



Quick Start Guide

English

Synapse InSite

version **3.5**

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4456924	5247352	5412737	5600448	5802034	5996499	6136509
4500919	5249067	5420702	5608822	5813346	5998067	6147789
4558302	5283140	5420722	5615282	5818498	6003442	6158345
4743091	5291273	5459505	5625766	5854883	6014471	6159659
4992864	5296935	5473733	5636330	5861904	6016752	6164637
5049901	5313278	5481379	5649220	5861992	6031932	6180325
5079721	5323248	5488906	5650076	5864651	6043865	6181362
5103407	5325217	5497252	5652804	5875288	6060208	6181439
5111308	5331439	5508828	5691823	5894342	6063528	6186068
5113249	5333064	5509561	5691828	5900981	6063546	6189452
5122871	5339176	5517359	5696393	5934196	6072518	6191882
5124547	5343059	5519852	5699174	5942137	6090529	6204874
5132723	5355446	5526143	5699740	5946426	6096461	6208369
5150225	5359451	5532728	5708736	5947028	6098544	6252522
5153769	5359458	5561691	5713287	5958647	6107011	6260482
5155782	5367360	5568595	5739819	5966504	6112663	
5157516	5367388	5576754	5742743	5969872	6115056	
5208818	5384648	5579115	5764381	5973801	6121996	
5208888	5384899	5592309	5771794	5986819	6130702	
5247174	5412491	5594556	5785309	5995475	6134393	

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What is Synapse InSite?

Synapse® InSite is a portal that lets printers and their customers work with print jobs over the Internet. InSite helps to manage the proofing, correction, and approval process so it is more efficient.

Where to Learn More

For more information on a tool or icon, hold your cursor over the icon and a tooltip appears.

Hold cursor over
icon to display
Tooltip



For complete instructions on performing any Synapse InSite task, see the Online Help.

Click to display
Online Help



Logging Into Synapse InSite

To log into Synapse InSite, you must have:

- a high-speed Internet connection (64 kilobits per second (kbps) or higher)
- Internet Explorer 5.0 or later on Mac OS 9.2, OS X.2.5 or higher, Windows 2000, and Windows NT 4 Service Pack 5
- Internet Explorer 6.0 or later on Windows XP, Windows 98, or Windows ME
- Netscape 7.0 or later on Mac OS 9.2, OS X.2.5 or higher

Type the Printer's home page

Address

Click **Troubleshooting** to ensure your system meets Synapse InSite's software and configuration requirements

Type your **Username** and **Password** and click **Login**



Logging Out of Synapse InSite



Click to **Logout**

Viewing Your Jobs on the Printer's Synapse InSite Server

The Jobs view shows your company's InSite jobs. Job Home provides information on the status of a job.

The image shows two screenshots of the Synapse InSite interface. The top screenshot shows the 'Jobs' view, and the bottom screenshot shows the 'Job Home' view for a specific job.

Jobs View:

- Header: **Top Printing**
- Section: **Jobs**
- Number Of Jobs: 2
- Show: All Active Jobs
- Sort By: Name
- Job List:
 - [Creativity Brochure](#) [20 pages](#)
 - Created: 6/9/2003 3:32:21 PM

Job Home View:

- Header: **Top Printing**
- Job Name: **Creativity Brochure**
- Section: **Job Home**
- Pages**
 - Total: 20
 - Requiring Approval: 5
 - Work In Progress: 15
- File Transfer** [New Upload...](#)
 - Number of Uploads: 1
- Reviews**
 - Number of Pages Remaining: 3
 - Print Buyer (Print Buyer): 1
 - Legal Department (Legal): 2
- Notes**
 - 6/9/2003 3:34:02 PM Kevin Baret
 - Uploaded Creativity Brochure files with 1 files (162.1 ME)
 - The first set of files for the Creativity Brochure job.

Annotations:

- Select a job (points to 'Creativity Brochure' in the Jobs view)
- Job Home displays (points to the Job Home section)
- Pages filtered by status (points to the Pages section)
- Files sent to the Printer (points to the File Transfer section)
- Pages to be reviewed by users (points to the Reviews section)
- Notes to other users accessing this job (points to the Notes section)

Sending Files to the Printer's Synapse InSite Server

When you upload files to Synapse InSite, they are copied to a folder for the job on the printer's web server. You need Upload user rights to be able to upload files.



Click **Home**

File Transfer

[New Upload...](#)

Click **New Upload**

No files have been uploaded and none are available for download.

Name the upload

Attach a note describing the upload, included in email notification to the CSR

Click the **Upload Files** tab to select files

Click **Change Folder** (PC) or **Desktop** (Mac) to find the files or folders to upload

The screenshot shows the 'Upload Files' interface in a Microsoft Internet Explorer browser window. The page title is 'InSite - Creativity_Brochure - Microsoft Internet Explorer'. The main heading is 'Upload Files' and the job name is 'Job: Creativity_Brochure'. There are two tabs: 'Notes' and 'Upload Files'. The 'Current Folder' is 'G:\GraphExpo2002\Commercial\Prinergy Files'. A table lists files in the current folder:

Name	Size	Date
Creativity.pdf	170009545	18:01 Sep 11, 02

Buttons on the right side include 'Change Folder', 'Up One Level', and 'Open'. Below the table, there are 'Add' and 'Remove' buttons. The 'Files to Upload' section contains a table:

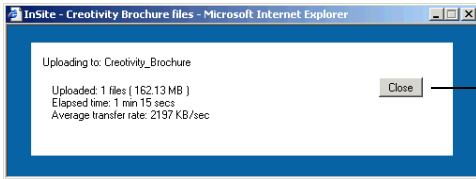
Name	Size	Path
Creativity.pdf	170009545	

At the bottom right, it shows '1 file(s) 162.1 MB' and 'Cancel' and 'Upload' buttons.

Select the files or folders you want to upload

Click **Add** to add to the Files to Upload box

Click **Upload** to start the file transfer



Click **Close**

Click **Refresh** or **Auto-Refresh** to see the status of file copying or refining

Upload Details: Creativity Brochure files_03

Last Refreshed: 6/11/2003 3:22:28 PM Auto-Refresh

Refresh ?

Date: 6/11/2003 3:21:38 PM
Uploaded By: Print Buyer (print_buyer)
Uploaded Files: 1
Size: 162.1 MB
Elapsed Time: 1 min 14 secs
Average Transfer Rate: 2215 KB/sec
Notes: The first set of files for the Creativity Brochure job.
Processing Status: Refining Files

Processing Information

- 6/11/2003 3:22:14 PM Refining 1 input files using the plan Refine:KB-1 stRef-Normz.
- 6/11/2003 3:22:14 PM Created a new process with identifier 694.
- 6/11/2003 3:22:14 PM Creativity.pdf submitted for processing.
- 6/11/2003 3:22:14 PM Adding 1 input file(s).
- 6/11/2003 3:22:14 PM Preparing AutoRefine input file(s) for the upload Creativity Brochure files_03.
- 6/11/2003 3:22:14 PM Copied the file
 \\bigwhite\araxivolume_bigwhite_j\Jobs\Creativity_Brochure\WebUploads\Creativity Brochure files_03\Creativity.pdf to \\bigwhite\araxivolume_bigwhite_j\Jobs\Creativity_Brochure\System\WebAutoRefineInput

Uploaded Files [Top](#)

File	Date	Size	Path
Creativity.pdf	6/11/2003 3:21:37 PM	162.1 MB	Creativity Brochure files_03\Creativity.pdf

Click **Close** to return to Job Home

Asking Other Users to Review Pages

In the Pages view you can select specific users to review specific pages before they are approved for printing.

Top Printing **Creativity_Brochure**

Pages
Total: 20 Requiring Approval: 5 Awaiting Correction: 0

Show **Number of Page(s) Found: 5**

Sort By [Select All](#) [Select None](#) Selected: 0

<input type="checkbox"/>				Creativity.p1.pdf Last Modified: 6/9/2003 3:35:38 PM File Size: 4.5 MB
<input type="checkbox"/>				Creativity.p2.pdf Last Modified: 6/9/2003 3:35:39 PM File Size: 8.4 MB
<input type="checkbox"/>				Creativity.p3.pdf Last Modified: 6/9/2003 3:35:39 PM File Size: 2.9 MB

Click **Request Review**

Select users

Click **Request Review**

Top Printing

Creativity_Brochure

Request Review

2 Pages Selected
Select the users you would like to review the selected pages.

[Select All](#) [Select None](#)

- Buyer, Print
- Department, Legal
- Designer, Graphic

Request Review

Cancel

(Your Company's Custom Footer Content)

creo | powered by **Synapse® InSite**



Pages

Total: 20 Requiring Approval: 5 Awaiting Correction: 0



Show Pages With Approval Required

Number of Page(s) Found: 5

Sort By Name

[Select All](#) [Select None](#) Selected: 0

  **Creativity.p1.pdf**
Last Modified: 6/9/2003 3:35:38 PM
File Size: 4.5 MB

  **Creativity.p2.pdf**
Last Modified: 6/9/2003 3:35:39 PM
File Size: 8.4 MB

  **Creativity.p3.pdf**
Last Modified: 6/9/2003 3:35:39 PM
File Size: 2.9 MB

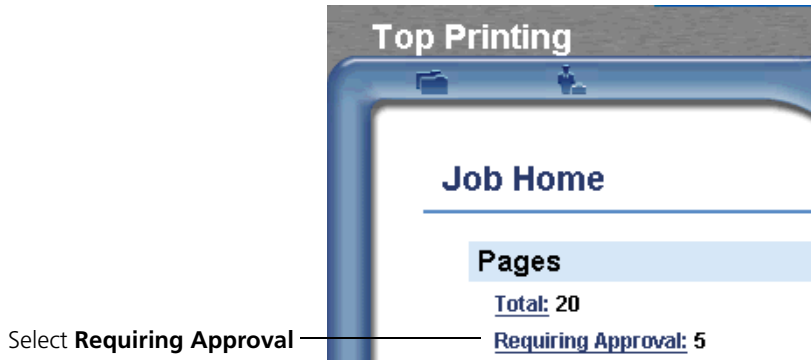
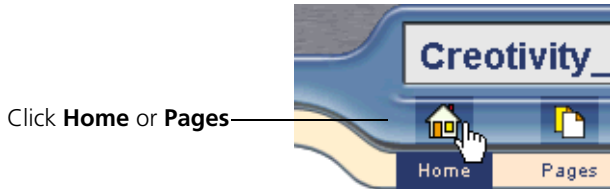
? Department, Legal

? Department, Legal

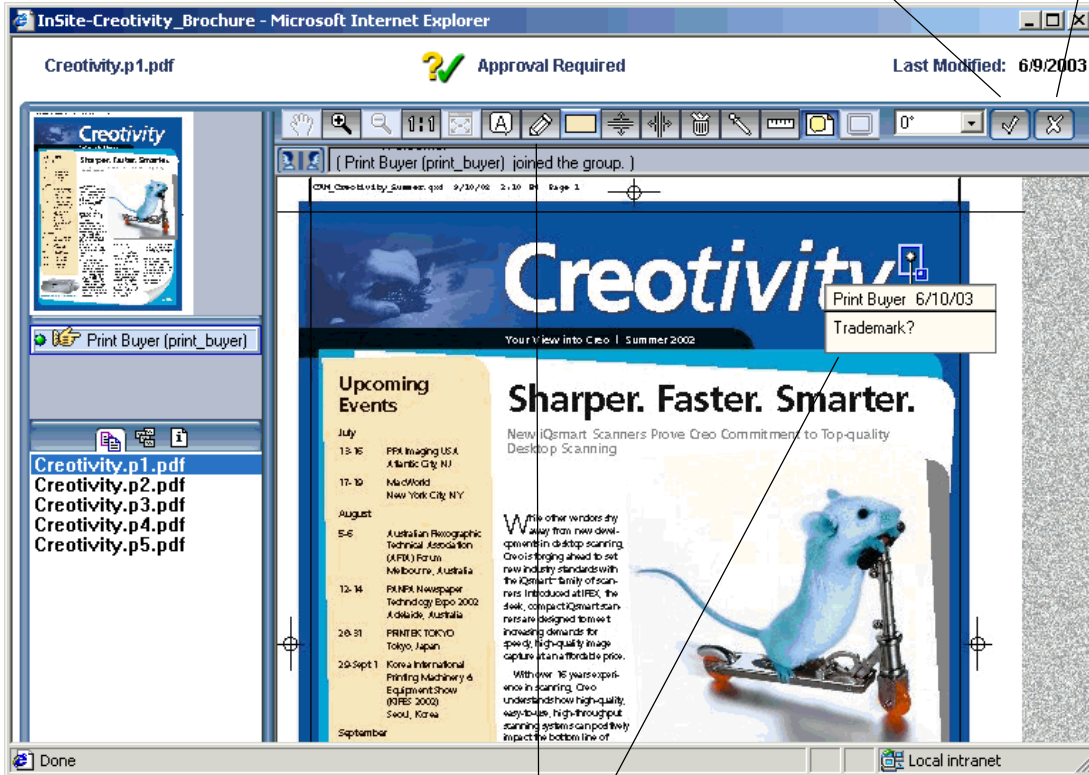
Reviews requested

Viewing Your Pages in Smart Review

Smart Review provides a detailed, full screen preview of the selected page and provides several viewing and annotation tools, and a chat feature. Anyone can review a page, but you need the Approval role to approve or request corrections for a page.



Click **Approve/Reviewed - OK**, or **Request Corrections/Reviewed - Not OK**




























Use the annotation tools to indicate corrections. A complete list appears on the following page

Smart Review Tools

The Smart Review tools allow you to review a page.



Use this tool...	To...
	Pan the page
	Zoom in on the page
	Zoom out on the page
	Show the page at 1:1 to view 1 screen pixel to 1 image pixel
	Fit page to screen
	Make a text annotation
	Draw a free-form line
	Draw a rectangle
	Position a horizontal guide
	Position a vertical guide
	Delete the selected annotation
	Measure color density at any point
	Measure the page

Use this tool...	To...
	Hide annotations
	Enable color management
	Rotate the page
 	Show and hide the Chat area to be able to write messages and see messages from other members of the session
	Show and hide a filtered page list
	Show and hide a list of separations
<input checked="" type="checkbox"/>  Cyan <input type="checkbox"/>  Cyan	Turn separations on and off
	Show and hide information about the page, including width, height, resolution, and zoom factor, and change the measurement unit.
	Complete the review and indicate the page is OK. or: Approve the page (Available with Approve user rights)
	Complete the review and indicate the page is Not OK. or: Ask the printer to make the indicated corrections (Available with Approve user rights)

Approving or Rejecting a Page

When you are satisfied with a page, you can approve it.

Reject a page if there are problems with the page that you don't think can be corrected. If you think the page can be corrected, annotate the page to suggest corrections.

You need the Approval role to approve or reject pages.

Top Printing **Creativity_Brochure**

Pages
 Total: 20 Requiring Approval: 5 Awaiting Correction: 0

Show Pages With Approval Required **Number of Page(s) Found: 5**
Sort By Name [Select All](#) [Select None](#) Selected: 0

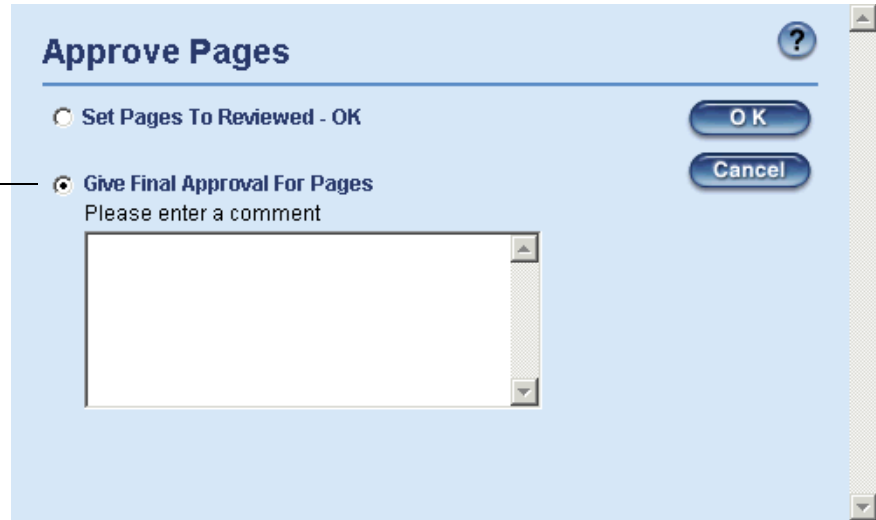
<input type="checkbox"/>		Creativity.p1.pdf Last Modified: 6/9/2003 3:35:38 PM File Size: 4.5 MB
<input type="checkbox"/>		Creativity.p2.pdf Last Modified: 6/9/2003 3:35:39 PM File Size: 8.4 MB
<input type="checkbox"/>		Creativity.p3.pdf Last Modified: 6/9/2003 3:35:39 PM File Size: 2.9 MB

Select All selects all pages in the current filter

Select pages to approve or reject

Click to **Approve** or **Reject Selected Pages**

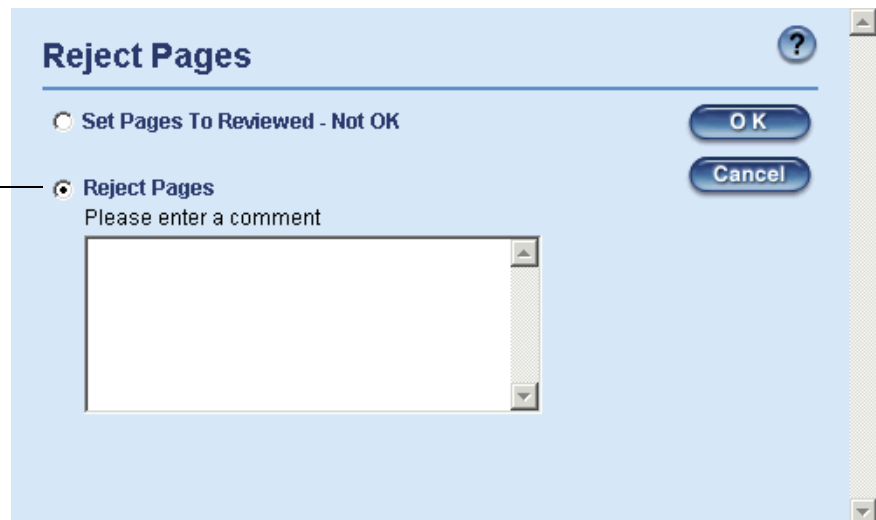
To approve pages,
select **Give Final
Approval For
Pages** and click **OK**



The 'Approve Pages' dialog box has a light blue background and a title bar with a question mark icon. It contains two radio button options: 'Set Pages To Reviewed - OK' and 'Give Final Approval For Pages'. The 'Give Final Approval For Pages' option is selected. Below this option is a text input field with the placeholder text 'Please enter a comment'. To the right of the dialog are two buttons: 'OK' and 'Cancel'.

Or:

To reject pages,
select **Reject Pages**
and click **OK**



The 'Reject Pages' dialog box has a light blue background and a title bar with a question mark icon. It contains two radio button options: 'Set Pages To Reviewed - Not OK' and 'Reject Pages'. The 'Reject Pages' option is selected. Below this option is a text input field with the placeholder text 'Please enter a comment'. To the right of the dialog are two buttons: 'OK' and 'Cancel'.


Changing Customer User Accounts

A customer user account should be created for each customer employee that uses Synapse InSite. This enables accurate tracking of who performed what task on a particular job.

Customer user accounts can also be created for guest users; for example someone from outside the company, such as a graphic designer, that needs to access a job.

Adding Another User

You must enter information in the fields that are labelled on the screen in red—**Unique User Name**, **Password**, **Confirm Password**, **First Name**, and **Last Name**. To receive email notification, you must also enter an address in the **Email** field.



The screenshot displays the 'Top Printing' Customer Administration interface. At the top, there is a toolbar with 'Jobs' and 'Admin' buttons. A mouse cursor is pointing at the 'Admin' button, which is highlighted in blue. Below the toolbar, the page title is 'Customer Administration: Top Printing'. The main content area is divided into sections: 'Top Printing' (with address, phone, fax, website, and CSR email), 'Job Templates' (with a 'BackUp Guide' link), and 'Users of Top Printing' (with 'Guest Users' listed as 'None'). A blue 'Add New User' button is located in the bottom right corner of the 'Users of Top Printing' section. A callout line points from the text 'Click the Administration tool on the toolbar' to the 'Admin' button. Another callout line points from the text 'Click Add New User' to the 'Add New User' button.

Click the Administration tool on the toolbar

Click Add New User

Add User

Fields in RED are Required

Email user about new account

User Information

Unique Username

Lawyer

Password

Confirm Password

Personal Information

First Name

Legal

Init.

Last Name

Department

Title

Manager

Contact Information

Email

legal.department@creo.com

Office Phone

604.451.2720

Fax

604.437.9891

Cell

Home Phone

Pager

User Rights

View All Pages in Jobs

View all pages in accessible jobs. If unchecked, the user will only see pages which they have been asked to review.

Upload

Upload files to job-specific folders.

Download

Download files from job-specific folders.

Annotate

Annotate pages in Smart Review and request reviews.

Approve

Approve and reject pages, request and clear reviews, annotate pages, request corrections and submit annotated PDFs.

Edit Customer Info

Edit customer information and user accounts.

Create Jobs

To Edit the Create Jobs right, you must have the Create Jobs right.

Note: All users have viewing rights, including the ability to view accessible jobs and accessible pages, and download LowRes proofs and HiRes files.

Expiry

Account Does Not Expire

Account set

Account Expires In 10 **Day(s)**

to expire

Job Access

Allow access to all current and future jobs

Allow access to following jobs ONLY:

User can only access this job

Creativity_Brochure



Enter information then click **Add User**

Changing Your Password

The printer may require strong passwords in InSite. Strong passwords are passwords of at least eight characters, that must have a combination of different types of characters. See the Online Help for guidelines for creating strong passwords. All users can change their own passwords.



Click to display **Edit User Information**

Top Printing

Edit User Information: Print_Buyer

Personal Information

First Name	Init.	Last Name
<input type="text" value="Print"/>	<input type="text"/>	<input type="text" value="Buyer"/>

Title

Change Password

Click **Change Password**

InSite - Change User Password:Print_Buyer - Microsoft Internet Explorer

Change User Password: Print_Buyer

Enter your current password.

Enter your new password.

Confirm the new password.

Cancel **Update**

Enter your password

Enter a new password

Retype the new password to confirm, then click **Update**

