</table>

Tasks	Lesson Plan	Resources

Troubleshoot Pages (Staff User)	• Log on as a staff user.
	• If pages do not post back to Prepress Portal, do the following:
	  ◦ Check the job upload history.
	  ◦ Check the upload processing rules.
	• If you want to provide the files back to the customer:
	  ◦ Place the files in the **WebDownloads** folder (this is located in the Job Folder)
	  ◦ In the Job view, click **Download**, and select file to download.	

Set Job Status	• Show how you can set a job to completed status. • Explain that setting the job to completed removes the job from the active job list. • Show how you can delete a job. • Explain the concept of Move to Production	

Configure Job Templates for the Customer Account	• Log on as a staff user.
	• Explain the advantages of using a job template.
	• Configure the customer account to use a job template with upload processing rules.
	  ◦ Create a new job. Name it <YourCustomerName_Template>.
	  ◦ Enable upload processing for the job.
	  ◦ Explain the attributes that are part of a template job.
	  ◦ On the home page, click **Customers**.
	  ◦ Locate the customer account, and click the row where the customer name appears.
	  ◦ Click **Administration**.
	  ◦ In **Customer Administration** view, add the job template to the customer account.
	• Create a new job for the customer account with the assigned template.
	• Upload a file to the job.
	• Ensure the files are processed correctly.	

Configure upload processing with preflight in Prepress Portal (Advanced Preflight must be purchased)	• In Prinergy Workshop, add a preflight profile and set the preflight options in a Refine Process template. Note: Create the preflight profile using the Preflight Profile Manager in Prinergy. • In Prepress Portal, create an upload processing rule and base the rule on the Process Template with preflight enabled. Name the rule **Preflight**. • Create a job. • Associate the **Preflight** upload processing rule to the job.	For more information on preflight see *PDF Preflight* in the *Prinergy Workflow Help*.

Tasks	Lesson Plan	Resources
View preflight errors and warnings in Smart Review	• Upload a file to the preflight job. • Go to the **Pages** tab. Explain that the preflight status on each page is indicated by the colored icons (red: error, yellow: warning, green: ok). • Click the information icon on a page to display the messages that page. • Launch Smart Review. • Use the **Preflight** panel, and click on any of the preflight error categories to zoom in on the relevant area on the page. Note: The **Auto Zoom to Selection** option must be selected. • Double-click the name of the page in the **Preflight** panel to clear selected areas on the page.	
Arrange Pages in a Job	• In Prinergy, create a pre-job that will do a simple refine for the uploaded file. • Add a page set to the pre-job, and save the pre-job. • Web-enable the pre-job to give customers access to the job in Prepress Portal. Select your customer account when you web-enable the pre-job. • Log on to Prepress Portal as the customer user. • Locate the job. • Upload files to the job. • On the **Pages** tab, click **Arrange Pages**. • Use the Arrange Pages dialog box to arrange pages or drag and drop the Pages pane on the left side to the **Positions** pane on the right. • If more than one page set is available, select the page set or the you want to work with. • Back in the **Pages** tab, click **Preview** and review the assigned pages. • When a user assigns pages to positions (**Pages** > **Arrange Pages**), the user can have the PDF file name appear under each thumbnail. To view all the file names, click **Show Page Names** in the upper right corner.	See *Adding Page Sets and Enabling Web Access for Customers with Prepress Portal* in the *Prinergy Workflow Help*.
Wrap-up	• Recapture the lesson activities and achievements • Introduce the agenda of next lesson • Ask students to: Review the *InSite Prepress Portal 7.0 On-Site Training Checklist* and list questions or concerns to review during the next class. • Ask students to: Go to the activities section at the end of this document and complete Activity 4: Jobs, Uploads, and Approval Workflow • Ask students to: Give feedback on pace of the training, and their individual progress, and concerns.	*InSite Prepress Portal 7.0 On-Site Training Checklist*

MODULE 5

Activities

Activities in this module

Activity 1: InSite Prepress Portal administration
Activity 2: Staff user role - site administration
Activity 3: Staff user role - site customer administration
Activity 4: Jobs, uploads, and approval workflow

Activity 1

InSite Prepress Portal administration

What you will learn

After completing this activity, you will know how to perform the following tasks:

- InSite Prepress Portal administration
- For Enterprise system users

Work on the following items. If you get stuck, see the *InSite Prepress Portal 7.0 System Administration Guide*, *InSite Prepress Portal System Quick Start Guide* or the *Prepress Portal Help*.

1. Access the InSite Administration page from another computer. Use the username and password that you noted earlier.
2. Can you send e-mail notifications to users when you shut down the Prepress Portal server? How would you notify your users?
3. Find the *InSite Prepress Portal 7.0 System Administration Guide* and download it to your desktop.
4. If you use strong passwords, in the System Administration Guide, look up the rules for creating strong passwords. Note the three conditions required for a strong password.
5. Where would you set up the global review and approval workflow? What are the limitations?
6. What section of the InSite Administration page tells you which users are online?
7. Why should upload processing be enabled on the InSite Administration page?
8. Where would you check to see which customer is the most frequent user of your Prepress Portal server?
9. What phone number do you call to speak to the Kodak Customer Engagement Center? What is your business partner number?
10. How can you tell that a customer or job has been deleted from Prepress Portal?

For Enterprise system users

1. In an Enterprise system, where is the customer and user information set up?
2. How do you resolve a database conflict when joining a Prepress Portal satellite server to an Enterprise system?
3. Can you restrict which satellite site a staff user has access to?

Activity 2

Staff user role - site administration

What you will learn

After completing this activity, you will know how to perform the following tasks:

- Staff user role - site administration

Work on the following items. If you get stuck, see the *InSite Prepress Portal 7.0 System Administration Guide*, *InSite Prepress Portal Quick Start Guide* or the *Prepress Portal Help*.

1. Check the URL of the Prepress Portal login page, and access that page from your own computer.
2. Run a system diagnostic test, and check the details. Does it report any problems with your computer that you should correct before logging on?
3. Log on to Prepress Portal with the Administrator logon and password that you noted earlier.
4. Create a staff user account for yourself and assign full administrative rights for the System, Customer and Job roles. Unsubscribe to one e-mail event.
5. Can you restrict a staff user to specific customers? Are their roles carried over? Explain.
6. Log off as the administrator, and log on with your new staff user account.
7. For your workflow, list the key upload processing rule types that you would use, and create the upload processing rules.
8. Create Preflight Upload Processing Rules.
9. List some items that you can customize using Prepress Portal themes.
10. Create a new theme and customize the terminology, color, and icons based on the printer's corporate requirements. Do not assign usage to this theme yet. Later, you will use this theme and assign it to a customer account.
11. Create a new staff user but restrict the rights so that the user does not have system rights.
12. Log off and log on as the restricted right staff user, and observe how that user will have a different experience.

Activity 3 Staff user role - site customer administration

What you will learn

After completing this activity, you will know how to perform the following tasks:

- Staff user role - site customer administration

Work on the following items. If you get stuck, see the InSite Prepress Portal 7.0 *System Administration Guide*, *InSite Prepress Portal Quick Start Guide* or the *Prepress Portal Help*.

1. Log on using your staff user account (with full admin rights) and create a new test customer (prefix with your initials).
2. Create three customer users with the following roles. If the role does not exist, create a new role for the user.
   - User 1: Assign a Customer and Job Role with full admin rights. Subscribe this user to receive e-mail notifications on Page Approved events. This user will provide final approval on pages for jobs created in a later activity.
   - User 2: Ensure their Job Role allows them to View All Pages and Annotate rights. The Annotate right enables the user to review but not approve any pages. This View All Pages rights enables the user to see pages for all jobs in the customer account.
   - User 3: Assign any combination of roles based on your workflow. Ensure the user is subscribed to event-based emails based on your workflow.
3. Create a new user group, and name the group **Review Only** and add the users 2 and 3 to the group.
4. Create multiple Customer users by importing the information from the supplied template spreadsheet.
5. Log off and log on as any of the customer users created and observe how that user will have a different experience.

Activity 4 — Jobs, uploads, and approval workflow

What you will learn

After completing this activity, you will know how to perform the following tasks:

- Jobs, uploads, and approval workflow

Work on the following items. If you get stuck, see the InSite Prepress Portal 7.0 *System Administration Guide*, *InSite Prepress Portal Quick Start Guide* or the *Prepress Portal Help*.

1. Log on as the staff user.
2. Create a job for the customer account.
3. Assign an upload processing rule to the job.
4. Set View options on the job.
5. Create a secure email link for the job.
6. Upload a file to the job.
7. Select the pages and select the user with final approval rights for approval of the pages.
8. On the **Summary** tab, click **Manage Access**, and assign access to this job for the **Review Only** user group.
9. Log off as the staff user, and log on as a customer user with Final Approval rights.
10. Locate the job. Select some of the pages and request review of the pages by the **Review Only** user group.
11. Log on as the user who will review and annotate the pages. This user does not give final approval of these pages.
12. Locate the job.
13. Filter the pages to display only the pages that you have been assigned to review.
14. Change the view for the pages.
15. Open Smart Review.
16. View the pages in **Spread View**.
17. Use the options on the Annotations toolbar, and mark-up sections of the page with the drawing tools.
18. Use the stamp tool to add another annotation to the page.
19. In Smart Review, open the **Annotations** panel, and use it to sort the annotations by name or date.

20. Set the page status to Review OK, and add a comment. Click **OK**, and go to the next page.
21. Add a text annotation to the page. Set the page status to Review Not OK. Close Smart Review.
22. Log off and log back on as the user with final approval rights.
23. Open the job and filter the pages to display the reviewed pages. Run a report on all the pages that have been reviewed.
24. In thumbnail view, approve the pages that have been set to OK by the reviewers. The assigned staff user will receive an e-mail with the final approval status of the page.
25. Request a correction on the page that is not approved by reviewers. The staff user will receive an e-mail with the correction requested status for the page.
26. Upload the same file that was not approved due to corrections (assume corrections have been made in this file). If you want to override the old file, ensure the file names are the same.
27. Log on as the staff user.
28. Locate the job. On the **Pages** tab, sort the pages to display only the pages that have a **Waiting For Correction** status.
29. On the pages, under the **Waiting For Correction** page state, click **Printable Report** to view the annotations for a specific page.
30. In the Jobs view, locate the job and set the job to complete.
31. Create a new job with upload processing rules and use the job as a job template in the customer account.
32. Create a new job. Use the job as a job template to set up Preflight for the job.
33. Create a pre-job that will do a simple refine for the uploaded file. Add a page set to the pre-job, and web-enable pre-job. In Prepress Portal, upload files to the job, and use the Arrange Pages feature to assign the pages. Preview the assigned pages.

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