Trisoft
InSite Web Portal

Trisoft Graphics Inc.

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Welcome to the first phase in Trisoft Graphics rollout of InSite Web Portal. Although the evolution of our implementation will bring a number of additional features and services in future phases, all of the basic elements are in place to provide our clients and their clients with extraordinary tools for communication, job management and virtual proofing. Current tools and processes such as e-mail, ftp, fax and hard proofs, will continue to be employed. However, we think you will find InSite and Smart Review, welcome replacements for some of these manual and cumbersome methods.

Our goal is simple: continue to improve service to our clients by offering them ever more effective and efficient tools as we continue to improve our own processes and procedures to eliminate waste and minimize errors.

Growth and change are never easy but they are inevitable and Trisoft has always been at the forefront of technological and operational advancement.

Trisoft is the first Trade shop on the west coast to have a Digital Plate Making System and a Dupont Digital FAST System. Last year, we are first on the west coast to install the Kodak NX system. Now, we are the first trade shop on the west coast to employ and offer the Kodak Insite Web Portal and Smart Review.

With InSite and Smart Review, we can finally invite our clients remotely into our workflow, allowing them to have more control and connection with the projects we work on for them. Our staff is standing by to help you incorporate these tools into your own unique workflows. Training and support are all part of the service we offer and the value we bring to our client relationships.

We look forward to serving you and continuing to provide you with the latest technology.

Logging in to InSite Web Portal:

You can log in to InSite from anywhere with your unique username and password.

login url:
http://216.237.54.170/companyname

The welcome screen as well as the login screen can be customized with your logo and welcome message.

Jobs can be created by you or by Trisoft and you will be able to view and interact with all active jobs.
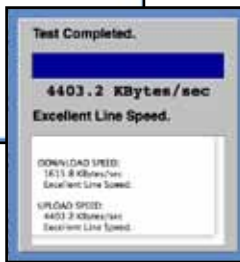
System Diagnositcs:

To determine the quality of your connection to InSite, click on "System Diagnostics" **1** on the login page and follow the prompts.

A brief description of your system, browser and settings may indicate required software downloads like Java.

Line Speed quality will be indicated as a range:
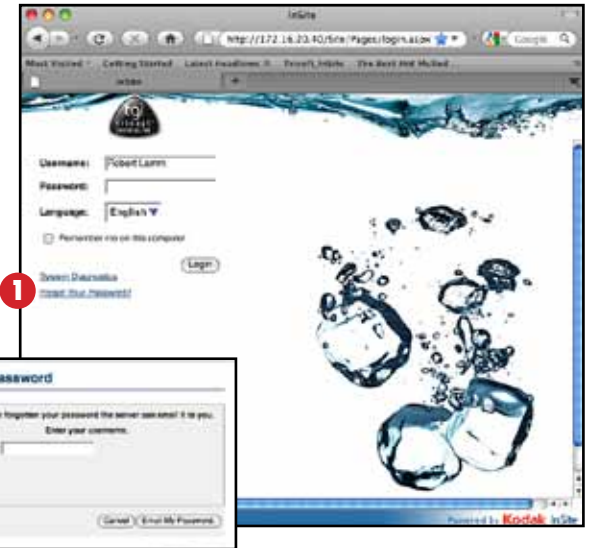*Excellent*
Good
Fair
Poor

Contact Trisoft if your connection speed is Fair or Poor.

Once everything checks out, click at the bottom of the diagnostics **2** window to run a test of your connection speed.
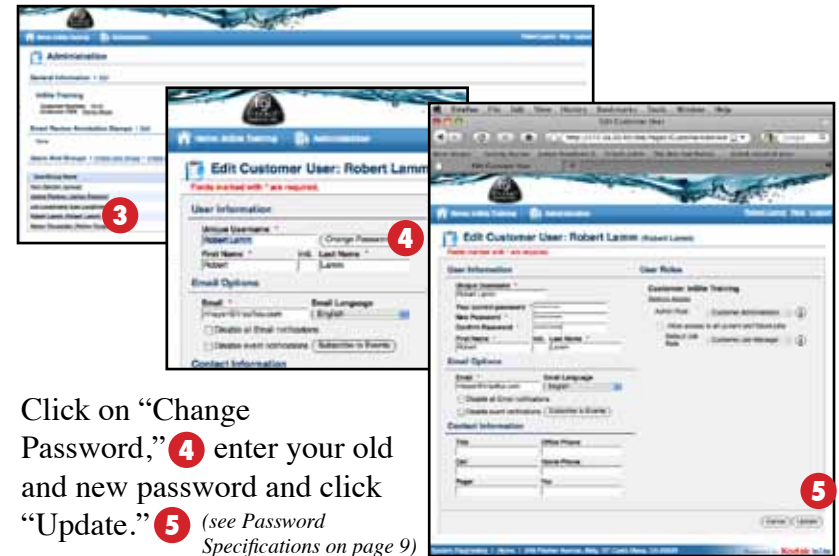
If you have a slow connection speed or you see any red text in the diagnostics window, contact your InSite Administrator at Trisoft for assistance setting up your system.

Passwords:

Forgot your password? Click on "Forgot Your Password?" **1** on the login page and send yourself an e-mail with your password.
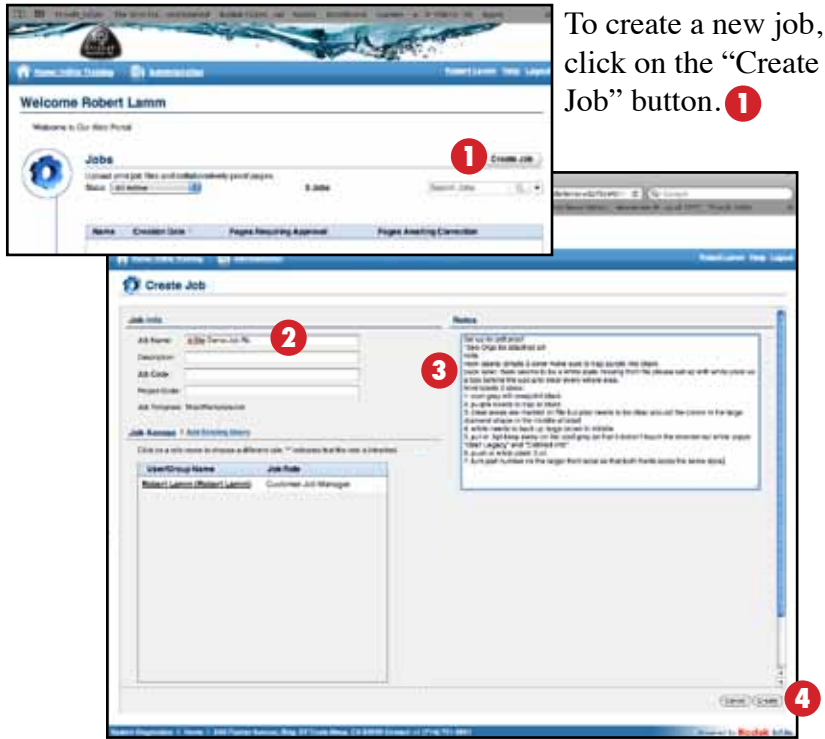
To change your password, click Administration **2** and select your User Name. **3**

Click on "Change Password," **4** enter your old and new password and click "Update." **5** *(see Password Specifications on page 9)*

Creating a job:

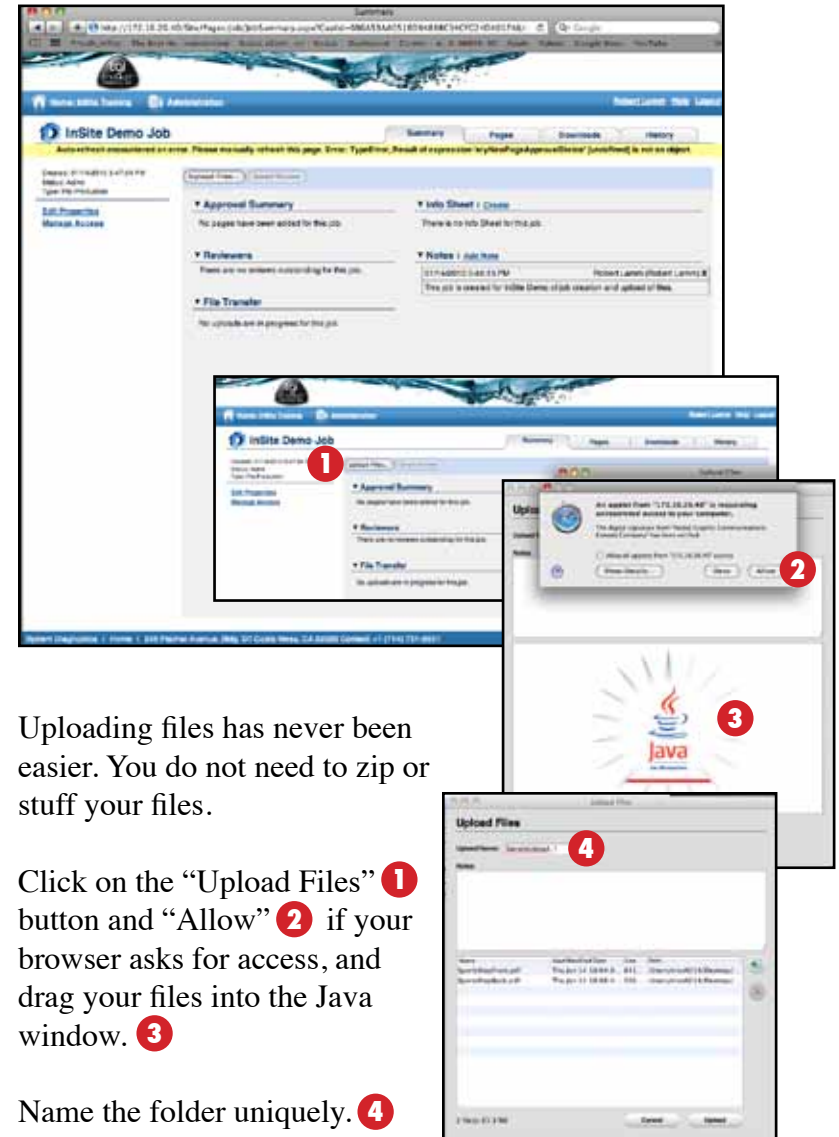To create a new job, click on the "Create Job" button. **1**

Name the job **2** and add a description, job or project code. You will also be able to add users or groups of users to this job.

Job names should include elements you wish to see in the final job name. Trisoft will be renaming the job, adding our unique job number and making sure the job name conforms to system requirements (no special characters such as &, %, !, #). Please keep your job names as short as possible so we can include everything. The system allows for 31 characters including our job number.

Make sure to add your instructions in the "Notes" window. **3** This easily replaces an e-mail and ties directly into the job.

Click the "Create" button **4** and your job window will open to the default "Summary" tab.

The "Summary" tab allows you to see general activity and notes in the job as well as access to Info Sheets which will be rolled out in the next phase of InSite. This is also where you will manage access to the job when you create users and groups that need to be part of your review process.
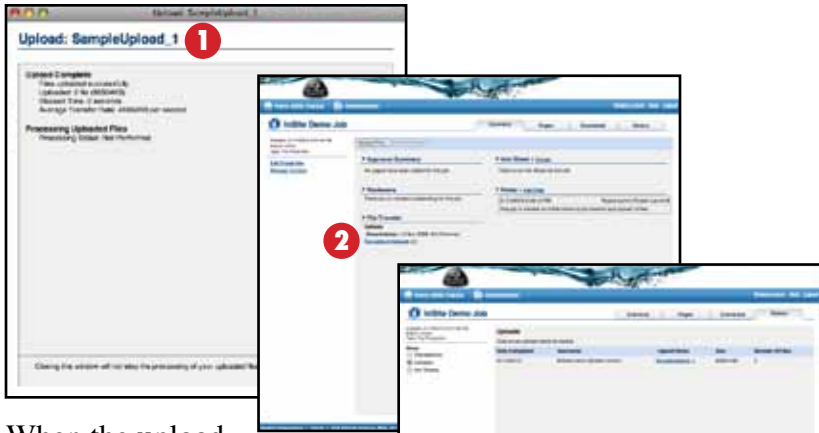

Uploading files has never been easier. You do not need to zip or stuff your files.

Click on the "Upload Files" **1** button and "Allow" **2** if your browser asks for access, and drag your files into the Java window. **3**

Name the folder uniquely. **4** This folder will go directly into the job on our server.

It is recommended that folder names have a number or date included for multiple uploads.

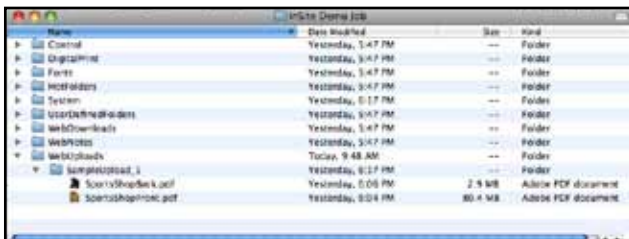# Web Uploads and Web Downloads:

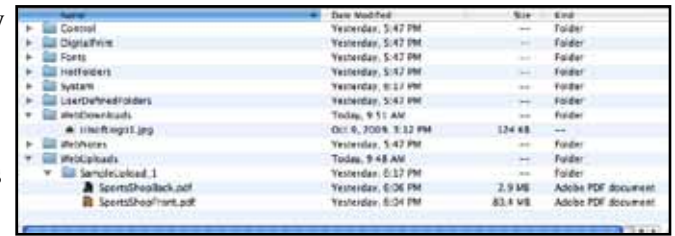When the upload is finished, InSite gives you a report ❶ including any processing that may have taken place.

The "Summary" tab shows (1) upload ❷ completed and if you click on the "Completed Uploads" link, you can drill down to the most specific details of the upload.
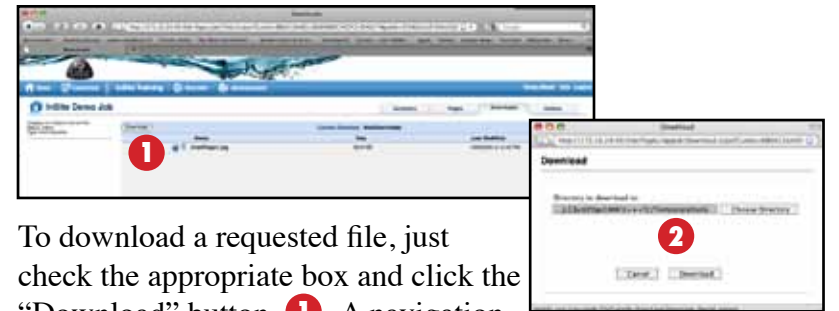
Not only does InSite deposit the files in the actual job on the Trisoft server which we never had with ftp, it eliminates the problems inherent to ftp processing and refresh. Your files don't appear on our server until the upload is complete and subsequent uploads automatically go to a new folder named by you.

It is equally simple for Trisoft to download certain files requested by our customers by depositing them in the "Web Downloads" folder found in each job on our server. Once we deposit files in this folder, they are visibile and downloadable by authorized users.

To download a requested file, just check the appropriate box and click the "Download" button. ❶ A navigation window opens for you to browse to a specific location for the file and confirm your download. ❷ This service is limited to non-proprietary files.

E-mail notifications offer another way of entering InSite. These notifications are sent when files are provided for download or when a proof is ready to be reviewed for approval.

Simply click on the link ❸ and once you enter your username and password, you will be taken directly to the job or files in the job if applicable.
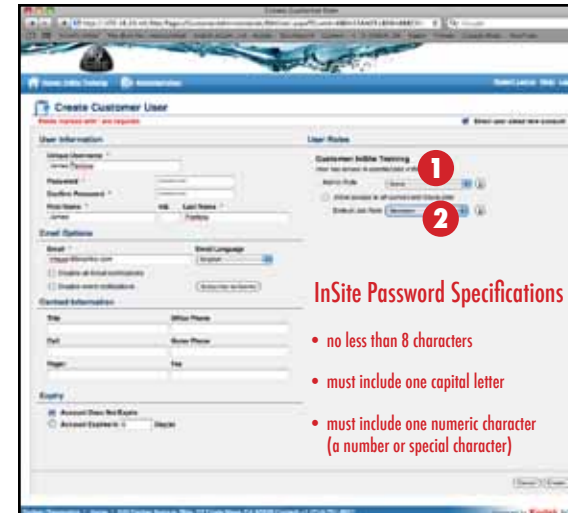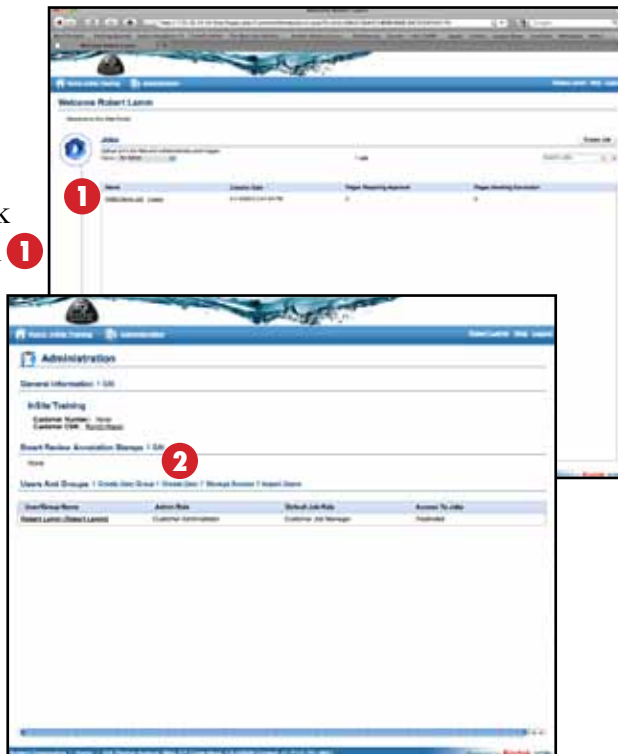
Creating users and user groups:

As a customer of Trisoft, Smart Review is simply part of the service we provide. We would, however, like to offer you the option to subscribe to an extended service that allows you to create users and user groups in order to collaborate with your customers.

Either way, you will always be able to participate in the review process yourselves.

You have already been given the temporary administrative priveleges to create users. We will leave this feature enabled for a 90-day trial period after which, you will need to decide if you wish to subscribe to continue this service or simply collaborate between Trisoft and your company.

To create new users (people you want to invite into jobs for review purposes), click Administration **1** and then click on "Create User." **2**

Fill in all the required fields including a password that conforms to InSite specifications. Assign the user an appropriate role. We recommend no Administrative **1** role and a Default Job Role of "Reviewer." **2** Assigning a user to an Administrative role may allow them more control than you want to give them including creating additional users. Repeat the process until you have created all the users you need and then you can put them in a user group if you wish.

InSite Password Specifications

- no less than 8 characters

- must include one capital letter

- must include one numeric character (a number or special character)

To create a user group, click on "Create User Group" **3** in Adminisration.

Name the group, **4** give the group an Administrative role of None and a Default Job Role of Reviewer.

Check each user you want in the group. **1**

Click on "Update" **2** and you can now invite each user or the entire group to review proofs with you.

As the Customer Job Manager, you control access to jobs and to proofs through InSite using a tool called Smart Review (see next section).

To add or remove users, or add them to or remove them from groups, click on "Manage Access" **3** on the Summary tab or in Administration.

Make any changes or deletions and update. **4**

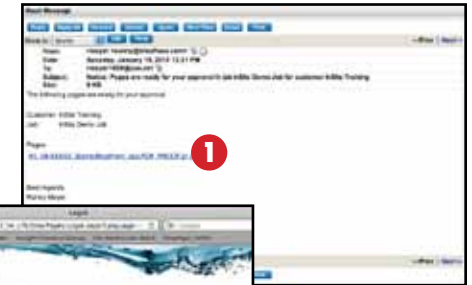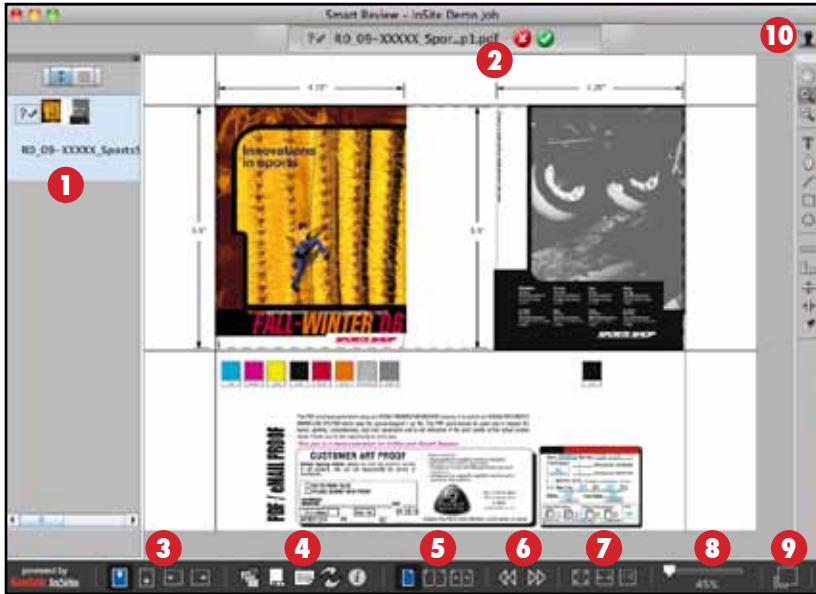Once you have completed assigning access, click "Apply." **5**

Smart Review:

When Trisoft prepares a digital proof for customer review, an e-mail is automatically generated inviting the reviewer to the specific job via InSite. Just like the e-mail notification generated earlier with WebDownloads, the recipient can click on the link **1** and be taken directly to the InSite login and after login, directly to the file or files being reviewed.

As the Customer Job Manager, you can review one or more rounds of proofs yourself, or invite others to join in the approval process at any stage. You control what those users see and have final approval and sole communication with Trisoft unless you initiate collaboration between your users and Trisoft.

You will receive notification from Trisoft when a proof is ready to be viewed. To examine a proof, simply click on the proof icon **2** and Smart Review will download and launch automatically. Each time Smart Review launches, you will be prompted to allow access to your computer **3** or you may check the box to allow access without the warning for future operations.
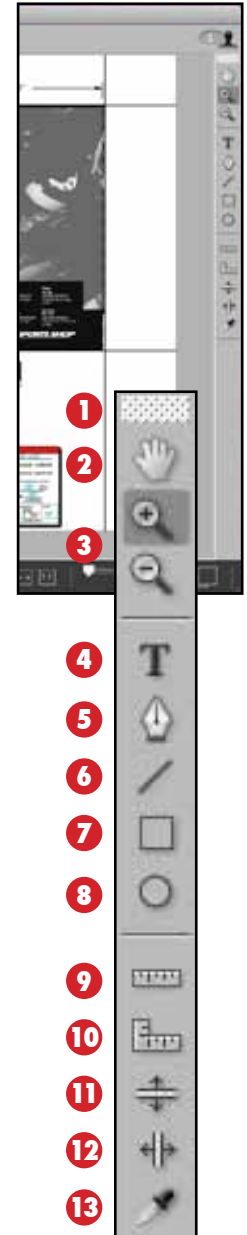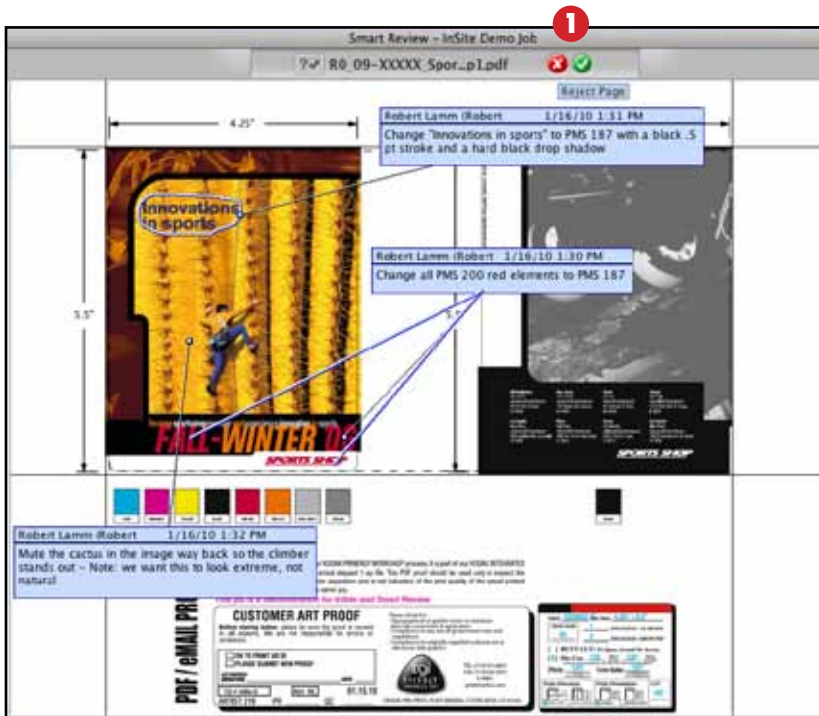
Smart Review Window

1. The area to the left of the proof window shows all available proofs to view. There should be as many revisions as have been made for this particular job. You can choose thumbnail or list view.

2. In the proof name area there are two options: red x for reject; and green check for approval.

3. You can view the proof at any of four rotation choices.

4. Available views such as: Separations; Versions; Annotations Manager; Preflight Manager; and general Page Info.

5. Single Page Mode, Reader Spread Mode, and Compare Mode.

6. Previous and Next Page cycles through available proofs for review.

7. Best Fit, Fit to Width, and Actual Size views.

8. Or you can control the view percentage with the slider tool. Note that you can also use the Navigation window which is especially helpful when zoomed in to the proof.

9. This tool toggles to Full Screen Mode and back if you want to view without the tools and window boundaries.

10. Group Manager: allows you to begin and control a group session with other reviewers. This may work best with telephone conference contact much like a web meeting.

Smart Review Toolbar

1. Annotations Toolbar: Move the annotations toolbar to a margin or as an independent window.

2. Pan: Commonly known as the Grabber Hand allows you to move the view of the proof.

3. Zoom In/Zoom Out: Click or drag a selected area to zoom into or out of.

4. Text Annotation: Allows for text note and direction pointer to any area on the proof.

5. Pen Annotation: A free form pen tool used for circling an area of the proof.

6. Line Annotation: Allows you to drag a line between one place and another on a proof. Ideal for connecting text annotations to free form, rectangle or oval annotations.

7. Rectangle Annotation: Allows you to mark an area of the proof where a rectangular selection is an appropriate choice.

8. Oval Annotation: Allows you to mark an area of the proof where an oval selection is an appropriate choice.

9. Ruler: Lets you measure between two points on the proof.

10. Square Ruler: Lets you measure the rectangular area or width and height of an area on the proof.

11. Horizontal Guide Annotation: Allows you to place a horizontal guide anywhere on the proof.

12. Vertical Guide Annotation: Allows you to place a vertical guide anywhere on the proof.

13. Densitometer: Lets you measure the ink density of any area on the proof including accurate spot color and overprint densities.
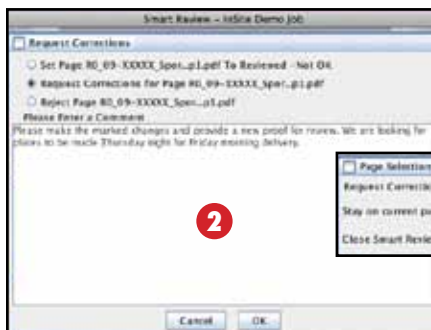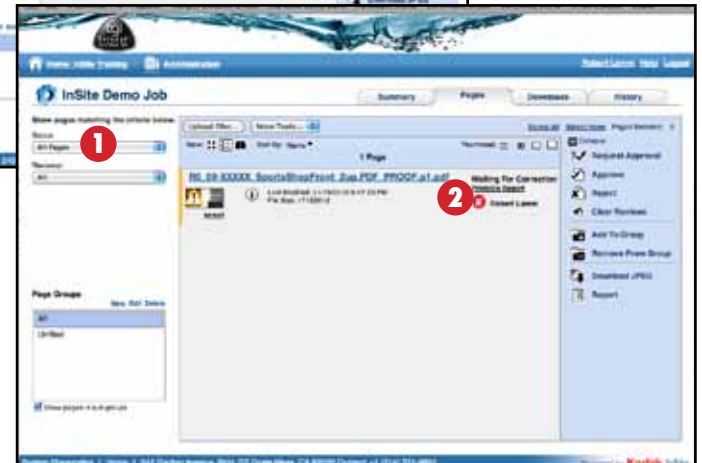
Aproving or Rejecting Proofs:

If the proof is perfect as is, just click on the green check icon ❶ and add a note to the approval. If, however, you wish to make revisions, you can annotate or mark up the proof using the different annotation tools. Move the location of the notes, lines and pointers to make it easier to view.

Once you are finished with all annotations, click on the red x icon, ❶ add instructions as part of a note and click OK. ❷
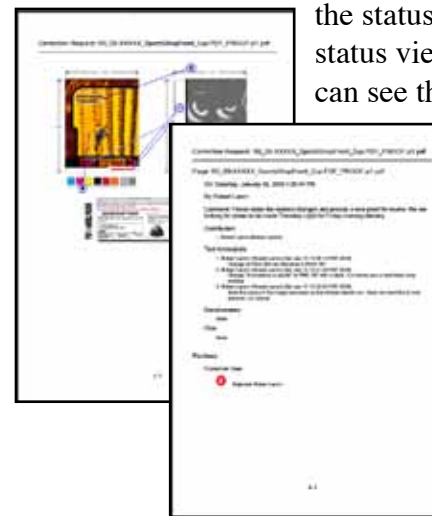

You will be given the option to stay on the current page or close Smart Review.

Remember, notes are not just a convenience, they are instructions that we hope will take the place of e-mail.

Although your initial InSite Pages tab may no longer show the proof document, this is simply because you have changed the status of the proof. Change the status view to All Pages ❶ and you can see that your proof is Waiting For Correction.

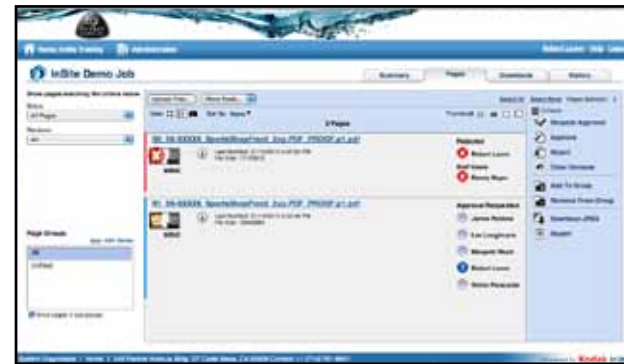By clicking on the Printable Report ❷ link, you can view, print and save, a pdf report capturing all the notes from this session including a visual of the annotated proof.

Once Trisoft completes the revisions, a new proof will be made and you will receive a new e-mail notification inviting you to review that proof.

Trisoft will mark the previous proof as Rejected and the new revision will be marked as Approval Requested.

At any stage, you can elect to invite other reviewers into the process by selecting the proof and clicking on Request Approval. ❶

Select the users or groups you wish to invite and click the Request Approval button. ❷
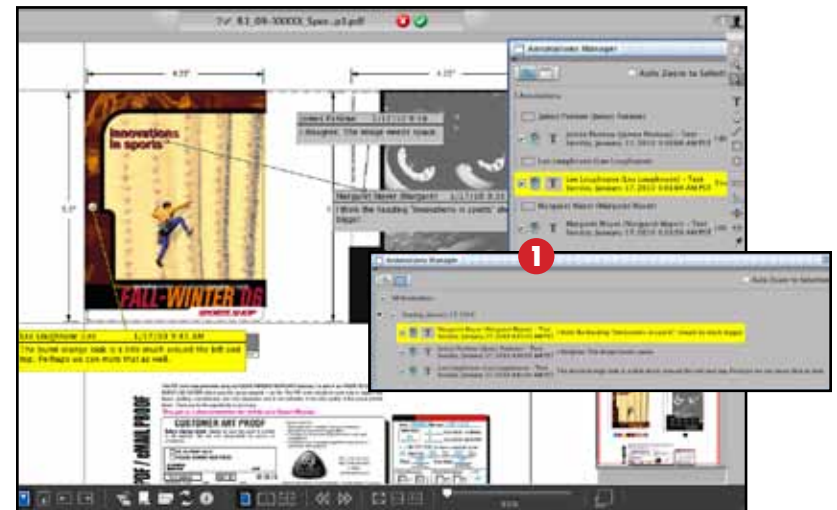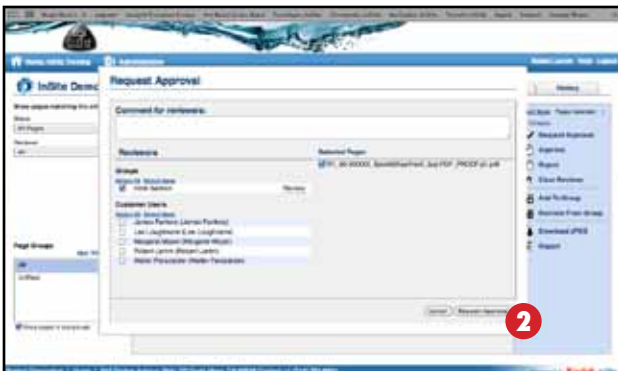

Your page summary now shows all of the users within the group that will receive e-mail notifications and links to this proof.
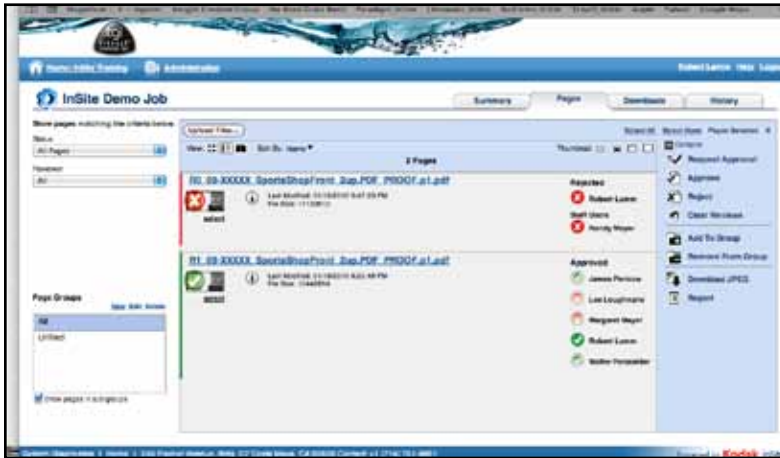
You will receive an e-mail notification from each of your users as they review the proof. Once they have all responded, you can launch Smart Review and look over each of their annotations. You can sort annotations in the Annotations Manager either by name of user or by date ❶ (letting you see the chronology of the comments, which could make a difference in your final approval).

Once you have reviewed all annotations, you will have the opportunity to either compile them along with your own annotations for another round of revisions with Trisoft or override them and approve the proof. As the Customer Job Manager, you can delete anyone's notes and give final approval. No other reviewer, however, can delete another reviewers notes. Below is an example of a proof approved by the Customer Job Manager even though there are two users that had suggested revisions.
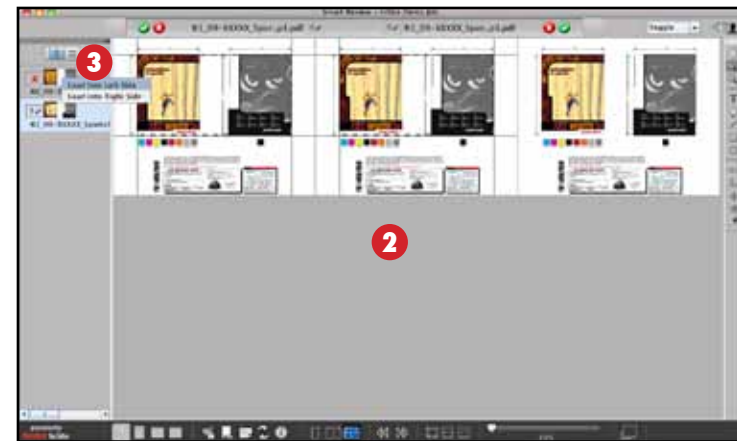

Comparing Proof Revisions:

One of the most powerful tools in Smart Review is the Compare Mode. Compare Mode allows you to view two revisions side by side with a third pane indicating the difference between the two revisions.

Compare Mode only works if you have two or more revisions of a particular proof available to preview.
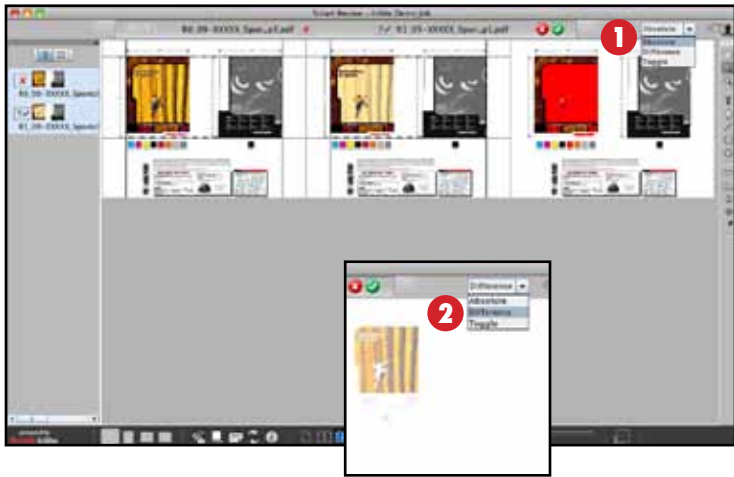

When you click on Compare Mode ❶ the screen defaults to a view of the same proof in both left and right panes (the third pane to the far right is the compare or difference pane). ❷

Right-click/control-click on the alternate version you wish to compare and load it into either the left or right side. ❸

For any given job there could be one, two or many revisions of proofs. InSite/Smart Review allows you to compare any two proofs available. It is Trisoft procedure to keep all proofs from R0 to the most recent revision, available for you to view. It is also part of our internal QC process to compare the client original file (untouched by Trisoft), with the R0 1up.

In Compare Mode there are three choices for viewing the third pane comparison: Absolute ❶ which uses a different solid color mask for the areas changed and toggles between them; Difference ❷ which shows a static image of the areas changed only; and Toggle ❸ which simply toggles between the two revisions.

Our internal method is to view the proofs in Difference view and then Toggle view.

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Another feature of Compare Mode is that, when you zoom in to an area, all three panes zoom with you. You can use the Navigation tool to move around the proof at closer zoom views.

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3.25.10