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PDF REVIEW MODULE 01 update 2

Quick Start

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1. Introduction

About the PDF Review Module

The PDF Review Module is a Switch module that enables the integration of a PDF review process in a Switch workflow.

The PDF Review Module consists of two application components: a web server and a Switch app. Once the server is installed and configured, you can use the app just like any other Switch app: add it to your flow, define the incoming and outgoing connections, set the properties, and activate the flow.

Files that arrive in the app are uploaded to the web server and made available for review in an HTML5 browser. The reviewer will receive a link to the file and can inspect the file in a user-friendly interface and (optionally) give feedback using a sticky note tool. Once reviewed, the reviewer must approve or reject the file by clicking the appropriate button, and that will bring the file back into the Switch flow and move it to the appropriate output folder.

Of course this approval workflow can be fully integrated in a bigger Switch flow: files can be prepared, approved and sent to the printer without manual intervention.

About this document

This document provides you with the basic information to get started with the PDF Review Module. Basic knowledge of Enfocus Switch is assumed.

2. Installation and activation

Note: The PDF Review Module is a Switch module, so the installation and activation of Switch 13 update 1 or higher (Core Engine) is assumed. For the full procedure, refer to the Switch Reference Guide.

Installation

The PDF Review Module consists of two components:

- **The PDF Review web server**: The web server must be installed on a Windows server. Simply double-click the executable and follow the on-screen instructions. The web server will be installed in the usual installation folder for 64-bit Enfocus products (C:\Program Files \Enfocus) . It will run as a Service on Windows, so it will start automatically as soon as the system starts. For more information about Windows services, refer to *the Microsoft website*.

  Note: It's possible to **try** the PDF Review Module (for a period of 30 days) without installing the web server component. Instead you use the Enfocus online trial server. In that case, the configuration and activation of the web server described below are not relevant; just make sure to choose 'Online trial server' in the properties of the app. See *Configuration in Switch* on page 6.

- **The PDF Review app**: The (free) app must be downloaded and installed from the Enfocus Appstore. Note that we recommend closing all Enfocus applications, including Switch, before starting the installation. Once installed, you will find the app in the Flow elements pane in Switch. If it's not shown immediately, click the **Refresh apps** button in the top right corner of the Flow elements pane.

  Note: When a new version of the app is available, you'll get a notification in Switch. In that case, we recommended updating the server too, so you can make use of the new features. Note that version 3.0 of the app is compatible with 1.1 of the server, version 4.0 of the app is compatible with 1.2 of the server.

Administration area

After the installation of the web server, the administrative login page is displayed automatically in your default browser. The administration area allows you to customize the look and feel of the interface that will be presented to the reviewers. It's also the place to configure the server settings (e.g. a secure connection).

Note that it is mandatory to log into the admin area at least once, otherwise you won't be able to use the PDF Review Module. Once you're logged in, we recommend changing the password on the User Settings tab.

Activation

The PDF Review Module must be licensed through the Local License Manager. You can find this application in the Enfocus installation folder (C:\Program Files (x86)\Enfocus). Activation is easy: simply click the **Activate** button in the bottom left corner and enter the product key you received at the time of your purchase. Note that an Enfocus ID and password are required.

License count

The PDF Review Module allows access for a fixed number of concurrent reviewers. By default, this number is set to 10. If you need more, you can buy additional user licenses as required.

As it's not always easy to estimate how many reviewers will use the PDF Review Module at the same time, we have built in some flexibility: during 2 hours a day (in total), it's allowed to have more users, with a maximum of two times the number of licensed users. For example, if you have a license for 10 users, during 2 hours a day, 20 reviewers are allowed to use the PDF Review Module at the same time. If this is the case for more than 2 hours, or if an 21st reviewer wants to access, access will be blocked. Switch will issue a log message to inform you.

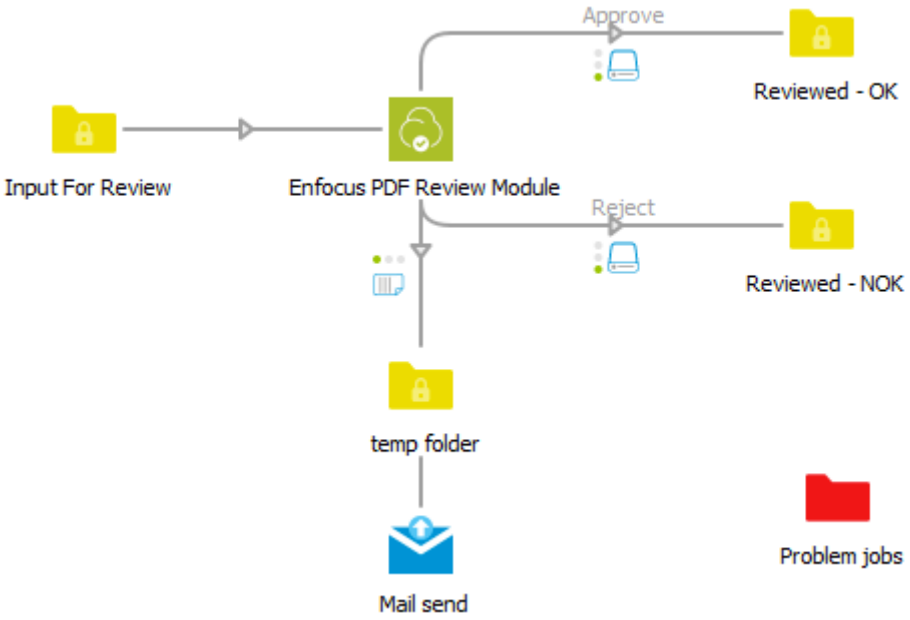
Note: The current license count and an overview of the actual license usage can be found on the *Statistics* tab in the Administration area.

3. Configuration in Switch

Once you have set up the PDF Review Module, you can use the PDF Review app in your Switch flows.

Below you can see an example of a Switch flow and how a PDF submitted to this flow will be presented to the reviewer.

Example Switch flow



As soon as a PDF file arrives in the input folder, it is uploaded to the PDF Review server. After it has been uploaded to the server, it is sent to the outgoing log connection (Mail send in this example), so a notification can be sent.

The PDF file remains in the input folder until it has been processed by the server; as soon as a reviewer clicks a button in the HTML5 user interface, the file is sent to the corresponding outgoing data connection (Approve or Reject in this example).

Configuration notes

Connections:

The PDF Review Module expects at least one incoming connection, one (but usually more) outgoing *data* connections and one outgoing *log* connection.

The *incoming connection* is used to supply the PDF files that are ready for review.

The *outgoing data connections* are used to move the reviewed files to the appropriate folder. The names of the connections will be displayed as buttons to the reviewer. If the connections have no names, the folder names will be used.

Note: The order in which the connections have been made determines the order in which the buttons will be displayed in the HTML5 user interface. The color of the connections can determine the color of the buttons.

The *outgoing log connection* is used to make sure that a notification is sent to the reviewer; the most obvious choice for the notification will be to use Mail send.

App properties:

In the *PDF Review web server* property, make sure to select the server that will be used to upload the PDF files:

- Select *Online trial server* if you haven't installed and configured your own web server, but want to make use of the Enfocus online trial server. Note that the trial is limited to 30 days, 100 KB per file with a maximum of 200 files. The trial starts with the first file upload.
- Select *Local PDF Review server* to upload the files to the server on which you have installed the PDF Review Module. Enter the URL using the following format: <http: or htpps:><IP address or localhost>:<port number>. This should match (one of the) server settings in the Administration area.

The View Settings property determines which functionality will be available to the reviewer.

For an overview of the other properties, refer to the app documentation.

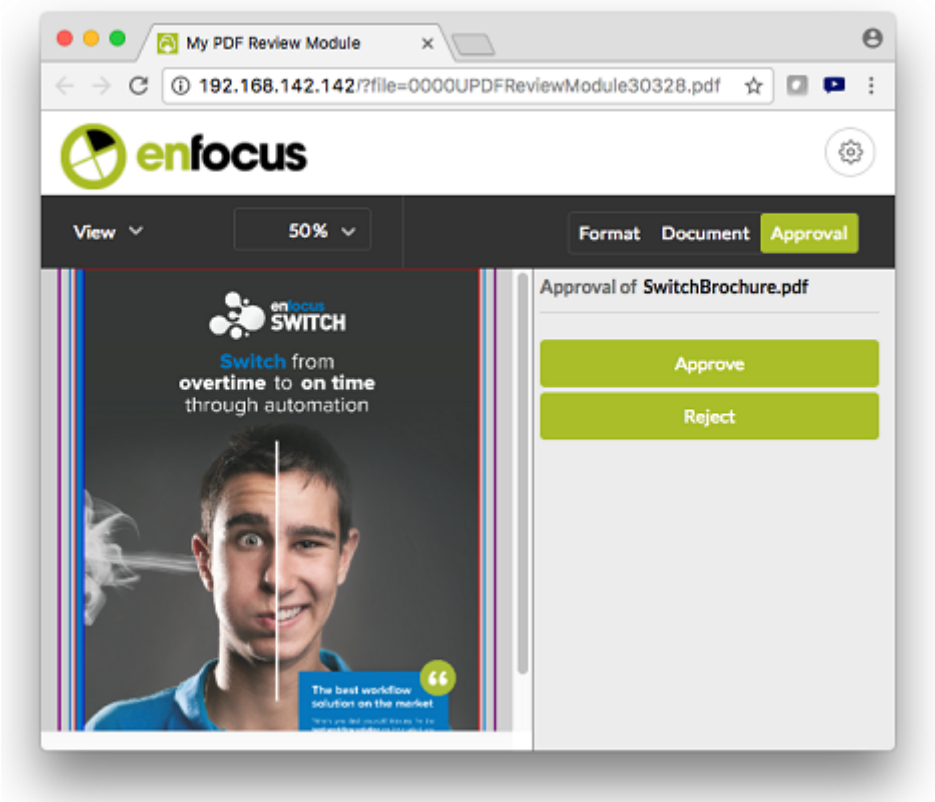
Mail send:

If used with the PDF Review app, the following settings are mandatory:

- *Body template* must be set to *Associated with job* (to make sure that the correct link is sent to the approver).
- *Message format* must have the *same value as Mail format* in the PDF Review app (both plain text or both HTML).

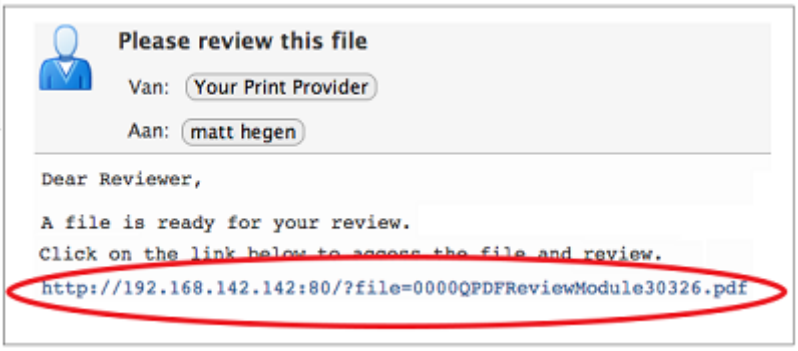
For an overview of all properties, refer to the *Switch Reference Guide*.

Example of a file opened in the PDF Review Module user interface

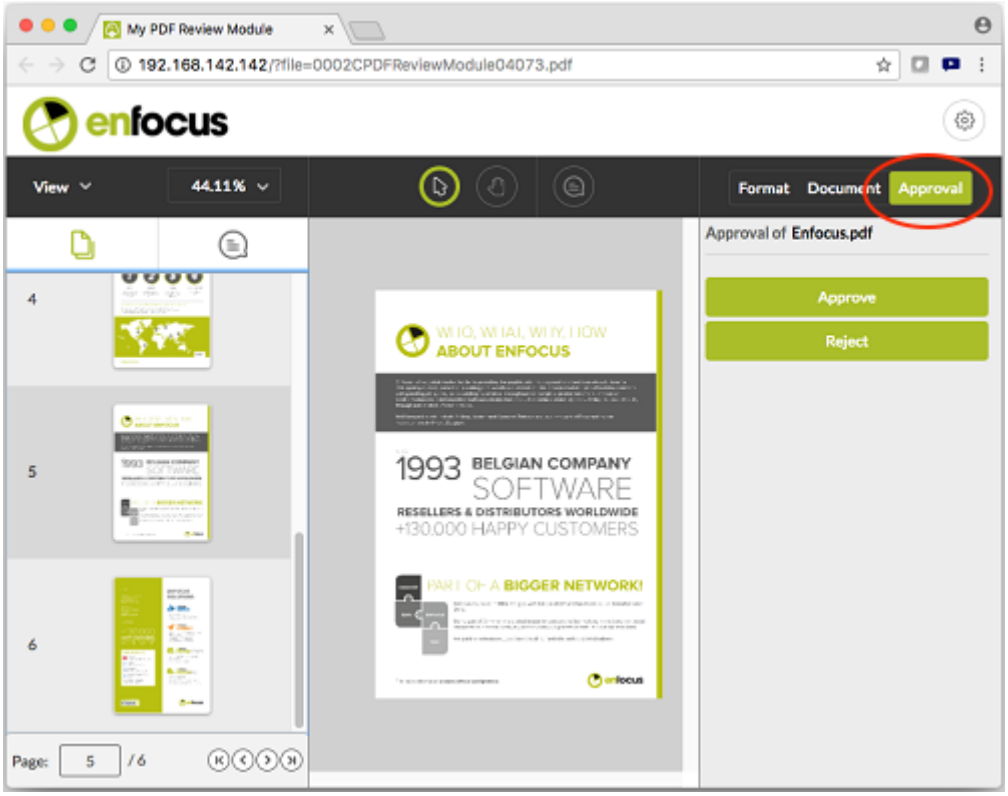


4. Review and approval

As soon as a file arrives in the PDF Review app in Switch, a notification is sent to the reviewer. The file itself is not included as a file attachment, but as a URL.



When a reviewer clicks this URL, the file opens in his default browser, as shown below. The colors may be different, the sidebar on the left may be collapsed and there may be fewer tabs (depending on the configuration), but there will always be an **Approval** tab on the right, with buttons to accept or reject the file after inspection.

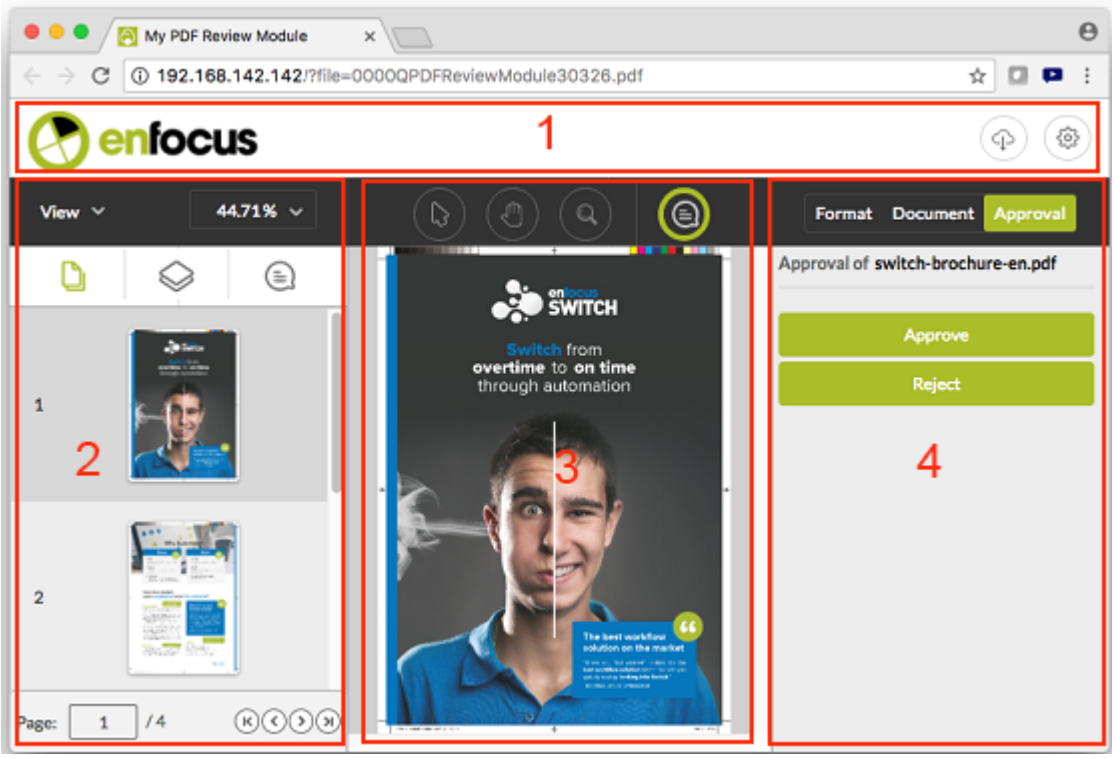


The reviewer can now inspect the file thoroughly and even add comments that will be sent along with the reviewed file. Once the reviewer has clicked the button of his choice, the file is further

handled in Switch, and moved along the chosen connection. It is not possible to send additional remarks afterwards.

5. User Interface and functionality

The table below gives an overview of the main screen areas. Remember that the look and feel may be different and the functionality depends on the configuration in Switch. The image below is an example with all functionality enabled.



#	Area
1	**Title bar** with the logo of the company that provided you with the file. The button in the top right corner, gives access to the User Preferences dialog, where you can change the language and the unit of measure as required. Note that you must reload the page to see the user interface in the chosen language. The button allows you to download the PDF file locally (including the review comments if any) before sending your approval decision. This button is optional and depends on the configuration.
2	The left part of the screen is the sidebar, which consists of up to 3 different tabs: • Thumbnails of each page

#	Area
	• Layers if any (if there are no layers in the document, or if the function is disabled, this tab is absent) • Comments (if the *View comments* functionality is enabled) The **View** menu allows to hide or view certain screen elements such as page boxes, rulers and guides, etc. The buttons at the bottom of the sidebar allow you to page through the PDF.
3	The central part displays the PDF file. The **toolbar** gives access to up to four different tools: • The first is a selection tool (which behaves like the PitStop Pro selection tool). • The second is a pan tool. • The third is a zoom tool to take a closer look at specific areas. • The fourth is an *Add comments* tool. Note that you must click the tool you want to use, in order to activate it. The tool that is currently active is highlighted (in this example: the *Add comments* tool).
4	The right pane consists of up to 3 tabs: • **Format** displays the page properties and provides information about selected objects (text, art work, images), for example fill and stroke properties, position, ... • **Document** displays the document properties, for example the PDF version, file size, creation date, separations, ... • **Approval** contains the reject/approve buttons as configured in Switch. This tab is always present. The active tab is highlighted. **Note:** To save space, the right pane may be collapsed. It will be expanded automatically whenever you click one of the tabs at the top.

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