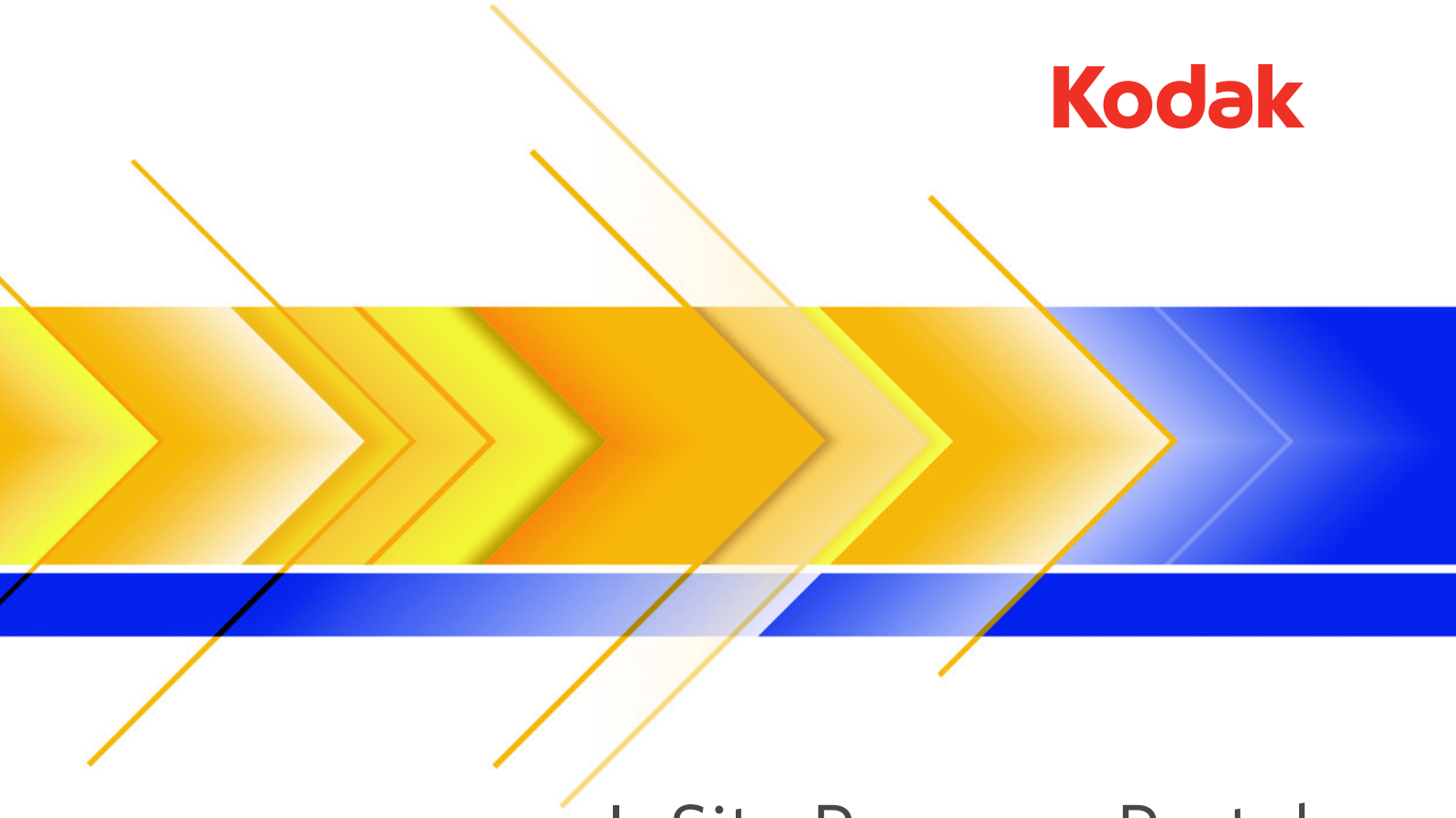


InSite Prepress Portal and InSite Storefront

Systems
Version 5.0

Upgrade Guide
English

72-3667L-EN Rev D

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Overview

This document guides you through the steps required to upgrade a Kodak® InSite™ Prepress Portal system (formerly known as InSite software) or Kodak InSite Storefront system. Your current installation of the Prepress Portal software must be version 4.5 or later. If you have an earlier version, contact your service representative.

Note: For information on workflow software requirements, see the *InSite Prepress Portal Release Notes* (06-3358) or the *InSite Storefront Release Notes* (739-00420). These documents are available from Kodak eCentral®, the Internet portal, at: https://ecentral.graphics.kodak.com/.

Before Upgrading

Before upgrading the Prepress Portal or Storefront server, ensure that

- You have applied all Microsoft® Windows® security updates (also known as hotfixes)
- You have recently backed up the Prepress Portal or Storefront server

Installing Microsoft security updates

The following servers are configured to automatically obtain a list of Microsoft critical and security updates that have been tested by Kodak:

- InSite servers at version 4.5.0.2076 and later
- Prepress Portal and Storefront servers at version 5.0 and later

When new Microsoft updates are available, an icon appears in the notification area of the server desktop.

Note: Some security updates require that the server have Windows 2000 Service Pack 4 software installed. Do not apply these security updates until after you upgrade the server to Service Pack 4.

To check which security updates are available but not yet applied:

1. On the Prepress Portal or Storefront server, go to the Microsoft Web site at http://www.microsoft.com/. Click **Security**.
2. Under **Current Security Updates**, click **Windows Security Update** to download and install the latest critical Windows security updates.
3. Restart the Prepress Portal or Storefront server.

Backing Up

Before upgrading, you should back up your Prepress Portal or Storefront system. For instructions on how to back up your system, see the *InSite Prepress Portal and InSite Storefront Backup Guide* (72-3700), available from eCentral.

Performing the upgrade

Important: You must perform the upgrade directly on the Prepress Portal or Storefront server—you cannot perform the upgrade via a remote connection. You must be logged on to the Prepress Portal or Storefront server using the ARAXI account (where the username is ARAXI and the password is generally ARAXI) to complete the upgrade.

- To upgrade your Prepress Portal system from **version 4.5.x to 5.0.x**, see the following procedure.
- To upgrade your Prepress Portal system from **version 5.0.x to 5.0.y**, see page 10.

Upgrading Prepress Portal from version 4.5.x to 5.0.y

If your InSite 4.5.x software is integrated with a Kodak InSite Creative Workflow system or Kodak InSite Asset Library, see *Upgrading to Prepress Portal 5.0.3 With Creative Workflow and Asset Library 3.0.3*, available on the eCentral portal at https://ecentral.graphics.kodak.com/. You must upgrade the Creative Workflow/ Asset Library server before you upgrade InSite 4.5.x to Prepress Portal 5.0.y.

Important: If the upgrade fails, do not click **Cancel**. Make a note of the error message and continue with the upgrade. Contact a service representative to report the error.

1. If you are upgrading Prepress Portal on a server that also has Kodak Prinergy® Evo™ software installed:
   a. On the shared Prinergy Evo/Prepress Portal server, locate **%Program Files%\Common Files\InstallShield**.
   b. Delete the entire **InstallShield** folder.
2. Insert the Oracle 10 DVD in the DVD drive.
3. Copy all the Oracle 10 components to the root of drive **E** on the Prepress Portal server:
   a. At the root level of drive **E**, create a new folder named **Oracle10.2**.
   b. Copy the Oracle 10 DVD files to the **Oracle10.2** folder.
   c. From the Windows **Start** menu, click **Command Prompt**. Type `subst O: E:\Oracle10.2` and press ENTER
4. Remove the Oracle 10 DVD from the DVD drive.
5. Double-click the **InSite Administrator** shortcut on the desktop of the Prepress Portal server.
6. Under **Software Updates**, look for the message `1 InSite Update Available`.

   Tip: If the message `There are no software updates available` appears, click **Check Now** to have the system search for updates.
7. Click `1 InSite Update Available` to apply the update.
8. Click **Release Notes**, read them, and close the window.
9. Click **Apply**.

10. Click **OK**.

    The Maintenance message appears.

    Note: You can change this message to one that you want your customers to see during the upgrade. For information about setting a maintenance message for your customers, see the InSite Administration Help.

11. Click **Shutdown now**.
12. Click **Open**.

    The InSite installer starts.

13. Click **Next**.
14. In the NT User Account dialog box, provide the password information:
    a. In the **Password** box, type the password (generally ARAXI).

       Note: If you are upgrading InSite 4.5.x for Prinergy Connect or Prinergy Powerpack, the password for the InSite ARAXI account must match the password for the Prinergy ARAXI account on the primary server.

    b. In the **Confirm password** box, retype the password.
    c. Click **Next**.
15. You are asked to provide the location of the Oracle 10 installer. Type the DVD drive (usually **H**) or the name of the network share where Oracle resides (usually **O**). Click **Next**.

    The Oracle software upgrade takes about 30 to 60 minutes.

    Important: You cannot continue until the installer is located and verified.

16. The Summary screen appears. Click **Next**.

    The installer updates the InSite 4.5.x software on your system. When installation is complete, the InSite Configuration Utility (ICU) wizard appears.

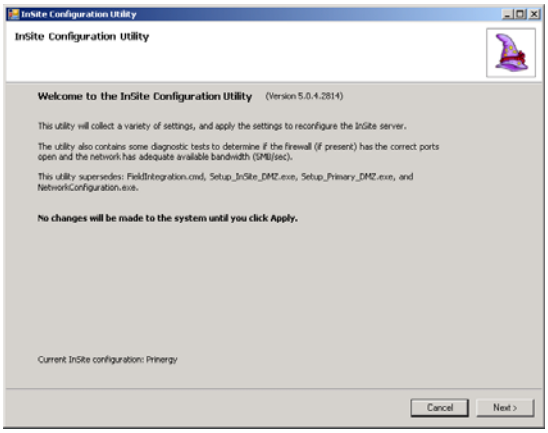


Figure 1: InSite Configuration Utility (ICU) Welcome screen

17. Click **Next**.

18. Perform one of the following steps:

If You Have This Workflow	Do This
Prinergy Connect or Prinergy Powerpack	a. On the Prinergy Primary Server Information screen, confirm your server name and IP address. b. Click **Next**.
Prinergy Evo	a. On the Workflow Server Setup screen, select the **Enable** check box and type the Prinergy Evo server name and IP address. b. Repeat step a for each Prinergy Evo server that can refine jobs. c. Click **Next**.
Brisque	Ensure all **Enable** check boxes are cleared, and click **Next**.

19. On the Administrative Credentials screen, confirm your administrative username and password. Click **Next**.
20. On the InSite Administrator screen, type the InSite Administrator password: `Cre<`*`BPNumber`*`>!` and click Next.

    Important: The exclamation mark (!) is part of the strong password and *BPNumber* is your business partner number.

    Note: You can change the InSite Administrator password later, in the InSite Administrator software. For instructions, see *Changing the InSite Administrator password* on page 7.

21. If you have Prepress Portal for Prinergy Connect or Prinergy Powerpack, the DMZ Mode screen appears.
    - If your Prepress Portal system is not in a DMZ configuration, click **Next**.
    - If your Prepress Portal system *is* in a DMZ configuration:
        - Ensure that **Run InSite in DMZ mode** is selected.
        - Ensure that the InSiteService password is correct.

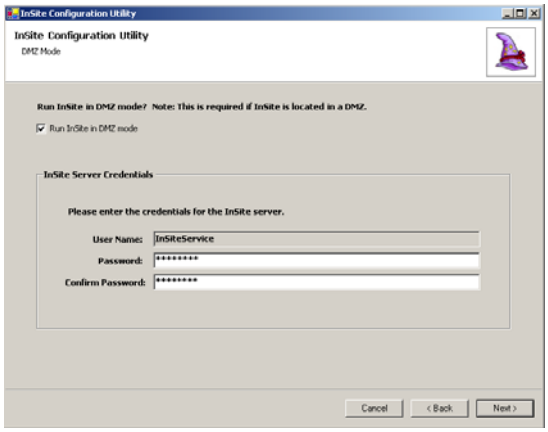


Figure 2: ICU—DMZ Mode screen

    - Click **Next**.

Note: For information about Prepress Portal in a DMZ, see the *InSite DMZ Network Configuration Guide*, available on the eCentral portal at https://ecentral.graphics.kodak.com/.

22. If you have multiple servers that host your jobs, the Job Hosting Servers screen appears. Confirm that all job hosting servers are listed. To update the list:
    - Under **Enable**, select the server that hosts your jobs.
    - Under **IP Address**, type the server's IP address.
    - For all Prinergy secondary servers and Windows (tertiary) servers, select **SMB Direct/Native**. For all UNIX servers that store jobs, select **SMB over NetBIOS**.

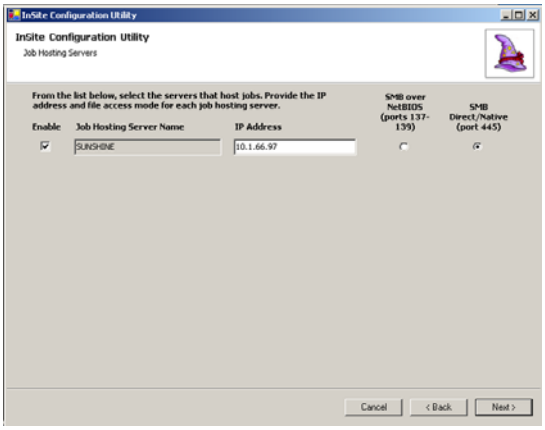


Figure 3: ICU—Job Hosting Servers screen

    - Click **Next**.

23. If you have one or more distribution servers connected to your Prepress Portal server, the Distribution Servers screen appears. Confirm the IP address of each distribution server and click **Next**.

    For information about distribution servers, see the *InSite Prepress Portal 5.0 System Administration Guide*, available in InSite Administration under **Documentation**.

24. On the Multihomed Server Setup screen, if your Prepress Portal and Storefront server is multihomed, ensure that **Multihomed Server** is selected and confirm the IP addresses. Ensure that **HTTPS (SSL) Access Only** is selected. Click **Next**.

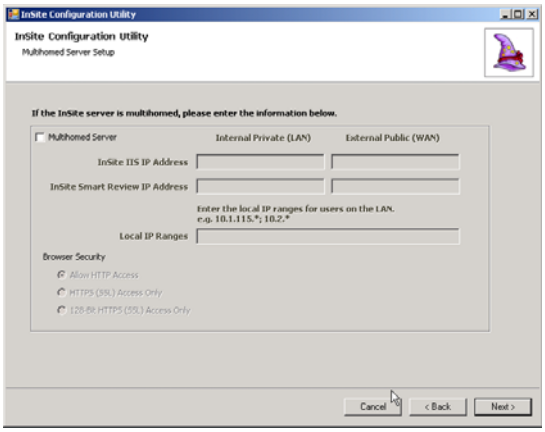


Figure 4: ICU—Multihomed Server Setup screen

25. On the Email Relay Server screen, confirm that your email relay server appears. If it is not listed, type either the Domain Name System (DNS) name (recommended) or the IP address of your email relay server. Click **Next**.

    The Configuration Summary window appears.

26. Click **Apply.**

    The ICU wizard configures your Prepress Portal and Storefront system. When configuration is finished, a list of the completed operations appears.

27. Click **Close**.

28. On the Configuration Results screen, click **Done** and click **Finish**.

29. Ensure that **Yes, I want to restart my computer now** is selected and click **Finish** to restart the Prepress Portal and Storefront server.

30. If you are using the Prinergy Connect or Prinergy Powerpack workflow, stop and restart the Prinergy service using Prinergy Administration.

    Note: The ICU wizard has configured pre-rendering rules on the Prinergy primary server. You must restart the Prinergy service for these rules to take effect.

31. (Prepress Portal only) If you will be installing or upgrading Prinergy Evo software on a server that also has Prepress Portal installed, perform the following steps:

    a. On the shared Prinergy Evo/Prepress Portal server, locate **%Program Files%\Common Files\InstallShield**.

    b. Delete the entire **InstallShield** folder.

Verifying the upgrade

Note: If you are using the Prinergy Connect or Prinergy Powerpack workflow, confirm that Prinergy is running before verifying the upgrade.

1. Double-click the **InSite Administrator** shortcut on the server desktop.
2. Click **Configuration Settings**.
3. Confirm that the configuration settings have not changed.

Changing the InSite Administrator password

You can change the InSite Administrator account password that you set during the upgrade.

1. Double-click the **InSite Administrator** shortcut on the server desktop.
2. Click **Configuration Settings**, and click **Security**.
3. In the **Administrator Password** box, type the new password.

   Note: Consider using strong passwords. For more information, see the InSite Administration Help.
4. Click **Update**.

Migrating data from version 4.5

Customers and users maintain their access and rights, so they can work as usual after the upgrade is complete.

Existing upload processing rules remain active, but you should use the new upload processing rules—created in the Prepress Portal software—for new jobs and new customers. You must modify existing job templates after you move to the new upload processing rules.

In version 5.0, themes replace customized headers, footers, and login pages. You must manually set up the themes you want, based on your customizations from version 4.5 of the software.

You must also recreate customized email notifications, Job Info sheets, and Upload Info sheets.

Upgrading user rights to user roles

Your new Prepress Portal software contains a feature for creating and assigning user *roles*. A role is a collection of user rights. Users can work immediately after the upgrade is complete: the rights that your users had before were automatically migrated into preset roles in the 5.0 software. You can rename and modify roles at any time in the Prepress Portal user interface.

Note: If the rights you have in version 4.5 do not match any of the default roles in version 5.0, then a custom role is created for each set of user rights. These roles are labeled "Custom-nn" and must be renamed or deleted; they cannot be assigned to users.

For more information about roles, see the Prepress Portal Help.

To view and modify user roles after the upgrade:

1. Log on as an Administrator.
2. On the home page, click **Roles**.
3. View the available roles. When you click a role name, the user rights that are available for the role appear in the right-hand pane.
4. Add or modify the roles as needed:
   - To modify a role, select or clear the check boxes beside the user rights.
   - To add a role, click **New Role.**

   Note: When you modify a role, all users who have that role are automatically updated with the new collection of rights.
5. Click **Update**.

Recreating customized Login pages, headers, and footers

Your Prepress Portal software contains a feature for customizing the user interface, by creating *themes*. Use themes to customize the branding, color schemes, and terminology of the user interface, both for you and for your customers.

For more information about creating themes, see the Prepress Portal Help.

To recreate custom Login pages, headers, and footers after the upgrade:

1. Double-click the **InSite Administrator** shortcut on the desktop of the Prepress Portal server.
2. Click **Customization**.
3. Determine which of your customers had customized headers and footers.
4. Copy all required images to drive **E** on the Prepress Portal server.
5. Double-click the **InSite Logon** icon on the desktop of the Prepress Portal server.
6. Log on as a staff user with full Administration rights.
7. On the home page, click **Themes**.

   A default theme appears.
8. Click **Create Theme** to create a new theme for your company's default look and feel.

   Note: Recreate customizations for your company before recreating customizations for your customers. For more information, see the Prepress Portal Help.
9. Type a descriptive name in the **Theme Name** box.

10. Implement the customizations you want:
    - Click **Add New Image**, and upload the image files you need for the theme.
    - In the **Login Panel HTML** box, replace `LoginGraphic.png` with the name of the login image file that you uploaded.
    - In the **Header** box, edit the code for the custom header. Replace `ISBanner58px.jpg` with the name of the banner image file that you uploaded.
    - Under Footer, make any necessary changes, such as changing the contact phone number.
11. If needed, change the color scheme and terminology.
12. Click **Save and Preview** to test the theme.
13. Click **Save and Close** when you are done.
14. Repeat for each customer that has a custom Login page, header, or footer.

Recreating customized email notifications

Your new Prepress Portal software contains a feature for users to subscribe to the email notifications that they want to receive. In the 5.0 software, notifications can be either *directed* or *event-based*. If you have customized or translated email notifications, you must recreate them and then move them into the correct folders on the server.

For more information, see the *InSite Prepress Portal System Administration Guide*.

Moving customized Job Info Sheets and Upload Info Sheets

If you have customized Job Info Sheets and Upload Info Sheets, you need to move your customized files.

For more information, see the *InSite Prepress Portal System Administration Guide*.

Upgrading the InSite system from version 5.0.x to 5.0.y

Important: You must be logged on to the Prepress Portal or Storefront server using the ARAXI account (where the username is ARAXI and the password is generally ARAXI) to complete the upgrade.

Important: If the upgrade fails, do not click **Cancel**. Make a note of the error message and continue with the upgrade. Contact a service representative to report the error.

1. (Prepress Portal only) If you are upgrading Prepress Portal on a server that also has Prinergy Evo software installed, perform the following steps:
   a. On the shared Prinergy Evo/Prepress Portal server, locate **%Program Files%\Common Files\InstallShield**.
   b. Delete the entire **InstallShield** folder.
2. Double-click the **InSite Administrator** shortcut on the desktop of the Prepress Portal or Storefront server.
3. Under **Software Updates**, click **1 InSite Update Available** to apply the update.

   Tip: If the message `There are no software updates available` appears, click **Check Now** to have the system search for updates.
4. Click **Release Notes**, read them, and close the window.
5. Click **Apply**.
6. Click **OK**.

   The Maintenance message appears.

   Note: You can change this message to one that you want your customers to see during the upgrade. For information about setting a maintenance message for your customers, see the InSite Administration Help.
7. Click **Shutdown now**.
8. Click **Open**.

   The InSite installer starts.
9. Click **Next**.
10. In the NT User Account dialog box, provide the password information:
    a. In the **Password** box, type the password (generally ARAXI).

       Note: If you are upgrading Prepress Portal or Storefront for Prinergy Connect or Prinergy Powerpack, the password for the InSite ARAXI account must match the password for the Prinergy ARAXI account on the primary server.
    b. In the **Confirm password** box, retype the password.
    c. Click **Next**.

11. The Summary screen appears. Click **Next**.

    The installer updates the Prepress Portal or Storefront software on your system. When installation is complete, the InSite Configuration Utility (ICU) wizard appears.

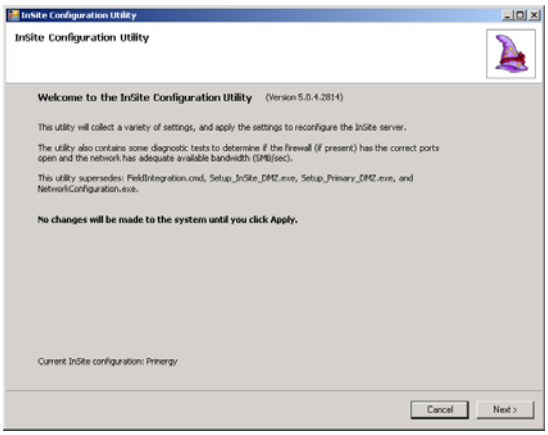


Figure 5: InSite Configuration Utility (ICU) Welcome screen

12. Click **Next**.
13. Perform one of the following steps:

If You Have This Workflow	Do This
Prinergy Connect or Prinergy Powerpack	a. On the Prinergy Primary Server Information screen, confirm your server name and IP address. b. Click **Next**.
Prinergy Evo	a. On the Workflow Server Setup screen, select the **Enable** check box and type the Prinergy Evo server name and IP address. b. Repeat step a for each Prinergy Evo server that can refine jobs. c. Click **Next**.
Brisque	Ensure all **Enable** check boxes are cleared and click **Next**.
Third-party software (Storefront systems only)	Ensure all **Enable** check boxes are cleared, and click **Next**.

14. On the Administrative Credentials screen, confirm your administrative username and password. Click **Next**.

15. If you have Prepress Portal or Storefront for Prinergy Connect or Prinergy Powerpack, the DMZ Mode screen appears.
    - If your Prepress Portal or Storefront system is not in a DMZ configuration, click **Next**.
    - If your Prepress Portal or Storefront system *is* in a DMZ configuration:
        - Ensure that **Run InSite in DMZ mode** is selected.
        - Ensure that the InSiteService password is correct.

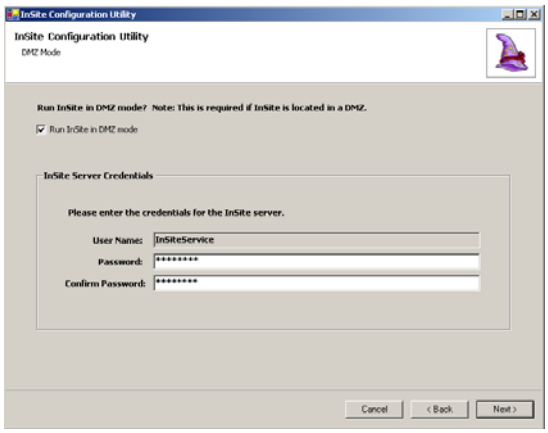


Figure 6: ICU—DMZ Mode screen

    - Click **Next**.

Note: For information about Prepress Portal or Storefront in a DMZ, see the *InSite DMZ Network Configuration Guide*, available on eCentral, the Internet portal at https://ecentral.graphics.kodak.com/.

16. If you have multiple servers that host your jobs, the Job Hosting Servers screen appears. Confirm that all job hosting servers are listed. To update the list:
    - Under **Enable**, select the server that hosts your jobs.
    - Under **IP Address**, type the server's IP address.
    - For all Prinergy secondary servers and Windows (tertiary) servers, select **SMB Direct/Native**. For all UNIX servers that store jobs, select **SMB over NetBIOS**.

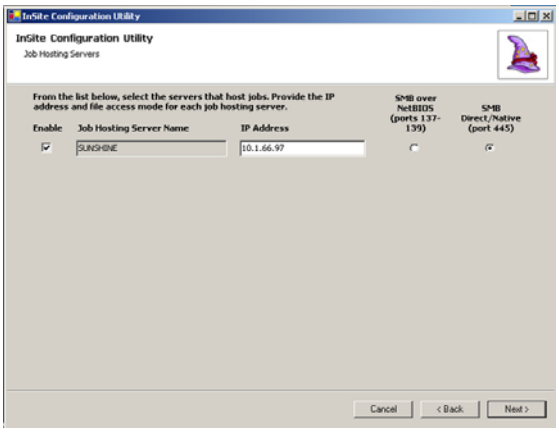


Figure 7: ICU—Job Hosting Servers screen

17. Click **Next**.

18. If you have one or more distribution servers connected to your Prepress Portal or Storefront server, the Distribution Servers screen appears. Confirm the IP address of each distribution server, and click **Next**.

    For information about distribution servers, see the *InSite Prepress Portal System Administration Guide*, available in InSite Administration under **Documentation**.

19. On the Multihomed Server Setup screen, if your Prepress Portal or Storefront server is multihomed, ensure that **Multihomed Server** is selected and confirm the IP addresses. Ensure that **HTTPS (SSL) Access Only** is selected. Click **Next**.

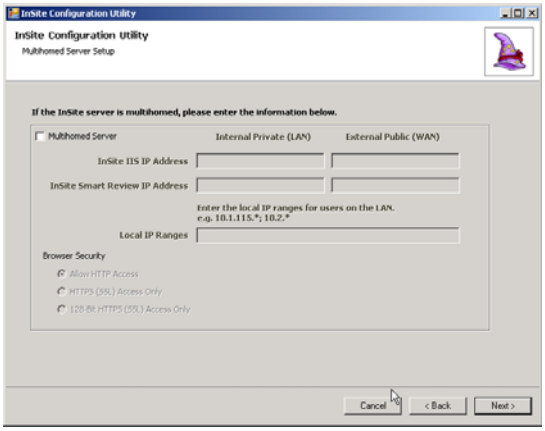


Figure 8: ICU—Multihomed Server Setup screen

20. On the Email Relay Server screen, confirm that your email relay server appears. If it is not listed, type either the Domain Name System (DNS) name (recommended) or the IP address of your email relay server. Click **Next**.

    The Configuration Summary window appears.

21. Click **Apply.**

    The ICU wizard configures your Prepress Portal or Storefront system. When configuration is finished, a list of the completed operations appears.

22. Click **Close**.

23. On the Configuration Results screen, click **Done** and click **Finish**.

24. Ensure that **Yes, I want to restart my computer now** is selected and click **Finish** to restart the Prepress Portal or Storefront server.

25. If you are using the Prinergy Connect or Prinergy Powerpack workflow, stop and restart the Prinergy service using Prinergy Administration.

    Note: The ICU wizard has configured pre-rendering rules on the Prinergy primary server. You must restart the Prinergy service for these rules to take effect.

26. (Prepress Portal only) If you will be installing or upgrading Prinergy Evo software on a server that also has Prepress Portal installed, perform the following steps:

    a. On the shared Prinergy Evo/Prepress Portal server, locate **%Program Files%\Common Files\InstallShield**.

    b. Delete the entire **InstallShield** folder.

Upgrading Storefront product price sheets from 5.0.x to 5.0.5

If you have configured product price sheets in Storefront 5.0.3 or 5.0.4, you must manually upgrade these price sheets to comply with Storefront 5.0.5. The upgrade process consists of renaming the existing price sheet and regenerating a new price sheet.

1. Log on to Storefront as a staff user.
2. On the home page, click **Products**.
3. In the left pane, click a product category and in the right pane, click a product description.
4. In the product description, click the **Pricing** tab.
5. Rename the existing price sheet:
   a. Click **Open Price Sheet Folder**.
   b. If a network connection dialog box appears, type your credentials, and click **OK**.
   c. Right-click **PriceSheet.xls** and select **Rename**.
   d. Rename the file to **PriceSheet_old.xls**.
6. Regenerate a new price sheet:
   a. On the **Pricing** tab in Storefront, click **Update Price Sheet Fields**.
   b. Click **Open Price Sheet Folder**.
   c. In the Windows Explorer window, double-click **PriceSheet.xls**.
   d. If a confirmation dialog box appears, click **Update**.
7. In the Microsfot Exce®l spreadsheet software, confirm that there is an orange row that begins with **Shipping Method Name**.
8. Transfer your pricing from the old spreadsheet to the new spreadsheet:
   a. In the Windows Explorer window that contains both price sheets, double-click the **PriceSheet_old.xls** file.
   b. If a confirmation dialog box appears, click **Update**.
   c. Copy all of the *green* cells from the **PriceSheet_old.xls** file to the **PriceSheet.xls** file.

      Important: Do *not* copy any of the blue or orange cells.
   d. If you have customized any formulas, retype the customized formulas in the **PriceSheet.xls** file.

      Important: Do not copy your customized formulas from the old price sheet.
   e. Save and close the **PriceSheet.xls** file.
9. On the Storefront toolbar, click **Products**.
10. Repeat steps 3 to 9 until all product price sheets have been upgraded to 5.0.5.