

Lakeside Book

Insite Administration - Quick Start Page

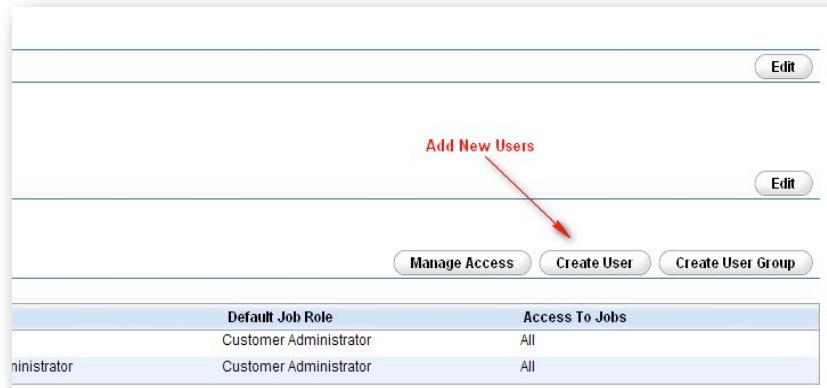
This page is a quick overview sufficient for most administration needs. Following pages provide greater detail of all topics.

As an InSite Administrator, you are responsible for the creation of new user accounts and removal of accounts for people you no longer wish to have access to your InSite jobs.

You know that you have “Customer Site Administrator” status by the **Administrator** icon at the top of your login screen. If you do not have this icon, then you do not have the ability to administer.

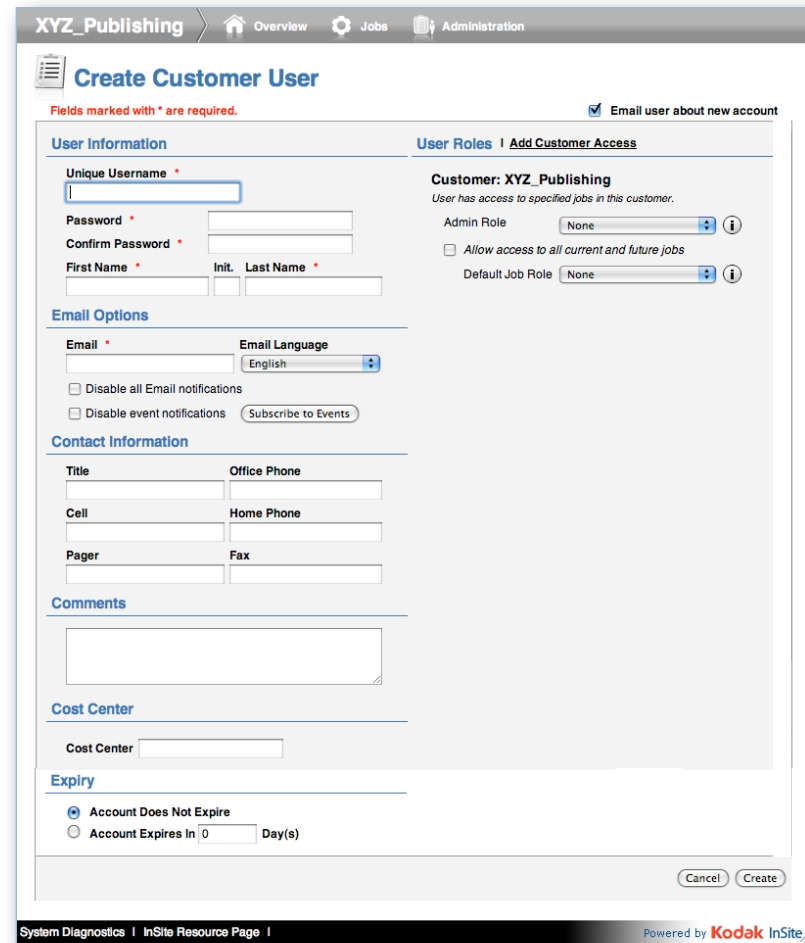


Once you click the Administration icon, you will be taken to the Administration window where you create and edit. To create a new user, click the **Create User** button.



When setting up new users, the fields marked with red “*” are required. Once you have entered the user name, First Name, Last Name, and password, make sure you enter the email address.

You will need to make selections for Admin Role, “Allow access to all current and future jobs” check box and Default Job Role. Admin Role is typically set to None, unless you want to grant your own rights as customer administrator to someone else. Turn the “Allow access...” checkbox on if you want the user to have job access. Select the appropriate Default Job Role as Customer Administrator, Approver, Reviewer or Upload only. [Click for link to detailed diagram.](#)



Use a strong password, which uses 8 characters minimum, and 3 of 4 character types: upper case, lower case, numbers and symbols.

Subscribe to Events button allows you to select Insite events that will notify the user about their jobs. You may turn event notifications off using the “Disable event notifications” checkbox or turn all emails off using the “Disable all Email notifications” checkbox. Click Create button to finish creating a user.

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Insite Administration - Complete Section

This section goes into greater detail about administration topics and security. Lakeside Book sets up your security initially and then gives control to you, the customer administrator. You may change it if needed.

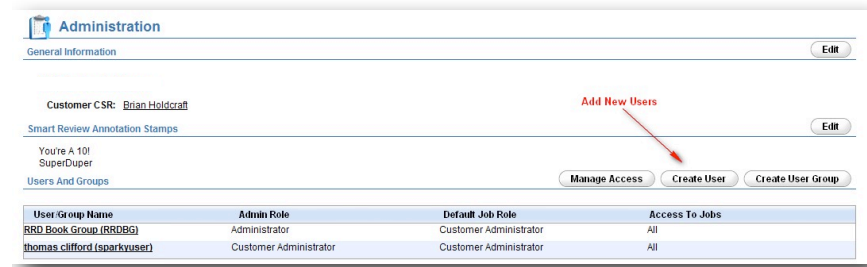
Roles

A role in Insite means a package of many detailed features. When you grant a role to an individual or a group, the “i” icon next to the role setting shows you the detailed features. The most commonly assigned roles are Customer Administrator, Approver, Reviewer and Upload Only.

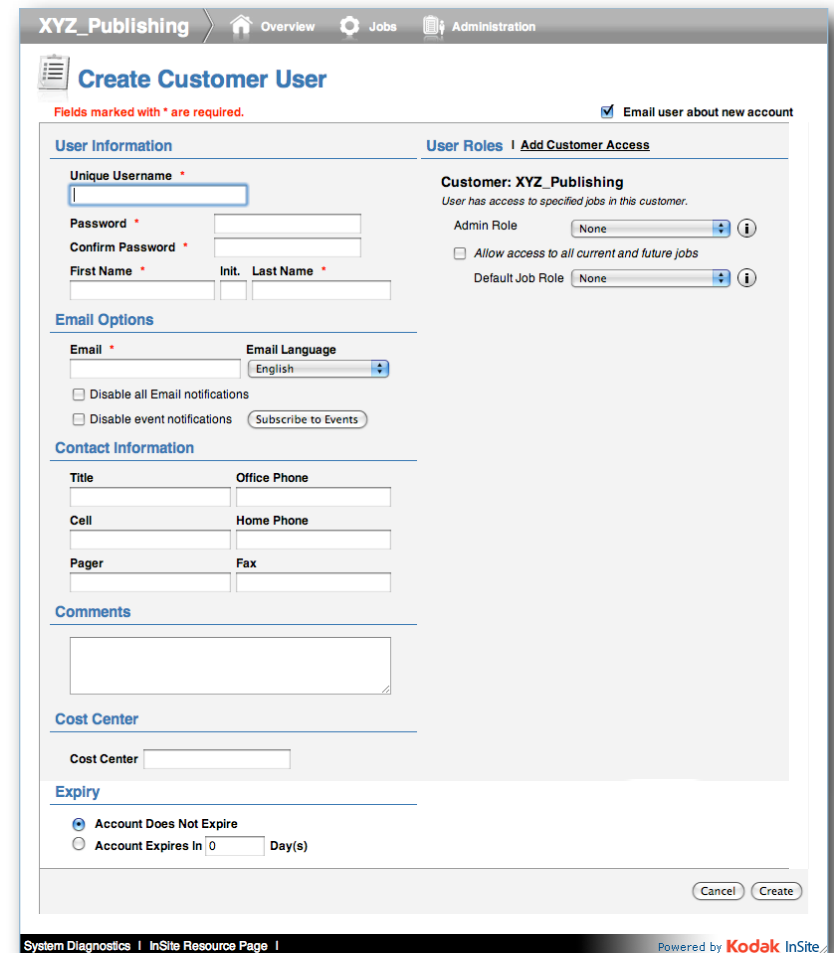
The [guide on the next page](#) summarizes the four methods for administration in Insite. The user account method was briefly explained on the first page. All methods are explained in greater detail in this section.

Setting up new User Accounts

1. To create a new user, click the **Create User** button. [Click for link to detailed diagram.](#)



2. For an additional level of security, the Lakeside Book InSite systems require a strong password. Here are the requirements for a strong password:
 - Be at least 8 characters long
 - Contain at least one character from three of the following four groups:
 - Uppercase letters: A, B, C...Z
 - Lowercase letters: a, b, c...z
 - Numbers: 0, 1, 2...9
 - Special characters, such as punctuation or symbols: {, }, #, \$, %, and so onExamples of strong passwords: ihVsns(5), Lo\$tD0ge



3. Once you have entered the user name, password, First Name and Last Name make sure you enter the email address. Make sure to check the box to **Email user about new account**. This setting emails the link, username and password for the account to the address entered in the Email Options section.

Insite Administration - Methods Guide

1 User Accounts define default roles and job access. This is the most common admin method.

User (required)

Categories:

- 1) Admin roles
- 2) Job access
- 3) Job roles

Comprehensive rights

2 Groups add to, but never reduce user roles and job access

Groups (optional)

Categories:

- 1) Admin roles
- 2) Job access
- 3) Job roles

3 Job roles override user and group roles, but can only add job access, not remove it.

Job (optional)

Categories:

- 1) **No Admin roles**
- 2) **Adds job access**
- 3) **Overrides Job roles**

4 Secure Email Link grants temporary and partial access to one job.

Secure Email Link

- 1) **No Admin roles**
- 2) **Partial Job access**
- 3) **No Job roles**

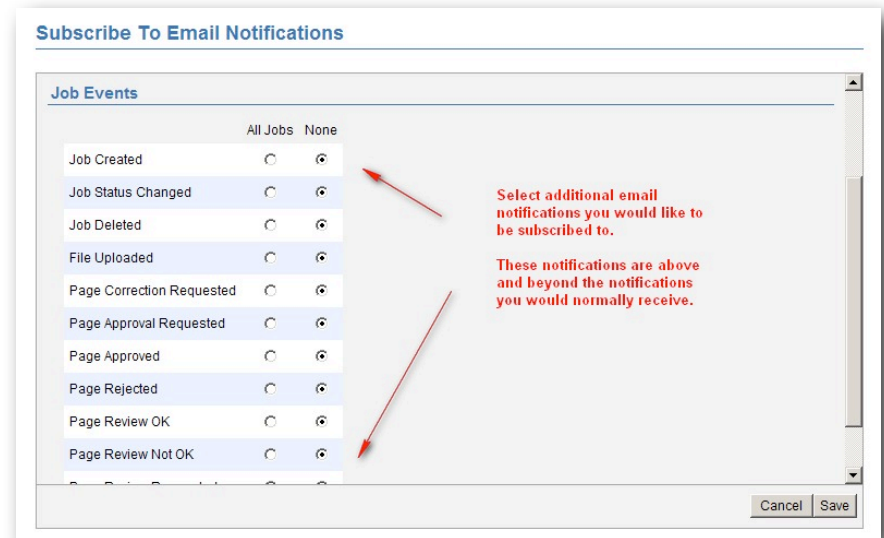
Limited rights

Categories of roles:

Admin roles defines those tasks that an administrator does, such as add, remove and edits accounts.
Job access defines which jobs a user can view.
Job roles defines tasks within a job, such as upload files, view proofs, review proofs and approve proofs.

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4. Roles will determine what access level and actions a user can perform. If the user needs access to all current and future jobs, click the check box next to this setting. If you plan on using groups or job access, consider how they can add to user rights or remove user rights later. If not then follow the instructions below.
 - Will this user need to create other user accounts? If yes, then select "Customer Administrator" in the Default Job Role AND the Admin Role.
 - Will this user just be reviewing pages but NOT giving final Approval? If yes then select "Reviewer" from the default job role and "None" from the Admin Role.
 - Does the user need Final Approval Rights? If yes then select "Approver" from the default job role and "None" from the Admin Role. **Only users with approval rights can give final approval of pages. If there is more than one user with final approval rights on a job, then only one of those people needs to give final approval.**
 - Will this user be uploading only? Set Admin Role to "None", and Job Role to "Upload Only".
 - In cases when any user not within your organization has an account in Insite for multiple customers, for security reasons we ask that you limit job access by turning off "Allow access to all current and future jobs" checkbox, and granting access to each job, only as needed. How will you know if that is the case? If Lakeside Book notices that a user you have, usually a compositor, also has accounts with other customers, then you will be notified of the need to limit your access. If that happens then we recommend that you grant access only to jobs for which they need to access.
5. The Disable all Email notification checkbox turns off all email notifications, those directed to the user and for events in jobs they access. Directed emails are sent out to individuals and groups whenever someone requests approval. Events can trigger emails if you have subscribed to those events using the Subscribe to Events button.
6. Disable event notification checkbox turns off all subscriptions.
7. The Subscribe to Events button allows you to control the event-based email notifications you receive from the InSite system. For instance, if you have subscribed to uploads, an upload to one of your jobs will generate an email notifying you of that upload.

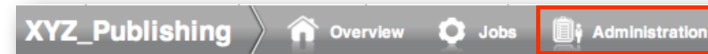


NOTE: Be careful with this setting, active accounts can generate a lot of added email notifications.

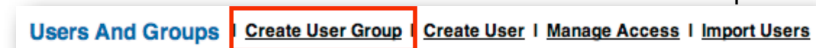
8. Email notification subscriptions are only defined in the user account settings, not in group roles, nor in job roles. They generate emails in all jobs the user has access to, but not for jobs a users does not have access to.

Setting up user groups

Click on Administration link.



Then in the administration window click on Create User Group.



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In the Create User Group window, follow the guidance for defining the group name, group members and group roles (rights). After entering these inputs, click on Create button at the bottom of the window to make the group.

After creating a group you can use that group in many ways, depending on your needs.

- You can leave a group permanently active and add or remove individuals from the group as needed.
- Since groups can add roles and job access to users you can promote an individual to a higher role just by adding them to a group. Later when you remove them from the group they will lose that temporary promotion but retain their user roles and access.
- Since groups can grant job access, one strategy that has been used is to give no job access to users until you add them to a group. Then the group's job access is granted to all its members.
- Keep in mind as you plan how to use groups you can quickly change a group's roles and access, whereas changing user's roles and access could take a long time if you have many users.
- Groups are not for everyone. If you don't have a compelling reason to use them, then you are probably better off without them.

Setting Job Roles

User roles and group roles have been explained, but job roles are special for two reasons.

- They override users roles and groups roles.
- They add job access, but do not remove it.

In any job click on Manage Access button to start the process.

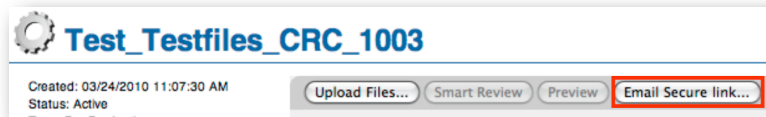
You will be presented with all groups and users who have access to your jobs. Some groups and users will show None and others will indicate what job roles they have. There are some definitions listed below for how this tool works.

1. You can promote roles or demote roles for immediate override, just for this job.
2. You can grant access to this job to users who don't have access through their user or group job access setting. Their initial role will say "none" in this case.
3. You are **not** allowed to remove job access for someone who has user job access set to "Allow access to all current and future jobs".
4. An asterisk next to a role indicates that the role is defined in the group role or user role.

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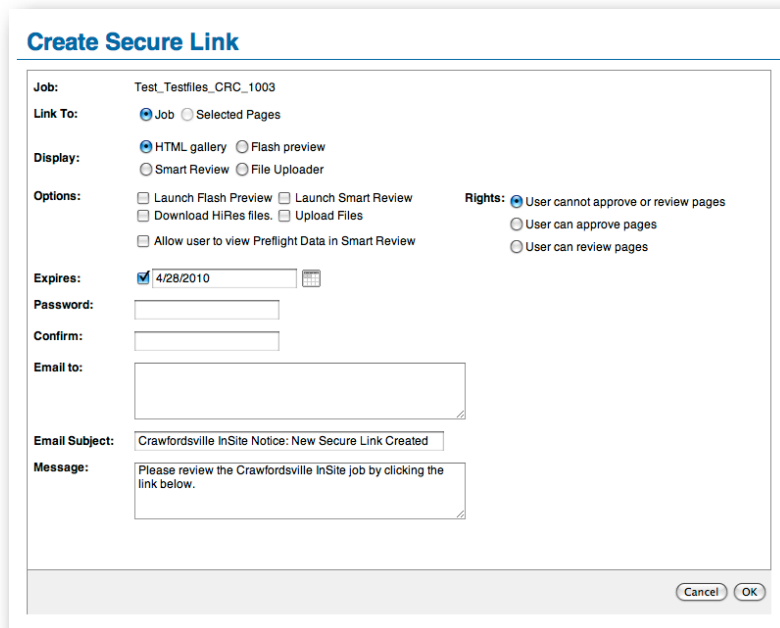
Secure Email Link

This is a method for sending anyone temporary access and limited features for a job or pages in a job. It creates an email link that grants access through their web browser when they login using a password of your choosing. First open a job, optionally select pages in the pages tab, then click on the “Email Secure link...” button.



Make the various selections, shown below, create a password and enter an email address. You may change the email subject and message. Then click on the OK button to create the secure link and send the email.

Rights rather than roles are used in this method. You can create a link and email it to yourself as a test to see how it will behave before sending it to someone else.

A screenshot of a 'Create Secure Link' dialog box. The title bar says 'Create Secure Link'. The main area contains several sections:

- Job:** Test_Testfiles_CRC_1003
- Link To:** Job Selected Pages
- Display:** HTML gallery Flash preview
 Smart Review File Uploader
- Options:** Launch Flash Preview Launch Smart Review
 Download HiRes files. Upload Files
 Allow user to view Preflight Data in Smart Review
- Rights:** User cannot approve or review pages
 User can approve pages
 User can review pages
- Expires:** 4/28/2010 (with a calendar icon)
- Password:** [text input field]
- Confirm:** [text input field]
- Email to:** [text input field]
- Email Subject:** Crawfordsville InSite Notice: New Secure Link Created
- Message:** Please review the Crawfordsville InSite job by clicking the link below.

At the bottom right, there are 'Cancel' and 'OK' buttons.

XYZ_Publishing Overview Jobs Administration

Create Customer User

Fields marked with * are required. [Click to email account information](#) Email user about new account

User Information

Unique Username * [Set default access to all jobs](#)

Password *

Confirm Password *

First Name * Init. Last Name *

User Roles | Add Customer Access

Customer: XYZ_Publishing
User has access to specified jobs in this customer.

Admin Role: [Choose customer administrator if they need it](#)

Allow access to all current and future jobs

Default Job Role: [View all features enabled for this role.](#)

[Select appropriate job role:](#)
- Customer Administrator
- Approver
- Reviewer
- Upload Only

Email Options

Email * Email Language:

Disable all Email notifications

Disable event notifications [Subscribe to Events](#)

Contact Information

Title	Office Phone
<input type="text"/>	<input type="text"/>
Cell	Home Phone
<input type="text"/>	<input type="text"/>
Pager	Fax
<input type="text"/>	<input type="text"/>

[Click here to modify which events trigger an email notification](#)

Comments

Cost Center

Cost Center

Expiry

Account Does Not Expire

Account Expires In Day(s) [Set # of days for temporary access](#)

[Click Create button after making changes](#)

[return to Quick Start](#)

[return to Complete Section](#)