OPTIMA PRESS
PRINT EXCELLENCE

InSite Prepress Portal iPad Application Quick Start Guide

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1 The iPad application—overview

The Kodak InSite iPad application was developed to enable InSite Prepress Portal users to review, annotate, approve, or reject pages, directly from their iPad in portrait or landscape orientation, with no need for a standard browser.

The pages that the users are reviewing on the InSite iPad application are the same pages that they would be viewing via the web browser. All comments are displayed both in Smart Review and on the History tab of InSite.

The InSite iPad 9.2 application can be downloaded from the App Store. You can use the InSite iPad 9.2 application only with iOS 11 or later. If you are running an older iOS, upgrade to the latest iPadOS. The InSite iPad 9.2 application works with InSite Prepress Portal 8.0, 9.0, 9.1.x, 9.2, and 9.5.

2 The iPad application—logging on and off

Requirements:

- You must be connected to an InSite Prepress Portal 8.0, 9.0, 9.1.x, 9.2, or 9.5 server.

1. On the iPad Home screen, tap the **InSite** application

icon .
2. On the Log In page, tap the **Server** box.
3. In the New Server window:
    a. In the **URL** box, type the URL of your InSite server.
    b. (Optional) In the **Alias** box, type a name for your InSite server.
    Note: If you didn't enter any alias, the word Server will be displayed as the alias.
    c. Tap **Done**.

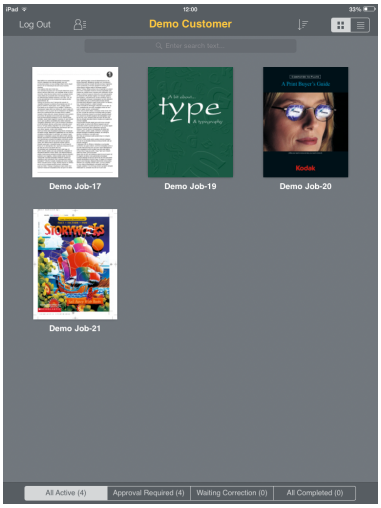
    Your InSite server URL is added to the list of servers.

    Note: To add more servers, tap the **Server** box and then tap .
4. Tap the **User Name** box and type your user name.
5. Tap the **Password** box and type your password.
6. (Optional) To automatically log on next time, tap the **Automatic Login On/Off** switch.
7. Tap **Log In**.
8. (Optional) To save your user name and password for this server, in the message that appears, click **Yes**.
9. To log off, tap **Log Out** on the upper-left side of the job list screen.

3 Finding and viewing jobs

You can search for jobs and define your view of jobs.

After logging on, the application automatically displays the list of jobs of the first customer in your customer list. The jobs are displayed in a gallery view (default).



On this screen, you can perform the following actions:

The required action	Do this
View the jobs in a gallery view (Default)	On the toolbar, tap . Thumbnails of the first page of each job are displayed.
View the jobs in a list view	On the toolbar, tap .
View the customer list and select a different customer	1. On the toolbar, tap . 2. In the customer list that appears, tap the name of the required customer. The list of jobs of the selected customer appears on screen. **Note:** The number that appears next to the customer names in the list, indicates the number of jobs of this customer in InSite. In addition, an alphanumeric scroll bar is located on the right-hand side of the customer list. When you scroll to a specific letter or number and tap it, the customers that start with the specific letter or number are displayed.

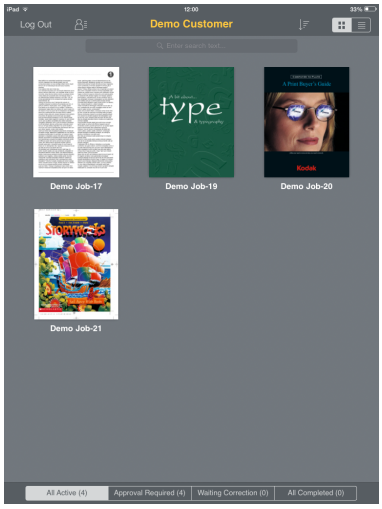
The required action	Do this
Sort jobs by name or creation date	1. On the toolbar, tap . 2. Tap the required sorting option (**Name** or **Date**).
Search for a specific job	1. Under the toolbar, tap . 2. Use the onscreen keyboard to enter the name of the job. A list of jobs that contains the name that you entered appears.
Filter jobs by the following statuses: **All Active, Approval Required, Waiting Correction**, and **All Completed**	On the bar, at the lower part of the screen, tap the required job filter. Only the jobs with the status that you selected are displayed.

4 The iPad application—working with pages

- The iPad application—viewing pages in a job (see page 8)
- Viewing page information (see page 9)
- Page status (see page 9)
- Reviewing or approving pages (see page 10)
- The iPad application—reviewing, rejecting, or requesting to correct pages (see page 11)

4.1 The iPad application—viewing pages in a job

1. In the list of jobs (gallery view), tap a thumbnail of one of the jobs.

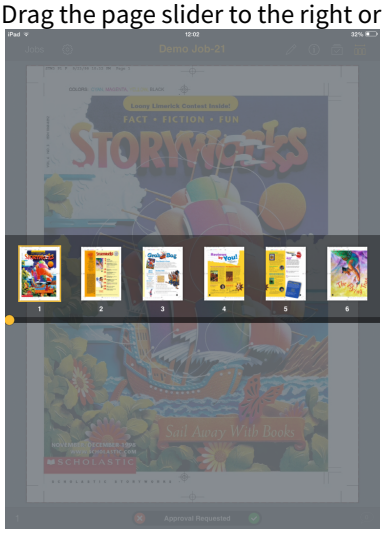


The first page of the job is displayed.
If you view the pages in portrait orientation, a single page is displayed. If you view the pages in landscape orientation, the pages are displayed in a spread view.

The name of the job is displayed on the toolbar.
The page number is displayed in the lower-left corner of the screen. The page status is displayed at the bottom of the screen.

2. View the pages in any of the following ways:

- Flick right or left to display the next or previous page.
- In the upper-right corner of the toolbar, tap , or tap on the screen with three fingers until the film strip appears.
    - Drag the page slider to the right or to the left to view more page thumbnails.



    - Tap a thumbnail in the film strip to open the required page.

3. Zoom in or out a page in the following ways:
    - Zoom in—Pinch the page with two fingers, or double-tap the part you want to zoom in on.
    - Zoom out—Double-tap the image to zoom out.
    - Pan or scroll (When zoomed in)—Drag up, down, left, or right to view another part of the image.
4. To get more information about the approval status of the job, tap the **page status** button at the bottom of the screen. In the Status Info window that appears, you can view the names of the users who have been requested to review or approve this page and the names of the users who have completed their reviews, approvals, or rejections, or requested corrections.
   Note: If no users have been requested to approve or review pages, the Status Info window does not appear.

4.2 Viewing page information

For a page, view the following information:

- The name of the page
- The page trim size
- The page preflight status
  The optional statuses are: errors, warning, succeed, or none (no preflight was done on this page)
- The colors that are used on this page

1. In the list of jobs, tap a thumbnail of one of the jobs. The first page of the job is displayed.
2. Flick left or right to locate the page that you want, tap the page, and then tap the **View page information** button.
   Note: If the pages are displayed in spread view, page information is displayed for both pages.

4.3 Page status

The page status indicates the page's current approval state.

You can see the page status at the bottom of the page's screen.

This Page Status	Means That
Approval Requested	Pages are ready for review or final approval.
Approved	The page is ready to print or to create a hard-copy proof.
Rejected	The page is incorrect and cannot be corrected.
Waiting for Correction	This page requires changes, printable report with the annotations is generated.
Work in Progress	The printer is preparing the page. The page is not available for review or approval at this time.
Approval Not Required	The page is ready and may be viewed, but there is no need to review or approve it.
Approval In Progress	The page is currently being reviewed.

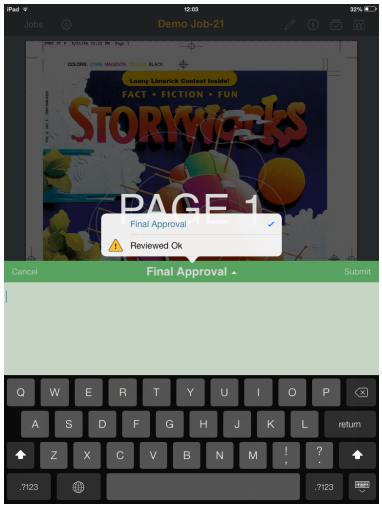
4.4 Reviewing or approving pages

If you have been requested to review or approve a page, and you think that the page is ready for print, set the page's approval status to **Approved**.

Requirements:

- For review, you must have the appropriate review workflow settings and rights (not the Give Final Approval user right). For final approval, if you have a job role that includes both the Annotate and Give Final Approval users rights and the appropriate approval workflow settings, you can annotate and set the approval status of a page.
- If the selected option for the customer review or approval workflow is **Only on request**, you must make sure that you were specifically requested to review or approve the desired pages.

1. Locate and tap the required page in the job.
2. To review or approve the page, perform one of the following actions:
   - With the page open, tap or .
   - With the page open, flick up to approve the page.
     Note: The button is available only if the page status is **Approval Requested**or **Approval in Progress**.
     The following confirmation screen appears:



3. Perform one of the following actions:
   a. If you were requested to review the page, the **Reviewed OK** page status is displayed. You can type comments or just tap **Submit**.
   b. If you were requested to approve the page, the **Final Approval** page status is displayed. You can type comments or just tap **Submit**.
   c. If you were requested to review the page and you have the Give Final Approval user right, tap the arrow to the right of **Final Approval** page status and select the **Reviewed OK** option. You can type comments or just tap **Submit**.

      Important: You can approve a complete job (all pages of a job at once) by tapping the **Approve Job** button in the upper-right corner of the toolbar.

   If you gave final approval to a page, the page status changes to **Approved**. if you selected the **Reviewed OK** option, the page status stays **Approval Requested**. If you have completed your reviews, the page is still available for other users to complete their reviews or final approvals.
   If you have set the page status to **Approved** by mistake and other users need to review the page, contact your Customer Service Representative (CSR) to change the page status back to **Approval Requested**.
   Important: When you set the approval status of a page to **Approved**, the page's status changes in the Kodak iPad application and in the job. You can no longer annotate the page. No other users can annotate the page either.

4.5 The iPad application—reviewing, rejecting, or requesting to correct pages

If there are problems with a page that you don't think can be corrected, set the page's approval status to Rejected. If there are problems with a page and you think the problems can be corrected, set the page's approval status to **Waiting For Correction**.

Requirements:

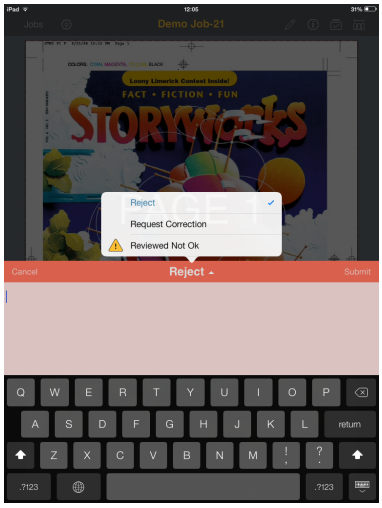
- For review, you must have the appropriate review workflow settings and rights (not the Give Final Approval user right). For final approval, if you have a job role that includes both the Annotate and Give Final Approval users rights and the appropriate approval workflow settings, you can annotate and set the approval status of a page.
- If the selected option for the customer review or approval workflow is **Only on request**, you must make sure that you were specifically requested to review or approve the desired pages.

Note: You should annotate the page to suggest corrections.

1. Locate and tap the required page in the job.
2. To set a page status to Reviewed Not OK, reject a page, or request corrections for a page, perform one of the following actions:
   - With the page open, tap or .
   - With the page open, flick down to reject the page.

   Note: The button is available only if the page status is **Approval Requested** or **Approval in Progress**.

   The following confirmation screen appears:



3. Tap the arrow to the right of the Reject page status and select one of the following options:
   a. **Reject**—tap this option if the pages contain errors that cannot be corrected.
   b. **Request Correction**—tap this option if the page contains errors that can be corrected—for example, the text contains a typographical error.
   c. **Reviewed Not OK**—Tap this option if you have completed your review and found errors in the page, but other users have not yet completed their reviews.
4. (Optional) Use the onscreen keyboard to type comments if desired.
5. Tap **Submit**.

   If you rejected a page or requested corrections for a page, the page status changes to **Reject** or **Waiting for Corrections**. If you selected the **Review Not OK** option, the page status stays **Approval Requested**. If you have completed your reviews, the page is still available for other users to complete their reviews or for final approval.

   If you have requested corrections, a PDF correction report is sent by email to the CSR.

   If you have accidentally set the page status to **Reject** or **Request Correction** and other users need to review the page, contact your CSR to change the page status back to **Approval Requested**.

   Important: When you set the approval status of a page to **Rejected** or **Request Corrections**, the page's status changes in the Kodak iPad application and in the job. You can no longer annotate the page. No other users can annotate the page either.

5 The iPad application—working with annotations

- Text and shape annotations (see page 13)
- Setting the view options (see page 13)
- Viewing information about an annotation (see page 14)
- The iPad application—adding a text annotation (see page 15)
- The iPad application—adding a shape (see page 15)
- The iPad application—deleting an annotation (see page 16)
- Viewing annotations in pages that have been approved or rejected (see page 16)

5.1 Text and shape annotations

Use text and shape annotations to add comments and specify required changes to a file.

You can use the following types of annotations:

- Text annotations
- Straight line tool
- Oval tool
- Rectangles tool
- Pencil tool
- Densitometer tool

The annotation tools are available only when you have a job role that includes the Annotate user right and when the page status is **Approval Requested** or **Approval in Progress**.

5.1.1 The annotations' colors

User	Annotations are displayed in:
The annotations that you added to the page	Blue
The currently selected annotation	Yellow
Other users' annotations	Gray **Note:** If the **Users Annotations by Colors** option is selected, the annotations of each user are displayed in a different color. The colors are automatically selected by the application per page (up to 11 colors).

5.2 Setting the view options

Define the settings for displaying the pages, the annotation tools, and the annotations on the screen.

1. On the toolbar, tap .
2. Select the desired display options:

Select this option	To
Page View	By default, the option is set to **All Pages**. If pages have been assigned, it is possible to view the pages by **Page Sets**.
Unit of Measure	This option enables the user to define the unit of measure for displaying the page information. Three options are available: **Points, Inches**, and **Millimeters**. The default unit of measure is based on the default option in the InSite Administration page.
Annotation Toolbar Location	This option enables the user to define the location the annotation's toolbar on the rightside of the screen. Three options are available: **Top, Middle**, and **Bottom**. The default location is **Middle**.
User's Annotations by Colors	When this option is on, it enables the user to view annotations of other users in different colors.
Show Trim Size	When this option is off (default), it enables the user to view the bleed line (red) and the trim line (gray) of a page. When this option is on, the user can see the page's trim size.
High Definition	When this option is off (default), the pages are displayed at normal resolution. When this option is on, the user can view the contents of the page in high definition, which is helpful to view areas with smaller type or areas that include great detail. **Note:** Additional time is required to provide the preview when this option is on. A yellow progress bar above the page indicates the progress of the rendering process.

5.3 Viewing information about an annotation

1. In the lower-right corner of the screen, tap

,
Note: The number of annotations for the page you are viewing is displayed on the button.
2. In the **Annotations** list that appears, you can view information about an annotation, including who added it, the creation date, and the color that is associated with the user (if the **Users Annotations by Colors** is selected in the Settings window).

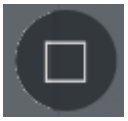
5.4 The iPad application—adding a text annotation

Use text annotations to add comments and specify the required corrections to a page.

1. On the upper-right corner of the toolbar, tap .
2. On the annotation toolbar, tap , and then tap the location where you want to place your note on the page.
   A text box and keyboard appear in the specified location.
3. Type your comments.
4. Tap anywhere on the page to close the text box.
5. A icon indicates that a note is added in the specified location.

5.5 The iPad application—adding a shape

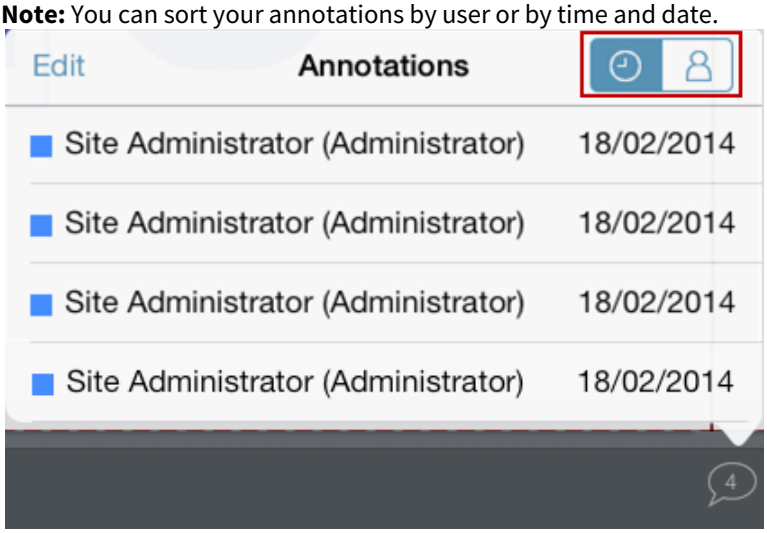
You can add shape annotations in the form of straight or free-form lines, squares or rectangles, and circles or ovals.

1. On the toolbar, tap .
   The annotation toolbar appears on the right side of the screen.
2. Tap the desired annotation tool button:
   - Tap to draw a straight line.
   - Tap to draw a circle or oval.
   - Tap  to draw a square or rectangle.
   - Tap to draw a free-from line.
   - Tap to check the color density of a specific area of an image.

5.6 The iPad application—deleting an annotation

Requirements: You can delete your own annotations only. To delete your annotations you must have a job role that includes the Annotate user right, and the page's approval status must not be set.

1. On the upper-right corner of the toolbar, tap .
2. In the lower-right corner of the screen, tap the **Annotations** icon.
   The **Annotations** list appears.
   Note: You can sort your annotations by user or by time and date.



3. Tap the **Edit** button.
   The **Delete** icon appears next to each annotation.
4. Tap next to the annotation that you want to delete, then tap **Delete** to confirm deletion.
5. Tap **Done**.

5.7 Viewing annotations in pages that have been approved or rejected

In pages that have been approved or rejected, you can only view the annotations, but you cannot add or edit the annotations.

1. To view the annotations, on the upper-right corner of the toolbar, tap .
   If the pages have been approved, or rejected, or corrections were requested for them, the annotation toolbar does not appear.
2. While the annotation tool is selected, flick right or left with two fingers to display the next or previous page.
   Note: When the annotation tool is not selected, you need to use a single finger to flick to the next page.

6 E-mail notifications

If you use your iPad to access e-mail messages and have received an e-mail request to review or approve pages, you can click the link in the e-mail message on your iPad App. However as of InSite 9.5, The iPad App no longer recognizes that the link was clicked on the iPad App and will refer you to the web site on the iPad via the default browser. You can still open the iPad app and get to the required job or page on the app itself.

In addition, an e-mail message that is sent by using the secure link option enables the user to authenticate with a password, if required. If a password is not required, the iPad App opens the pages that you were requested to review or approve, unless your cooperating InSite Server is at 9.5 or later; then the Secure Link will open in the iPad's default browser.

Note: Only links for Preview and Smart Review can be viewed using the InSite Prepress Portal iPad application.