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InSite Premedia System Creative Workflow 3.0

Customer Quick Start Guide

(Mac OS®X and Windows® XP)

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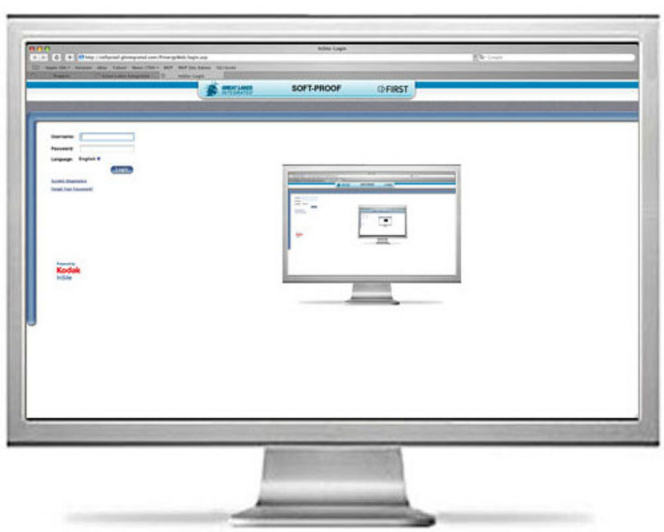

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About Creative Workflow

Kodak® InSite™ Creative Workflow system provides a collaborative workspace where you and your team can manage and share *elements*—the individual images, pieces of artwork, and other files that make up a publication. (You may already know elements as "digital assets.") In Creative Workflow, you organize elements into *projects*.

Multiple users can access the system at the same time, either through a Web browser or through the Kodak InSite Desktop software, which you install on your local workstation and use to access the Creative Workflow server.

When compared to a Web browser, Desktop provides additional features that are intended for advanced users. For details, see *Desktop Feature Summary* on page 15.

About Projects

A *project* is a collaborative workspace where you can upload and download elements to share with other users. You can also use projects to manage the review and approval of elements by associating tasks with specific elements and assigning those tasks to other users. (For more information, see *About Tasks* on page 1.)

Projects are typically temporary—they are used over short periods of time and deleted when the work is complete.

What you can do with projects depends on the user rights you are assigned, but a common scenario is for anyone to be able to create and delete projects, organize the elements within a project, and upload and download elements in projects. (For more information about user rights and for instructions on finding out which rights are assigned to you, see the Creative Workflow Help.)

About Tasks

A *task* is an action associated with one or more elements in a project and assigned to one or more users. You can use tasks to better manage the review and approval of the elements in your projects.

Depending on your project user rights, you can create tasks, assign them to various members of your project team, and then monitor the status and completion of each task. Depending on their project user rights, users assigned to tasks can review, approve, request changes for, and reject elements associated with tasks.

If event notification is set up for your system, and your user account specifies your e-mail address, you can automatically receive an e-mail message whenever you are assigned a task or when another user sets the status for a task that you created. This is useful because you can be notified of new tasks and task status changes without having to log on to the system. Each e-mail message also includes links to open either a Web browser or Desktop to the target task. (For more information about event notification and for instructions on viewing your event notification settings, see the Creative Workflow Help.)

Users assigned a task can set their task status in either the Elements or Tasks view of a project or in Smart Review. (See *About Smart Review* on page 2.)

For instructions on creating tasks and setting task status, see *Working With Tasks* on page 11.

About Smart Review

Smart Review is a tool available through Creative Workflow that enables you to open a detailed, full-resolution preview of an element.

Using Smart Review, you can view an element in different ways (for example, by zooming in or out on an image, panning to a different area of the image, or rotating the image), take measurements, display and hide separations, check color density, add annotations, and (depending on your user rights) set the status for individual annotations.

You can also use Smart Review to approve and reject elements that are associated with tasks. If the system is licensed for color-accurate monitor proofing, you *must* use Smart Review to review and approve elements for color accuracy.

Note: To color approve an element in Smart Review, you must view the element on a Apple® Macintosh® workstation that is running the Kodak Matchprint® Virtual technology, and you must use a qualified color monitor. For more information, see the Creative Workflow Help.

If multiple users are assigned the same task, they can also use Smart Review to view the associated element at the same time and collaborate in a *group review session*. In a group review session, all users can see annotations made by another user for the same task, and all users can use the chat tool to discuss the element.

Logging On

How you log on to the system varies, depending on whether you are using a Web browser or Desktop.

You can log on through a Web browser on a computer running either the Apple Mac OS® X or Microsoft® Windows® operating system. In a Mac OS X operating system, the supported browser is Safari®. In a Windows operating system, the supported Web browser is Internet Explorer® 5.0 or later.

Desktop runs on a Mac OS 10.3.9 or 10.4 client or on a Windows XP, 2000, or 2003 client. To install Desktop, you must first log on through a Web browser. At the bottom of the Web browser window, click **Download InSite Desktop**, and follow the on-screen instructions to complete the installation. Once Desktop is installed, you can log on to it directly.

In a Web Browser

To log on using a Web browser, you must have a high-speed Internet connection—64 kilobits per second (Kbps) or higher. As well, you must have previously been assigned a logon user name and password.

1. In the browser's **Address** box, type the printer's home page address—for example, `http://server.printer.com`.
2. Before the first time you log on, check your computer's configuration to ensure that it is running the required software.
   a. On the logon page, click **System Diagnostics**.
   b. The System Diagnostics dialog box appears, displaying your computer's configuration, including the operating system, Web browser, JavaScript and cookie settings, and Sun® Java® software version. The Java software must be installed and enabled for your browser to correctly display the site's contents.
   c. If the Java software is not installed or is not enabled, or your current Java version is not supported, click **Follow these instructions...** to install and enable a supported Java version.
   d. Return to the logon page.

      The next time you log on to the system from the same computer, you do not need to check the system diagnostics. (If desired, you can check the system diagnostics at any time after logging on by clicking **System Diagnostics** at the bottom of the window.)
3. Type your **Username** and **Password**, and click **Login**.

Note: If you log on using your e-mail address as your user name and a default password that was assigned to you, the first time that you log on, you may be prompted to change your password and contact information.

To log off:

➢ In the upper-right corner of the Web browser window, click **Logout**.

In Desktop

To log on using Desktop, you must have previously been assigned a logon user name and password.

1. Start Desktop.

   If this is your first time logging on to Desktop, you are prompted to enter your user name and password.

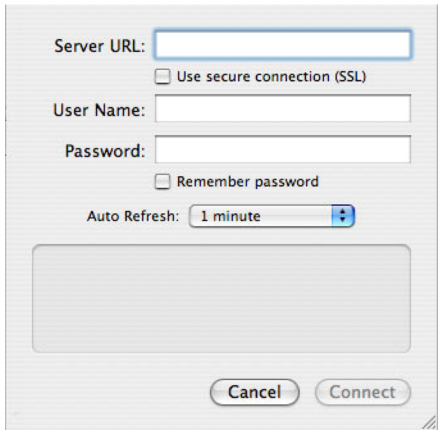
   

   Figure 1: New Account dialog box

2. In the **Server URL** box, type the printer's home page address, as you would when logging on using a Web browser.
3. If you are connecting to a server in an SSL (Secure Sockets Layer) environment, select **Use secure connection (SSL)**. When in an SSL environment, selecting this option automatically adds the prefix `https://` to the connection URL.
4. Type your **User Name** and **Password**.
5. Select **Remember password** to have a Desktop window open automatically the next time that you start Desktop, without prompting you for your user name or password.
6. **Auto Refresh** specifies the frequency at which Desktop is automatically refreshed with updated information from the server. Changes made by other users since the last refresh appear only after Desktop is refreshed. However, refreshing Desktop requires significant bandwidth. If you have a high-speed connection, you can leave the **Auto Refresh** option set to the default **1 minute**. If you have a low-speed connection or if it is not important for you to see recent changes made by other users, you may want to decrease the frequency at which Desktop is automatically refreshed.
7. Click **Connect**. A new Desktop window opens.

To log off:

- In Desktop for Mac: From the **Kodak InSite Desktop** menu, select **Quit Kodak InSite Desktop**.
- In Desktop for Windows: From the **File** menu, select **Exit**.

Getting Around

How you navigate and manage projects depends on whether you are accessing them through a Web browser or though Desktop.

In a Web Browser

When you log on through a Web browser, the main portal page lists any projects to which you have access. Click a project name to open it.

The Elements view displays the elements in the project, organized into folders. In this view, you can upload, organize (rename, move, and copy), and download elements. You can also assign source profiles to elements, select elements and create tasks for them, and set the status of tasks assigned to you. An icon appears in the upper-right corner of any element that has an associated task assigned to you.

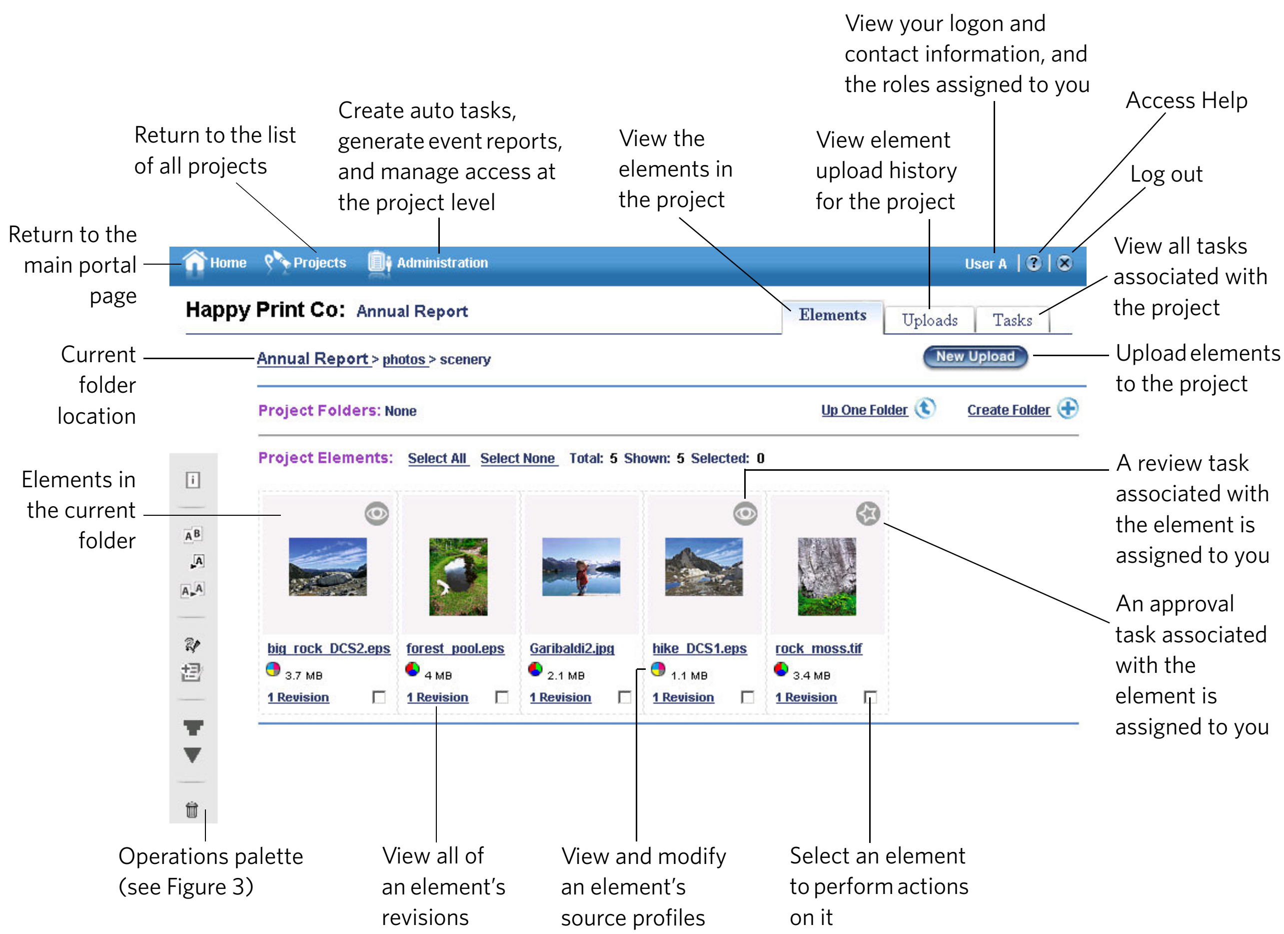


Figure 2: A project open in a Web browser—Elements view

For information about source profiles, managing user accounts, and about managing project access, see the Creative Workflow Help.

The buttons on the Operations palette enable you to view element attributes, organize elements in the project, create tasks and set task status, and download elements. You must select an element's check box before you can take action on the element using the Operations palette.

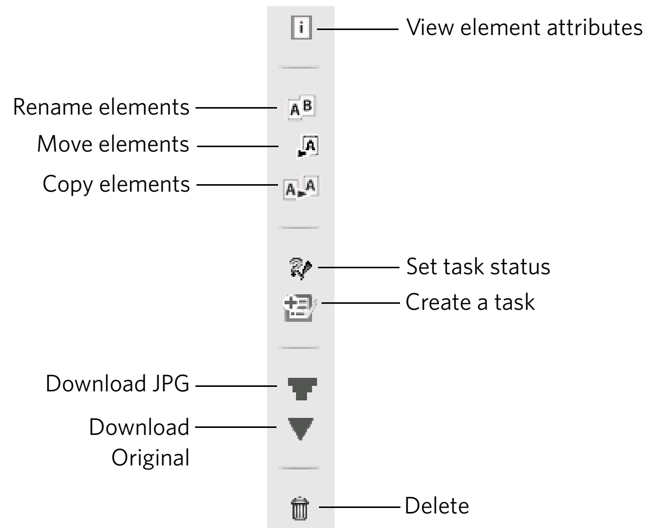


Figure 3: Operations palette

The project Tasks view lists all tasks associated with elements that reside in the current project, the elements associated with each task, and your task status for any tasks assigned to you. In this view, you can set the status of tasks assigned to you, view the attributes of selected elements, and download elements. You can also view a report summarizing all annotations added to an element in Smart Review for a particular task.

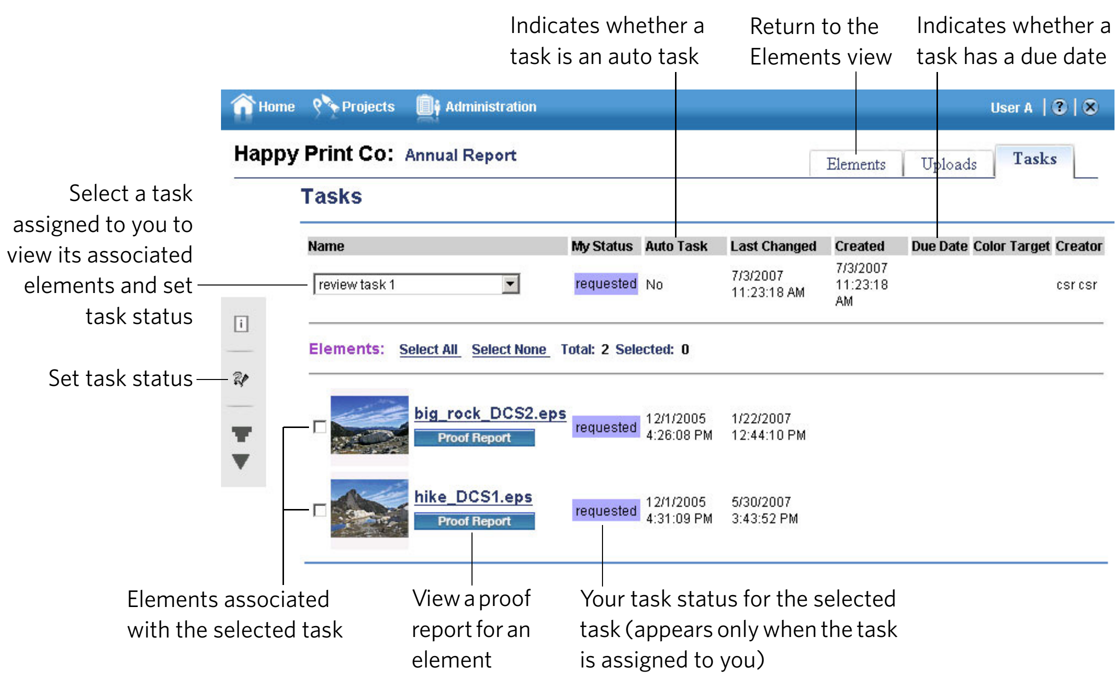


Figure 4: A project open in a Web browser—Tasks view

In Desktop

The left pane of the Desktop window lists all projects to which you have access. Click a project name to open it.

As in a Web browser, the project Elements view in Desktop displays the elements in the project, organized into folders. You can upload, organize, and download elements, and view element attributes. In addition, you can filter the elements to display either all elements in the current folder or only elements with associated tasks that are assigned to you. You can also type a file name or extension in the filter box to display only the elements in the current folder whose names match the specified file name or extension.

Using Desktop's menu items (not shown), you can also assign source profiles to elements, select elements and create tasks for them, and set the status of tasks assigned to you. An icon appears in the upper-right corner of any element that has an associated task assigned to you.

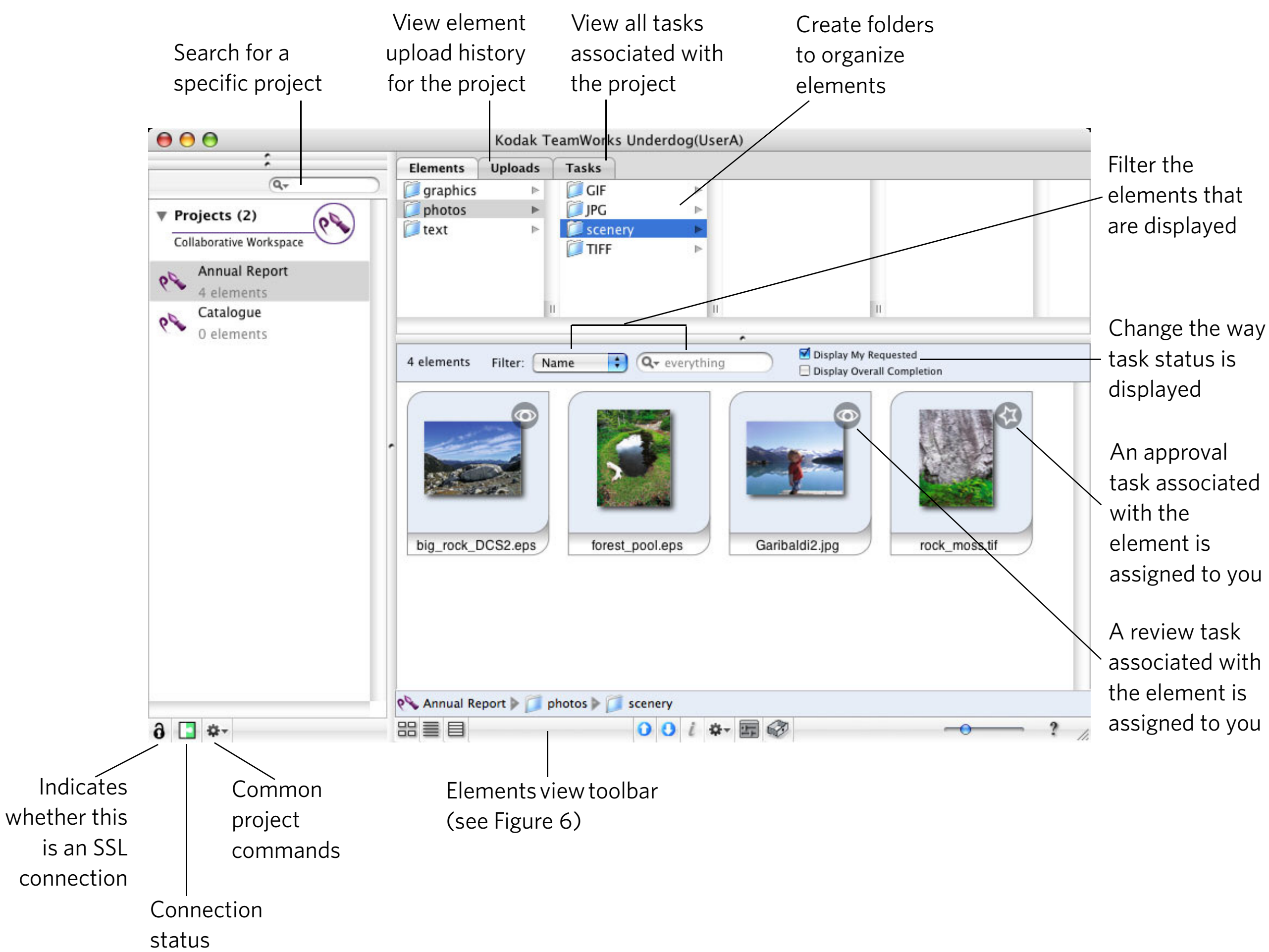


Figure 5: A project open in Desktop—Elements view

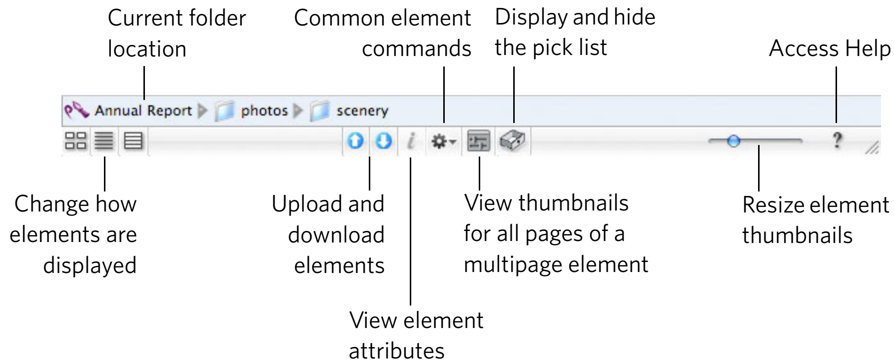


Figure 6: Elements view toolbar

The project Tasks view lists all tasks associated with elements that reside in the current project, the elements associated with each task, and your task status for any tasks assigned to you. In this view, you can set the status of elements in tasks assigned to you and view a report summarizing all annotations added to an element in Smart Review for a particular task. You can also use the **Filter** list to filter the tasks that are displayed (either all active tasks in the project, only active tasks assigned to you, or only tasks whose associated elements require changes).

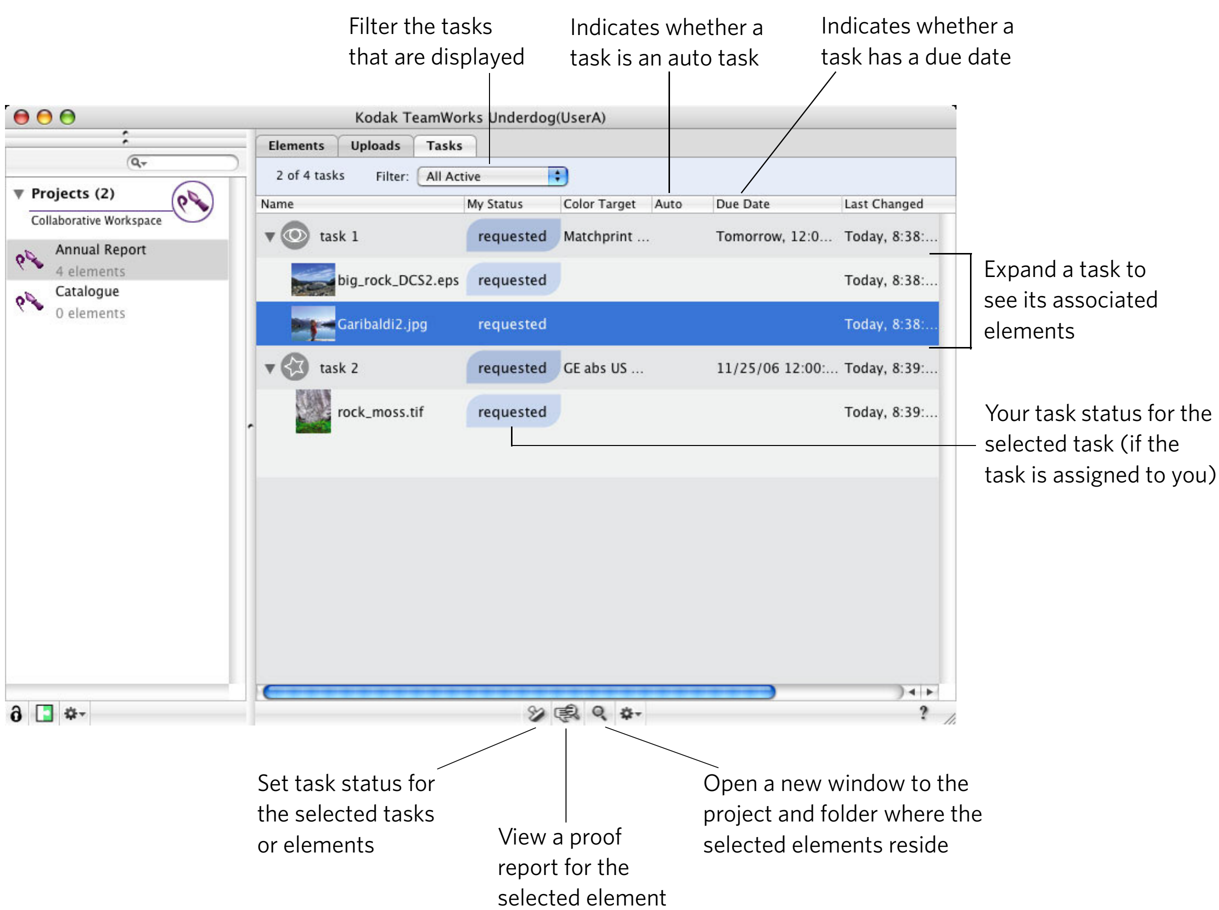


Figure 7: A project open in Desktop—Tasks view

Smart Review

When you open an element in Smart Review, the Smart Review window looks the same, regardless of whether you are using a Web browser or Desktop.

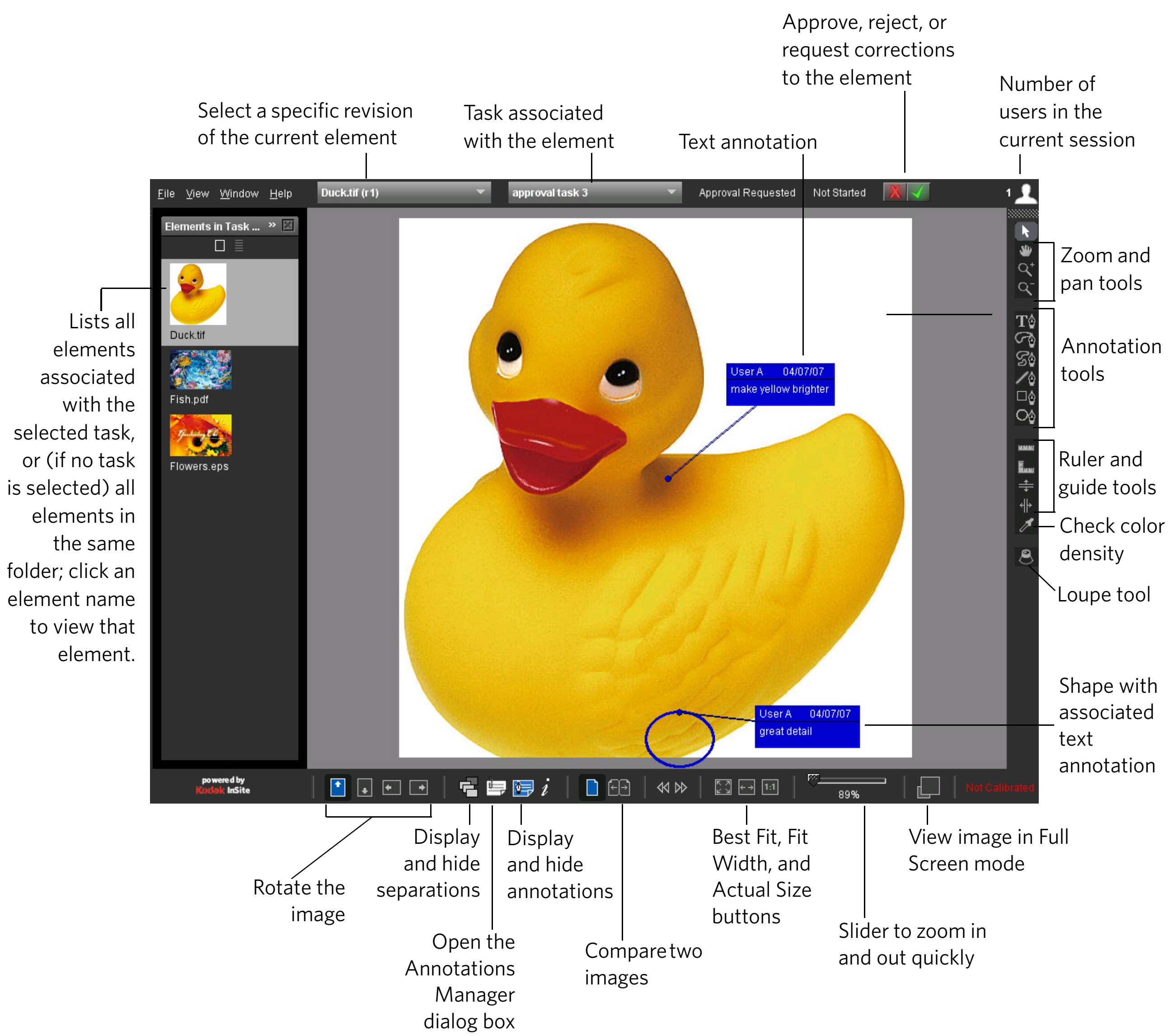


Figure 8: Element in a Smart Review session

For more information about using Smart Review, see the Creative Workflow Help.

Frequent Procedures

The following table describes how to perform common procedures in either a Web browser or Desktop. For detailed instructions and for additional procedures, see the Creative Workflow Help.

Procedure	In a Web Browser	In Desktop
Create a project	In the **Projects** view, click **New Project**, type a name for the project, and click **Create Project**.	Select **File > New Project**, type a name for the project, and click **Create Project**.
Upload an element to a project	Click **New Upload**. In the Upload Files dialog box, type a name for the upload. Click the **Add Files** button to locate and select the elements that you want to upload. (Alternatively, you can drag elements from your desktop directly to the dialog box.) Click **Upload**.	Click **Upload Files**. In the New Upload dialog box, type a name for the upload. Click **Add Elements** to locate and select the elements that you want to upload. (Alternatively, you can drag elements from your desktop directly to the **Elements to upload** area.) Click **Upload**. **Tip:** In Desktop for Mac, you can drag elements from your desktop directly into a project. This automatically opens the New Upload dialog box, with the dragged elements already listed.
Open an element in Smart Review	Click the element.	Double-click the element.
Copy an element between folders within a project, or between projects	Select the element, and on the Operations palette, click **Copy**. Select the destination location, and click **Copy**.	Select the element and select **Edit > Copy**. Open the destination location and select **Edit > Paste**.
Move an element between folders within a project	Select the element, and on the Operations palette, click **Move.** Select the destination folder, and click **Move**.	Drag the element to the destination folder.
Move an element between projects	In a Web browser, you can move elements between folders within a project only. To move elements between projects, you must first copy the element to the destination project and then delete it from its original location.	Drag the element onto the name of the destination project in the left pane. **Note:** You can move elements between projects in Desktop for Mac only. In Desktop for Windows, you must first copy the element to the destination project and then delete it from its original location.
Download a high-resolution version of an element in its original format	Select the element that you want to download, and, on the Operations palette, click **Download Original**.	Select the element that you want to download, and click the **Download Files** button. In the **Download type** list, select **Original**.

Procedure	In a Web Browser	In Desktop
Download a low-resolution JPEG version of an element	Select the element that you want to download, and on the Operations palette, click **Download JPEG**. Select the desired resolution.	Select the element that you want to download, and click the **Download Files** button. In the **Download type** list, select **Low resolution JPEG.** In the **Resolution** list, select the desired resolution.
Delete an element	Select the element. On the Operations palette, click **Delete**.	Select the element, and select **Edit > Delete**.

Working With Tasks

Note: The following table describes how to perform common procedures that are specific to tasks. For detailed instructions and for additional task-related procedures, see the Creative Workflow Help.You can perform task-related procedures only if you are assigned a project role that includes task user rights. For information about user rights, see the Creative Workflow Help.

Procedure	In a Web Browser	In Desktop
Create a task	In the Elements view, select the elements for which you want to create a task. On the Operations palette, click **Create Task**.	In the Elements view, select the elements for which you want to create a task. From the **Actions** menu, select **Create Task**.
Set the status of a task assigned to you	In the Elements or Tasks view, select the elements whose task status you want to set. (You can set the status only for tasks assigned to you.) On the Operations palette, click **Set Status**. Click the name of the task whose status you want to set. **Tip:** You can also set task status in Smart Review. If you have been assigned a color approval task, you *must* set its status in Smart Review. For details, see the Creative Workflow Help.	In the Elements or Tasks view, select the elements whose task status you want to set. (You can set the status only for tasks assigned to you.) From the **Actions** menu, select **Set Task Status**. Select the task whose status you want to set. **Tip:** You can also set task status in Smart Review. If you have been assigned a color approval task, you *must* set its status in Smart Review. For details, see the Creative Workflow Help.
Add elements to an existing task	This feature is not available in a Web browser.	In the Elements view, select the elements that you want to add to the task. Drag the elements to the **Tasks** tab at the top of the Desktop window. When the window switches to the Tasks view, drag the elements to the name of the task to which you want to add the elements.

Procedure	In a Web Browser	In Desktop
Remove elements from a task	This feature is not available in a Web browser.	In the Tasks view, expand the task whose elements you want to remove. Select the elements that you want to remove. From the **Edit** menu, select **Delete**.
Edit a task to modify its task name, due date, or description, or to turn password authentication on or off	This feature is not available in a Web browser.	In the Tasks view, select the task that you want to edit. From the **Actions** menu, select **Edit Task**.
Add users to a task or remove users from a task	This feature is not available in a Web browser.	In the Tasks view, select the task for which you want to add or remove users. From the **Actions** menu, select **Edit Task**. In the **Users** area, select the check box for each user that you want to add to the task, and clear the check box for each user that you want to remove from the task. Click **Apply**.
Send a reminder e-mail message to any users assigned a task who have not yet set their task status	This feature is not available in a Web browser.	In the Tasks view, select the task for which you want to send a reminder. From the **Actions** menu, select **Send Task Reminder**. Modify the message as desired, and click **Send Reminder**.
Reset a user’s task status	This feature is not available in a Web browser.	In the Tasks view, expand the task for which you want to reset the user's status until you see all of the users assigned the task. Select the user whose task status you want to reset. From the **Actions** menu, select **Reset User's Task Status**.
View a report summarizing all of an element’s annotations that are associated with a particular task	In the Tasks view, select the task associated with the element for which you want to view a report. (You can view a report for only one element at a time.) Click **Proof Report** next to the element.	In the Tasks view, select the element for which you want to view a report. (You can view a report for only one element at a time.) From the **Actions** menu, select **View Proof Report**.

Using Auto Tasks

When you create an *auto task* in a project, any elements uploaded to the project after the task is created are automatically added to the task. This is useful if you have several elements to upload to the project at different times, but you want all of the elements to be reviewed by the same users.

When you upload an element to a project that has an auto task, the element is automatically added to the task. (Elements are added to color approval tasks only if their file types are supported by the Matchprint Virtual technology. For information about the file types supported by Matchprint Virtual, see the Creative Workflow Help.)

Like regular tasks, auto tasks appear in the Tasks view of a project. When an element is added to an auto task, a task icon automatically appears on the element thumbnail in the Elements view. If event notification is set up for your system, when an element is added to an auto task, all users who are assigned the task receive an e-mail message.

To create an auto task:

- In a Web browser: Open the project in which you want to create an auto task, and click **Administration > Create Auto Task**.
- In Desktop: Open the project in which you want to create an auto task, and select **Actions > Create AutoTask**.

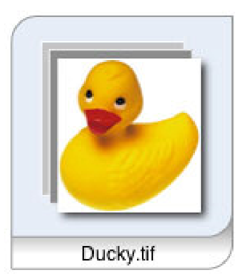
About Element Revisions

You can upload multiple revisions of an element, and each revision is stored and displayed without overwriting previous revisions.

An element with multiple revisions appears differently in a Web browser than in Desktop. In a Web browser, the number of revisions for the element appears as a **<number> Revisions** link below the thumbnail. In Desktop, the thumbnail appears as a stack of images (in Gallery Display mode). In either case, the thumbnail in the Elements view is for the latest revision of the element.

In a Web browser

In Desktop



To view all of an element's revisions:

- In a Web browser: Click the **<number> Revisions** link below the element thumbnail.
- In Desktop: Select the element, and select **Actions > View Revisions**.

You can then perform actions on a specific revision—for example, copy it to another location, download it, or open it in Smart Review.

For more information about working with element revisions, see the Creative Workflow Help.

Working With Element Attributes

An *attribute* is information associated with an element that provides details about that element, such as its file size or type. You might want to view an element's attributes to learn more about the element. For example, the attributes that are displayed when you select a PDF file indicate whether the file can be separated and, if not, why—for example, because the file contains a nonseparable color space.

To view an element's attributes:

- In a Web browser: Select the element, and on the Operations palette, click **Get Attributes**.
- In Desktop: Select the element, and click **View Attributes**.

For more information about element attributes, see the Creative Workflow Help.

Using Hot Folders

A *hot folder* is a folder that is monitored for incoming files as a trigger for an automatic operation. The software that processes the files checks the folder location on a regular basis, and automatically processes files found there.

In Desktop, you can create upload hot folders to automatically upload elements to specified projects.

When you create an upload hot folder, you associate it with a project. Then whenever an element is placed in the hot folder, the element is automatically uploaded to the associated project.

Upload hot folders are useful because you can place elements in a hot folder and have them automatically uploaded to a particular project without having to log on to the system.

You can place many elements in an upload hot folder and have them upload to a single location. This is especially useful if you will be frequently uploading files to the same location.

To create an upload hot folder:

1. In Desktop, select the project with which you want to associate an upload hot folder.
2. From the **File** menu, select **New Hot Folder**.
3. Select any existing folder in your file system or create a new folder to use as the upload hot folder, and click **Create Hot Folder** or **OK**.

To view and manage all upload hot folders for all projects:

➢ From the **Window** menu, select **Hot Folders**.

For more information about hot folders, see the Creative Workflow Help.

Desktop Feature Summary

The following list summarizes the additional features that are available in Desktop beyond what is available in a Web browser:

- Upload and download elements using drag-and-drop
- Upload InDesign files that can be viewed in Smart Review
- View elements in Gallery, List, or Table Display mode
- Create your own pick list of elements
- Associate upload hot folders with specific projects, and automatically upload elements placed in those hot folders
- Associate download hot folders with specific projects, and automatically download XMP approval metadata for elements that are associated with tasks in those projects (Desktop for Windows only)
- Manually download XMP approval metadata for individual elements in tasks
- Open elements in their native software
- View low-resolution versions of elements (Desktop for Mac only)
- Set your own Desktop user preferences (Desktop for Mac only)

When working with tasks, Desktop also offers the following capabilities beyond what is available in a Web browser:

- View the users assigned to a task and the task status for each user
- View only task elements that require changes
- View all of the tasks associated with an element
- Add elements to an existing task and remove elements from a task
- Edit a task to modify its task name, due date, or description, or to turn password authentication on or off
- Add users to a task or remove users from a task
- Send a reminder e-mail message to any users assigned a task who have not yet set - their task status 16 InSite Creative Workflow 3.0 Quick Start Guide
- Reset a user's task status
- Delete tasks
- Inactivate tasks and reactivate inactive tasks
- Set the final status for a task

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