
POLKADOTS SOFTWARE

Send-it v3.6 for NEWSflo – External Suppliers Handbook

How external suppliers work with Send-it for NEWSflo

The screenshot displays the Send-it software interface. At the top, the logo 'Send-it' is on the left, and navigation links 'Jobs | Settings | Disconnect' are in the center. On the right, it shows the user 'Super-user su2_jack' is logged on to 'Job 34 - Daily' on 'Mar 14, 12:35:43'. Below the header, there's a 'Pages (14)' tab. The main area is divided into a left sidebar and a main content area. The sidebar contains a 'File upload' section with a 'Browse...' button, a 'Prepage-it upload' option, a 'Preflight profile' dropdown set to 'NORM_PAGES_CMYK', and a 'Send-it' button. Below that is a 'Notes' section with a checkbox and the text '8_page_magazine.pdf' and 'jane on Mar 04, 2011 11:15:51'. The main content area features a toolbar with icons for 'Select all', 'Preview', 'View-it', 'Approve', and 'Delete', along with 'View by: Icon' and 'Size: [A] [A] [A]' options. Below the toolbar is a grid of 13 page thumbnails, each with a label and dimensions: 001 (8.8 x 12in), 002 (8.8 x 12in), 003 (8.8 x 12in), 004 (8.8 x 12in), 005 (8.8 x 12in), 006 (8.8 x 12in), 007 (8.8 x 12in), B01 (12.5 x 22.2in), B02 (12.5 x 22.2in), B03 (12.5 x 22.2in), B04 (12.5 x 22.2in), B05 (12.5 x 22.2in), and B06 (12.5 x 22.2in). Each thumbnail includes a status icon (checkmark or error) and a PDF icon.

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Introduction

What is Send-it?

Send-it is a software module within the Polkadots workflow which is designed for remote job submission, e-proofing and job approval. It gives external customers or suppliers the ability to submit files directly to a RIP for preflighting and RIPping. It also allows them to remotely softproof their rasterized pages and approve/reject their own jobs.

Once pages have been approved by external customers, they are paired up and made into plates according to publication and template specs specified by an internal NEWSflo Operator. All jobs submitted by external suppliers via Send-it will be visible to internal operators (i.e. company with plates & printing press). They will also be able to softproof them, if they wish, before plating and outputting the jobs.

Training videos

To help you get started, there are some **Training Videos** that give you a quick visual overview, for example:

- Uploading & softproofing pages
- How to install PrePage-it Upload

Please consult your *Polkadots Software* dealer or view them directly from the *Polkadots* web site http://www.polkadots.ca/support/training_videos.asp.

Send-it Basics

This chapter covers everything an external customer/supplier needs to know about Send-it. You will find basic, practical explanations and procedures regarding how to use Send-it.

External customers/suppliers log on to Send-it with Super-User or User accounts (see [External User Accounts](#) on p.21 for more information about Send-it accounts).

What can external customers / suppliers do with Send-it?

- submit jobs to be pre-flighted and RIPped
- see list of RIPped jobs
- view softproofs: low-res **Previews**, PDF softproofs (optional), and **View-it** hi-res softproofs (optional)
- approve/flush pages & jobs
- write and read annotation comments in a View-it softproof
- receive e-mail notifications of events (e.g. approved jobs, errors)

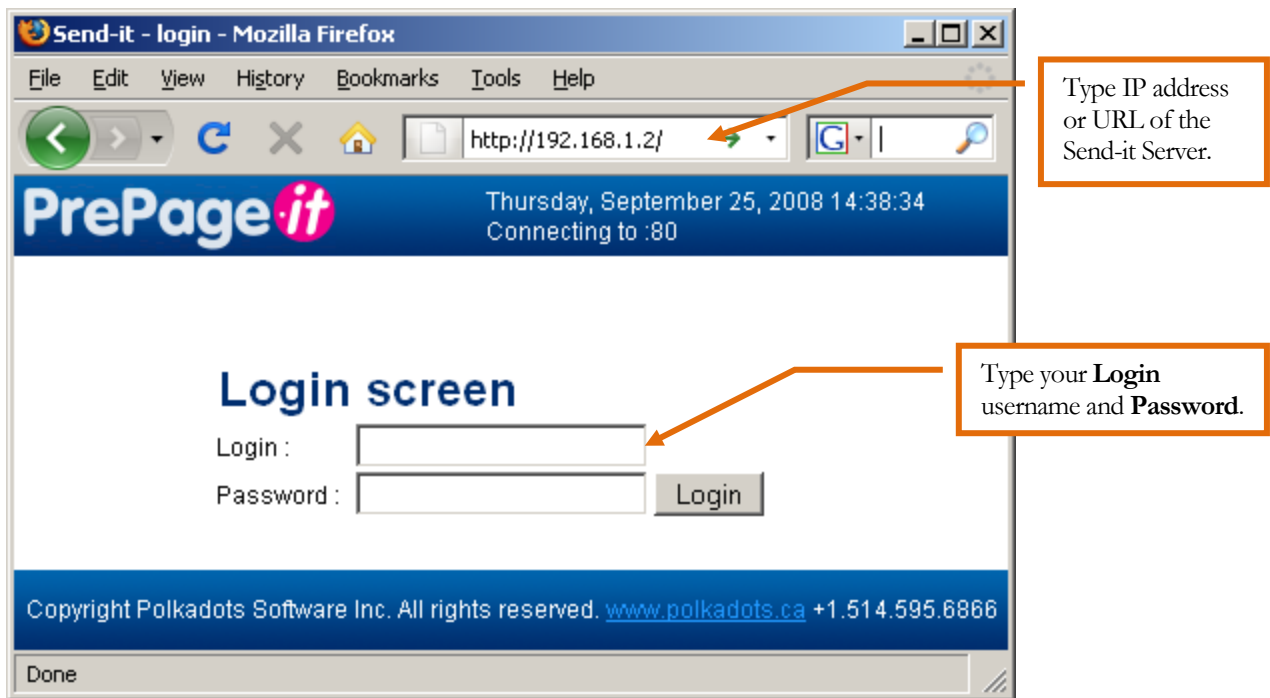
Launching Send-it

Note

Send-it Clients can be launched from any workstation equipped with one of the following operating systems: Win XP Pro (or higher), Mac OS 10.4 (or higher).

Send-it Clients can be opened in any web browser on any workstation by:

1. Typing the IP address or URL of the Send-it Server.
2. Logging on with your Send-it **Login** username/password.



IP address

An external customer/supplier must use the external, public IP address or URL of the Send-it Server (add port number if other than port 80).

Internal operators should use the internal, private IP address or URL of the Send-it Server (add port number if other than port 80).

Web browsers

Minimum requirements:

- Firefox 2 or 3 (Mac or PC)
- Internet Explorer 7 (PC)
- Safari v.3 (Mac OS 10.4 or higher)

Browser tips

- it is recommended to use recent versions of web browsers, as listed in the previous section
- avoid adding extra toolbars and add-ons (e.g. Google toolbar, etc.)
- pop-up blockers can prevent some Send-it windows from being displayed
- if portions of the Send-it interface are displayed incorrectly or missing:

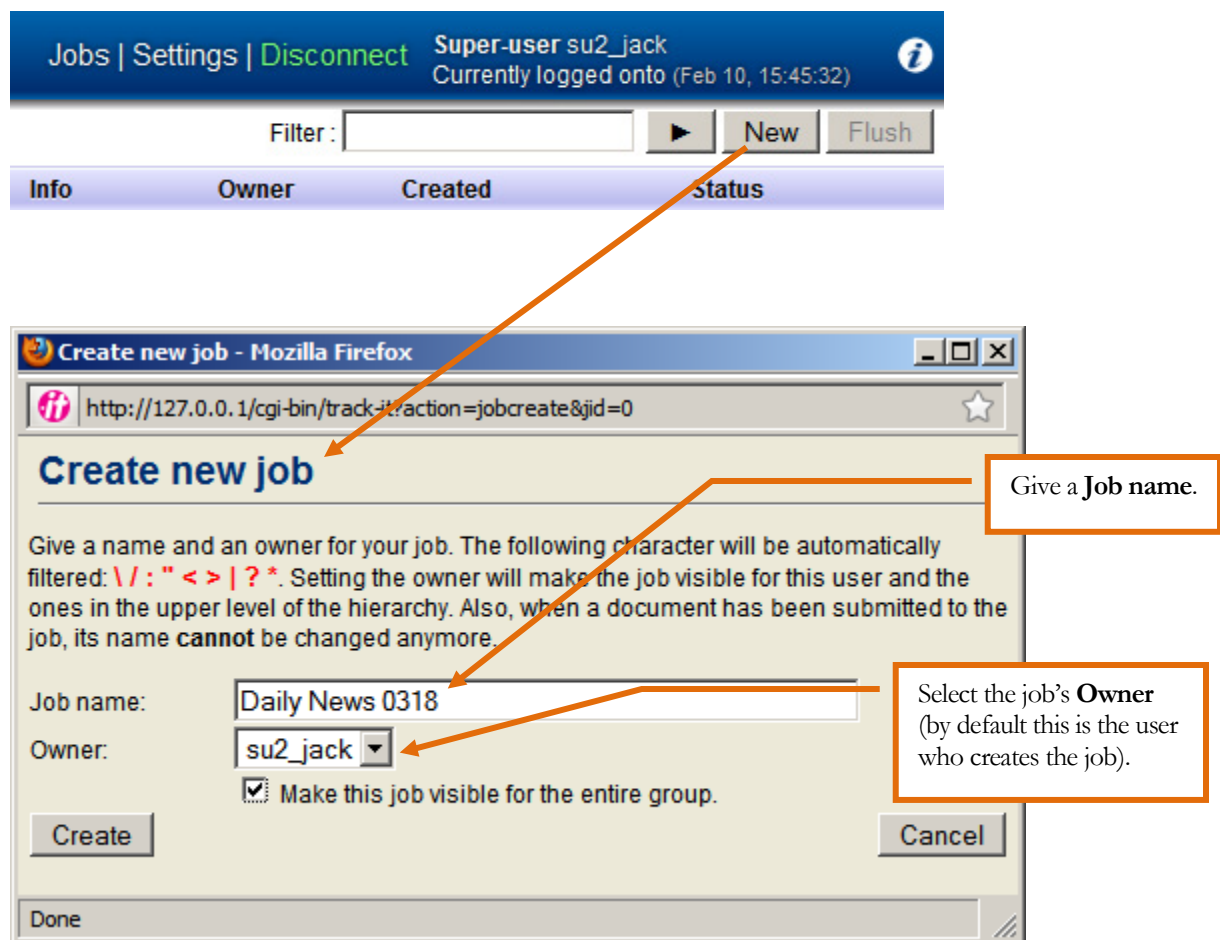
- try to reload/refresh the web page using the web browser's **Reload** or **Refresh** command
- try clearing the web browser's cache or temporary internet files
- see the section [Troubleshooting Tips](#) on p.25 for details

How to submit job pages - Overview

The procedure below describes how to create a job with Send-it, including how to upload, softproof, and approve/reject job files.

Create a job name

1. Click the **Jobs** link, then click the **New** button to create a new job name/folder.



The screenshot shows the 'Create new job' form in a Mozilla Firefox browser window. The browser's address bar shows the URL: `http://127.0.0.1/cgi-bin/track-it?action=jobcreate&jid=0`. The page title is 'Create new job'. The form contains the following elements:

- Job name:** A text input field containing 'Daily News 0318'.
- Owner:** A dropdown menu with 'su2_jack' selected.
- Make this job visible for the entire group.**
- Create** and **Cancel** buttons.

Annotations and callouts:

- An orange arrow points from the 'New' button in the top navigation bar to the 'Create new job' form.
- An orange arrow points from the 'Job name' field to a callout box: **Give a Job name.**
- An orange arrow points from the 'Owner' dropdown menu to a callout box: **Select the job's Owner (by default this is the user who creates the job).**

Tip

If a user creates a job and wants that job to be visible to all other users in their user group, then they should check the box **Make this job visible for the entire group**.

The new job will be listed in the **Job List**.



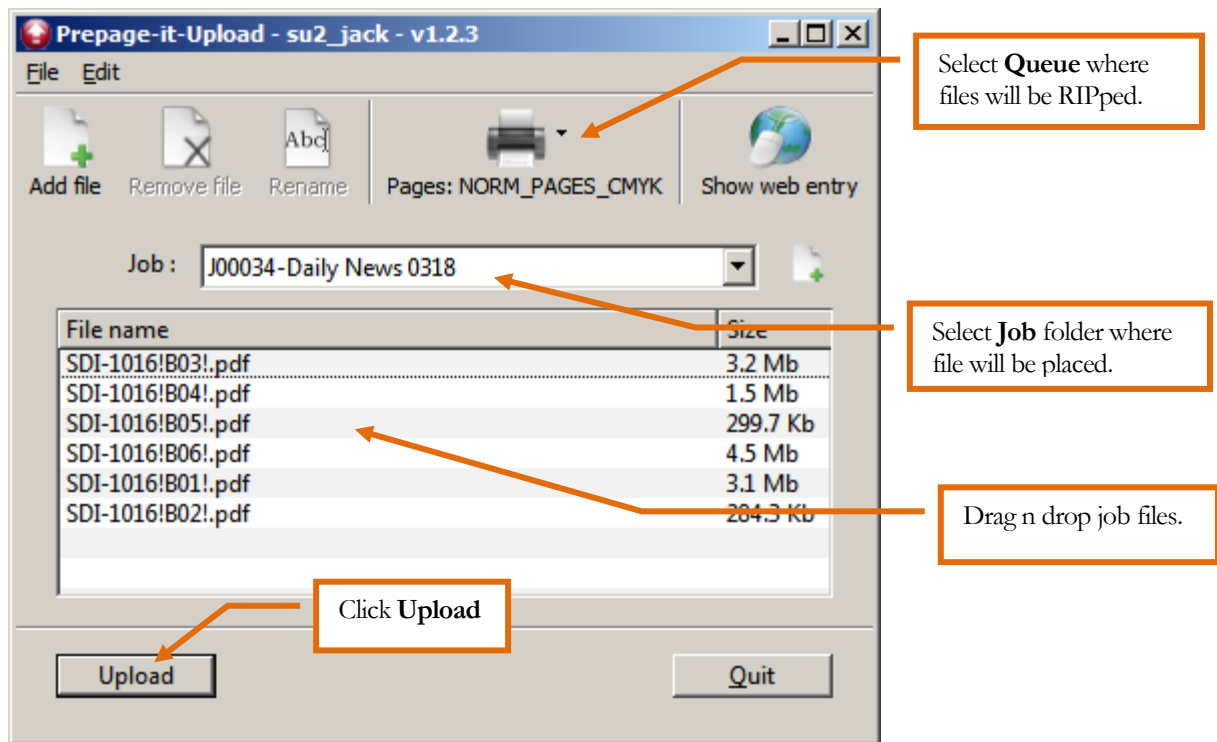
<input type="checkbox"/>	ID	Name	Info	Owner	Created
<input type="checkbox"/>	34	Daily News 0318		su2_jack	2011-02-10 15:43:15
<input type="checkbox"/>	33	ABC	8p., 4 colors	su2_jack	2011-02-10 13:02:02

Single Pages

1. Upload pages in one of the following ways:

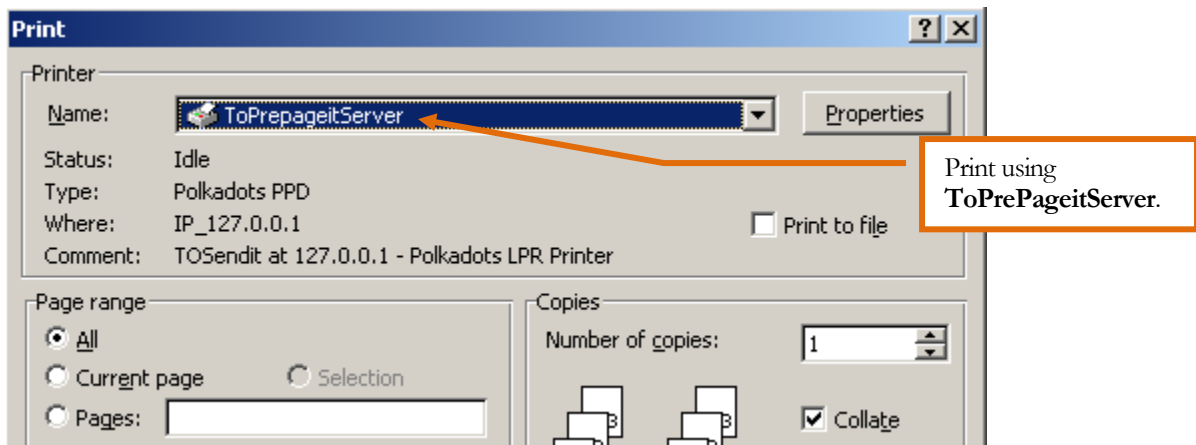
Method A: PrePage-it Upload: (see [Uploading Files](#) on p.11 for a detailed explanation)

Log on to PrePage-it Upload, select the new job folder you just created, then select a suitable **Pages** queue. Finally drag and drop the page files you want preflighted and RIPped, then click the **Upload** button.



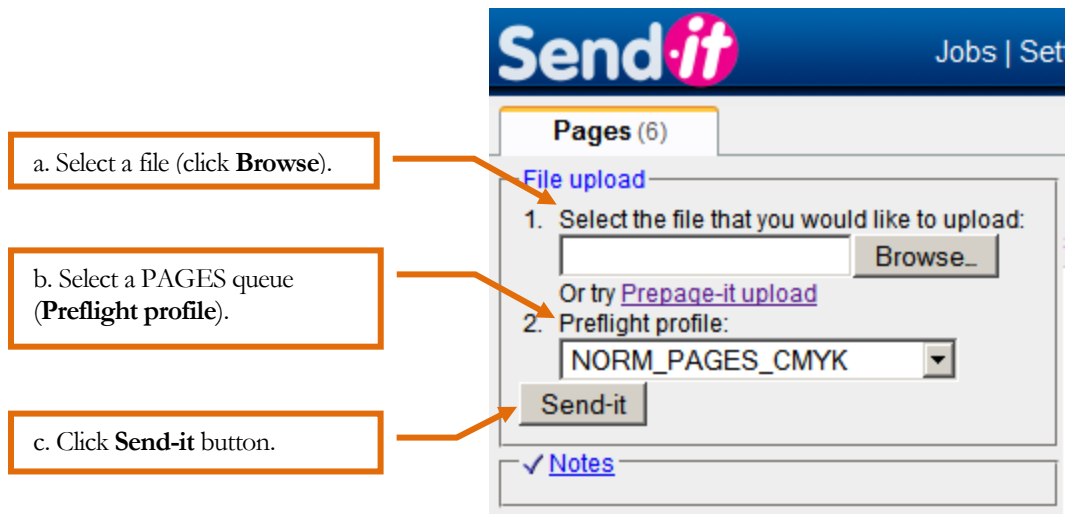
Method B: PrePage-it Printer: (see [Uploading Files](#) on p.11 for a detailed explanation)

Log on to PrePage-it Upload, select the new job folder you just created, then select a suitable **Pages** queue (see previous figure). Next, print a job file from any Mac or PC application, selecting **ToPrePageitServer** as the printer. Finally, go back to the **PrePage-it Upload** window and click the **Upload** button.




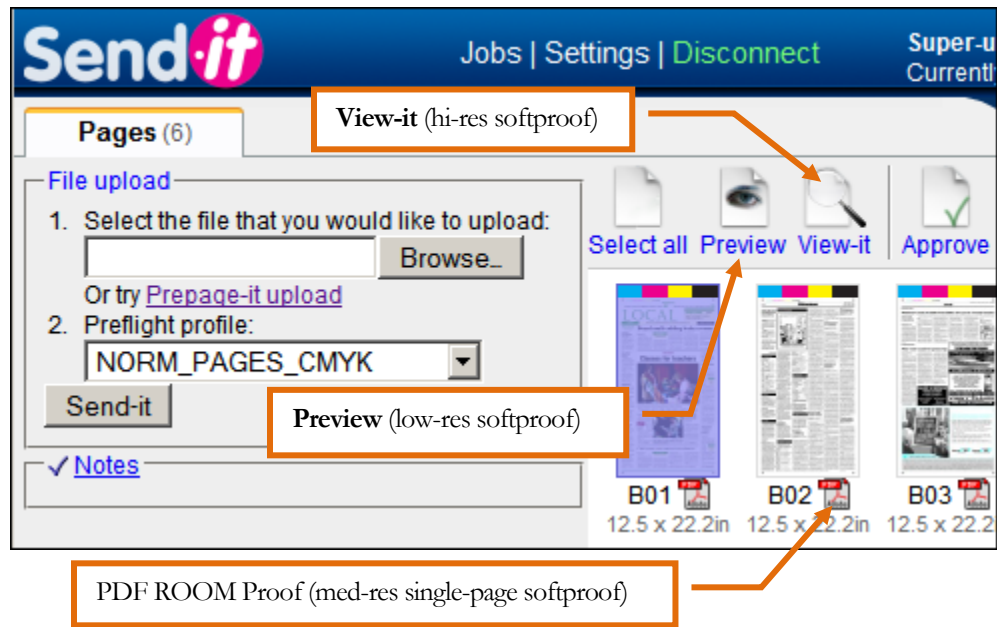
Method C: Web Interface:

Click on the link of the new job you just created, then click the **Pages** link. Now upload a page from the **File Upload** panel so it can be preflighted and RIPped.



2. Softproof single pages from the **Pages** tab in one of the following formats:

- a low-res **Preview**
- b med-res PDF (optional - click PDF icon  if available)
- c hi-res **View-it** softproof (optional – click View-it link if available)



3. Approve pages / jobs in the following way:

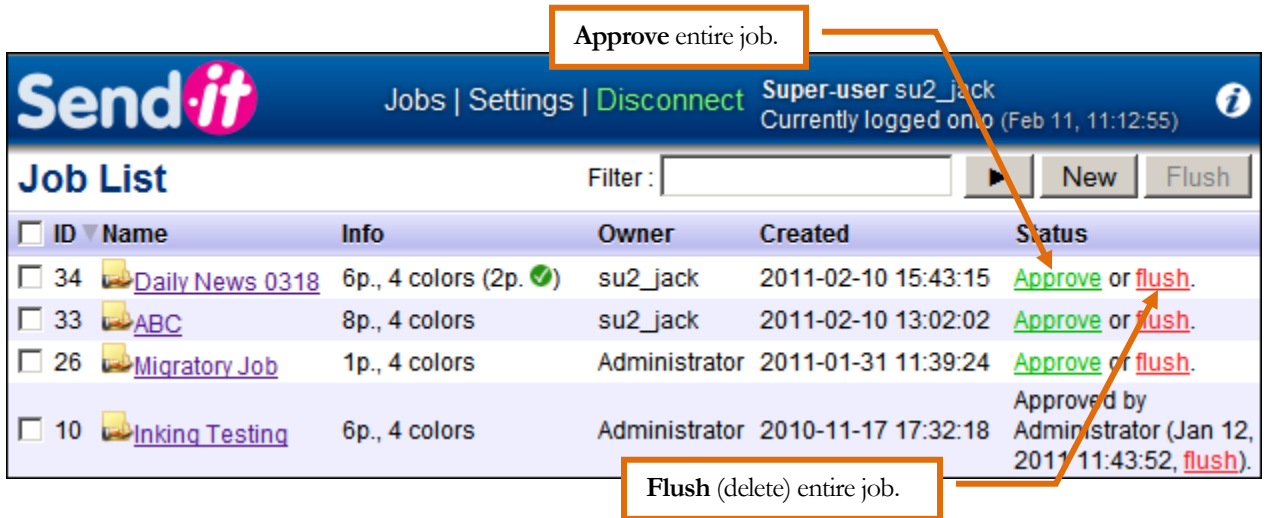
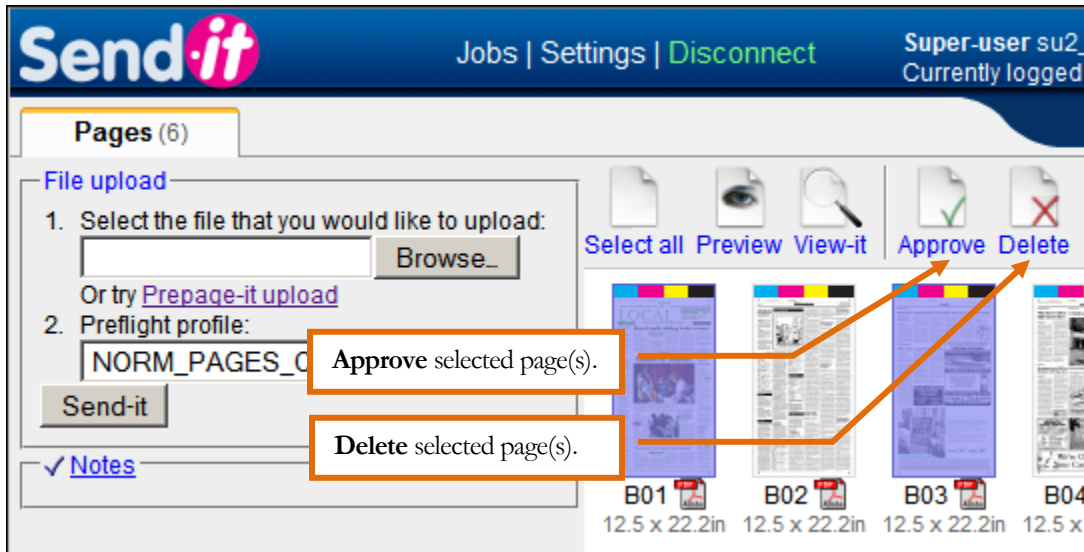
- If you are set up with page approval, then select one or more pages and click the **Approve** button from the **Pages** window.

or

- If you are set up with job approval, then when all pages are ok, **Approve** the whole job from the **Job List** window.

or

- If a page or job is not good, you can **Delete** selected page(s) or **Flush** the entire job.



Note

Send-it approval may be configured on a per-job or per-page basis. If you are set up with page approval, then rather than approving the entire job, you must approve individual pages – you will not have the option of approving the entire job as shown in the figure above.

Tip

As an alternative, a page may also be approved from within the **View-it** softproof window.

Important

When the terms **Flush** / **Reject** / **Delete** are used in reference to a page or job, they all have the same meaning i.e. the RIPped files will actually be deleted from the hard disk.

Uploading Files

The general procedure for submitting a job is outlined in the section [How to submit job pages - Overview](#), starting on p.6. This section explains the specifics about how to install the PrePage-it Upload and PrePage-it Printer and how to use these tools to upload files.

Uploading Overview

In Send-it there are currently three methods for submitting job files to the RIP:

- Web Interface's **File Upload (Pages tab)**
- PrePage-it Upload utility
- PrePage-it Printer (**ToPrePageitServer**)

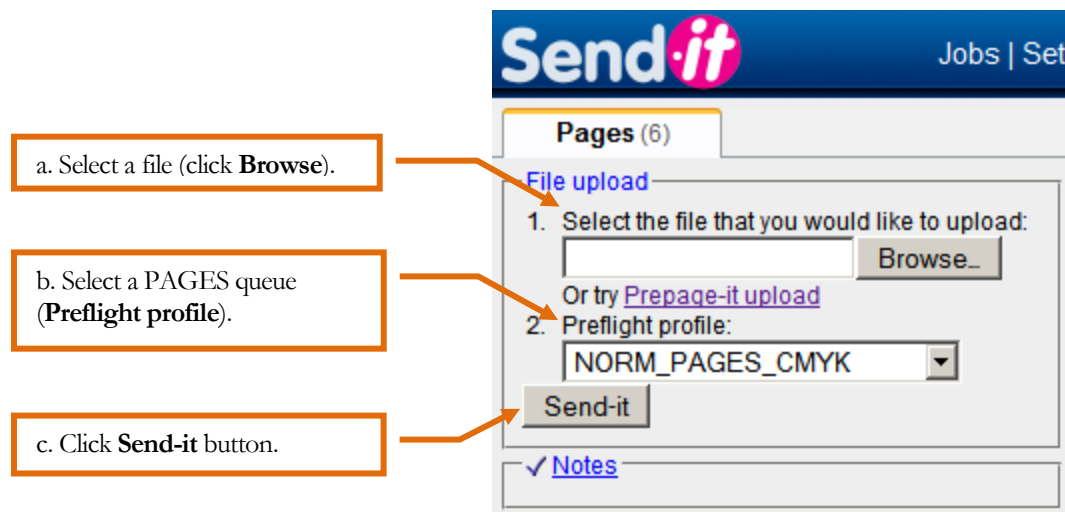
Note

The Java applet that was used for uploading files in prior versions has been replaced by the PrePage-it Upload utility.

The terms submitting/uploading/printing files here all refer to the same thing: submitting job files to a PrePage-it RIP queue in order to be processed i.e. preflighted, rasterized, etc.

Web Interface

The **File Upload** panel within the **Pages** tab of the web interface allows you to submit job files directly from the web interface (see figure below). However it is disadvantaged by the fact that you can only upload one file at a time.



PrePage-it Upload & Printer

Two other methods exist for submitting jobs: PrePage-it Upload and PrePage-it Printer. These are separate, external utilities that can be used without logging on to Send-it. PrePage-it Upload allows you to submit PS or PDF jobs by dragging and dropping them onto the **PrePage-it Upload** window. The PrePage-it Printer utility creates a printer called **ToPrePageitServer**, which you can use to print jobs to RIP queues from any application. These tools can be installed and used on Mac or PC workstations.

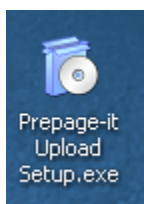
PrePage-it Upload/Printer provide more convenient ways of submitting jobs. PrePage-it Upload allows you to drag multiple job files onto the **PrePage-it Upload** window. The PrePage-it Printer allows you to print jobs in the intuitive manner that many operators are used to doing.

Note

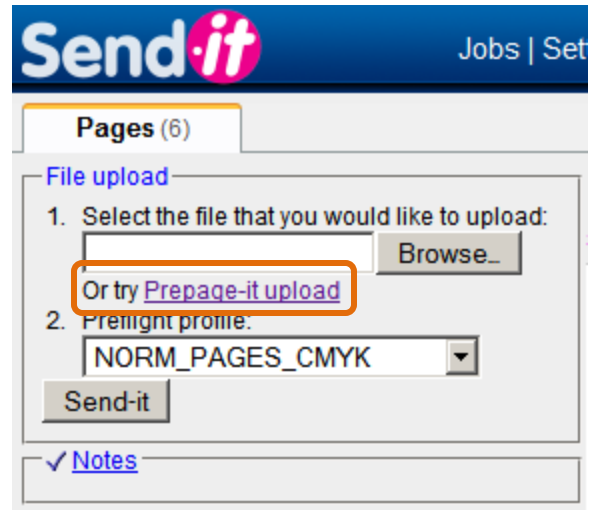
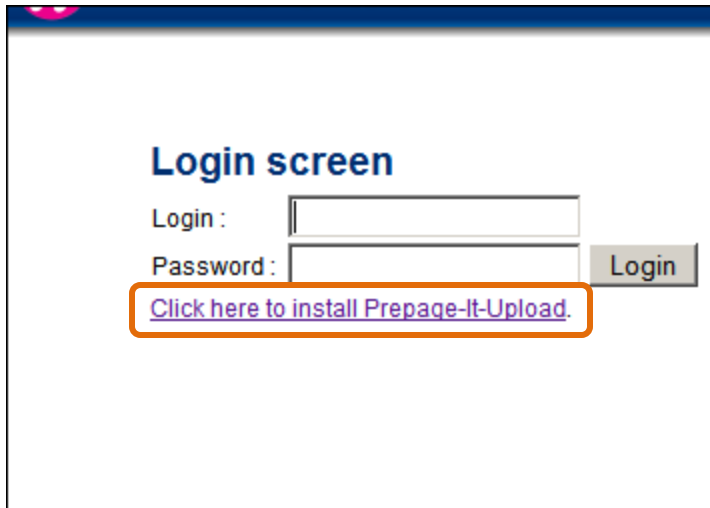
The PrePage-it Upload and PrePage-it Printer tools can be used on Windows XP Pro (or higher) and Mac OS 10.4 (or higher).

Installing PrePage-it Upload & Printer

The PrePage-it Upload Setup is an installer which installs both the PrePage-it Upload and PrePage-it Printer tools. It must be installed on each workstation where these tools will be used. There are two installers – one for Mac (zip) and one for PC (exe).



These installers can be downloaded either from the Send-it **Login screen** by clicking the link **Click here to install Prepage-it Upload** or from the Send-it **File Upload** panel by clicking the link **Or try Prepage-it Upload**.



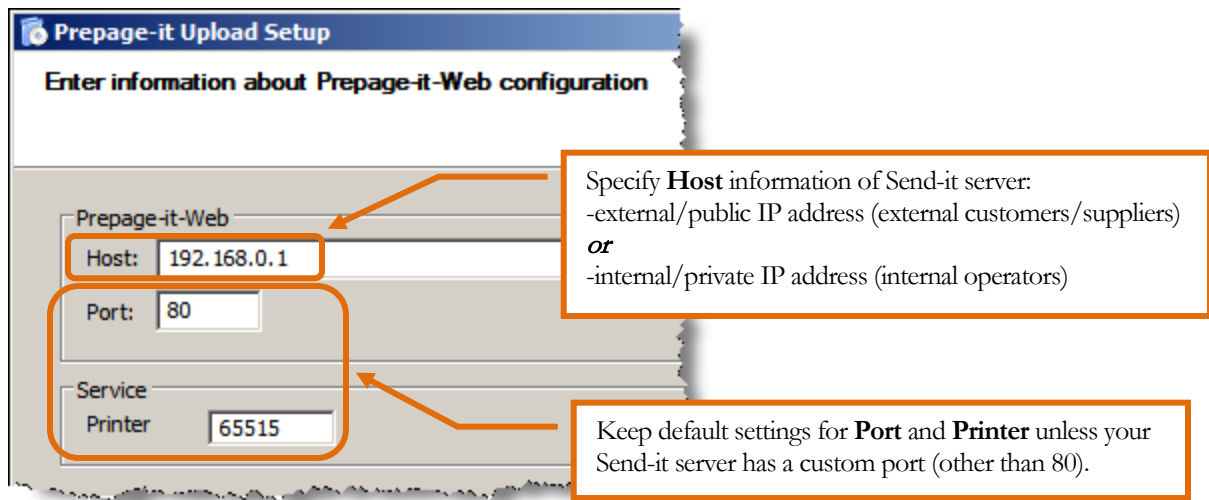
To install:

1. Launch the PrePage-it Upload Setup and follow the instructions provided.

Warning

When PrePage-it Upload is installed on a Mac OS X 10.5, a security feature prevents the PrePage-it Printer from being created. Therefore this security feature must be disabled in the Mac OS X **System Preferences** before running the PrePage-it Upload Setup. A detailed account of this topic can be found in the tech note *PrePage-it Upload & Mac OS 10.5*.

2. When prompted with the following window, you should provide the Send-it **Host** information i.e. the IP address or URL of the server machine.

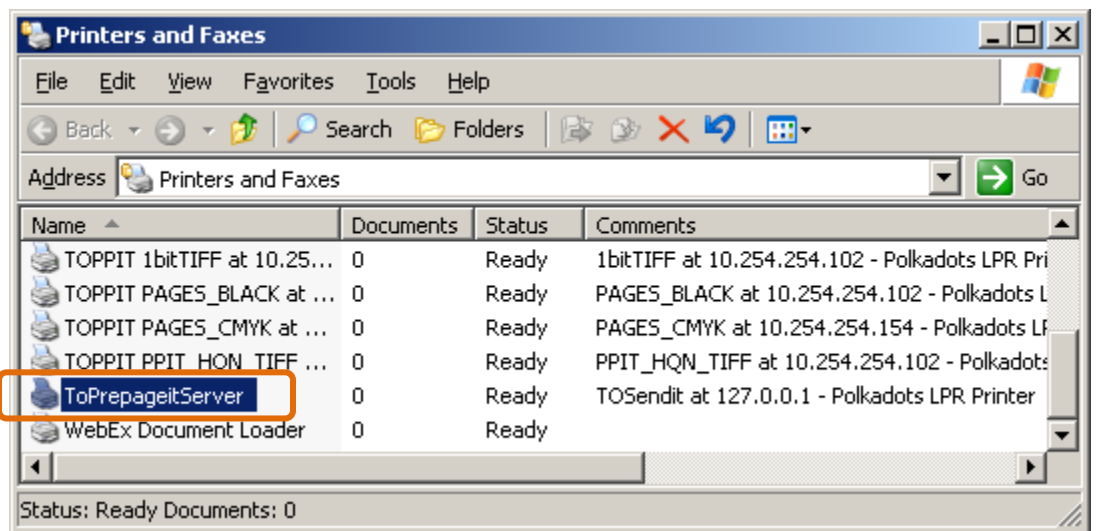


Note

For external customers/suppliers who install PrePage-it Upload, the Send-it **Host** information must be the external, public IP address or URL of the server machine. Internal operators must provide the internal, private IP address or URL of the Send-it server.

- The **Port** and **Printer Service** settings can usually be left at their defaults. If you need to change them, you may do so at this point. Note that if the port used by your Send-it server is different from the default port 80, then it is important to specify the correct **Port** setting here.

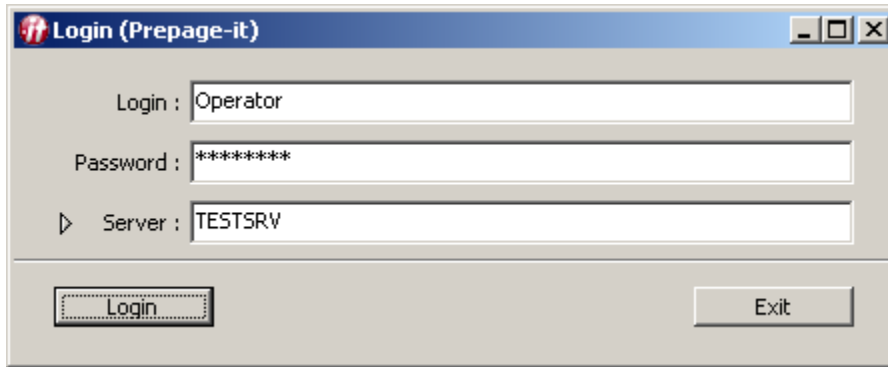
After a successful installation, you will see two items added: the **PrePage-it Upload** application (on the Windows **Desktop** or the Mac **Applications** folder) and a printer called **ToPrePageitServer**.



Submitting jobs with PrePage-it Upload & Printer

The following procedure outlines how to submit jobs via the PrePage-it Upload or PrePage Printer. This single procedure describes both tools.

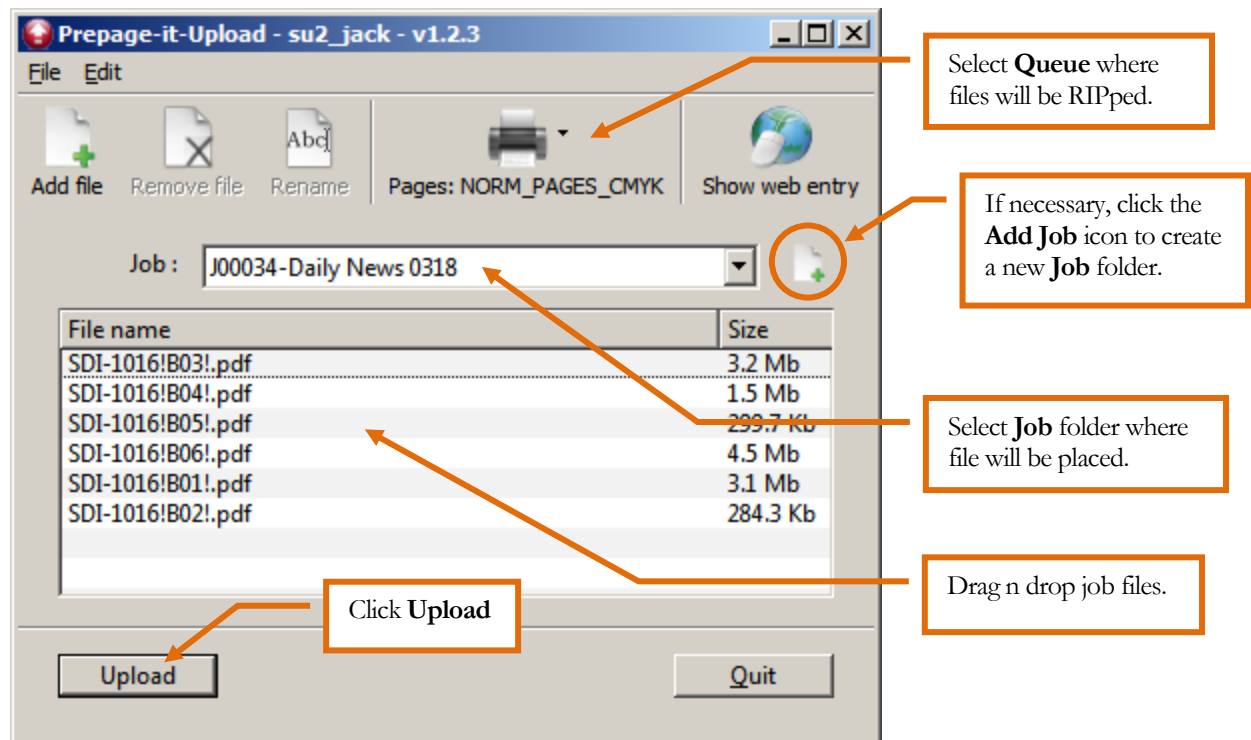
1. Launch the PrePage-it Upload application and log in with your Send-it account. If necessary, click the **Server** arrow and select your server.



2. In the **PrePage-it Upload** window shown below, specify the **Job** and **Queue** where you want to submit a file. If necessary, create a new **Job** folder by clicking **File > Add Job** or by clicking the **Add Job** icon.

Note

The **Job** folder and **Queue** that you select here applies whether you drag and drop files onto the **PrePage-it Upload** window or print them using the PrePage-it Printer.



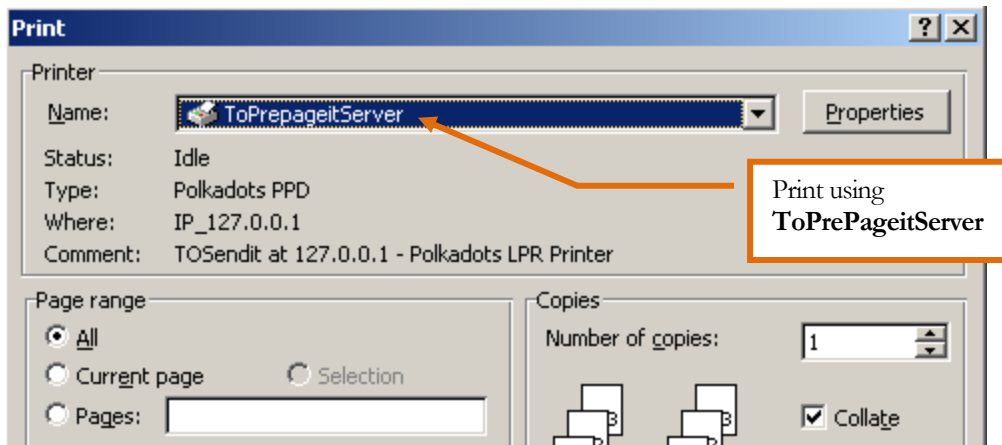
Tip

In a typical workflow setup, the **PrePage-it Upload** application window should always be kept open when you are submitting jobs, whether by drag n drop *or* by printing. If it's closed, you will be automatically prompted to log on to **PrePage-it Upload** after you've submitted a file via the PrePage-it Printer.

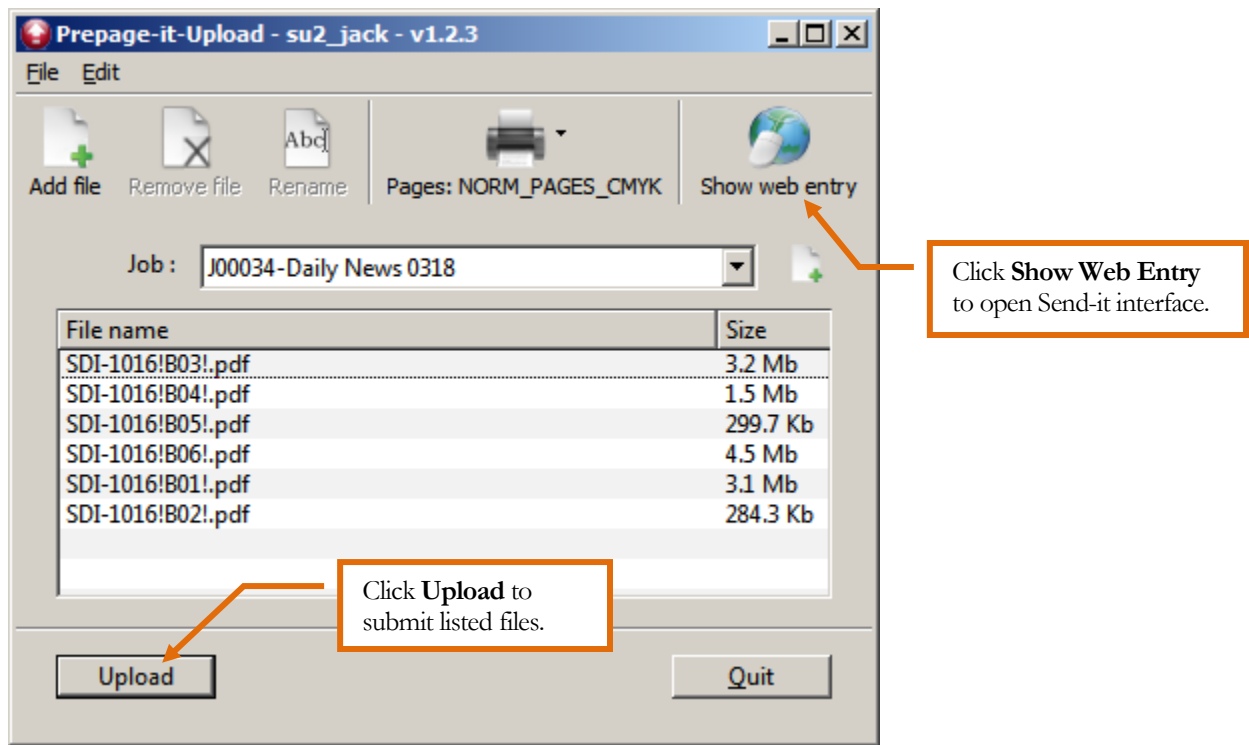
3. **Drag and drop:** If you want to drag and drop PS or PDF files, drag them unto the **PrePage-it Upload** window (figure above).

-or-

Print To print a file from an application, select the **ToPrePageitServer** printer when printing from your application (figure below).



4. When all files appear in the **PrePage-it Upload** window, regardless how they were submitted, click the **Upload** button.



Tip

To automatically open the Send-it window, click the **Show Web Entry** button.

Queues (Preflight profiles)

Queues, or Preflight profiles, determine how pages are preflighted and RIPped after they're uploaded. Send-it lists two types of queues: **Pages (Normalize)** and **Upload Only**.

In this section we explain the difference between these two types of queues.

Pages (Normalize) queues

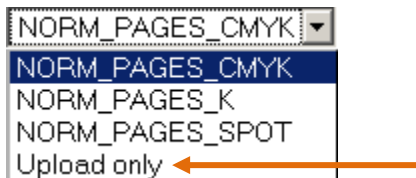
NORM_PAGES_CMYK
 NORM_PAGES_K
NORM_PAGES_SPOT

These queues preflight and process single-pages, RIPping them into rasterized, contone pages. As a result, all pages are “normalized” into a uniform, standard file type.

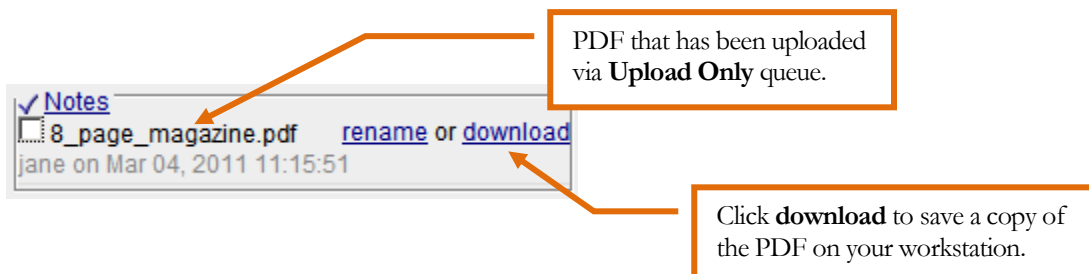
Typically, pages are processed through one of these queues:

- NORM_PAGES_CMYK → forces a page to CMYK (4 plates max.)
- NORM_PAGES_K → forces a page to the black plate (1 plate max.)
- NORM_PAGES_SPOT → preserves all plate colors (process + spots) in a page

Upload Only

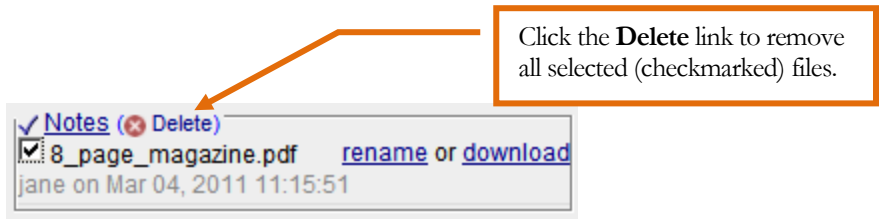


The **Upload Only** queue provides a way of exchanging files between Users/Super-users (external suppliers/customers) and Operators (internal company). Similar to an FTP Client, it can be used to upload and download files between a company and its suppliers. Anyone with a Send-it account can upload any type of file. This means that not only can users transfer PS or PDF jobs, but also files that cannot be sent directly to a RIP e.g. native Quark/InDesign/text files.

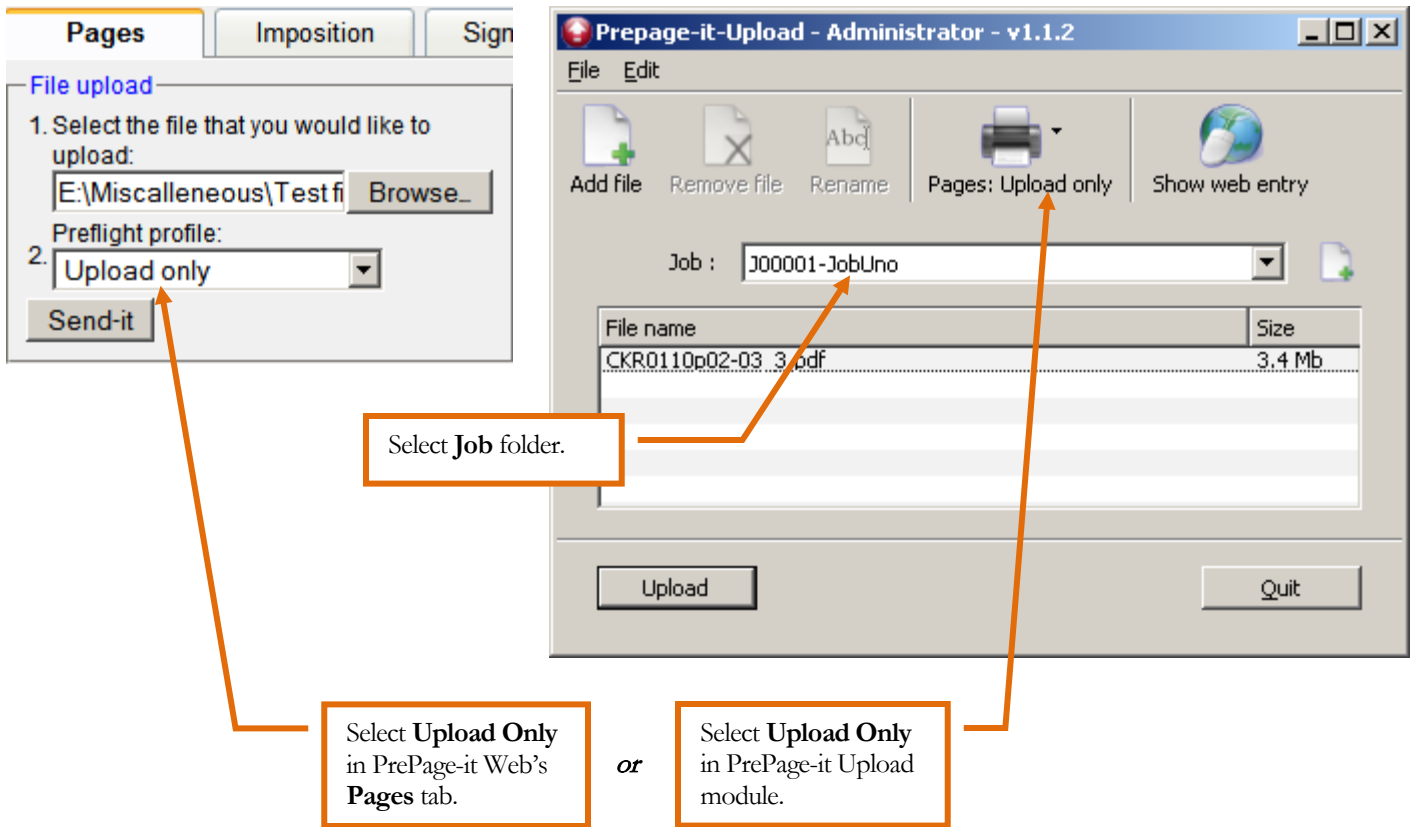


When a job is submitted to the **Upload Only** queue, it will appear in the **Notes** panel of the **Pages** tab (see figure above). Once it is listed in the **Notes** panel of a job, any operator or user who has access to that particular job can download a copy of the file to their workstation.

- clicking **Download** allows you to save the file on your hard disk
- the file will remain in the **Notes** panel until it is deleted by putting a checkmark next to the file and then clicking the **Delete** link



If a file is submitted with PrePage-it Upload, the **Job** folder as well as the queue **Pages:Upload Only** must be specified.



Viewing Tools

View-it

View-it is an optional module.

View-it is a high-resolution softproof of the RIPped data, showing the actual rasterized job as it will be printed on the plate. The proof is shown in a web browser and includes a number of tools for easy viewing (zooming, rotation), color information, approval/rejection, measuring (angles, distance) and annotation comments. Colors can be viewed individually or together.

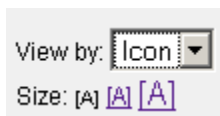
To know more about View-it:

- watch a quick video tutorial directly from the *Polkadots* web site http://www.polkadots.ca/support/training_videos.asp
- consult the View-it 3.0 Help page by clicking the (**Help**) link from inside the View-it 3.0 window

Preview

Clicking the **Preview** toolbar button will show quick, low-resolution previews of all selected RIPped pages. These previews can be downloaded or saved to your hard disk by clicking the **Download** button from inside the **Preview** window. A zipped file will be created containing a TIFF or JPG preview of each selected page.

View modes



Job pages can be viewed in one of the following modes, as selected in the **View By** dropdown menu (shown above):

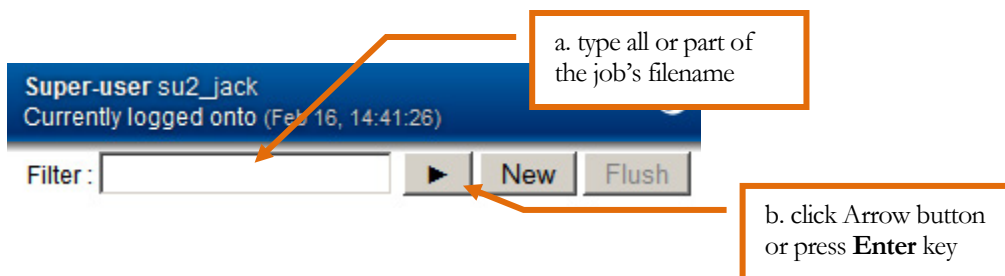
- **View by Icon**
- **View by List**

View by Icon shows the thumbnail preview of pages. You can change the size of the thumbnails by clicking one of the [A] links.

View by List displays information about pages without showing any preview. Information includes original filename, page size, colors, etc. This view allows you to list many more pages at once.

Job Filter

The Job Filter helps you to quickly find a job when your **Job List** has become too long to scan through visually.



In the **Filter** box found at the top of the **Job List** window, you can filter out the job list by typing all or part of a job name. After typing the filter characters, press **Enter** (on keyboard) or click the **Arrow** button.

It will filter the job list down to only those jobs containing the specified filter characters anywhere in the job name.

To return to the full job list, empty the **Filter** box and press **Enter**.

Selection of pages

Here is a list of techniques for selecting pages in Send-it:

- You can select multiple adjacent pages by clicking inside a page and dragging the mouse across all other desired pages. You can also deselect pages in the same way. In addition, this procedure can be repeated in order to select several “groups” of non- adjacent pages inside the same job e.g. p.4-7, 12-19, 22-26. (**Icon View** only)

Note

Please note the selection procedure described above (i.e. dragging across pages) is not supported in Internet Explorer, only in Firefox and Safari.

- You can select a list of consecutive pages by (i) clicking on the first page and (ii) **Shift**+clicking the last page you wish to select. (**List View** only)
- You can select a page while automatically deselecting all other selected pages. To do so, middle-click or **Shift**+click a page. (**Icon View** only)
- You can click the **Select All** toolbar button. (**Icon & List View**)
- You can click individual pages. (**Icon & List View**)

Tip

Pages can be deselected in exactly the same way as they are selected.

External User Accounts

Some external customers/suppliers have more than one employee in their company who uploads pages to Send-it and approves/rejects jobs. To manage this, employees of an external supplier may be attributed a Super-User account or a User account.

Suppliers that have a Super-User account can create additional User accounts for employees of their own company, for example, one account per employee. Alternatively, a supplier with multiple employees can have everyone submit pages to Send-it and approve/reject jobs using the same Super-User account. To decide which of these two setups would be more suitable for a given supplier, the following factors should be considered:

- Send-it will keep a record of the main actions taken by each user account. That is, every time a file is submitted/approved/rejected, the records will show the filename, timestamp and username for each action taken by any user.
- When logged in to Send-it with a Super-User account, you can create one or more additional User accounts - when logged in with a User account, you cannot create or manage other User accounts.

Note

Since Users cannot create or manage other user accounts, the **Settings** tab is only visible to Super-Users - not Users. The **Settings** window is where user accounts are managed.

Super-Users

The Super-User would typically be the supplying company's prepress manager or person responsible for creating and submitting jobs destined to be printed at the main company's printing press.

A Super-User can do anything that a User can do, as well as a few other things. They can:

- create Users
- list/softproof/approve/reject job pages from their own user group (i.e. jobs submitted by themselves or a User they have created)
- list and submit files to Pages and Upload Only queues (except hidden queues)

Users

Users, unlike the Super-User, cannot manage user accounts. Also, a User can only see their own jobs - other User's jobs are inaccessible.

They can:

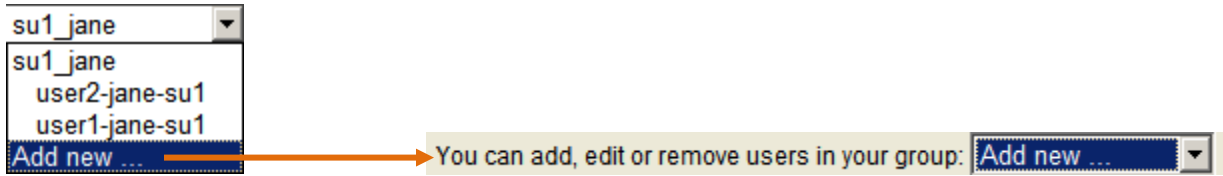
- list/softproof/approve/reject only their own jobs (i.e. pages)
- list and submit files to Pages queues and Upload Only queues (except hidden queues)

How to manage external user accounts

A Super-User can create and modify Send-it user accounts for their own employees (i.e. Users).

To create a new User:

1. In the **Settings** tab, select **Add New** from the dropdown list.



2. Specify the required **User information**:

Settings

You can add, edit or remove users in your group:

User information :

Class :

Login :

Full name :

Description :

Password :

Confirm :

- a **Login**, **Password** and **Confirm** are required. **Full Name** and **Description** are optional.
- b **Class** is determined automatically - it cannot be changed manually.
- c Click the **Add** button.

To modify settings for a User:

1. Select a User from the dropdown list.

Settings

You can add, edit or remove users in your group: Jim

User information :

Class :

Login :

Full name :

Description :

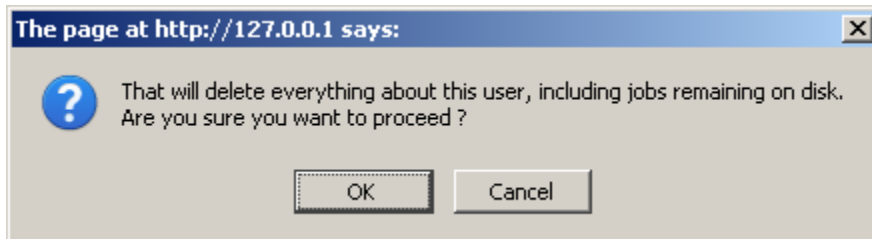
Password :

Confirm :

2. Make the required changes and click the **Modify** button.

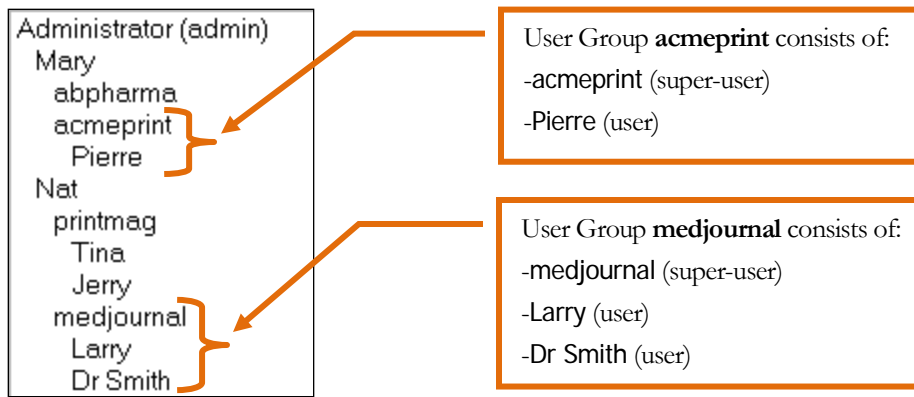
Note

To remove a user, select the user from dropdown list and click the **Delete** button. This will delete everything associated with the user, including jobs on the hard disk (see figure below).



User groups

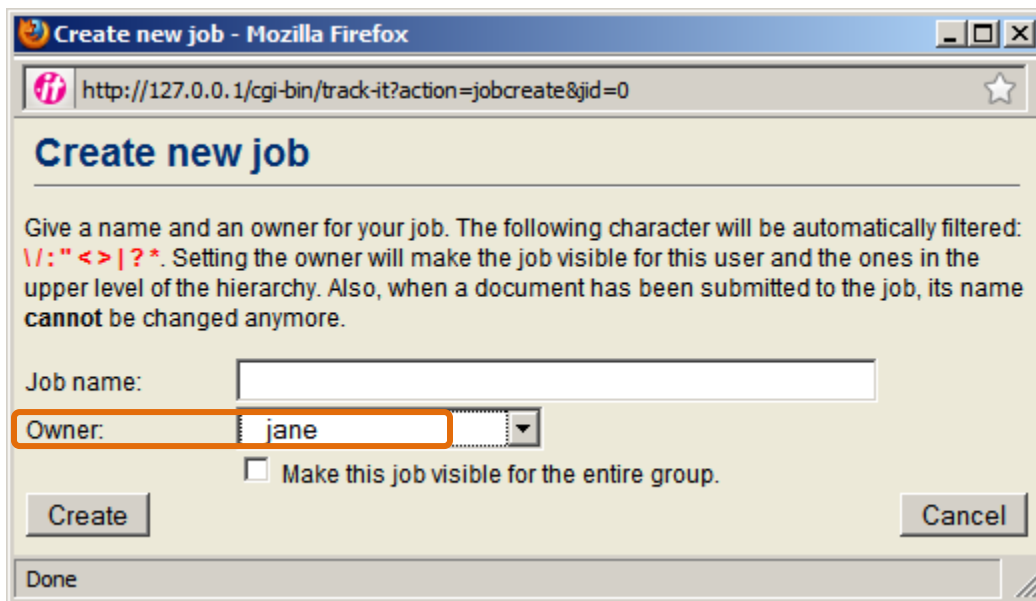
A User Group refers to a “user” and all others below him in the user hierarchy, as illustrated in the examples below.



Owner

If you want a job that you are creating to be visible and accessible to a particular user, then select them as **Owner**.

You can designate someone as the owner of a job when you create a new job (see figure below). In addition, you can make the job visible to every user under the owner (i.e. his entire user group) by checking the box **Make this job visible for the entire group**.

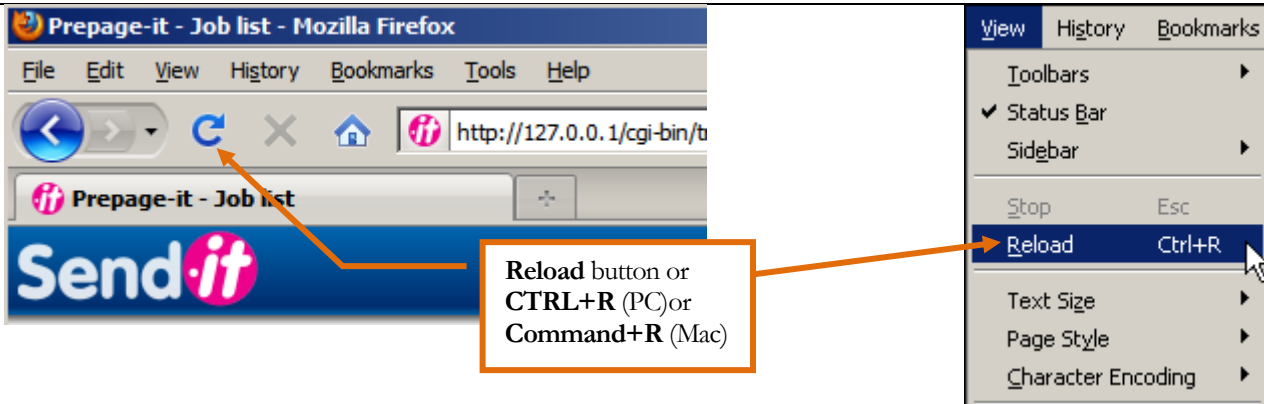


Troubleshooting Tips

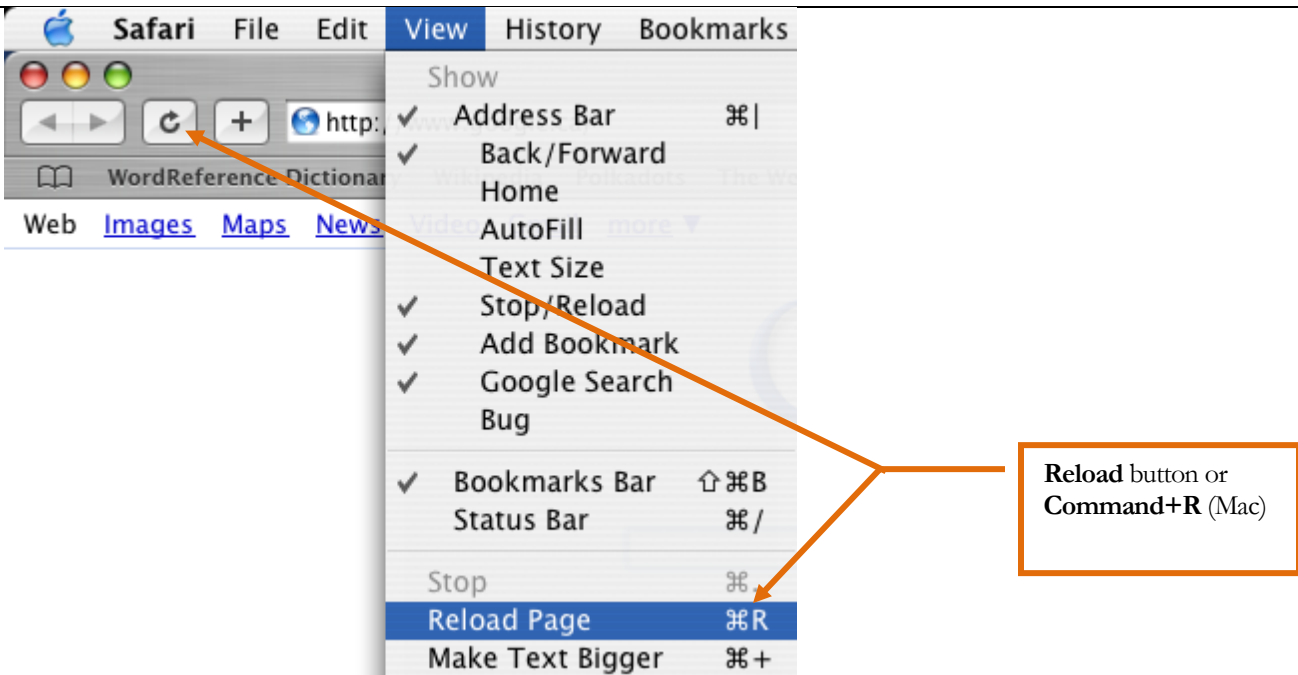
This section includes some basic troubleshooting tips in a question and answer format.

Refresh / Reload a web page

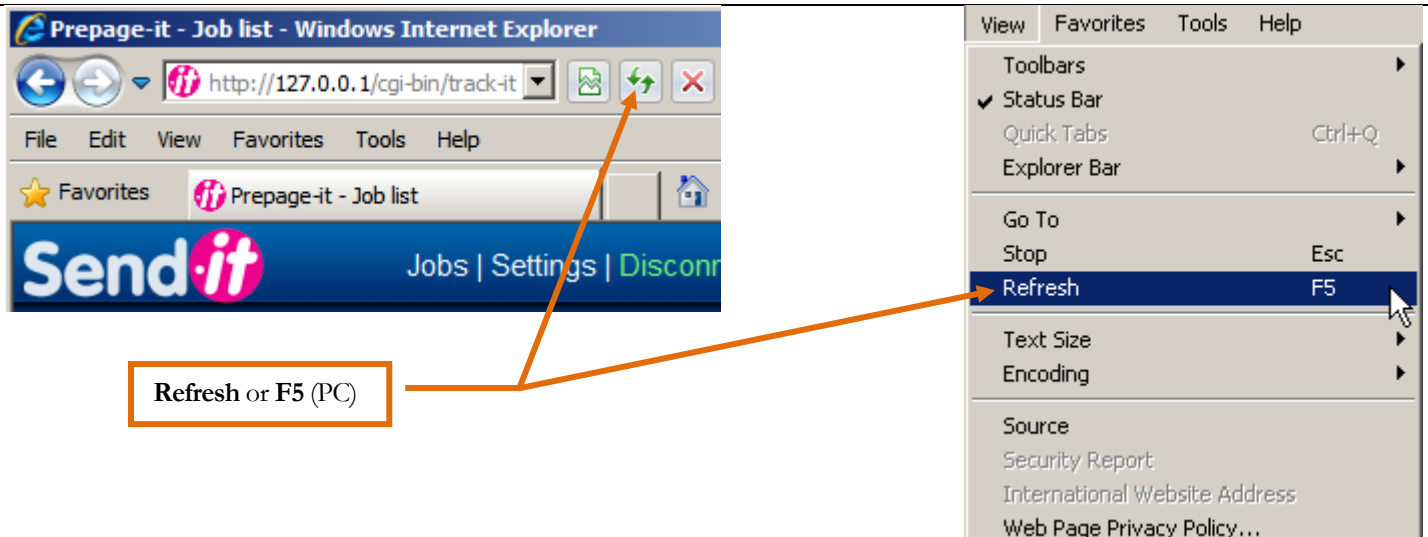
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Q: If portions of the Send-it interface are displayed incorrectly or missing?

A1: Try to **Reload/Refresh** the web page. Web browsers generally have a Reload or Refresh command (see previous figure).

A2: If this doesn't work, try erasing the web browser's cache and then **Reload/Refresh** the web page. Try this, for example, if you notice a display problem occurring after a software update.

To clear the web browser's cache:

- Firefox: click **Tools > Clear Private Data** or **Clear Recent History**
- Safari: click **Safari > Reset Safari**
- Internet Explorer: click **Tools > Internet Options > Browsing History > Delete**

Q: Some windows are not opening when you click a link in the Send-it Client?

A1: Make sure you are using recent versions of web browsers.

A2: Pop-up blockers can prevent some Send-it windows from being displayed – try de-activating them.

A3: Avoid adding extra toolbars and add-ons (e.g. Google toolbar, etc.).



Polkadots Software Inc.

2501 Dollard
Montreal, Qc, H8N 1S2, Canada
Phone (514) 595-6866
Fax (514) 595-6012
<http://www.polkadots.ca/>