

InSite Creative Workflow and Asset Library Integrated With Prepress Portal

System
Version 3.0

Quick Start Guide
English

731-01012C-EN Rev A

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731-01012C-EN Rev A

Revised July 2007

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About Creative Workflow and Asset Library

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*.

Kodak InSite Asset Library software is the companion software to Creative Workflow that provides an environment where you can store elements that you may want to reuse in future publications. In Asset Library, you organize elements into *libraries*.

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/Asset Library 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 20.

About Projects and Libraries

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 2.)

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 and Asset Library Help.)

A *library* is a storage place for elements that you may want to reuse in a future publication. Libraries are typically more permanent than projects—they usually contain many elements and exist over long periods of time so that elements can be reused again and again.

As with projects, what you can do with libraries depends on your user rights. A typical scenario is for only the administrator in an organization to be assigned the user rights to create and delete libraries and to add, remove, and organize elements in a library, while anyone can search for elements in libraries and download elements for reuse.

About Tasks

Note: Tasks are available for elements in projects only; they are not available for elements in libraries.

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 and Asset Library 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 12.

About Smart Review

Smart Review is a tool available through Creative Workflow and Asset Library 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 and Asset Library 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**.

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.

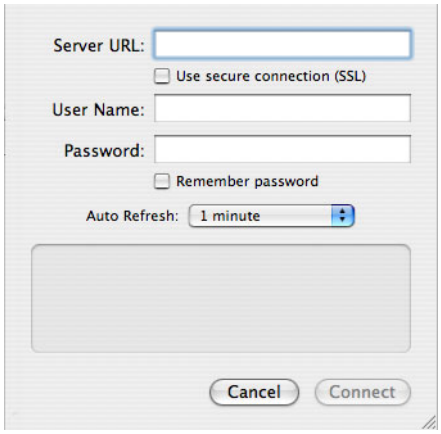


   Figure 1: New Account dialog box

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 and libraries 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, jobs, and libraries to which you have access. Click a project, job, or library name to open it.

In a project, 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.

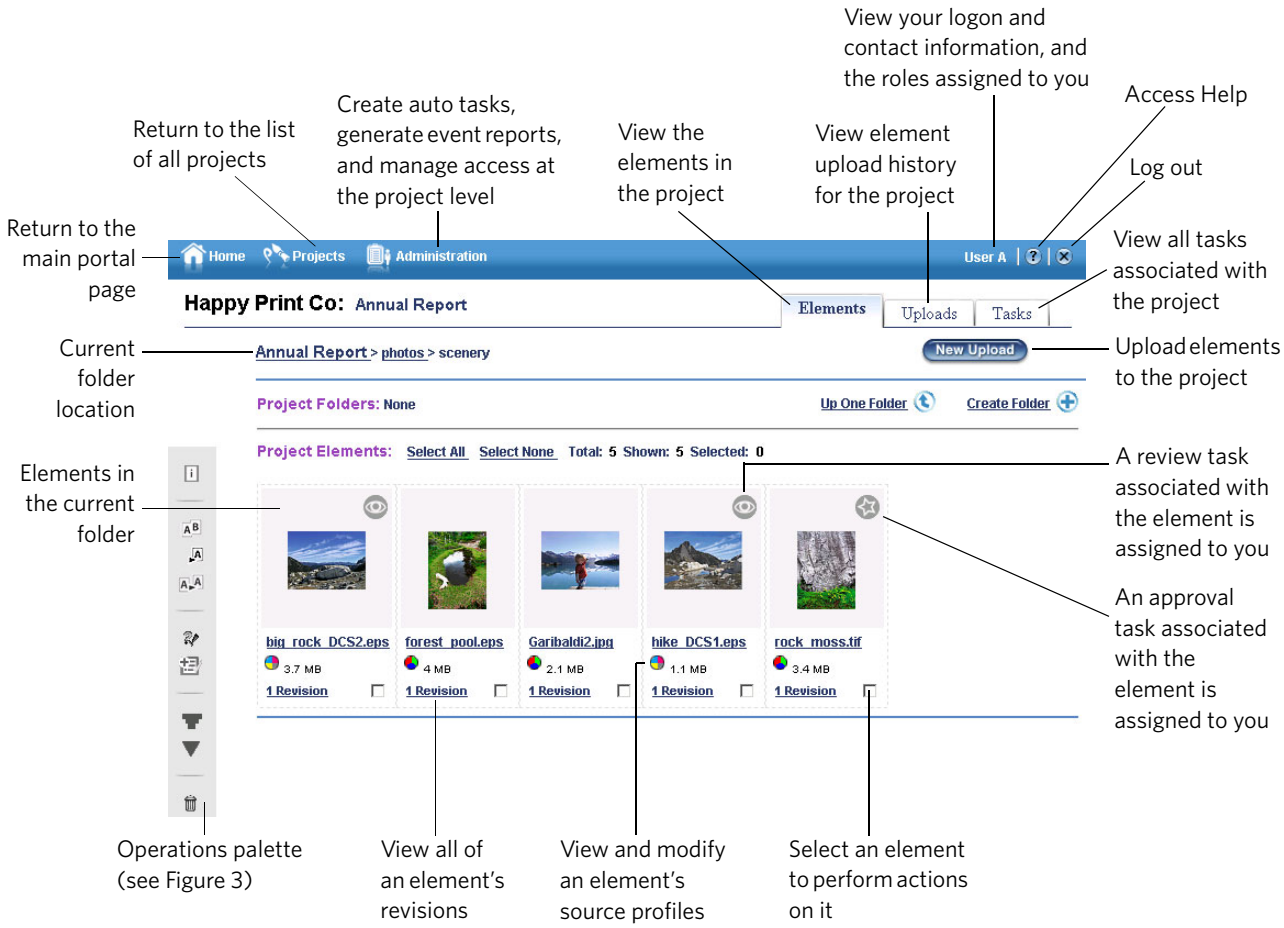


Figure 2: A project open in a Web browser—Elements view

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

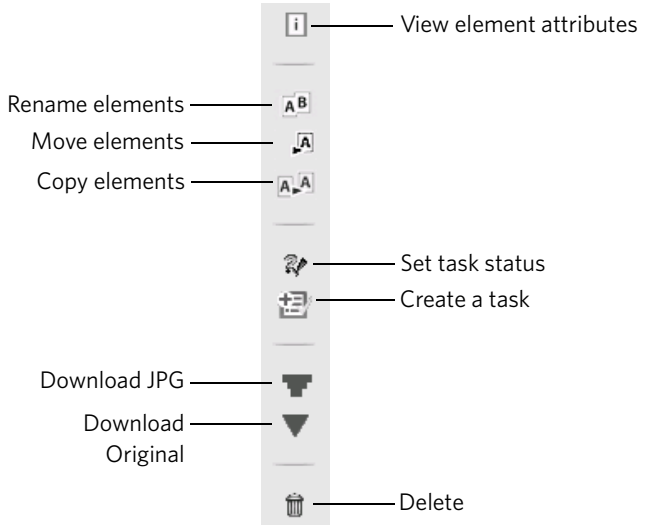


Figure 3: Operations palette

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.

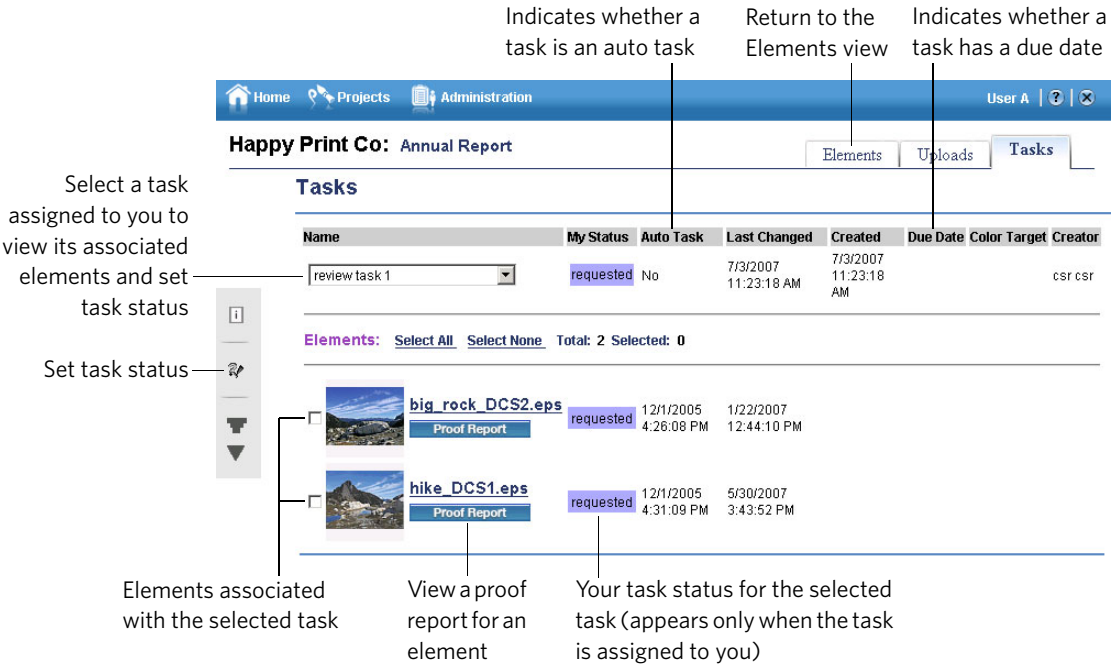


Figure 4: A project open in a Web browser—Tasks view

When you open a library instead of a project, the available tools on the toolbar and Operations palette are similar, with a few differences. As in a project, you can upload, organize, and download elements. In addition, you can search for elements in a library, modify element attributes, and download For Placement Only (FPO) versions of elements. (See *Downloading FPOs* on page 16.) However, you cannot create tasks or set task status in a library. Tasks are available for elements in projects only.

Figure 5 highlights the tools that are available in a library that are not available in a project.

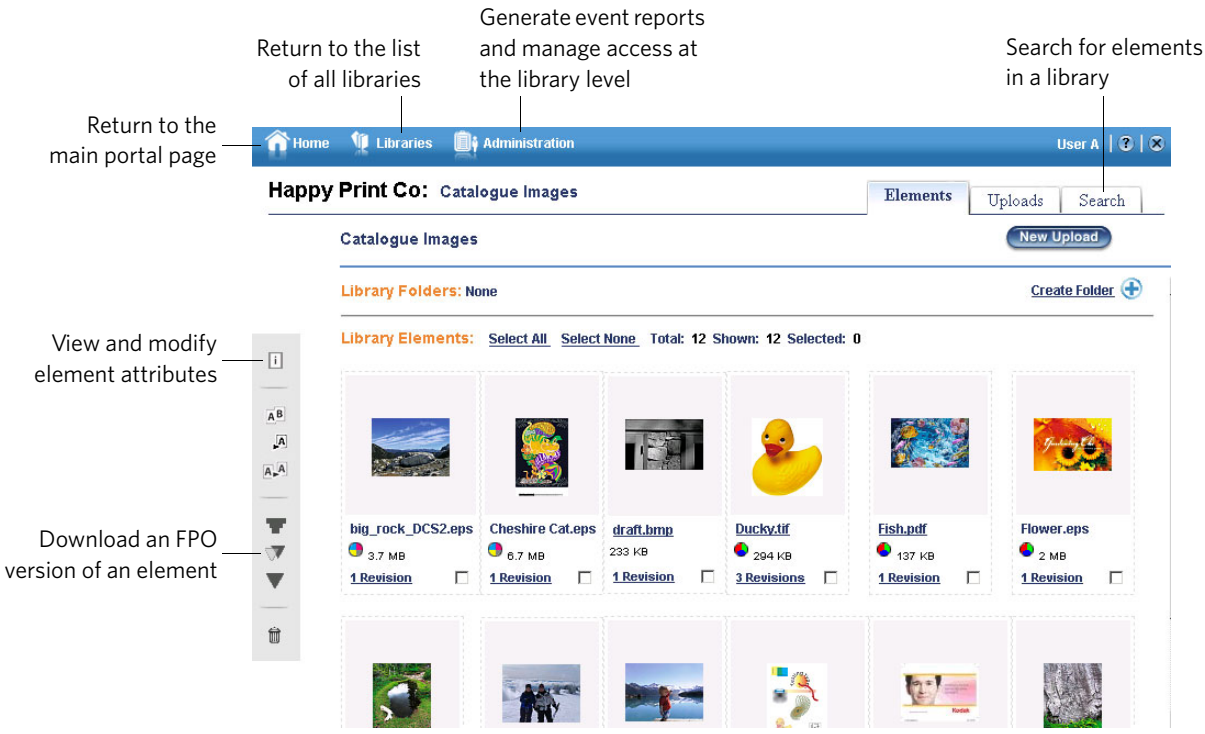


Figure 5: A library open in a Web browser

In Desktop

The left pane of the Desktop window lists all projects, jobs, and libraries to which you have access. Click a project, job, or library 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.

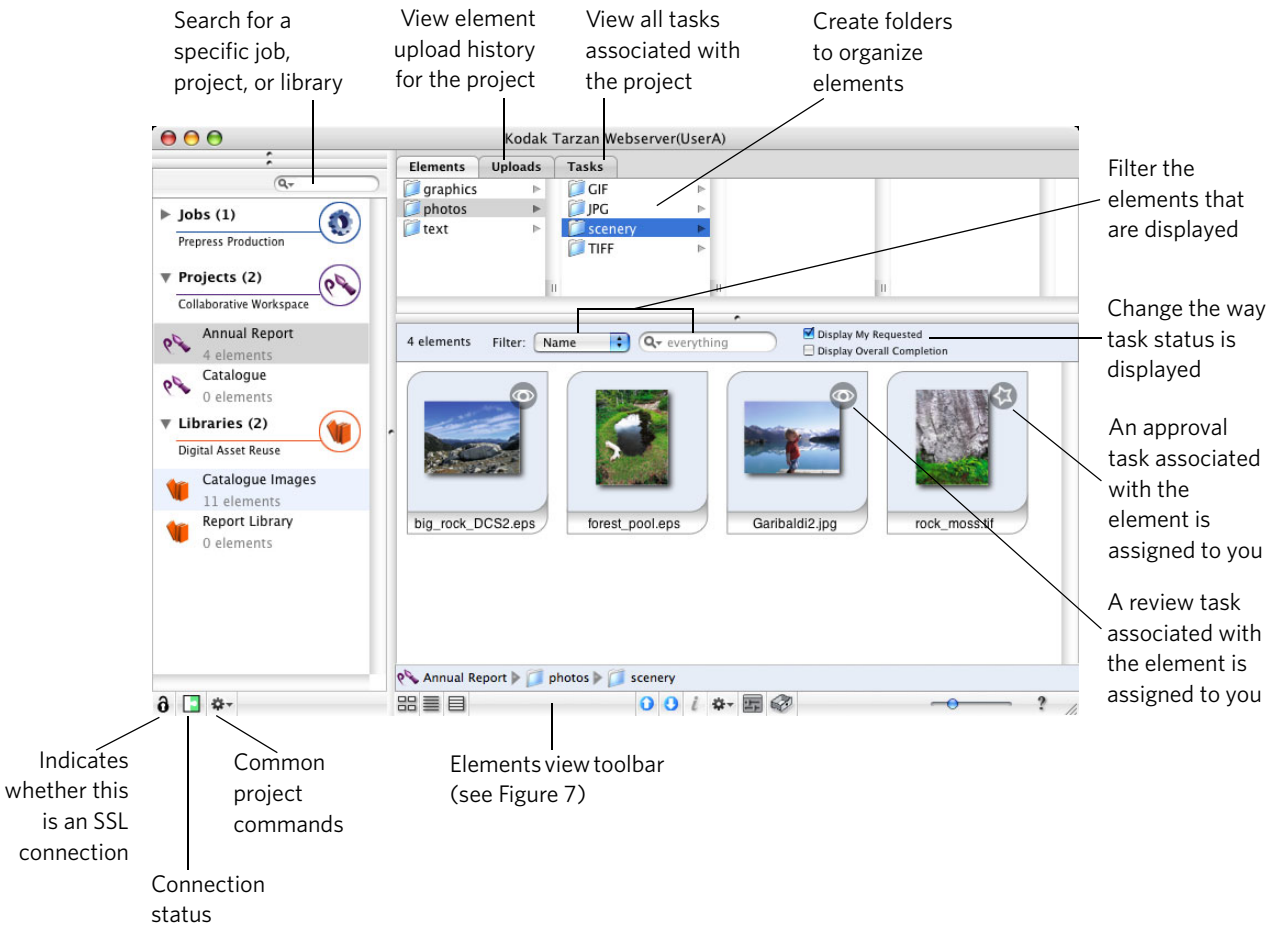


Figure 6: A project open in Desktop—Elements view

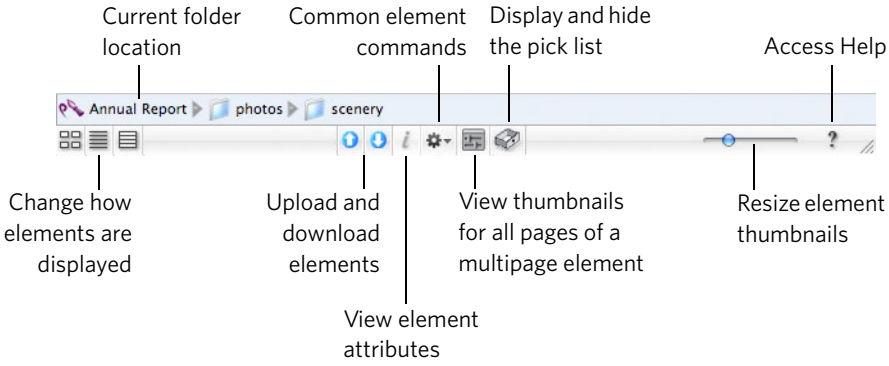


Figure 7: Elements view toolbar

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).

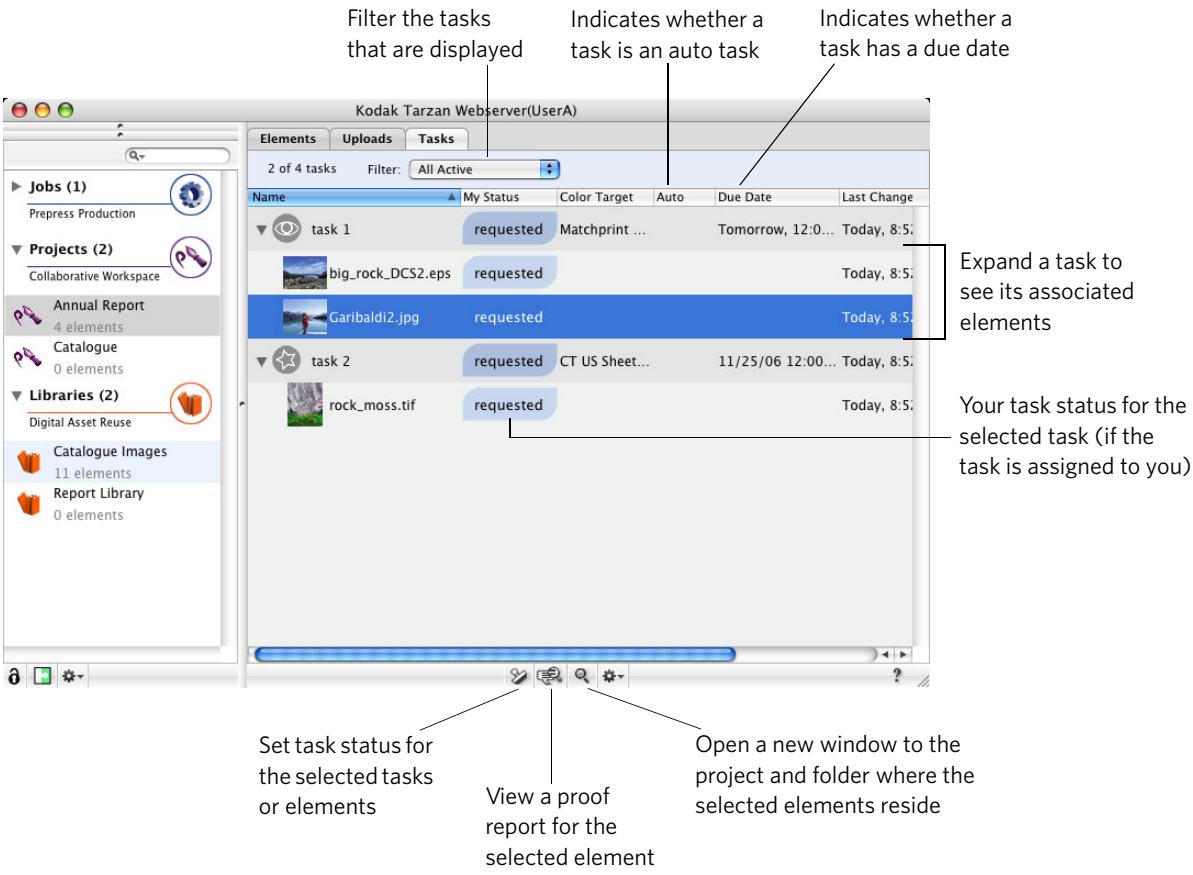


Figure 8: A project open in Desktop—Tasks view

When you open a library instead of a project in Desktop, the available tools are similar. As in a project, you can upload, organize, download, and filter elements. You can also modify element attributes. (In a project, you can view—but not modify—element attributes.)

As described throughout this guide, there are additional actions that you can perform in a library that you cannot perform in a project, such as searching for elements and element links. However, you perform these actions using the Desktop menu items rather than buttons in the main window. For instructions, see *Frequent Procedures* on page 11, *Searching for Elements* on page 17, and *Searching for Element Links* on page 17.

The Tasks view is not available in a library, because tasks are available only for elements in projects.

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.

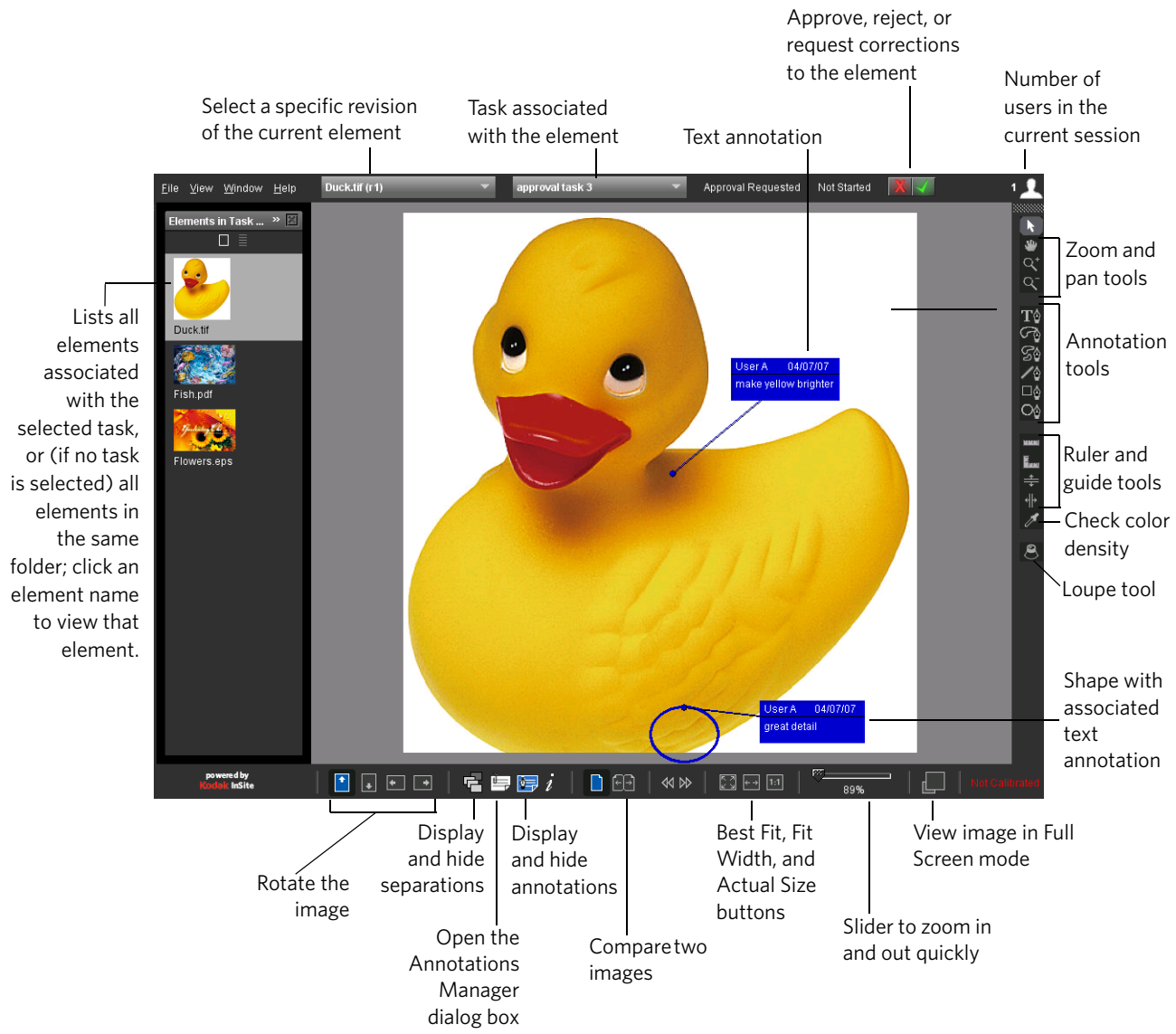


Figure 9: Element in a Smart Review session

Note: Some of the Smart Review tools (for example, the **Approve Element** and **Reject Element** buttons, and the annotations tools) are available only when you open an element that resides in a project. When you open an element that resides in a library, a reduced set of tools is available.

For more information about using Smart Review, see the Creative Workflow and Asset Library 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 and Asset Library 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**.
Create a library	In the **Libraries** view, click **New Library**, type a name for the library, and click **Create Library**.	Select **File > New Library**, type a name for the library, and click **Create Library**.
Upload an element to a project or library	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 or library. 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 library, or between projects and libraries	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 or library	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 and libraries	In a Web browser, you can move elements between folders within a project or library only. To move elements between projects or libraries, you must first copy the element to the destination project or library and then delete it from its original location.	Drag the element onto the name of the destination project or library in the left pane. **Note:** You can move elements between projects and libraries in Desktop for Mac only. In Desktop for Windows, you must first copy the element to the destination project or library and then delete it from its original location.

Procedure	In a Web Browser	In Desktop
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**.
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

The following table describes how to perform common procedures that are specific to tasks. For detailed instructions and for additional procedures, see the Creative Workflow and Asset Library Help.

Note: 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 and Asset Library 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 and Asset Library 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 and Asset Library Help.

Procedure	In a Web Browser	In Desktop
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.
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 and Asset Library 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.

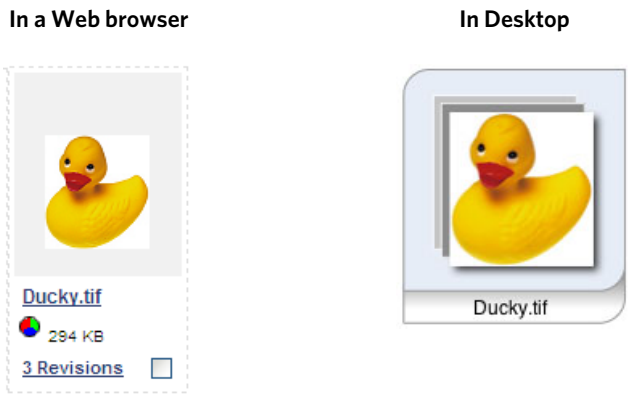


Figure 10: Element revisions in a Web browser and Desktop

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 and Asset Library 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**.

When you view the attributes of an element in a project, only the element's *system attributes* are displayed. The operating system extracts system attributes and automatically displays them on the **System** tab of the Attributes dialog box. You cannot modify the values of any attributes on the **System** tab.

When you view the attributes of an element in a library, both system attributes and *user-defined attributes* are displayed. User-defined attributes are defined in the system's attribute templates, which are set up and maintained by your system administrator. User-defined attributes appear on the **Customer** and **Site** tabs of the Attributes dialog box. (For information about the differences between the attributes on the **Customer** tab versus the attributes on the **Site** tab, see the Creative Workflow and Asset Library Help.)

Unlike the attributes on the **System** tab, you can modify the values of the attributes on the **Customer** and **Site** tabs. To record information about an element for later reuse, modify the value of an element's attribute. For example, if you set the value of an element's user-defined attribute **Artist** to `John Smith`, you can later search the library for any elements that have the attribute value `John Smith`. This can be very useful when you want to quickly find a specific element in a library that contains hundreds or even thousands of elements.

- To modify the values of an element's attributes, in the Attributes dialog box, click **Edit**. (This button is only available when you select an element in a library.)

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

Downloading FPOs

Note: You can download FPOs from libraries only, not from projects.

An *FPO* (For Placement Only) image—or proxy image—is a low-resolution version of a high-resolution original image. You may want to use an FPO as a placeholder for a high-resolution image when working on a layout, since the FPO file is smaller than its high-resolution original and, therefore, faster and easier to place into the layout, manipulate, and share.

You can download an FPO version of a high-resolution element that is stored in a library. Embedded in the FPO image is a unique descriptive comment that identifies the high-resolution version of the element in the database. When you send the layout for printing, your printer's workflow software will recognize the low-resolution FPO image in the layout and automatically swap it for the high-resolution image before output, using the FPO image's embedded identification comment to locate the high-resolution version in the database.

You can download an FPO image to your desktop and then place it in a layout (for example, in QuarkXPress® software). To do so:

- In a Web browser: Select the element that you want to download, and on the Operations palette, click **Download FPO**.
- In Desktop: Select the element that you want to download, and click the **Download Files** button. In the **Download type** list, select **Low resolution EPS FPO**.

In Desktop for Mac, you can also download an FPO image directly to a picture box in an Adobe® InDesign® software layout. When you download an FPO image directly to an InDesign layout, a placeholder image appears in the layout while the element is being downloaded. This enables you to work on the layout and even move the placeholder while the download is in progress. Once the download is complete, the placeholder image is replaced by the actual FPO image.

To download an FPO image directly to an InDesign layout:

1. Create a picture box in your InDesign layout.
2. In Desktop for Mac, select an element and drag it onto the picture box that you created in step 1.

For more information about downloading FPO images, see the Creative Workflow and Asset Library Help.

Searching for Elements

Note: You can search for elements in libraries only, not in projects.

You can use the **Search** command to find elements stored in libraries. This is useful when you don't know which library an element is stored in, or the library contains many elements, making it difficult to locate a specific one.

In a Web browser, you can search for elements only in the library in which you are currently working. You can search for an element's file name (even if you only know part of the file name) or for any single attribute value. For example, if you know that the element for which you are searching has a resolution attribute of `150 dpi`, you can specify your search criteria as `150`. The search results will list any elements with an attribute value of 150.

Desktop for Mac offers additional search functionality. In Desktop for Mac, you can search for elements in *any* library to which you have access. As in a Web browser, you can search for an element's file name, partial file name, or attribute value. You can also search for *multiple* attribute values or for a combination of file name and attribute values. In addition, if you have access to both jobs and libraries, you can use Desktop for Mac to search for an element used in a job. Specifically, you can search for an element based on the name of the job in which the element has been used, or based on the position or name of the specific page on which the element has been included.

Search functionality is not currently available in Desktop for Windows.

To search for elements:

- In a Web browser: Open the library in which you want to search for elements. Click the **Search** tab. Type your search keywords, and click **Go**.
- In Desktop for Mac: Select **Actions > Search**. In the **Search for elements whose** area, specify your search criteria. Click **Search**.

For more information about searching for elements, more detailed search instructions, and other search tips, see the Creative Workflow and Asset Library Help.

Searching for Element Links

As described in *Searching for Elements*, the **Search** command enables you to search one or more libraries for specific elements. The **Find Links** command enables you to take either of the following actions:

- Select a page in a Kodak Prinergy® system job and search your libraries for any elements placed in the page.
- Select an element in a library and search for any job pages in which the element is placed.

For an element to be found in a library when a job page is selected or for a page to be found in a job when an element is selected, the element must have been downloaded from a library as an FPO image and placed in the page layout, which was then uploaded to Kodak InSite Prepress Portal and refined.

To use the **Find Links** command, you must have access to both libraries and jobs. The command is available in Desktop for Mac only; it is not available in a Web browser or in Desktop for Windows.

To find the elements placed in a job page:

1. In a job, select the page whose elements you want to find.
2. From the **Actions** menu, select **Find Links**.

   The Links dialog box lists any elements placed in the selected page.

To find the job pages in which an element is placed:

1. In a library, select the element whose page usage you want to search.
2. From the **Actions** menu, select **Find Links**.

   The Links dialog box lists any pages in which the selected element is placed.

Note: You can search for elements in libraries only; you cannot search for elements in projects. As well, you can search for job pages when you select an element in a library only; you cannot search for job pages when you select an element in a project.

For more information about searching for element links, see the Creative Workflow and Asset Library 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 and libraries.

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

Upload hot folders are useful because you can place elements in a hot folder and have them automatically uploaded to a particular project or library 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 or library 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 and libraries:

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

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

Working With Pick Lists

Note: Pick lists are available only when using Desktop for Mac.

A *pick list* is a tool that you can use to collect elements from multiple projects or libraries and then to download the elements to your desktop or copy them to another project or library.

➢ To display your pick list, click the **Toggle Pick List** button at the bottom of the Desktop window. The pick list appears to the right of the window.

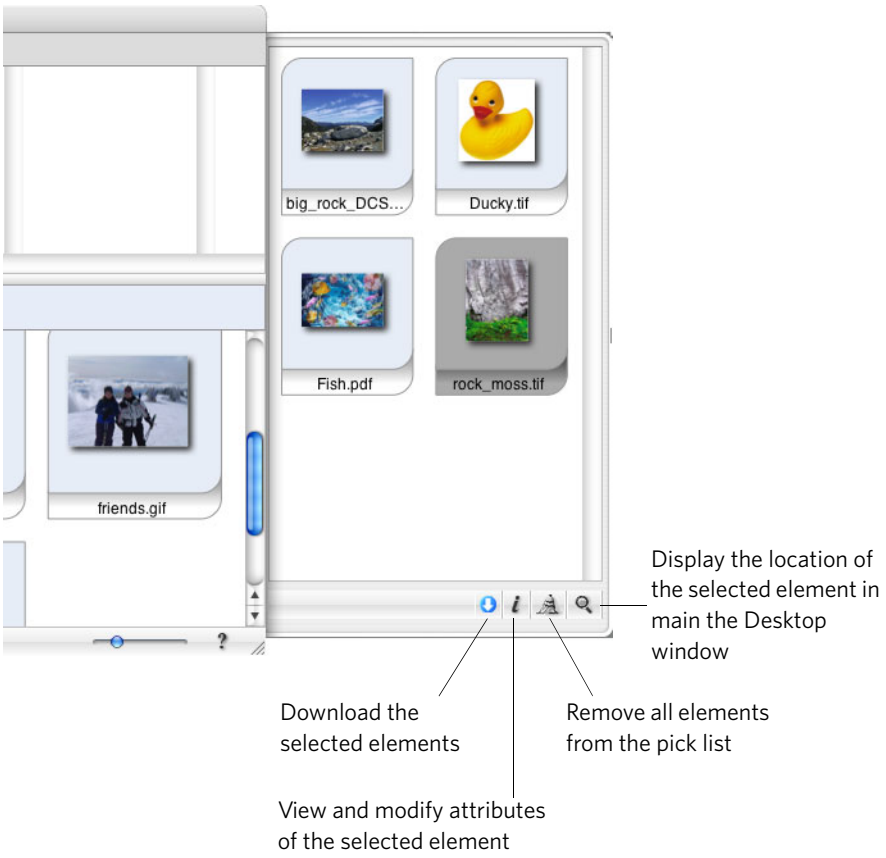


Figure 11: Pick list with elements added

➢ To hide the pick list, click **Toggle Pick List** again.

➢ To add elements to the pick list, drag the selected elements to the pick list.

➢ To download elements from the pick list to your desktop, select the elements and then click the **Download files** button in the pick list pane.

For more information about pick lists, see the Creative Workflow and Asset Library 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
- Download FPO images directly to InDesign layouts
- View elements in Gallery, List, or Table Display mode
- Create your own pick list of elements
- Search for elements stored in any library, and search for links between Prinergy job pages and the elements stored in any library
- Search for elements based on multiple attributes, including user-defined attribute values and Prinergy job names and page numbers
- Associate upload hot folders with specific projects and libraries, 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)
- Customize the Search Elements and Link dialog box toolbars (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
- Reset a user's task status
- Delete tasks
- Inactivate tasks and reactivate inactive tasks
- Set the final status for a task