

ENFOCUS



REVIEW

User Guide

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1. About Enfocus Review

Enfocus Review is an Enfocus-hosted cloud-based SaaS solution to upload, share and review PDF files.

Enfocus Review comes with a Switch app, for integration in a Switch flow. This app can be downloaded for free from the Enfocus Appstore.

Once the Review app is installed and the Switch flow is set up appropriately, files that arrive in the Review app are uploaded to the Enfocus cloud environment and made available for review in an HTML5 browser, the Enfocus Review Viewer. The reviewer will receive a link to the file and can inspect the file in a user-friendly interface and 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.

2. Setting up Enfocus Review

2.1. Before you start

Prerequisites

- You need a licensed Switch (Core Engine), version Switch 2022 Fall or later.
- You need a subscription for Enfocus Review. More info can be found on the [plans and pricing page](#) on our website.

Firewall and Allowlist settings

- You need to whitelist the following URLs:
 - https://*.enfoc.us.cloud & wss://*.enfoc.us.cloud (Europe)
 - https://*.enfoc.us.cloud & wss://*.enfoc.us.cloud (Countries outside Europe)
 - https://*.cloudfront.net & wss://*.cloudfront.net
 - https://*.s3-accelerate.amazonaws.com
- You need to allow communication using port 443.

Setup

There's no real setup required... you only need to:

- [Download and install the free Enfocus Review app](#), and
- [Generate a token for use in Switch](#), so Switch 'knows' the app is licensed.

2.2. Installing the Enfocus Review app

The Enfocus Review app is a Switch app available for download in the Enfocus Appstore. It's free for users with an active Switch maintenance contract.

Before you start: The Enfocus Review app is an app for use in Switch. The installation and activation of Switch 2022 Fall or higher (Core Engine) is assumed. For the full procedure, refer to the Switch Reference Guide.

To install the Review app:

1. Go to <https://www.enfocus.com/en/appstore/product/enfocus-review>.
2. Click the **Get it now** button.
3. If you're not signed in yet, enter your Enfocus ID credentials.
4. If your Enfocus ID is not linked to your Switch installation yet, you're asked to sign in to Switch first.
5. Select the Switch installation(s) to which you want to assign the app.

6. Click **Start free app**.

The app is downloaded to the selected Switch installation(s). You're redirected to your My Enfocus account, where you get to see an overview of all apps linked to your Enfocus ID.

7. Do one of the following:

- If Switch is running, you can start using the app immediately by clicking the **Refresh apps**



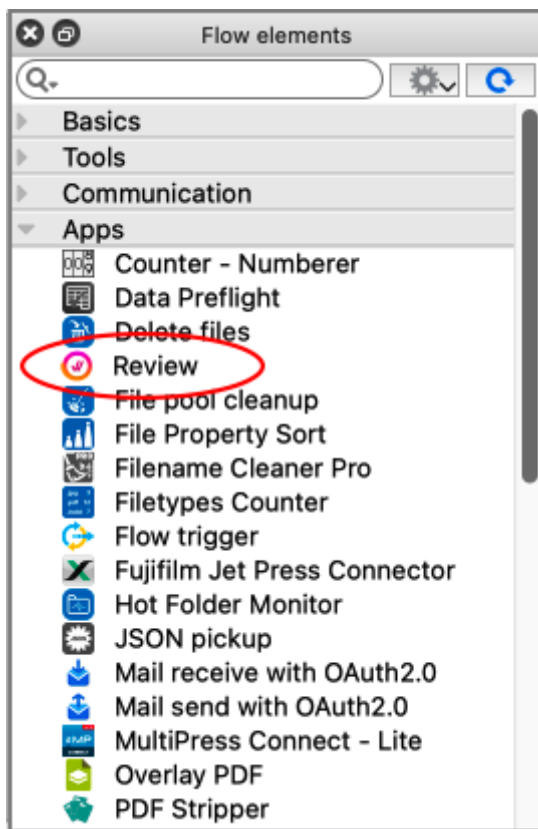
button in the top right corner of the Flow elements pane. This will install the app in your local Switch.



Note: If you don't click the **Refresh apps** button, the app will be installed automatically next time you start Switch.

- If Switch is not running, next time you launch Switch, the app is installed automatically in the background. You don't have to do anything.

You will find the Review app in the Flow elements pane in the Apps category.



Note: When a new version of the app is available, you'll get a notification in Switch.

2.3. Generating an Enfocus Cloud Token

An Enfocus Cloud Token is a unique ID that securely connects Enfocus Review to your Switch machine. Such a token must be entered in the properties of the Enfocus Review app. This must

be done for each instance of the app. For more info, refer to [Review app - Properties Overview](#) on page 24.

To generate an Enfocus Cloud Token:

1. Sign into the Enfocus Cloud Admin Area using your Enfocus ID.
For EU customers, the URL is <https://portal.eu.enfocus.cloud/review>.
For all other customers, the URL is <https://portal.us.enfocus.cloud/review>.



Note: You can also sign into the Cloud from your My Enfocus account (Products > Review).

The Enfocus Review Admin Area is displayed. For more info, refer to [The Enfocus Review Admin Area](#) on page 8.

2. In the bottom left corner of the sidebar, click the **Settings** button.
3. Create a *connection*:
We recommend that you create one connection per Switch instance, for example if two Switch Servers are linked to your site, you need two connections. Note that each connection comes with a unique token.
 - a. In the top right corner, click the + **New Connection** button.
 - b. Enter a name for your connection and optionally a description.
 - c. Click **Create**.
A new token is generated.
 - d. Click **Copy Token to Clipboard**.
 - e. Close the dialog.
The newly created Connection is added to the Connections page.
 - f. In Switch, go to the instance of the Enfocus Review app for which you want to use the token and copy it into the **Enfocus Cloud Token** property.



Note:

- If you haven't created your flow yet (see [Configuring Switch flows for Enfocus Review](#) on page 20), create a blank flow, drag and drop the Enfocus Review app onto the canvas and copy the token into the Enfocus Cloud Token property. You can later configure the rest of the flow and the other properties of the app.
- Note that for security reasons you can display this token only once. If you want to use it in multiple instances of the app, you should copy it immediately to all instances or store it somewhere in a safe place.

The app is now licensed and can be used in a Switch flow.



Note:

- If you generate a new token for an existing connection, the current key will be invalidated and all instances of the Enfocus Review app where the token is used will stop working.
- This is also the case if you delete a connection, because when you delete a connection, you also delete the token associated with it.

2.4. The Enfocus Review Admin Area

2.4.1. About the Admin Area

If you are an Enfocus Review administrator, you can log into the Enfocus Cloud to get an **overview of the reviews** you have initiated using Enfocus Review.

This is also the place where you can find information about your account, such as the available cloud space, the connections you configured, and the transactions available in your subscription. Here you can also generate a **token** to license the Enfocus Review app in Switch. See also [Generating an Enfocus Cloud Token](#) on page 6.

Access

Sign into <https://portal.eu.enfocus.cloud/review> (EU customers) or <https://portal.us.enfocus.cloud/review> (customers outside the EU) with your Enfocus ID.



Note: You can also sign into the Cloud from your My Enfocus account (Products > Review).

Overview

The Admin Area consists of a number of web pages that you can navigate through the sidebar.

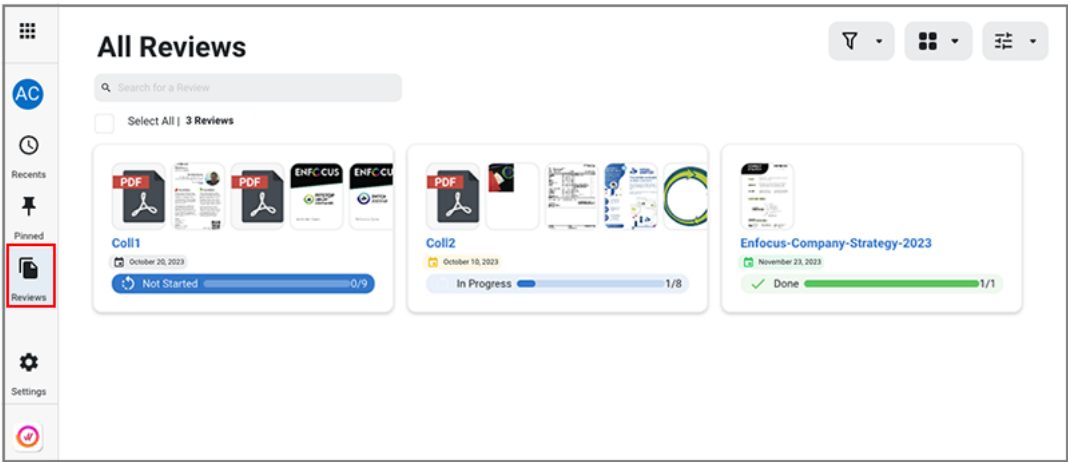
Icon	Gives access to:
	- Your Cloud Settings (also accessible through the Settings button at the bottom of the sidebar) - Your My Enfocus account
	Your personal account details, such as your language and timezone. You can here also change the theme in which the admin area is displayed. Options are light, dark and auto (= based on your system settings).  Note: Here you can also sign out from the Enfocus Cloud.
 Recents	Your reviews in a timeline view (reviews performed today, yesterday, or in the previous 7 days). See also Recents.
 Pinned	Reviews you want to be able to access quickly. You can add reviews to this view by clicking the pin icon in the All Reviews view. In grid view, the pin icon is visible when you hover over a card; in list view, the pin icon is located on the right side of a row. See also Pinned.

Icon	Gives access to:
	An overview of all your reviews. See also Reviews on page 9.
	Settings where you find info about your account, your connections and transactions and where you can generate Enfocloud Tokens. This is also where you can define themes. See also Settings on page 14.



Note: By default, there is only one Review Administrator. However, you can grant administrator rights to another user as described [here](#).

2.4.2. Reviews



The **All Reviews** page provides an overview of all reviews that have been initiated and their status. Each 'card' shows a job (a single job file) or a job collection (= a set of files belonging together; the number of files is indicated next to the status).

Possible statuses are:

- Not Started
- In Progress (if part of the job collection has been reviewed)
- Done (highlighted in green)

The date below the collection name is the due date, that is the date by when the review must be accomplished. After this date, the document will be removed from the All Reviews overview. The color indicates that the files have been approved already (green) or need to be approved soon - within one week (orange). In all other cases, the color is gray.

You can access the files by clicking the file or collection name or the thumbnail on the card concerned:

- In case of a single file, the file will be opened immediately in the Enfocloud Review Viewer.

- In case of a job collection, the job collection will be shown in detail. In list view, click the file of your choice to open it in the Enfocus Review Viewer. In grid view, hover over the file of your choice and click the icon on the right . The info icon on left  will open a side panel (see also the note below).



Note: When you click somewhere on the card (or, in case of list view, somewhere in a row), an info panel on the right is shown, with info about the review status, the file size and the file type and the option to view the file in the Viewer or to make an approval decision. In case of a job collection, you also get info about the number of files have which status, for example, 7 files to be reviewed of which 2 have not been started and 5 have been finished.

You can also display the overview in list view instead of grid view, change the sort order or filter jobs by category (see the [table](#) below).



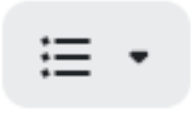
Note: Reviewed files can be opened but the approval decision cannot be changed anymore and it's also not possible to send additional remarks afterwards.



Tip: You can use the arrow keys to navigate the reviews in the overview.

Buttons

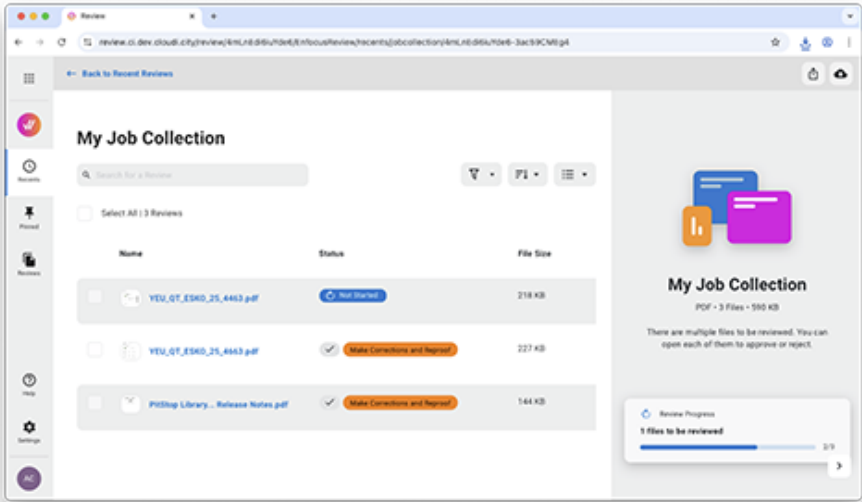
Button	Description
	Search for a particular file by entering (part of the) file name or collection name. The content of the collection is not searched for. Note that it is possible to search inside a job collection if needed.
☐ Select All 3 Reviews	Select the checkbox to select all files in one go. When selected, a label is displayed in the top right corner, next to an icon of a recycle bin, allowing you to delete all selected files at once.  Note: If some (but not all) of the reviews are selected, the checkmark becomes a hyphen. If you click it once, it will become a checkmark (= all reviews selected); if you click it twice, the checkbox will be cleared (= no reviews selected). 
	Filter by approval process status and/or theme. Approval progress options are: - Due Soon (= in 1 week) - Not Started - In Progress - Done Theme options are: - All themes

Button	Description
	Any theme listed under Settings > Customization (see Themes on page 15.) You can select several options if wanted. When selected, the number of jobs matching the filter is mentioned at the top. Note that you can select all reviews belonging to a certain category (= having a certain status) by clicking the checkbox below the name of the category.
 (grid view is active)	Switch between grid and list view. Click the button and select the view of your choice.
 (list view is active)	
	Advanced options: - To change the sort order of the jobs in the overview, select the desired option from the list at the top: - Newest on Top (= default) - Oldest on Top - A to Z - Z to A  Note: The sort order is based on the date the job files were uploaded, not on the due date. - To show the approval categories, move the slider to the right. The slider will turn blue. If you want to hide the categories, move the slider to the left. - To hide the thumbnails for a more compact view, move the slider to the right. The slider will turn blue. If you want to show the thumbnails, move the slider to the left.
 (review is not pinned)	In grid view, the gray pin icon becomes visible when you hover over a card. In list view, it's always visible, at the end of a row. To pin a review, simply click the icon. The icon will blue, and the review will be added to the Pinned Reviews view.
	

Button	Description																		
(review is pinned)	All Reviews Search for a Review Not Started <table><tr><th>Name</th><th>Due Date</th><th>Status</th><th>File Size</th><th>Uploaded On</th><th></th></tr><tr><td>for-notele... v3 signed.pdf</td><td></td><td> Not Started </td><td>908 KB</td><td>Apr. 12, 2024, 13:47:11</td><td> </td></tr><tr><td>PLC-errors...leshooting.pdf</td><td></td><td> Not Started </td><td>499 KB</td><td>Apr. 8, 2024, 11:54:34</td><td> </td></tr></table>	Name	Due Date	Status	File Size	Uploaded On		for-notele... v3 signed.pdf		Not Started	908 KB	Apr. 12, 2024, 13:47:11		PLC-errors...leshooting.pdf		Not Started	499 KB	Apr. 8, 2024, 11:54:34	
Name	Due Date	Status	File Size	Uploaded On															
for-notele... v3 signed.pdf		Not Started	908 KB	Apr. 12, 2024, 13:47:11															
PLC-errors...leshooting.pdf		Not Started	499 KB	Apr. 8, 2024, 11:54:34															
Delete	Click the 3 dots to open the context menu, with the Delete option. Manually deleting a review before its due date removes it from the database, hence frees up storage. Note that this cannot be undone! You can also remove jobs that are part of a job collection or all selected files in one go (see higher). Note: In Switch, the deleted jobs that were not yet reviewed are moved through the Timeout connection.																		

Job collections

When you click a job collection name, you'll be redirected to a web page where you get an overview of the files that belong to the job collection concerned. For each file in the collection, the status and the approval decision (if already taken) are shown.



Note the buttons in the top right corner:

Button	Description
	Allows you to generate an anonymous link that you can share with reviewers, who will get access to the job collection without having to sign in to the Enfocus Cloud. Reviewers using this link can view, download and review the job collection.

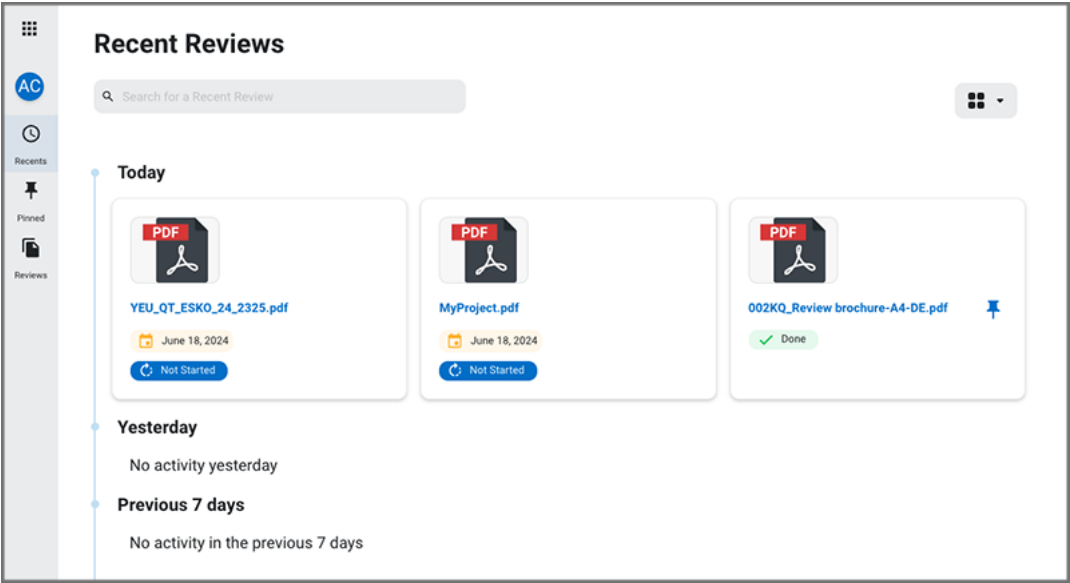
Button	Description
	Allows you to download all files of the job collection in one go.



Note: Reviewers have one extra button, the Settings button, that allows them to change the theme and the language of the job collections page. See [Changing the job collection page preferences](#) on page 72.

For more info about job collections, refer to [Handling job collections](#) on page 71.

2.4.3. Recents



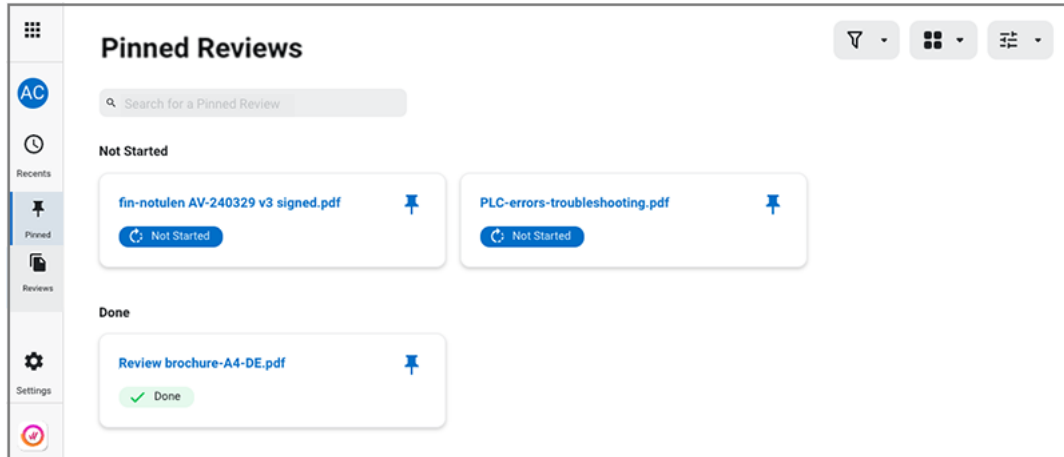
The **Recent Reviews** page provides an overview of reviews that recently have been worked on, i.e. today, yesterday or in the last 7 days.

"Worked on" means that:

- The review was initiated, or
- A file was added to or removed from a Job collection, or
- A file was evaluated and an approval decision was taken.

Note that it's possible to switch between grid and list view.

2.4.4. Pinned



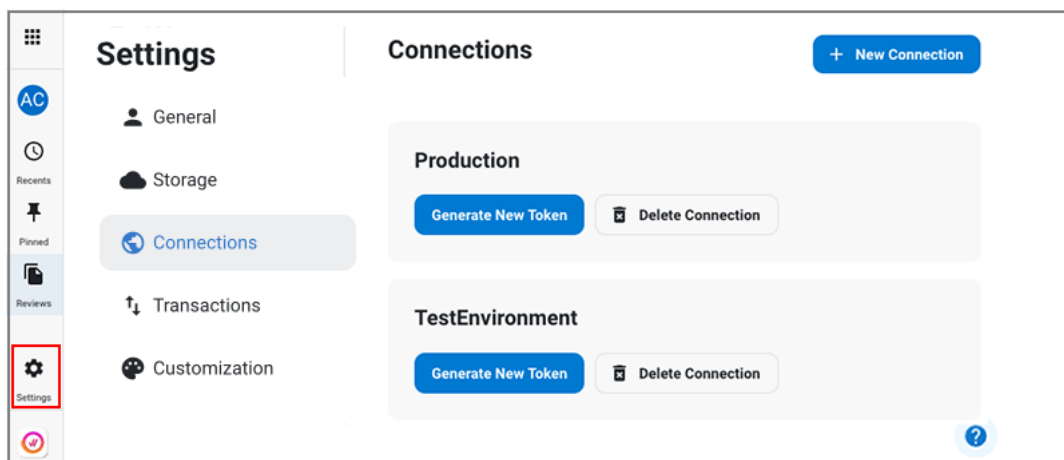
The **Pinned Reviews** page provides an overview of the reviews that you have 'pinned' to make them easily accessible. This is convenient for jobs you want to keep an eye on.

You can add reviews to this view by clicking the pin icon (of a certain job) in the All Reviews view. In grid view, the pin icon is visible when you hover over a card; in list view, the pin icon is located on the right side of a row.

To remove reviews from the Pinned Reviews view, simply click the blue pin icon.

Note that in the top right corner you'll find the same buttons as on the All Reviews page. For an explanation, see [Reviews](#) on page 9. However, the buttons can be used independently, so you can use for example grid view on the All Reviews page and list view on the Pinned Reviews page.

2.4.5. Settings



The Settings page consists of 4 sections:

- **General:** This section displays your account name and number and the begin and end date of your subscription, as well as an overview of your cloud storage and transactions (see further).
- **Storage:** Info about the amount of virtual space that is available for storing data in your Enfocus Cloud account. In Your Cloud Storage overview, you can see how much space there is still available and how much space has been used. Note that space is freed up when a document (after the review has been finished) is removed from the Enfocus Cloud. The Storage History displays how much space (in GB) was used on a daily, weekly or monthly base during a given period of time (e.g. the last 3 months).
- **Connections:** A connection defines a secure connection between Enfocus Review and Switch. Each connection comes with an Enfocus Cloud Token, a unique ID that must be entered in the properties of the Enfocus Review app. A token will only be displayed once and this for security reasons, please save your token securely. If you have forgotten your token a new token will have to be created. See also [Generating an Enfocus Cloud Token](#) on page 6.

You can create as many connections as you want, for example a separate connection for each of your Switch instances, or a separate connection for each flow or flow group.

- **Transactions:** The concept of transactions is used to calculate the number of reviews you're entitled to based on your subscription.

One review (or more precisely: one review cycle) for one document counts as one transaction. The transaction starts as soon as the file is uploaded to Enfocus Review and includes all steps needed to review the file (such as downloading and viewing the file). When the due date for the review is met, the transaction is considered done.

In case of a job collection, the number of reviews is counted based on the individual files that are part of the collection. For example, if a collection contains 5 documents, there will be 5 review cycles, hence 5 transactions. In the Your transactions overview, you can see how many reviews you're entitled to and how many you've already carried out. The Transaction History displays how many transactions were used on a daily, weekly or monthly base during a given period of time (e.g. the last 3 months).

- **Customization:** In this part of the admin area, you can define themes to 'brand' the Viewer and provide a corporate look and feel. You can create several themes, in addition to a Default Theme. See [Themes](#) on page 15.

When configuring the Review app in Switch, you can decide which theme to use for which jobs. The theme needs to be entered in the *Branding* property of the app. See [Review app - Properties Overview](#) on page 24.

2.4.5.1. Themes

With the themes in the Customization section of the Enfocus Review Admin Area, you can 'brand' the Viewer (that will be shown to the Reviewer) and provide it with a corporate look and feel.

When configuring the [Review app](#) in Switch, you can decide which theme to use for which jobs (by entering its name in the *Branding* property).

Default Theme

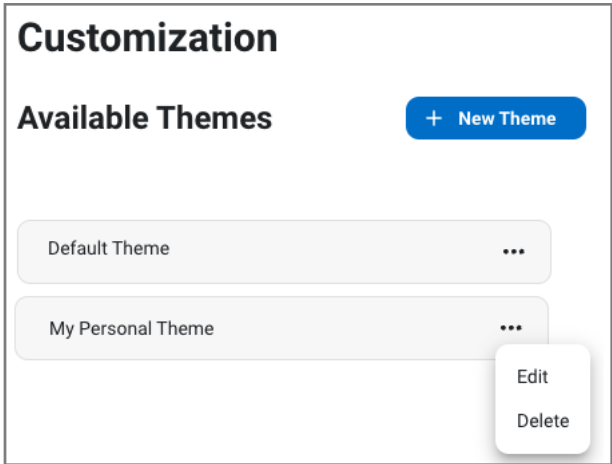
The Default Theme is a theme that cannot be deleted, but you can customize it to your needs. By default, it doesn't have a logo attached, so we recommend uploading your own logo.

Note that, in case no theme is defined in the Review app, a hard-coded Enfocus theme with Enfocus logo will be used.

Managing custom themes

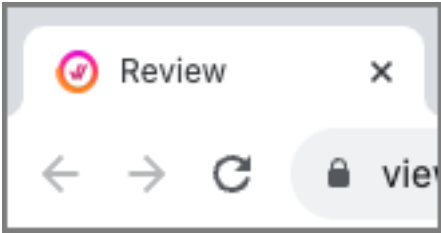
You can **define your own themes** (adapted to the corporate identity of your customers) by clicking the New Theme button. Newly added themes are added under Available Themes - make sure to reload the page. New themes are placed at the top of the list, but below the Default Theme.

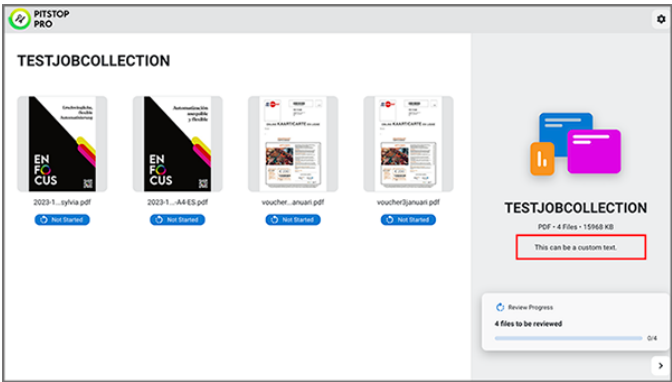
You can **edit and delete themes** as required. Note that you can use the Reset button to clear the fields that were changed since the theme was last saved. You can use the Cancel button to undo unsaved changes and hide the theme settings.

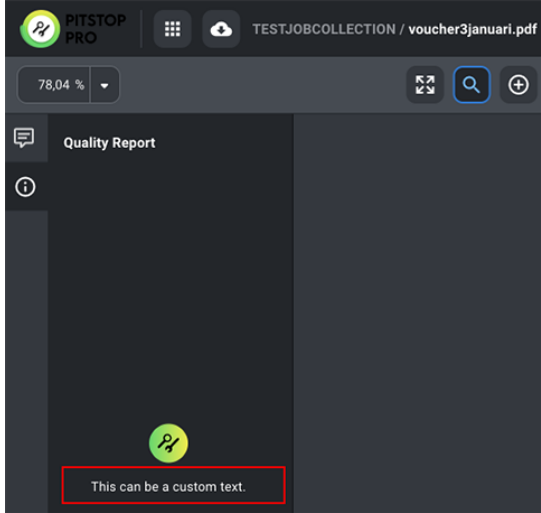


Settings of a Theme

The table below gives an overview of the settings that can be defined for each theme.

Setting	Meaning
Description	
Theme Name	Name of the theme.
Theme Description (optional)	Description of the theme.
Webpage Title (optional)	Title displayed on the browser tab and in the tooltip when you hover over the tab. 
Company Information	
Company Homepage	URL of the web page that is displayed when someone clicks the company logo. The URL must start with "http" or "https".
Company Logo (optional)	Logo of your company. The logo will be displayed in the top left corner of the Viewer.

Setting	Meaning
	Supported file types are PNG and JPG. Files are scaled if wider than 300 px and higher than 50 px.
Post Approval	If you want to present a dedicated webpage to the reviewer, after having reviewed the PDF, click the Enable Post Approval Page slider until it turns blue. The web page of which the URL is entered in the Post Approval Page field below is shown to the reviewer. The URL of this page must start with "http" or "https".  Note: It's possible to customize this page, for example to show a different page depending on the chosen approval button. If no post-approval page is enabled, after having finished the review, the PDF remains present in the Viewer, but the approval buttons are hidden.  Note: It's possible to customize this page, for example to show a different page depending on the chosen approval button. Example for demo purposes: <code>https://%themenamename%-option%.paperform.co?24qv=%themenamename%&3acmm=%jobid%&evnp8=%lang%</code> You can use this post-approval URL with the following options: • Theme name = Beverage • Options in your flow = Approved to Print, Make Corrections and Reproof, Cancel Job will send a new file
Collections	
Override Job Collection Help (optional)	Custom text shown for the files in a collection, instead of the default text shown in light gray.  The screenshot shows a window titled 'TESTJOBCOLLECTION' with a header 'TESTJOBCOLLECTION'. Below the header are four PDF thumbnails, each with a 'Not Started' button. To the right of the thumbnails is a sidebar with a 'TESTJOBCOLLECTION' section containing a 'PDF - 4 Files - 1568 KB' entry and a custom text box with the text 'This can be a custom text.' Below this is a 'Review Progress' section showing '4 files to be reviewed' and a progress bar.

Setting	Meaning
Override Reviewed Files Help (optional)	Custom text shown when all files in a collection have been reviewed, instead of the default text shown in light gray.
Viewer	
Override Quality Report Help (optional)	Custom text shown in the Viewer when there are no preflight issues, instead of the default text shown in light gray. 
Appearance	
Theme	Determines when the theme should be used: • In dark mode only • In light mode only • In both dark mode and light mode  Note: If a theme is configured for light mode only or for dark mode only, the user won't be able to switch to the other theme through the preferences. This is the case for the job collection page as well as the Viewer. See Changing the job collection page preferences on page 72 and Changing the theme of the user interface on page 46.
Dark mode button	Click this button to configure the colors for use in dark mode (only available if the theme will (also) be used for dark mode).
Light mode button	Click this button to configure the colors for use in light mode (only available if the theme will (also) be used for light mode).
Primary Accent Color Secondary Accent Color	The color patches show the colors that are used as primary and secondary color. The primary color is used for buttons, the secondary color is used for shadings, etc. You can also choose the text color.

Setting	Meaning
Accent Text Color	To choose a different color, click the color patch and pick one, or enter the HEX color code in the correct format, for example: • HEX: #ABBE28



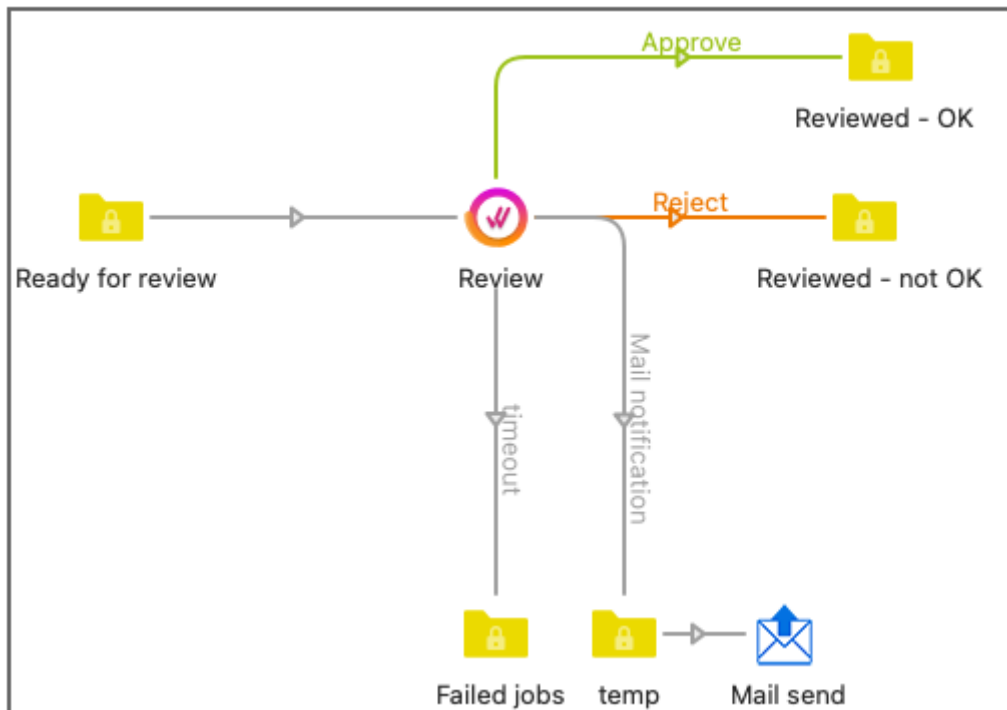
Note: The text overrides are dynamic, meaning that changes to the theme will be applied to existing job collections and in already processed files. That's also the case for the company logo.

3. Configuring Switch flows for Enfocus Review

3.1. Introduction

Once you have installed the Enfocus Review app as described in the previous chapter, you can use it in Switch to configure flows for online proofing.

Example Switch flow



This is what you need in your flow:

- Some input folder where you drop the files to be reviewed ('Ready for review' in this example)
- The app itself
- Outgoing connections that define the approval options that the reviewer will see in the Viewer ('Approve' and 'Reject' in this example).
- An outgoing connection that defines the notification to inform the reviewer that there is a PDF ready for review. In most cases, this will be a mail, so in that case, a Mail send flow element is also needed.
- An outgoing connection and folder for jobs that timed out.

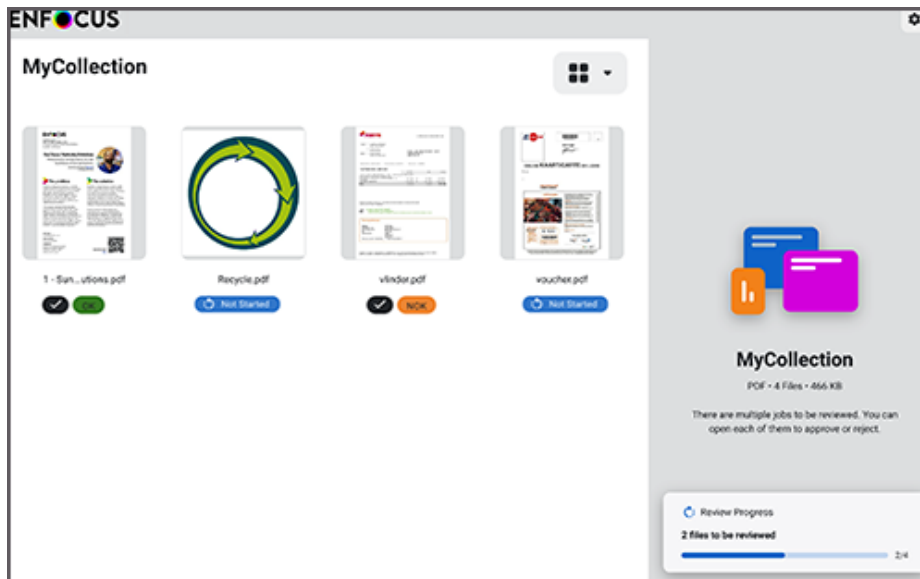
This is how it works:

- As soon as a PDF arrives in the input folder for the Review app, it's uploaded to the Enfocus Cloud Server. The reviewer is notified that a PDF file is waiting for review.

- The PDF file remains in the input folder in Switch until it has been processed; as soon as a reviewer clicks a review button in the HTML5 user interface (the Viewer), the file is sent to the corresponding outgoing connection (Approve or Reject in this example). If the reviewer has made annotations, the annotated file is downloaded back to Switch, to replace the original file.

Example of a web page that is shown when the file is part of a job collection

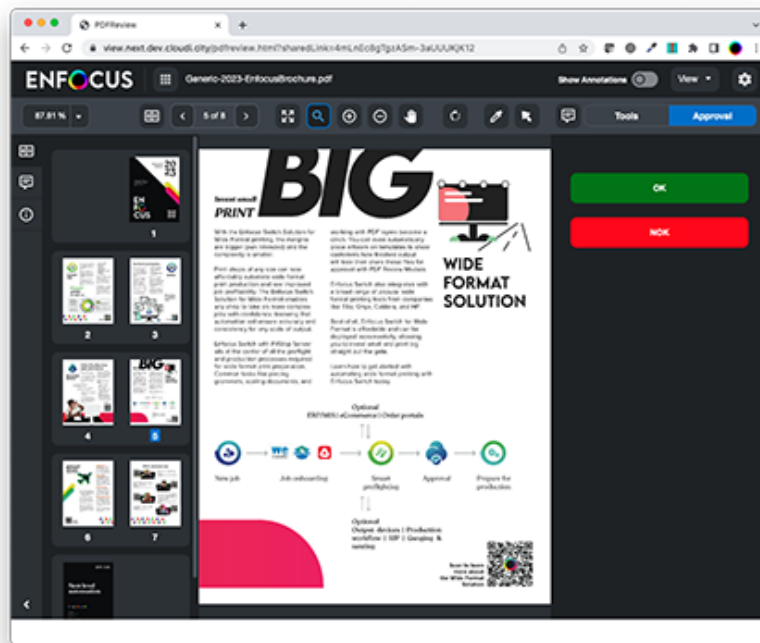
When the file is part of a job collection, the URL in the notification brings you to a web page, similar to the one shown below. It displays all files belonging to the job collection. Just click a file to open it in the Enfocus Review Viewer.



Example of a file opened in the Review Viewer

When the file is not part of a job collection, it's opened immediately in the Enfocus Review Viewer, as shown below (in this example in dark mode).

Note the names and the colors of the buttons (determined by the connection properties).

**Note:**

- If you're new to Switch, you may want to check out the [step-by-step procedure](#). Note that we also have a [Quick Start Guide on our website](#), which explains the basic concepts of Switch.
- If you're familiar with Switch, you will find all required information in the [app properties overview](#).

3.2. Step-by-step procedure

The Enfocus Review app can be found in the Flow elements pane in Switch and should be configured just like any other Switch app.

Proceed as follows:

1. Create a new flow in Switch.
2. Add the Review app to your Switch flow.
3. Make sure to define an incoming connection, for example a folder or an FTP receive flow element.
4. Make sure to define at least two outgoing connections for the output files (one for approved and one for rejected files). Each outgoing connection will be shown as a button in the HTML5 browser/ Review Viewer. If the connection has no name, the name of the output folder will be used.
 - The *Connection type* property must be set to *Reviewed file*.

- This connection type has the following subordinate properties: *Enable review comments*, *Enable approver name*, *Accept PDF with document comments*, *Enable translation* and *Button color*. For more details, refer to [App properties](#).
 - The order of the buttons in the Review user interface is determined by the order in which you create the outgoing connections. If you want the "Approve" button to be displayed first, make sure to create that connection first.
5. Define another outgoing connection that will take care of the notification to the reviewers:
- The *Connection type* property must be set to *Mail notification* or *Other notification*. This last option is to be used if you want to use an API or a database to configure a notification.
 - Configure the subordinate properties
 - In case of a mail notification: *Mail format* and *Mail template*
 - In case of 'other notification': *Private data tag name*
 For more details, refer to [App properties](#).
 - In case of a mail notification, add a **Mail send** flow element and configure the Mail send properties. Note that *Body template* must be set to *Associated with job* (to make sure that the correct link is sent to the approver) and *Message format* should have the same value as *Mail format* (see higher).
6. Define an outgoing connection for jobs that remain unprocessed for a certain time.
- a. The *Connection type* property must be set to *Timeout*.
 - b. This connection type has two subordinate properties: *Unit* and *Timeout delay* (for more details, refer to [App properties](#)).
7. Configure the properties of the Review app.
Refer to [App properties](#).



Note: A file can be approved or rejected only once: as soon as one of the buttons has been clicked, the file moves to the next flow element in the Switch flow. As a consequence, if different people need to review the file, you need different instances of the app!

8. Save your flow, activate it, and check if it behaves as expected:

- Submit a file to the flow.



Note: Password-protected PDFs are not supported.

- Check if the file moves correctly through the flow. Remember that you can find information in the Switch log messages as required.
- Check if the mail is sent to the correct email address and if it looks OK.
- Click the link. Does it open a web page (in case of a job collection) or the file in the Viewer?
- Check if the enabled features match your configuration.

- Approve or reject the file and check if the file moves to the appropriate folder.
- Check if given comments can be found in the metadata.
- Check what happens if a file remains too long in the input folder.

3.3. Review app - Properties Overview

Connections

The app expects at least one incoming connection, and three or more outgoing connections.

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

The *outgoing connections* have different functions, depending on the *Connection type* property:

- If the connection type is *Reviewed file*, the connection is used to move the reviewed files to the appropriate folder. The *name* of the connection will be displayed as button in the Viewer. If the connection has no name, the folder name will be used.

Typically, there are at least two outgoing connections of this type, one for the approved and one for the rejected files, but at least one outgoing connection of this type is mandatory.

Note that the order in which the connections have been made determines the order in which the buttons will be displayed in the Viewer.

This connection type has the following subordinate properties:

Property	Meaning
Enable review comments	If this option is enabled, the reviewer is able to give review comments after clicking the decision button, on condition that <i>Use comment properties of outgoing connection</i> (in the Review app) is enabled.
Enable approver name	If this option is enabled, the reviewer must add their name to the approval decision.
Enable approver email	If this option is enabled, the reviewer must add their email address to the approval decision.
Accept PDF with document comments	If this option is set to No, documents with sticky notes, comments etc. cannot move through this connection (no matter if they are added before or during the review). This can be useful to avoid that files with annotations get printed by accident. This option is only taken into account when <i>Use comment properties of outgoing connection</i> (in the Review app) is enabled.
Merge annotations	If this option is set to Yes, annotations are saved to the reviewed document.
Enable translation	The <i>names</i> of the connections, or (if they have no names), the names of the <i>output folders</i> will be displayed as buttons to the reviewer. This option enables you to translate the buttons into the given languages. If no translation is available for a particular language, the string used in Switch is displayed.
Button color	The color of the button in the Viewer. You can select one of the colors in the list (Yellow, Orange, Green, Cyan, Blue, Magenta, or

Property	Meaning
	Red) or enter the hexadecimal code of the color of your choice, for example: #993333.  Note: In case of a custom color, do not forget to add the hash sign (#). If None is selected, the button will adopt the color scheme of the Viewer environment (= dark/light blue, depending on the chosen interface theme).

- If the connection type is *Mail notification*, the outgoing connection is used to define the look and feel and the content of the mail notification that is sent to the reviewer.

Note that in your flow, you need at least one outgoing connection of the type *Mail notification* or of the type *Other notification*.

This connection type has the following mail-specific properties:

Property	Meaning
Mail format	The format of the mail message that will be sent out to inform the reviewer that a file is ready to be reviewed. Options: • Plain text • HTML (in this case, the email message has two bodies. The first is in HTML format and the second is a plain text version of the HTML message)
Mail template	Text of the mail message to inform the reviewer that a file is waiting for review. Options: • Default: The default Enfocus template for Enfocus Review is used. You cannot determine or change the text, it's fixed. • Built-in: Define the text of the mail yourself. • The subordinate property, <i>Body text</i>, shows the variable for the link to the PDF (currently, this is [Job.PrivateData:Key="com.enfocus.Review.URL"]). • Click the arrow button and choose Edit multi-line text (plain text) or Define multi-line text with variables (text with variables) to enter the content of the mail.  Note: The text that you have entered is attached to the job as a dataset ("Body"). To make sure this text is used when sending the mail, in the properties of Mail send, <i>Body template</i> must be set to <i>Associated with job</i> and <i>Template dataset</i> to <i>Body</i> (this is the default value). • Fixed file: Upload your own template file (*.txt, *.htm, or *.html) or choose Define single-line text with variables to construct the file path and file name using variables.

Property	Meaning
	 Note: If you're not using the default template, make sure that your body text contains the link to the PDF or to the job collection in the cloud, by adding the following Switch variable: [Job.PrivateData:Key="com.enfocus.Review.URL"] In case of a built-in text, it's present by default (so do not delete it!); in case of a fixed file you'll have to add it yourself!

- If the connection type is *Other notification*, the outgoing connection is used to attach the URL of the file that needs to be reviewed as private data to the job. This is useful if the URL needs to be stored in a database or if it is accessed through an API.

Note that in your flow, you need at least one outgoing connection of the type *Mail notification* or of the type *Other notification*.

This option has one subordinate property:

Property	Meaning
Private data tag name	Name of the private data key that will hold the URL of the file that will be reviewed.

- If the connection type is *Timeout*, the outgoing connection is used for files that were not reviewed after the date set in Due date (in the properties of the Enfocus Review app). Files that were not yet reviewed but deleted through the Enfocus Review Admin Area will also move along this connection.

At least one outgoing connection of this type is mandatory.

- If the connection type is *Reminder notification*, the outgoing connection is used to define the look and feel and the content of a reminder that is sent to the reviewer. This connection type is optional, and you can add several connections of this type if you want.

This option has several subordinate properties:

Property	Meaning
Mail format	See higher (connections of the type 'Mail notification')
Mail template	See higher (connections of the type 'Mail notification')
Unit	Days/hours Combined with the next property, this option indicates when the reminders will be sent, for example 2 days before the due date.
Amount before due date	Number Combined with the previous property, this option indicates when the reminders will be sent, for example 2 days before the due date.
Exclude weekends	If weekends should not be counted when calculating the date the reminders should be sent, indicate which days are considered "weekend".

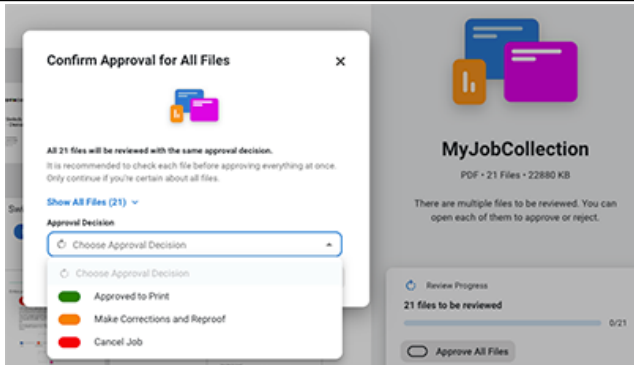
Property	Meaning
	None = Weekends are not excluded
Move	Indicates the type of job that will be injected in the outgoing connection. Options are: • Incoming job • Dummy job (this will inject a job with the name Dummy.txt)

App properties detailed information

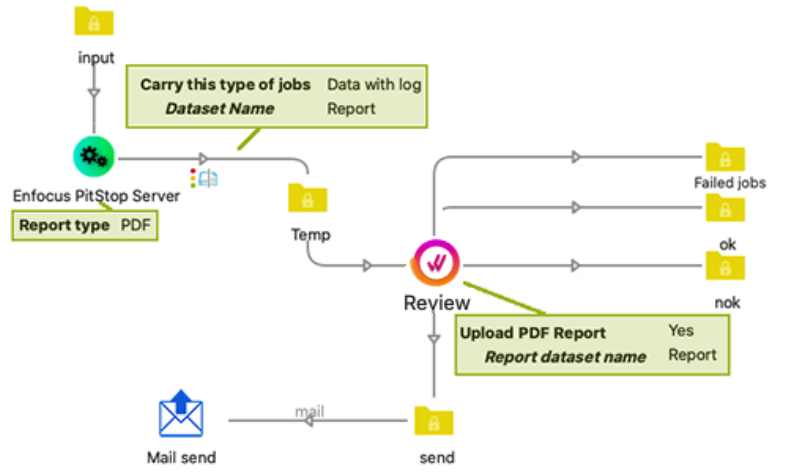
Property	Meaning
Enfocus Cloud Token	The unique ID that securely connects Enfocus Review to your Switch machine. This token is generated through the Enfocus Cloud. For more info, refer to Generating an Enfocus Cloud Token on page 6.
Branding	Determines which theme (i.e. look and feel) will be used. If the entered theme cannot be found in the Enfocus Review Admin Area (under Customization), or if this field is empty, the hard coded Enfocus theme will be used. See also Themes on page 15.  Note: If you use the option 'Select from library', you'll get the list with all available themes.
View settings	Determines which features will be made available to the reviewer. By default, all features are enabled. Alternatively, you can choose to restrict the feature set by enabling or disabling particular features. Options: • All Enabled: The reviewer has access to the complete functionality of Enfocus Review. • Advanced: Restrict the feature set by enabling or disabling particular features. Note that the preferred value (yes/no) can also be triggered by Switch variables. Following features can be turned on or off: • <i>View layers:</i> Ability to view layer properties of the document. • <i>View comments:</i> Ability to view comments in the document. • <i>View tools tab:</i> Ability to view the Tools tab. • <i>View finished size:</i> Ability to limit the shown content to the content inside the trim box (so that objects outside the trim box are not shown). • <i>View rulers and guides:</i> Ability to show or hide the rulers and guides as required.

Property	Meaning
	<i>View page boxes</i>: Ability to show or hide the page boxes as required. <i>View wireframe</i>: Ability to display the document in wireframe mode. <i>View rotation</i>: Ability to rotate the document. If enabled, a view rotation button is displayed in the user interface. <i>View ink coverage</i>: Ability to show or hide an ink coverage heatmap. <i>Enable double page view</i>: Ability to display the document in double page view instead of single page view. If enabled, a button to toggle between single and double page view is displayed in the user interface.
Double page initial view	Initial page view displayed when opening the document. Options are: - Single page - Double page
Double page cover page	Determines how the cover page and the subsequent pages will be displayed in double page view. Options: - No cover page (default): The first and the second page are placed side by side. - Cover page: The first page is shown as a single page. The double page view starts with pages 2 and 3. - Cover spread: The first page and the last page are placed side by side. - Cover and inside cover spread: The first page and the last page are placed side by side, as well as the second page and the penultimate page.
Double page view page box	Page box on which the double page view will be based. Default value: Trim box.  Note: If the selected page box is not defined in the document, the normal PDF specification rules are applied. For example, if the trim box is selected, but there is no trim box in the document, the crop box will be used.
Job collection	Allows you to determine whether or not jobs should be presented to the reviewer as a set of documents (on one and the same web page). Options: - No: Each document is presented separately. The reviewer will receive a separate mail with a separate URL for each document. The document is immediately opened in the Review Viewer. - Yes: Documents belonging to the same collection are presented as a set. The reviewer will receive a mail that contains the URL of the web page where the reviewer can find all PDFs that need to be reviewed.

Property	Meaning
	This property opens up the following fields: <i>Job collection name</i>: This is the name that will be used for the link that will be sent to the reviewer. It's also the text that will be shown as title on the overview page that lists the PDFs that are ready for review. The default value is 'Automatic': - In case of single files, the name of the file, without the extension will be used as the job collection name. - In case of a job folder, the name of the folder will be used as the job collection name. Alternatively, you can set the value using an inline value, a variable or a script expression. In the example below, the job collection name is set to a fixed value: 'ALL CUSTOMER X FILES'. The first image shows the mail with the URL, the second shows the web page. Dear Reviewer, A job / collection of jobs is ready for your review. Please, click on the link below to access the job(s) and review. ALL CUSTOMER X FILES ALL CUSTOMER X FILES PDF Review Module Page 02 0255K...ule_v8.pdf To Be Reviewed 00250...Users.pdf Reviewed 00255...r (t1).pdf To Be Reviewed <i>Allow bulk approval</i>: If set to Yes, all jobs in the job collection can be approved or rejected at once, instead of one by one. Note that in that case, all files should get the same approval decision. The default value is No. In the example below, when this option is set to Yes, the reviewer can click Approve All Files to review all files in a single step. The selected approval decision will be applied to all files in the collection.

Property	Meaning																									
	 • <i>Resend job collection email</i>: This option determines if and how often an email with the URL of the job collection is sent to the reviewer. Options are: • No: Every time a job is uploaded, a notification email is sent to the reviewer. • Yes: The notification email (with the URL of the job collection web page) will be resent when a job is submitted after the set time. For example, if the time is set to 1 day, jobs submitted during that 1 day won't trigger a notification. However, when after that day a new job is submitted, the notification mail will be resent. This gives you the time to upload a set of files (without mails being sent) and avoids that reviewers get too many mail notifications (all with the same URL). The table gives an overview of different use cases: <table><tr><th rowspan="3">What happens....</th><th colspan="3">Value of <i>Resend job collection email</i></th></tr><tr><th rowspan="2">NO</th><th colspan="2">YES</th></tr><tr><th>0 min</th><th>5 min</th></tr><tr><td>FOLDER UPLOAD</td><td></td><td></td><td></td></tr><tr><td>When a folder with files is submitted, only one email is sent immediately after uploading it. <i>Example: Uploading a folder containing 10 files will result in 1 single email.</i></td><td>X</td><td>X</td><td>X</td></tr><tr><td>MULTIPLE FILES UPLOAD</td><td></td><td></td><td></td></tr><tr><td>When multiple files are submitted at once, one email per file is sent immediately after uploading them. <i>Example: Uploading 10 files will result in 10 emails.</i></td><td>X</td><td>X</td><td></td></tr></table>	What happens....	Value of <i>Resend job collection email</i>			NO	YES		0 min	5 min	FOLDER UPLOAD				When a folder with files is submitted, only one email is sent immediately after uploading it. <i>Example: Uploading a folder containing 10 files will result in 1 single email.</i>	X	X	X	MULTIPLE FILES UPLOAD				When multiple files are submitted at once, one email per file is sent immediately after uploading them. <i>Example: Uploading 10 files will result in 10 emails.</i>	X	X	
What happens....	Value of <i>Resend job collection email</i>																									
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		0 min	5 min																							
FOLDER UPLOAD																										
When a folder with files is submitted, only one email is sent immediately after uploading it. <i>Example: Uploading a folder containing 10 files will result in 1 single email.</i>	X	X	X																							
MULTIPLE FILES UPLOAD																										
When multiple files are submitted at once, one email per file is sent immediately after uploading them. <i>Example: Uploading 10 files will result in 10 emails.</i>	X	X																								

Property	Meaning																																
	<table><tr><th>What happens....</th><th colspan="3">Value of <i>Resend job collection email</i></th></tr><tr><th></th><th>NO</th><th colspan="2">YES</th></tr><tr><th></th><th></th><th>0 min</th><th>5 min</th></tr><tr><td>When multiple files are submitted at once, one email per collection is sent immediately after uploading the files. <i>Example: Uploading 10 files at once will result in 1 email if within 5 minutes.</i></td><td></td><td></td><td>X</td></tr><tr><td>UPLOAD AFTERWARDS</td><td></td><td></td><td></td></tr><tr><td>When <i>within</i> the defined amount of time, additional files are added to an existing collection, no emails are sent anymore. <i>Example: Within the defined 5 minutes, when I upload another file to the same job collection, I don't want another email to be sent.</i></td><td></td><td></td><td>X</td></tr><tr><td>When <i>after</i> the defined amount of time additional files are added to an existing collection, one email per file is sent. <i>Example: After 5 minutes, when I upload more files to the same job collection, this will result in new emails per file.</i></td><td>X</td><td>X</td><td>X</td></tr><tr><td>When new files are submitted and the flow is stopped and restarted, and after that new files are uploaded, one email per file uploaded after the restart is sent.</td><td>X</td><td></td><td>X</td></tr></table> Important: The email contains the URL of the whole collection (not a direct link to the uploaded file).	What happens....	Value of <i>Resend job collection email</i>				NO	YES				0 min	5 min	When multiple files are submitted at once, one email per collection is sent immediately after uploading the files. <i>Example: Uploading 10 files at once will result in 1 email if within 5 minutes.</i>			X	UPLOAD AFTERWARDS				When <i>within</i> the defined amount of time, additional files are added to an existing collection, no emails are sent anymore. <i>Example: Within the defined 5 minutes, when I upload another file to the same job collection, I don't want another email to be sent.</i>			X	When <i>after</i> the defined amount of time additional files are added to an existing collection, one email per file is sent . <i>Example: After 5 minutes, when I upload more files to the same job collection, this will result in new emails per file.</i>	X	X	X	When new files are submitted and the flow is stopped and restarted, and after that new files are uploaded, one email per file uploaded after the restart is sent .	X		X
What happens....	Value of <i>Resend job collection email</i>																																
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When multiple files are submitted at once, one email per collection is sent immediately after uploading the files. <i>Example: Uploading 10 files at once will result in 1 email if within 5 minutes.</i>			X																														
UPLOAD AFTERWARDS																																	
When <i>within</i> the defined amount of time, additional files are added to an existing collection, no emails are sent anymore. <i>Example: Within the defined 5 minutes, when I upload another file to the same job collection, I don't want another email to be sent.</i>			X																														
When <i>after</i> the defined amount of time additional files are added to an existing collection, one email per file is sent . <i>Example: After 5 minutes, when I upload more files to the same job collection, this will result in new emails per file.</i>	X	X	X																														
When new files are submitted and the flow is stopped and restarted, and after that new files are uploaded, one email per file uploaded after the restart is sent .	X		X																														
Upload PDF Report	If set to Yes, you can upload the Preflight Report to the Enfocus Cloud and present it to the reviewer along with the PDF. This triggers one extra field: Report dataset name: The name of the dataset that contains the Preflight Report. This name must match the name of the dataset chosen in the outgoing connection of the PitStop Server configurator. Note: You must make sure that the PDF and the PDF Report are sent to the Review app through a <i>data with log</i> connection. Note that in the PitStop Server configurator, you should choose <i>PDF</i> as report type (not one of the other options). It's not necessary to certify the PDF (but it is allowed).																																

Property	Meaning
	 The diagram illustrates a workflow for reviewing PDF reports. It starts with an 'input' folder leading to the 'Enfocus PitStop Server' (Report type PDF). The process then moves to a 'Temp' folder, followed by a 'Review' step (represented by a red circle with a white 'W'). From 'Review', there are three possible paths: 'Failed jobs', 'ok', and 'nok'. The 'nok' path leads to an 'Upload PDF Report' step (Report dataset name), which then branches into 'Yes' and 'Report'. Finally, the 'Report' path leads to a 'Mail send' step (represented by an envelope icon).
Default unit	Determines the default unit of measurement in the Viewer. Options: • pt (point) • p (pica) • in (inch) • f (foot) • mm (millimeter) • cm (centimeter) • m (meter)  Note: The reviewer can overrule the default by changing the unit via the Settings in the Viewer.
Allow download	Determines whether or not the reviewers have the right to download the PDF file to their local system. Note that the file must be downloaded before approving or rejecting it. Options: • Yes: The reviewer will get a download button  in the top right corner of the user interface. You can determine what exactly can be downloaded: • The Annotations Report: Yes/No • The Original Document: Yes/No • No: There will be no button to download the PDF.
Set default language	Determines whether the approval pages (for example, job collection pages and the Viewer) open in a default language. This ensures that all reviewers see the pages in the same language, providing a consistent experience.

Property	Meaning
	Options: - No: The approval pages are displayed in the reviewer's preferred language, based on their browser settings or a previously saved language preference. - Yes: Choose the default language in which the approval pages will be displayed.  Note: The selected default language is only used when the approval pages are opened. Reviewers can still change the language of the Viewer or the job collection page themselves.
Review dataset name	Review comments, annotations, the chosen connection etc. are stored in a dataset for which you must enter a name and select a type (next property). This option is mandatory.
Review dataset type	Type of the dataset that will contain the metadata (review comments, annotations, chosen connection, etc.) Options: - XML - JSON  Note: Not sure how to extract the review comments afterwards? Refer to Finding review comments in Switch.
Due date	Date by which all submitted files should be reviewed. Options are: - Date: This option triggers a subordinate field where you can select the date of your choice. - Relative: The due date depends on the date of submission, for example, 5 days after the job was submitted. You can decide whether or not to take into account weekend days (and even choose which days are considered "weekend"). After the due date, the files that have not been reviewed yet are moved along the outgoing connection of the type 'timeout' and removed from the Cloud. They are no longer present in the Enfocus Review Admin Area ("All Reviews"). Note that you can postpone the removal from the Cloud through the <i>Deletion delay</i> property (see description below).  Note: In case of job collections, the due date is determined by the first file that is uploaded. The due date belongs to the collection and does not change when additional files are added later. If a different due date is required, create a new job collection or an individual proof link with a new job due date.
Deletion delay	Number of days by which the removal of files from the Cloud is postponed. The default is 0 (days). Examples: If Deletion delay is set to 0, the file will be deleted based on the due date only.

Property	Meaning
	If Deletion delay is set to 1, the file will be deleted 1 day after the due date.  Warning: If the Deletion delay is ≥ 1, the file remains available on the Cloud, but it can no longer be reviewed. Clicking the approval buttons has no effect!
Use comment properties of outgoing connection	Determines whether or not the values of <i>Enable review comments</i> and <i>Accept PDF with document comments</i> of the outgoing connections are taken into account. Options: - No: The properties of the outgoing connections are ignored. Review comments are not allowed (regardless of the <i>Enable review comments</i> property of the outgoing connections); PDFs with annotations are always accepted (regardless of <i>Accept PDF with document comments</i>). - Yes: The properties of the outgoing connections are taken into account. The ability to add review comments depends on <i>Enable review comments</i>; the ability to submit PDFs with annotations depends on <i>Accept PDF with document comments</i>.
Outgoing connection status	This property is used to verify if there is at least: - One outgoing connection of the type 'Reviewed file' - One outgoing connection of the type 'Timeout' - One outgoing connection of the type 'Mail notification' or 'Other notification' The value is always 'None'; if something is wrong with the connection, the property will be displayed in red. You'll find more details in the Switch log messages (via the Messages button in the toolbar).

Advanced performance tuning - additional properties

When **Show advanced element properties** in the properties of the **flow** is enabled, the following extra properties become available:

Additional property	Meaning
Number of slots	Number of slots that can be used concurrently by the Review app, so the maximum number of tasks the app can handle simultaneously. Possible values are: <i>Default:</i> The value set in the Switch Preferences (Processing - Concurrent processing tasks) is used. <i>0:</i> There is no limit set to the number of slots. - Any number larger than 0: The allowed number of slots that can be used concurrently.

Additional property	Meaning
Idle after job (secs)	Number of seconds the app should remain idle after processing a job, so the time in between jobs, in case of serialized processing.
Log debug messages	Enables log debug mode. - If set to <i>Default</i>, debug messages will only be shown if Log debug messages is enabled in the Switch preferences (See Switch preferences: Logging) - If set to <i>Yes</i>, debug messages for the Review app will be shown in the Messages overview, regardless of the value of Log debug messages in the Switch preferences.
Abort after (minutes)	Number of minutes the app can run after which it is aborted. - If set to <i>Default</i>, the value of the global <i>Abort processes after (minutes)</i> preference will be used (See Switch Preferences: Error handling). - If set to <i>0</i>, processing will never be aborted.  Note: This property is ignored if Log debug messages is set to Yes.

Mail send

If you have configured a *Mail notification* and/or a *Reminder notification* outgoing connection, you also need to add a **Mail send** flow element.

If used with the Review app:

- Body template* must be set to *Associated with job* (to make sure the correct link is sent to the approver). Do not change the name of the default Template dataset ('Body'), because this dataset contains the URL of the file that needs to be reviewed.
- Message format* must have the same value as *Mail format* in the outgoing connection of the Review app (both plain text or both HTML).

For an overview of all properties, refer to the [Switch Reference Guide](#).

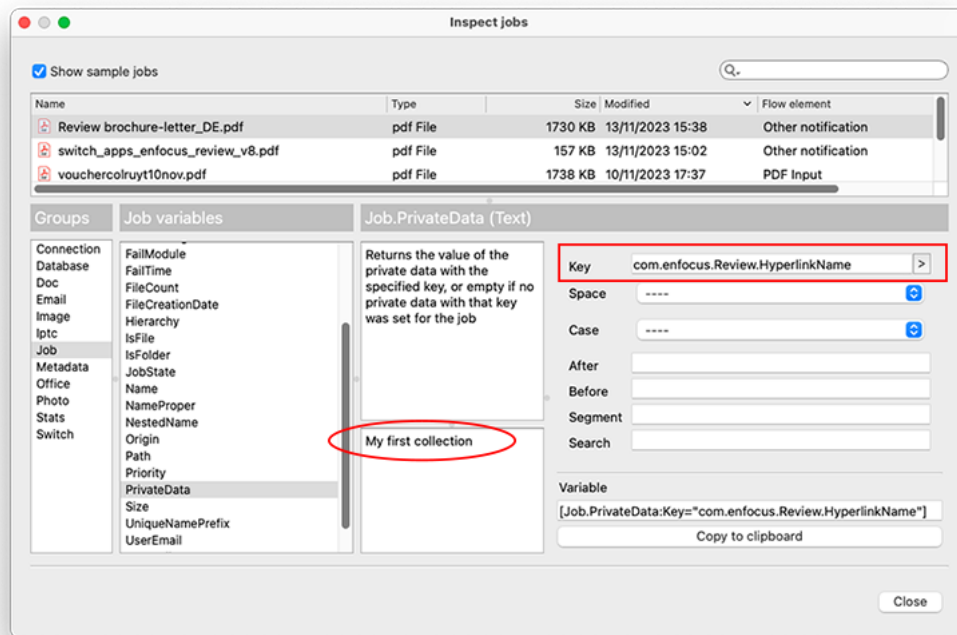
Private data

The Review app adds some private data to the outgoing jobs:

- For jobs going through the outgoing connection of the type 'Mail notification', the **URL of the job that needs to be reviewed** is stored as [Job.PrivateData:Key="com.enfocus.Review.URL"]. This variable can be used in mails to the reviewers.

Alternatively, choose **your own private data key** by adding an outgoing connection of the type 'Other notification'. The *Private data tag name* you enter here will be stored as a private key.

- The **name of the hyperlink** typically shown in the mail notification, i.e. the name of the job (in case of separate jobs) or the name of the job collection is stored as [Job.PrivateData:Key="com.enfocus.Review.HyperlinkName"].



3.4. Finding metadata (review comments, annotations, ...) in Switch

Review comments, annotations made during the review, the chosen connection etc. are stored as metadata in a Switch dataset. There are several methods to extract metadata; we'll explain two of them.

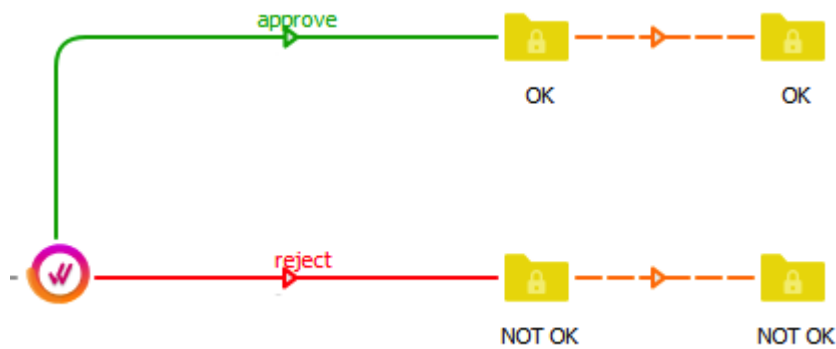
Both methods require that you make changes to your Switch flow BEFORE the files have been reviewed. Once the reviewed files have reached an output folder, the unique prefix has been removed and the metadata can no longer be accessed through the Inspect jobs dialog.

Note that more detailed information can be found in the Switch Reference Guide.

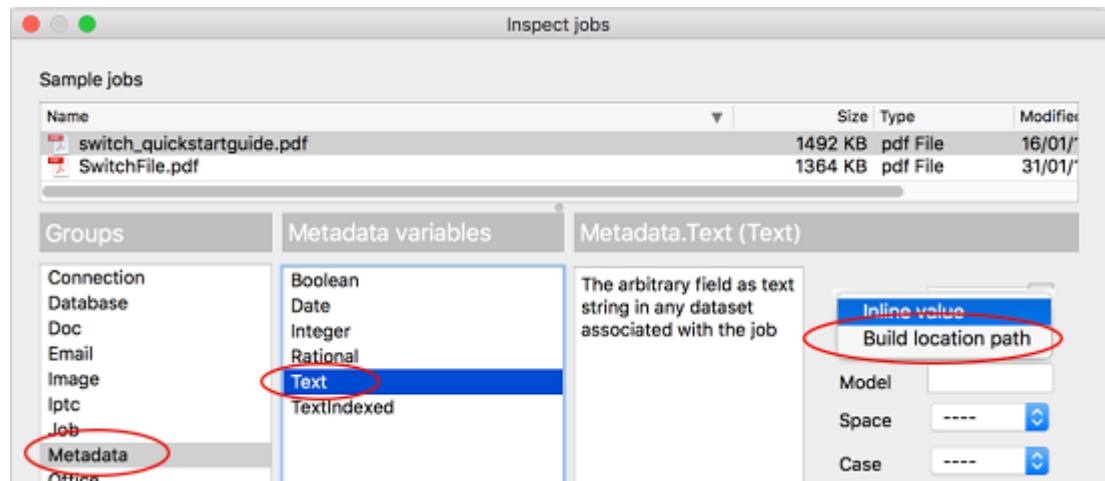
3.4.1. Checking metadata through the Inspect jobs dialog

Proceed as follows:

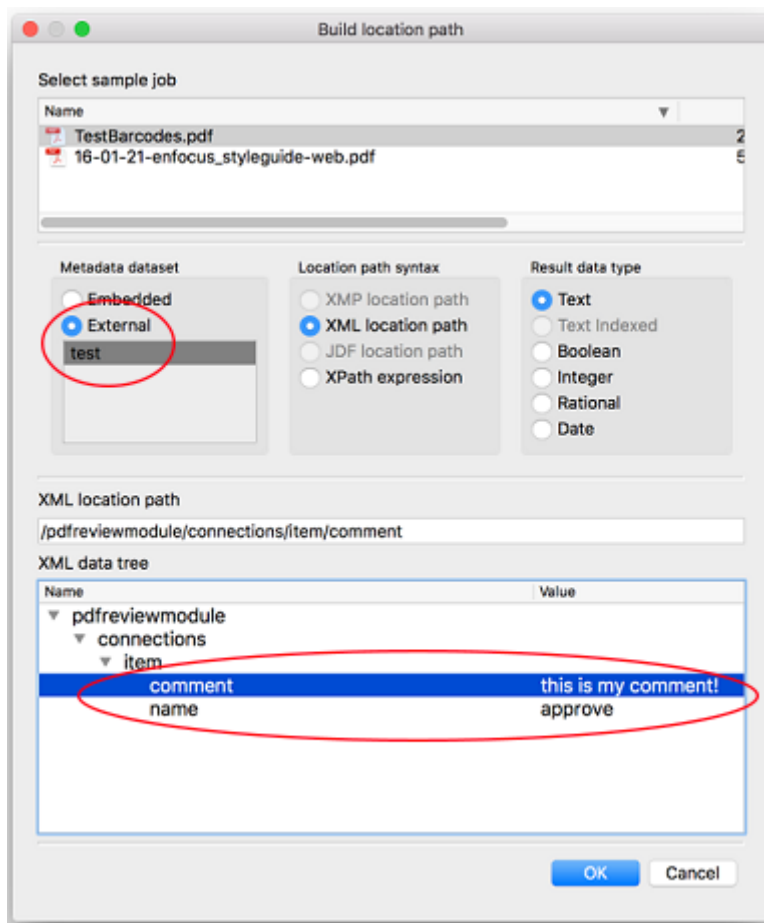
1. Add a connection between the output folder that contains the reviewed files and another, new folder.
2. Set the connection on hold.
3. Do this for all output connections for which you want to check the metadata.



4. Activate and test the flow by dropping some PDF files on the input folder and reviewing them (for example with a comment, with a couple of sticky notes etc.).
5. Stop the flow.
6. Click the **Inspect jobs** button in the tool bar and click Metadata - Text - Path and choose Build location path.



7. In the upper part of the Build location path dialog, select one of the reviewed files.
8. Choose **External** as Metadata dataset.
You'll find the name of the dataset (as entered in the app properties) in the field below 'External'. Depending on the chosen dataset type (XML or JSON) in the Review app properties, the selected location path syntax will be XML location path or JSON Pointer.
9. Expand the XML or JSON data tree in the bottom field until you find the data you're looking for.
10. Repeat step 7 - 9 for all reviewed files.

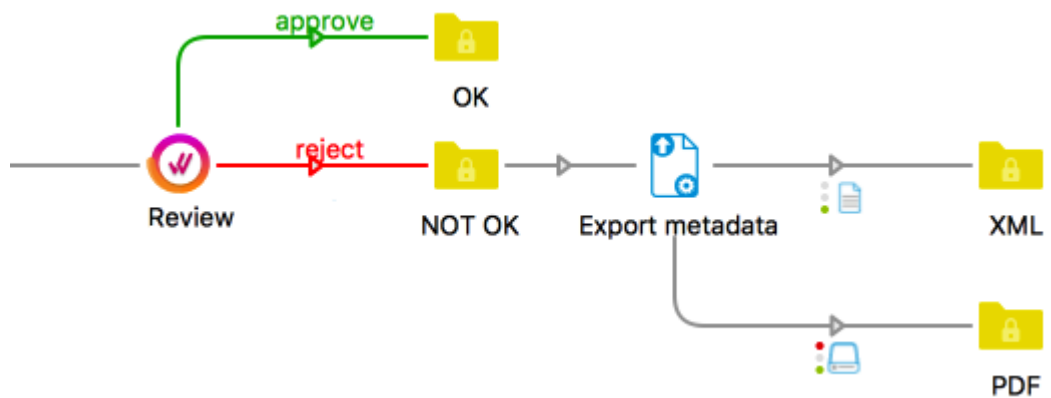


3.4.2. Exporting metadata

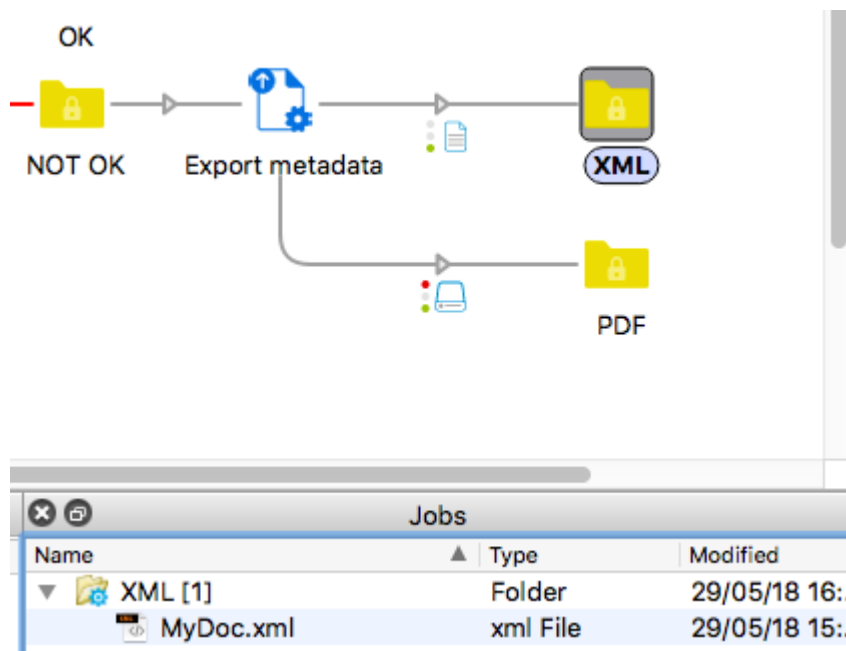
This method allows you to export the metadata to a separate metadata file (XML or opaque, depending on the chosen dataset type in the app properties).

Proceed as follows:

1. Add an **Export metadata** flow element to the right of the output folder that contains the reviewed files, and connect them.
2. Check the properties of **Export metadata**:
 - *Dataset name*: This should be the name of the dataset that contains the metadata = the name of the dataset entered in the Review app properties.
 - *Filename body* and *Filename extension* refer to the name of the metadata file that will be created. *Filename body*: *Job name* means that the file name will be used; *Filename extension*: *Data model* refers to the chosen dataset type (see the properties of the Review app); XML or opaque. You can change the default values or keep them as they are.
3. Configure the outgoing connections. **Export metadata** expects two outgoing connections:
 - One data connection for the reviewed PDF file.
 - One log connection for the metadata file.



4. Repeat steps 1 - 3 for all folders that contain files for which you want to export the metadata.
5. Activate and test the flow by dropping some PDF files on the input folder and reviewing them (for example with a comment, with a couple of sticky notes etc.).
6. Select the folder where you expect to find the metadata files.
The metadata files (XML or JSON) can be found in the Jobs pane.



4. Reviewing a file using the Enfocus Review Viewer

Note that it's possible to review a file on a computer, on a tablet, or on a smartphone. The view is adjusted automatically to the chosen device.

4.1. Step-by-step procedure

To review a file using the Enfocus Review Viewer:

1. Click the URL you received via email.

Depending on the configuration, you will be redirected either to a web page (which shows one or more job files), or directly to the PDF.

In case of a web page, hover over the file you want to review and click the icon on the right



- When you click the icon on the left (the info icon ) , some info about the file concerned is shown in a side panel on the right (for example, the file name, file size, asset type, status and the approval decision and the approver if already reviewed).
- Note that you can change the theme and the language of a job collection page. You can also switch between list and grid view. Refer to [Changing the job collection page preferences](#) on page 72.



Note: Password-protected PDFs are not supported.

The PDF is displayed in an HTML5 browser, the Enfocus Review Viewer.



Note: The first time you're using the Enfocus Reviewer in a particular browser, you may be informed that cookies are used to save your personal preferences, such as your language choice. Note that we do not store any personal details. Click **I understand** to continue.

2. Inspect the file as required.

You can inspect the document, page and object properties as required. For an overview of the options, refer to [UI & Functionality - Overview](#) on page 41. Note that is not possible to edit the file.

3. Optionally add your comments using the **Add Annotation** tool. 

For the full procedure, refer to [Adding, editing and removing annotations](#) on page 55.



Note: You cannot save intermediate results. If you add comments, you should approve or reject the file in the same session, otherwise your comments will be lost.

4. Click the **Approval** tab in the top right corner and click the button of your choice.
5. Confirm your choice and enter a comment if requested.
- Once you have clicked one of the buttons, you will be redirected to the website of the sender of the PDF. If you would try to open the file once more using the URL you received via email, you might be able to open it (this depends on the configuration), but it won't be possible to change the approval decision or to send additional remarks afterwards.

You will receive a mail whenever another file is ready for review.

If you received a single PDF for review, you will receive a mail whenever another file is ready for review.

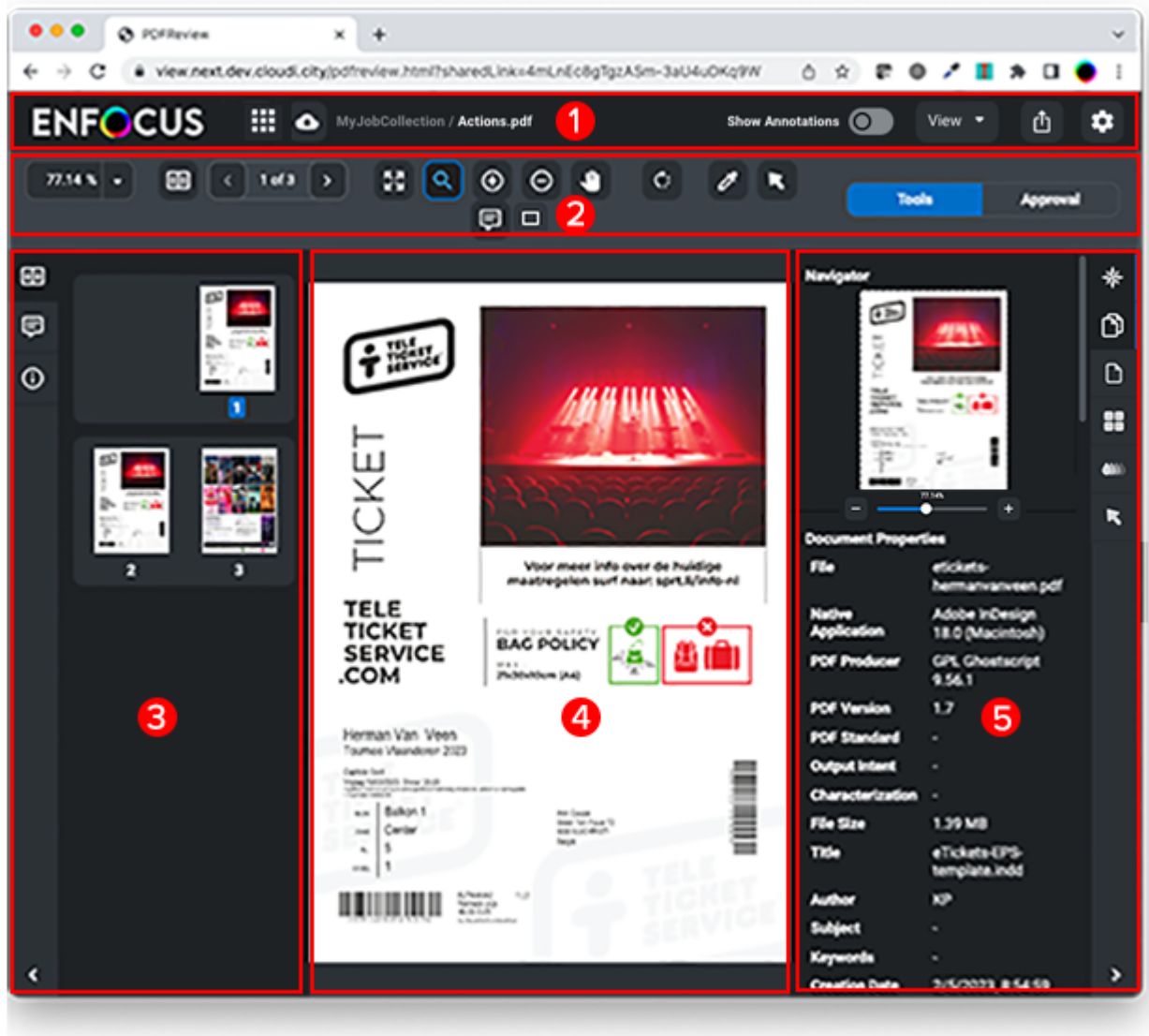
If you received the URL of a web page, the file you just reviewed is part of a job collection. Additional job files will be added whenever they are available for review.

4.2. User interface and functionality of the Viewer

4.2.1. UI & Functionality - Overview

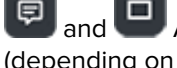
The table below gives an overview of the main screen areas and functionality.

Note that the UI may be customized, so the colors may be different, there may be fewer tabs in the right part of the UI, and the buttons may have a different text or color. All this depends on the configuration in Switch. The image below is an example with all functionality enabled.



#	Area	Functionality
1	Title bar with the logo of the company that provided you with the file and the name of the file that is currently shown in the Viewer.  Open the job collection (= the set of files) the currently opened file belongs to. If the file is not part of a job collection, this button is not available.  Download the PDF file locally (with or without annotations) before sending your approval decision. This button is optional (depends on the configuration in Switch). If	Changing the job collection page preferences on page 72 Viewing or hiding screen elements on page 50 Changing the language of the user interface on page 46 Changing the unit of measure on page 47 Changing the theme of the user interface on page 46 Displaying page box labels on page 48

#	Area	Functionality
	the filename is part of a job collection, it is preceded by the name of the job collection. You can click the name of the job collection to immediately open the job collection.  Show or hide annotations in the document. If hidden, the annotations are still visible in the Annotation list in the left sidebar.  Open this menu to show or hide certain screen elements, such as page boxes, rulers and guides, etc. (if enabled in Switch).  Click this button to generate an anonymous link that you can share with reviewers, who will get access to the file without having to sign in to the Enfocus Cloud. Reviewers using this link can view, download and review the job.  Open this menu to open the User Preferences dialog, where you can choose another theme, language or unit of measure. You can here also display page box labels.	
2	Toolbar with: - On the left, a button to change the zoom factor of the PDF. - In the center, a lot of tools that allow you to inspect the PDF (explained further) - On the right, you can switch between the Tools and the Approval tab, of which the content is shown in the right sidebar. The tab that is active is displayed in blue.	Changing the zoom level of the PDF file on page 52
3	Left sidebar The sidebar can be collapsed or expanded (as in this example) and can contain 4 different tabs:  Page list, i.e. thumbnails of all pages (this tab is always available).  Layers if any (if there are no layers in the document, or if the function is disabled in Switch, this tab is absent).	Walking through a multi-page PDF on page 54 Viewing or hiding layers on page 55 Adding, editing and removing annotations on page 55 Checking the PDF Report on page 69

#	Area	Functionality
	 Annotations (available if the <i>View comments</i> functionality is enabled in Switch).  PDF Report (available if <i>Upload PDF Report</i> is enabled in Switch and PitStop Server is configured to provide the PDF Report). The sidebar can be collapsed or expanded by clicking the arrow buttons at the bottom.	
3	The central part displays the PDF file. The tools above the central part allow you to inspect and manipulate the PDF:  Toggle between single and double page view. This button is not always displayed; it depends on the configuration.  Navigate through the PDF.  Fit the view to the size of the screen.  Zoom tools to take a closer look at specific areas.  Pan tool.  Just like the single/double page view button, this button may be absent, depending on the configuration.  Eyedropper tool.  Selection tool (which behaves like the PitStop Pro selection tool).  and  Add annotations tools (depending on the configuration).	Toggling between double and single page view on page 68 Walking through a multi-page PDF on page 54 Zooming in on certain areas of the PDF file on page 53 Moving the view horizontally or vertically on page 66 Rotating the page view on page 67 Measuring color values on page 67 Viewing the properties of one or more objects on page 65 Adding, editing and removing annotations on page 55

#	Area	Functionality
	The tool that is active is highlighted in blue.	
4	The right sidebar contains 2 tabs: • Tools allows you to display the document properties, details about the fonts and separations used in the PDF, information about the current page (size, orientation, page boxes) and any selected objects (text, art work, images), for example fill and stroke properties, position, ... • Approval contains the reject/approve buttons as configured in Switch. This tab is always present. The active tab is highlighted. To save space, this panel may be collapsed. You can expand it using the arrow button at the bottom, but it will also be expanded automatically whenever you select one of the Tools on the right: •  The Navigator shows you where you are on on the page (in case you zoomed in on a particular part of the PDF). •  Document properties •  Page properties •  Channels •  Ink coverage •  Inspector (showing the properties of the selected objects) Note that for every tool you select, a panel is added to the sidebar, one below the other.	Viewing the document properties on page 58 Viewing the document fonts on page 58 Viewing the channels on page 59 Viewing the ink coverage on page 62 Viewing the page properties on page 64 Viewing the properties of one or more objects on page 65 Reviewing a file using the Viewer Approving or rejecting a document on page 70

#	Area	Functionality
	If you don't want to display it anymore, just click the icon once more.	

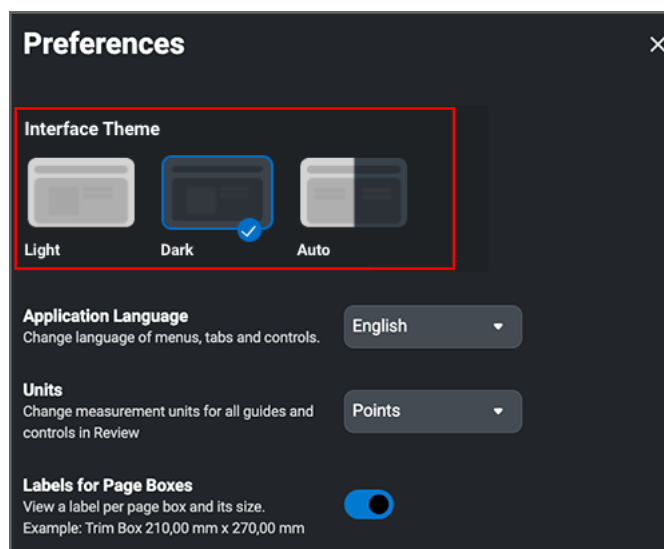
4.2.2. Changing the theme of the user interface

To change the theme of the user interface:

1. In the top right corner of the screen, click .
2. In the Preferences dialog that appears, click the interface theme of your choice.
Choices are:
 - Light
 - Dark
 - Auto (matches your system settings)



Note: If the Switch admin configured the current theme for dark or light mode only, the option to change the interface theme is not available.



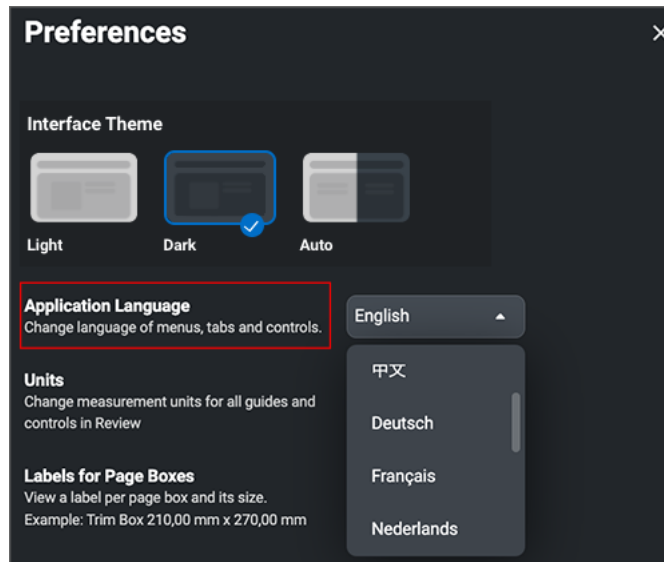
3. Close the dialog.
The selected theme is applied immediately. Note that next time you open the Viewer (in the same browser and provided that your browser supports cookies), it will automatically be displayed in the theme of your choice.

4.2.3. Changing the language of the user interface

By default, the Viewer is displayed in the language of your browser.

To change the language of the user interface:

1. In the top right corner of the screen, click .
2. In the User Preferences dialog that appears, open the **Application Language** list.



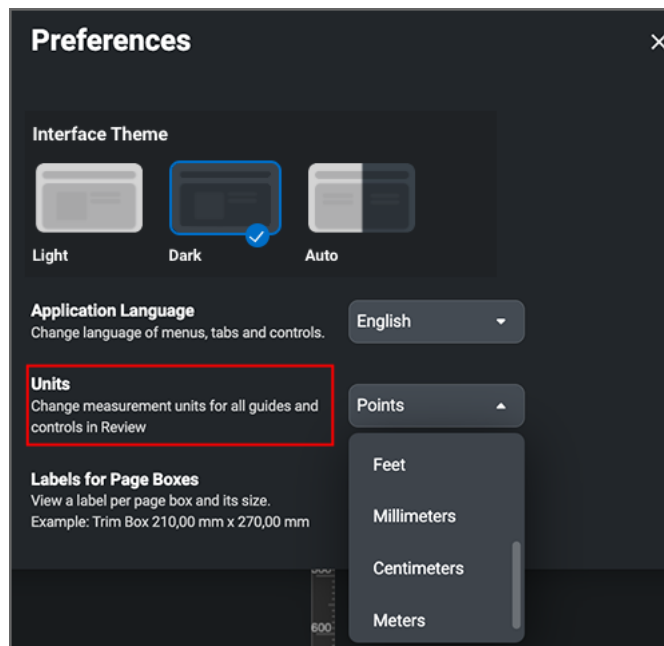
3. Select the language of your choice.
Available languages are the PitStop languages (Dutch, French, German, Italian, Spanish, Chinese or Japanese) + Portuguese, Polish, Norwegian, Swedish, Estonian, Latvian, Lithuanian and Finnish.
4. Close the dialog.
5. Reload the page.
Next time you open the Viewer (in the same browser and provided that your browser supports cookies), it will automatically be displayed in the language of your choice.

4.2.4. Changing the unit of measure

If you want information about dimensions and positions (e.g. the page size, the position of the page boxes), you may want the values to be expressed in a different unit.

To change the default measurement unit in the document/object properties:

1. In the top right corner of the screen, click .
2. In the Preferences dialog that appears, open the **Units** list.



3. Select the unit of your choice.

Choices are:

- Points
- Picas
- Inches
- Feet
- Millimeters
- Centimeters
- Meters

4. Close the dialog.

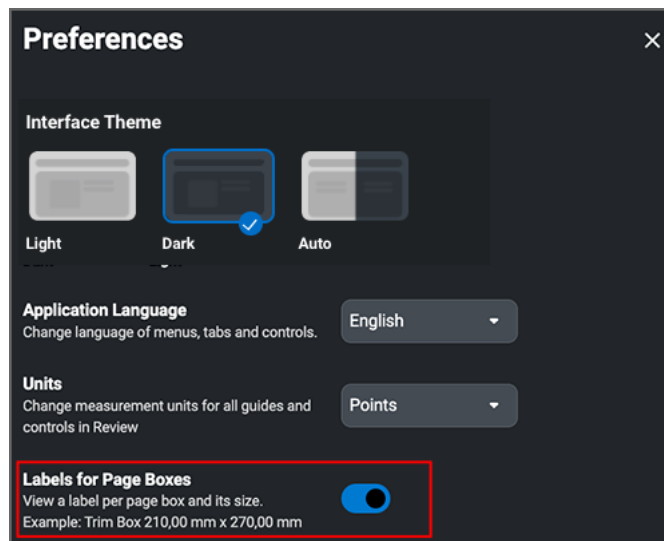
The unit and values are adjusted immediately.

4.2.5. Displaying page box labels

By default, if page boxes are enabled in the View settings, they are shown without labels and without page box sizes.

To display labels for page boxes:

1. In the top right corner of the screen, click .
2. In the Preferences dialog that appears, click the toggle button next to **Labels for Page Boxes**.



The toggle button will turn blue.

3. Close the dialog.

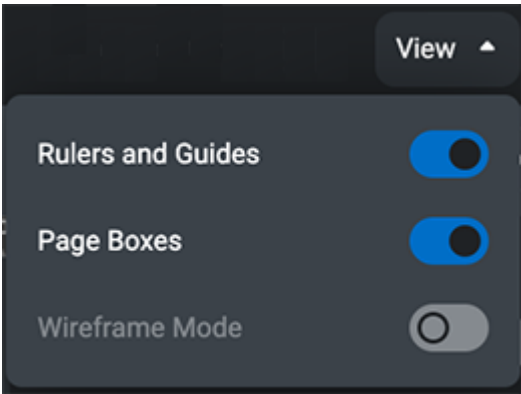
The page box labels are shown in the work area. The size of the page boxes is displayed as well and expressed in the chosen unit.



4.2.6. Viewing or hiding screen elements

Depending on what you want to do, you may want to view or hide certain screen elements, such as page boxes, rulers, guides, ... Which options are present, depends on the configuration in Switch.

1.
- In the top right corner of the Viewer, click **View**.
The screen elements that are shown, have a blue toggle button; the screen elements that are hidden have a gray toggle button.



2.
- Do one of the following:
 - To hide a shown screen element, click the blue toggle button. It will turn gray.
 - To show a hidden screen element, click the gray toggle button. It will turn blue.

Screen element	Meaning
Rulers and Guides (default off)	Rulers allow you to measure the size of the objects in the PDF. Guides are useful for lining up objects in the document. When you move the slider to the right, you have the possibility to add guides yourself. To add a guide: 1. Click in the ruler. The guide is added automatically. 2. Keep your cursor in the ruler area and drag it to the desired position. To delete a guide, drag it outside de document area.

Screen element	Meaning
	<i>This an example of a document with Rulers and Guides enabled. One (orange) guide was added.</i>
Page Boxes (default on)	Page boxes define the physical size of a document, so you may want to check if they are OK. Each page box has its own color. These colors cannot be changed. The used colors are: • Media box: red • Crop box: green • Trim box: blue • Bleed box: pale blue • Art box: purple  Note: In the Page properties (which can be visualized on the Tools tab in the sidebar on the right) you can find information about the dimensions and the position of the page boxes. If Page boxes are enabled in the View settings, you can also see which color represents which page box. When the page boxes are not shown, the crop box is the page size at which your document is displayed. If they are shown, the media box is used to define the page size. This behavior is the same as in PitStop Pro (Show/hide Page Boxes view).
Wireframe Mode (default off)	Wireframe Mode shows the objects in the document as outlines.
Spreads (default on)	If this view setting is enabled, the document can be displayed in double page view, so that two pages are shown side by side in the work area.
Finished Size (default off)	If this view setting is enabled, only the content inside the trim box is shown. Objects outside the trim box are not displayed.

Screen element	Meaning
	 Note: If no trim box is defined, this option has no impact and all content is shown.

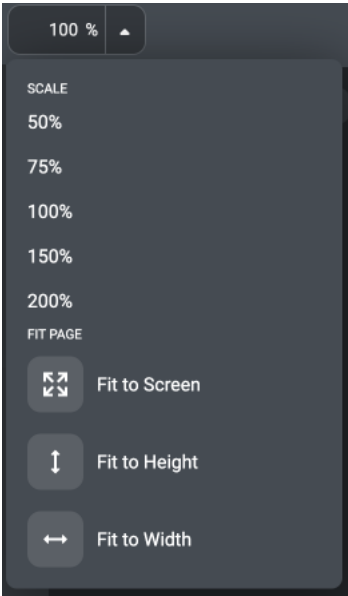
Your choices - except for wireframe - are remembered and used next time you open a document in the Enfocus Review Viewer.

 **Note:** Remember that the used unit for e.g. the rulers and guides, can be changed via the Settings menu (see [Changing the unit of measure](#) on page 47).

4.2.7. Changing the zoom level of the PDF file

The zoom level is displayed below the company logo, in the top left corner of the user interface.
To change the zoom level of the PDF:

1. Do one of the following:
 - Click in the **<number>%** field and type a different value. Note that a very high zoom level is supported (the maximum value is 51200).
 - Open the **<number>%** list in the toolbar and select the value of your choice. Alternatively, you can adjust the view to the available screen space (fit to screen) or to the height or width of your screen.



- Use the buttons in the toolbar above the work area:
 - Click  to zoom in.
 - Click  to zoom out.

2. Alternatively, you can use the Zoom button  in the toolbar to zoom in on a partical part of the PDF. Refer to [Zooming in on certain areas of the PDF file](#) on page 53.

4.2.8. Zooming in on certain areas of the PDF file

The Zoom tool supports "click, drag, zoom" as commonly used in graphic arts software.

To zoom in on a particular area of the document, proceed as follows:

1. To activate the Zoom tool, click the Zoom button  in the toolbar. The color of the button changes, to indicate that the tool is activated and can be used.  The cursor is adjusted as well - it looks like a magnifying glass.
2. Click and drag a rectangle around the area that you want to inspect, then release. The selected area is enlarged to fit the screen and marked on the thumbnail of the page in the Navigator, so you can see which part of the page is shown on screen. The zoom level is shown in the top left of the screen.



Note: If the Navigator is not yet active, click the Navigator button  in the sidebar on the right.

3. To view another part of the page with the same zoom level, click in the marked area on the thumbnail and move it as required.



Note: Invalid page boxes (e.g. crop box not completely inside the media box) may cause incorrect viewing results.

Note that you can zoom out again using the slider in the Navigator (below the image of the document) or by clicking the Zoom out button  in the toolbar. See also [Changing the zoom level of the PDF file](#) on page 52.

4.2.9. Walking through a multi-page PDF

To walk through a multi-page PDF:

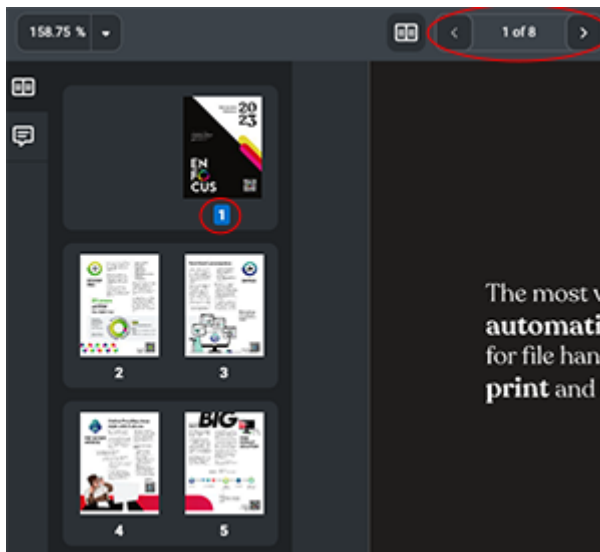
Do one of the following:

- Click the arrow buttons in the toolbar to move forward or backward.
- Click the thumbnails in the Page List to switch from one page to the other.



Note: If the page list is not shown, click  in the sidebar on the left.

Note that in case of double page view, two pages are displayed side by side. The number of the active page is highlighted in blue. See also [Toggling between double and single page view](#).

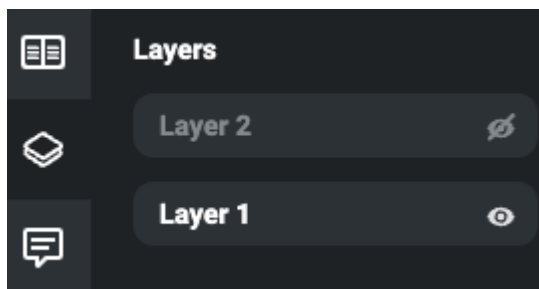


4.2.10. Viewing or hiding layers

This function is only available if it has been enabled in the configuration and if the file has layers.

To view or hide the layers in a document:

1. If the layers are not yet shown, in the sidebar on the left click Layers  .
The layers of the document are shown.
2. Click the eye icon to hide or display the layer(s) of your choice.
In the example below, the document has 2 layers of which only layer 1 is visible.



4.2.11. Adding, editing and removing annotations

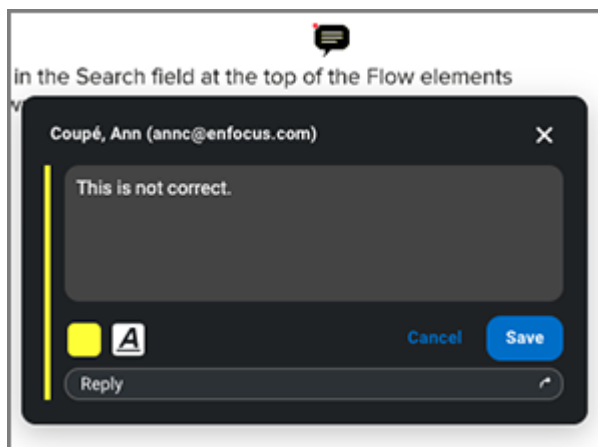
Although it is not possible to make changes to the PDF, you do have the option to add annotations, edit them afterwards and remove them as required. If the document contains an Annotation List, you can also view annotations that are already present in the document.

To add an annotation:

1. To activate the **Add annotations** tool, do one of the following:

- To add a *note annotation (text only)*, click the Note Annotation button  in the toolbar. The color of the button changes, to indicate that the tool is activated and can be used: . The cursor is adjusted as well - it looks like a text balloon (same behavior as Adobe Acrobat). Now click in the PDF, near the object or place where you want to put a comment.
- To add a *rectangle annotation (text + a rectangle - to highlight the area concerned)*, click the Rectangle Annotation button  in the toolbar. The color of the button changes, to indicate that the tool is activated and can be used. The cursor is adjusted as well - it becomes a crosshair. Now draw a rectangle to highlight the area on which you want to comment. Note that also the color of the rectangle can be changed.

2. In the dialog that pops up, type your comment.



Note:

- You can choose a color to distinguish between annotations from different approvers and you can enable rich text tools, for example to underline your text or put parts in italics or bold.
- If you're a user with an Enfocus cloud account, your name will be displayed at the top of the dialog. If you're an unknown user (using a shared link), you'll be able to enter your name (in the field at the top, where by default 'Anonymous' is mentioned). Note that this name is remembered next time that you're creating an annotation.
- In the Annotation List, the name of a registered user will be followed by a blue checkmark. This blue checkmark is not shown for unknown users.

3. Click **Save**.
You will see a sticky note where you added your comment. Note that you can drag it to a different place in the document as required.
4. To view and/or edit your comments
 - a. Click the **Annotation List** icon  in the sidebar on the left.

The annotations are listed one after the other. The author of the annotation is mentioned, as well as how long ago the annotation was modified. Note that new annotations are added to the end of the list. When you hover over an annotation, you can see when it was created.

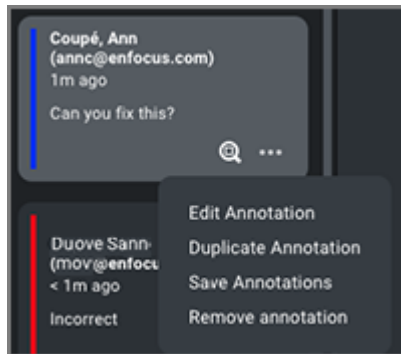
- b. To edit a particular annotation, select it.
The selected annotation and the corresponding sticky note in the document are highlighted.
- c. To be able to closely inspect the element (text, image,...) the annotation applies to, hover over the bottom right corner of the annotation and click the Zoom to annotation icon



that is displayed.

Enfocus Review zooms in on the annotation in the document.

- d. To be able to make changes, hover over the bottom right corner of the annotation and click the three dots button  that is displayed.



- e. Click **Edit Annotation**.
- f. Change the text as required.
- g. Click **Save**.



Note:

- Alternatively, you can select the annotation by clicking the corresponding sticky note in the document.
- You can also edit annotations that were already included in the document!

5. To reply to an annotation made by someone else:
 - a. Find the annotation you want to reply to in the **Annotation List** tab of the sidebar.
 - b. Click in the Reply field below the annotation text and type your reply.
 - c. Click **Save**.
6. To remove an annotation:
 - a. Select the annotation you want to remove:
 - Click the annotation in the **Annotation List** tab of the sidebar, OR
 - Click the sticky note in the document.

The selected annotation and the corresponding sticky note are highlighted.

- b. In the **Annotation List** tab, click the three dots button  in the bottom right corner and click **Delete Annotation**.



Note: When approving the PDF, you will be asked if you want to merge the annotations into the PDF.

4.2.12. Viewing the document properties

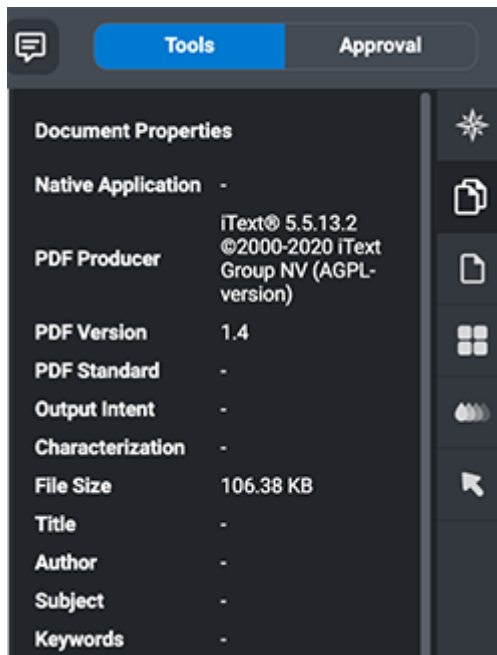
To view the document properties, such as the application used to create it, the file size, the creation date, ...:

1. In the right part of the screen, make sure the **Tools** tab is selected.
- 2.



In the sidebar, click **Document Properties**.

The properties of document are displayed.



- 3.



To hide the document properties, click the **Document Properties** tool once more.

4.2.13. Viewing the document fonts

To learn which fonts are used in the PDF:

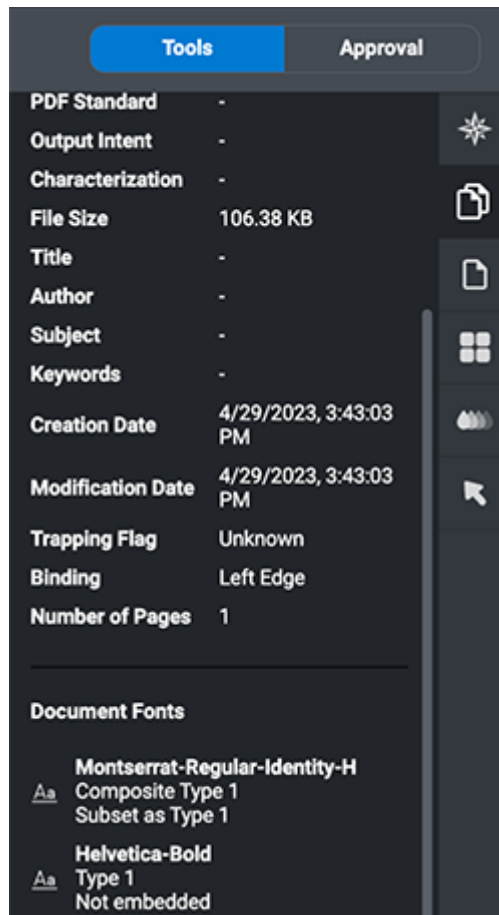
1. In the right part of the screen, make sure the **Tools** tab is selected.

2.



In the sidebar, click **Document Properties**.

The document fonts are displayed in a second section, below the document properties.



Note: If a font is not embedded, this is also mentioned in the Font properties.

3.



To hide the document properties, click the **Document Properties** tool once more.

4.2.14. Viewing the channels

To view the channels or separations used in the document:

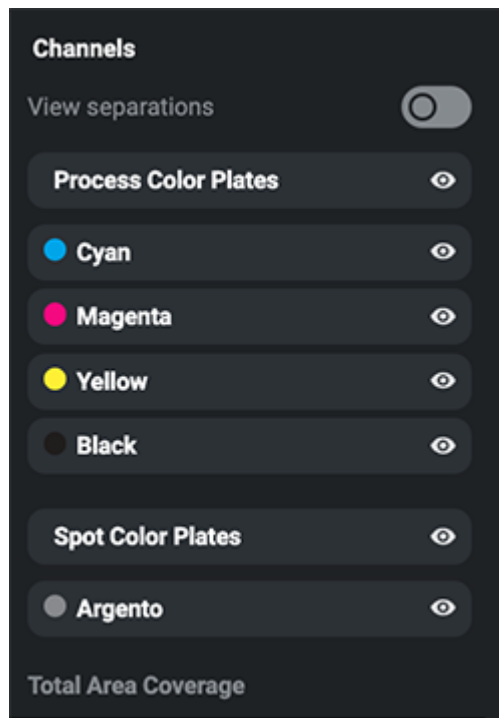
1. In the right part of the screen, make sure the **Tools** tab is selected.

2.



In the sidebar, click **Channels**.

The Channels panel is displayed.



3. To view or hide the separations, click the **View separations** toggle button.
If the toggle button is blue, it's active and the separations will be shown in separate panels in the work area. The panel with the name 'Composite' displays the composite color that is a result of the mix of the shown separations.
4. To hide or display a particular separation, click the eye icon beside the separation concerned.

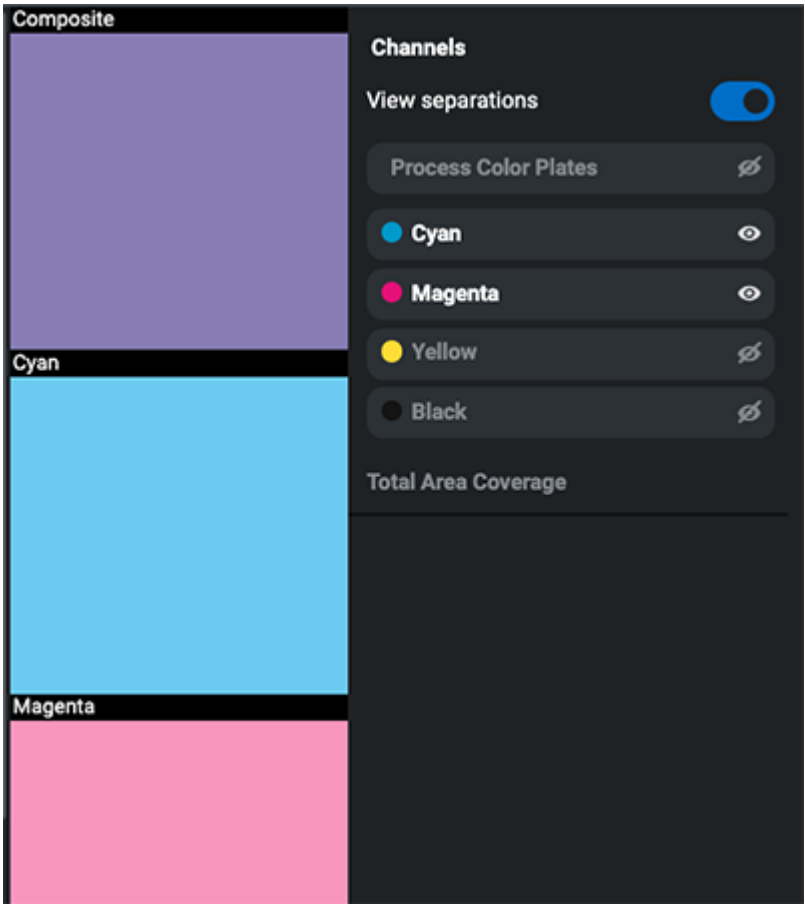


Note: Process Color Plates and Spot Color Plates are grouped.

5. To calculate the total ink coverage of a particular spot in the document:
 - a. Click the **Eyedropper** tool. 
 - b. Click somewhere in the document.

The total ink coverage of the area where you clicked will be displayed at the bottom of the Ink Coverage panel.

Examples:



Example 1: View separations is enabled. Yellow and Black are not shown.



Example 2: View separations is disabled. Yellow and Black are not shown.

4.2.15. Viewing the ink coverage

To view the ink coverage used in the document:

1. In the right part of the screen, make sure the **Tools** tab is selected.
- 2.

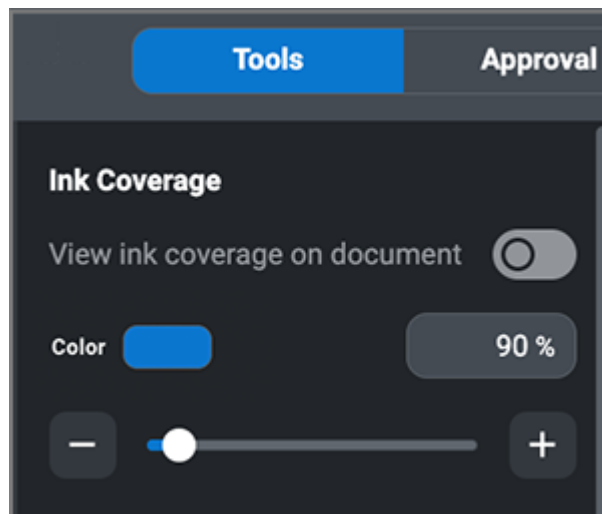
In the sidebar, click **Ink Coverage**.



The Ink Coverage panel is displayed in the sidebar.



Note: If the Ink coverage icon is not available in the sidebar, it means that the functionality was not enabled in the properties of the Enfocus Review app.



3. To view the ink coverage on the document in the work area, click the toggle button until it turns blue.

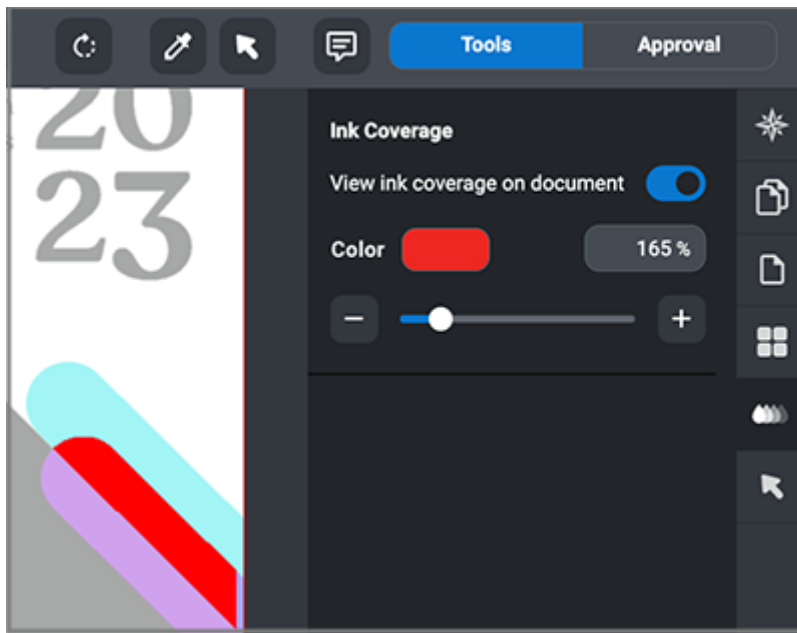
If not enabled, moving the slider or changing the value won't have any effect.

4. Do one of the following:

- Move the slider to the right to increase the value.
- Move the slider to the left to reduce the value.
- Manually enter the value of your choice
- Click the minus button to reduce the value by 1%.
- Click the plus button to increase the value by 1%.

The parts in the document that have an ink coverage that corresponds with the selected value are by default shown in red.

To change the color, click the color patch and, from the color picker that appears, select the color of your choice.



4.2.16. Viewing the page properties

To view the properties of a particular page, such as the size, the page orientation, the page level output intent (if set) and the dimensions of the page boxes:

1. In the right part of the screen, make sure the **Tools** tab is selected.
- 2.

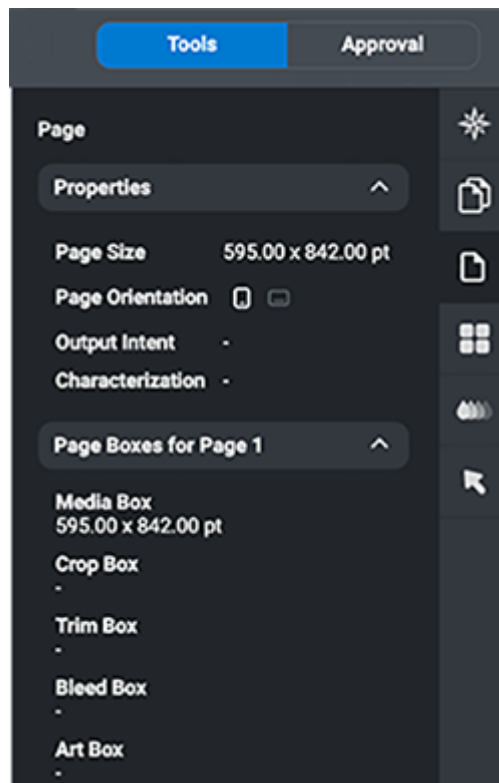
In the sidebar, click **Page Properties**.



The properties of the currently selected page are displayed. This includes the size of the page, the page orientation, the output intent and the characterization. The page box sizes are also displayed.



Note: Remember that the unit used for the page size and the dimensions of the page boxes can be changed via the Settings menu (see [Changing the unit of measure](#) on page 47).



3.

To hide the page properties, click the **Page Properties** tool  once more.

4.2.17. Viewing the properties of one or more objects

To view the properties of one or more selected objects (image, text, art work), such as the fill and stroke properties, the position, and text or image properties such as image size, resolution,...), proceed as follows:

1. Make sure the selection tool is active. By default it is enabled, but if you have used the Pan or

Add annotations tool, you may have to activate it again. To do so, click the button  in the toolbar.

The color of the button changes, to indicate that the tool is activated and can be used. 
The cursor changes into a pointer.

2. Do one of the following:

- To select one object, click it.
- To select multiple objects in one go, hold down the shift key while clicking the objects to include in the selection. Alternatively, you can drag a rectangle around the objects to select them.

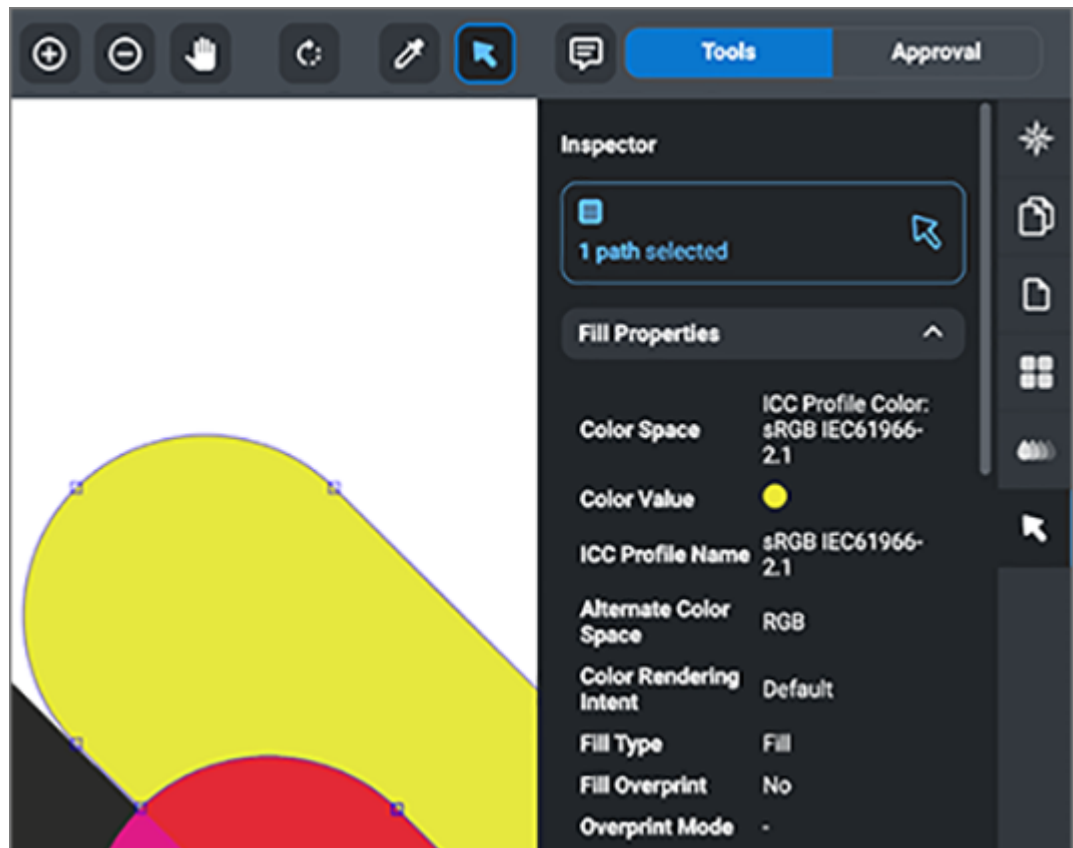


Note: The selection tool only works on the active page. In case of double page view, make sure that the page on which you want to select objects is active, by selecting

it in the Page List. See also [Toggling between double and single page view](#) on page 68.

On the Tools tab, in the sidebar on the right, the properties of the selection are displayed

in the Inspector . At top of the panel, you can see what's contained in the selection. Depending on the selected objects, different categories are possible, such as Text Properties, Fill Properties, Image Properties, Position, etc.



4.2.18. Moving the view horizontally or vertically

If your zoom level is very high and you cannot see the whole document, you may want to move the view.

To move the view horizontally or vertically:

1. To activate the **pan** tool, click the button  in the toolbar.

The color of the button changes, to indicate that the tool is activated and can be used. The cursor changes into a hand cursor.



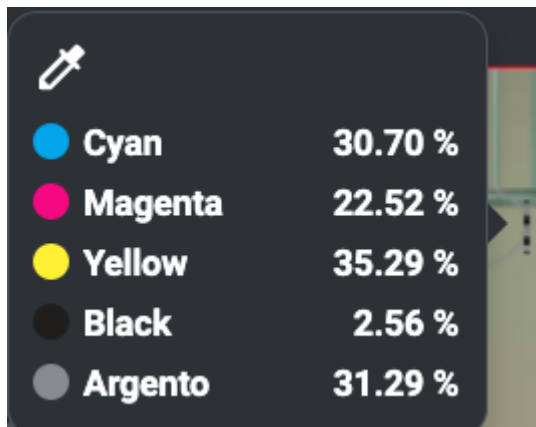
2. Swipe or move the area that you want to see.

4.2.19. Measuring color values

To get to know the exact color values of a certain spot in your document:

1. To activate the **Eyedropper** tool, click the button  in the toolbar.

The color of the button changes, to indicate that the tool is activated and can be used. 
The cursor changes into a cross.
2. Click the spot in the PDF for which you want to know the exact color values.
The separations that make up the color are listed with their corresponding values.



Note: The total ink coverage of the selected spot is shown at the bottom of the Channels tab. See also [Measuring color values](#) on page 67.

4.2.20. Rotating the page view

You can rotate the page view on condition that the rotate button  is displayed in the toolbar.

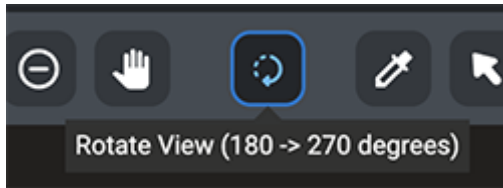


Note that rotating does not change the coordinates of the PDF: it's just the view that is rotated.

To rotate the page view:

1. Click .
The view is rotated to the right by 90 degrees.
2. Click until you have reached the desired rotation.
Every time you click the button, the view is rotated to the right by 90 degrees. For example, clicking twice puts the view upside down.

The tooltip indicates the current degree of rotation (180 degrees in the example below) and the new value when you click once (+ 90 degrees, so 270 degrees in the example). The arrow on the button also reflects the current rotation level of the view.



4.2.21. Toggling between double and single page view

You can toggle between double and single page view on condition that the toggle button is displayed in the toolbar.



To switch from single to double page view and vice versa:

1. Click the spread view button 
The button is highlighted  and the view is adjusted immediately.
2. To switch back to single page view, click .

Note that the initial view (either single or double page view) depends on the configuration in Switch, as well as the way the pages are shown (for example with or without a separate cover page) and the page box the view is based upon.



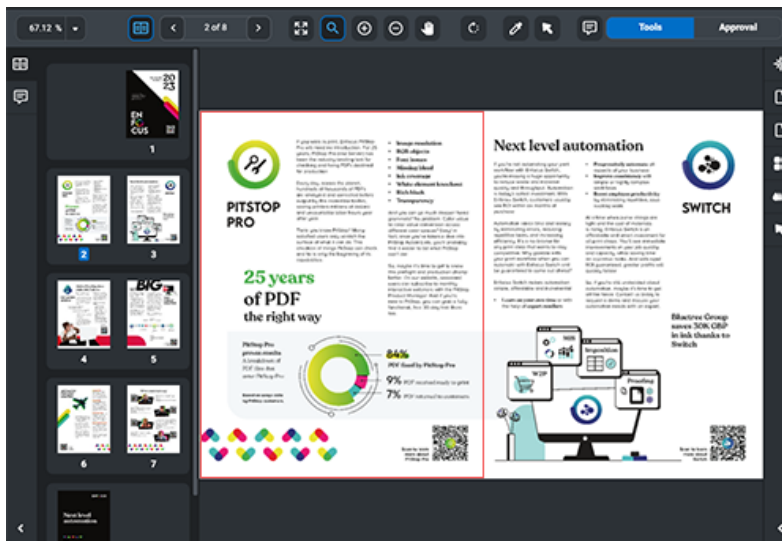
Note:

- In case of double page view, ink coverage and wireframe are only applied to the active page; this is the page of which the page number is highlighted in blue in the Page List. In the work area, the active page is marked with a red box. Note that you can only select objects on the active page.
- We recommend adding comments in single page view, to make sure that the comments are placed correctly.

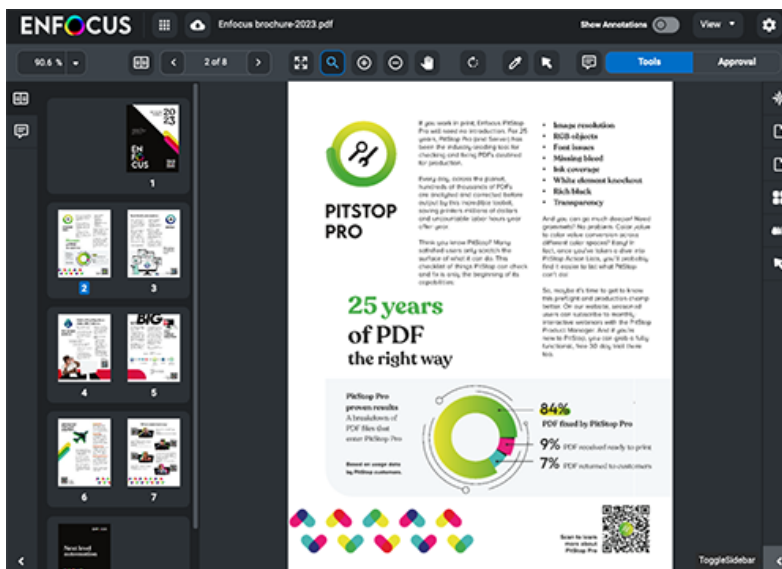
Example:

In the following example, page 2 is selected. The page number is highlighted in blue in the page list.

With Spread view enabled: Both left and right page are displayed in the work area.



With Spread view disabled: Only the selected page is displayed in the work area.



4.2.22. Checking the PDF Report

If a PDF Report is sent along with the PDF that has to be reviewed, you'll find it in the PDF Report tab in the sidebar on the left.

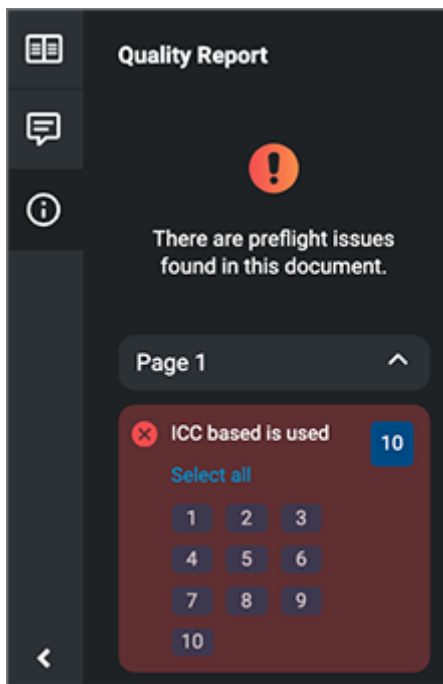
The PDF Report is displayed in the language of the interface, if it's one of the PitStop languages (Dutch, French, German, Italian, Spanish, Chinese or Japanese). Otherwise, it's displayed in English.

1.

Click the PDF Report tab  in the sidebar on the left, to see the content of the Report.

At the top, you may find a number of general issues (under 'Document'). Next, you can find all other issues grouped per page. If no issues were found during the Preflight, a message informs you that the file was preflighted successfully.

2. If the Document or Page sections are collapsed, click the arrow buttons to expand them.
Warnings that do not block preflight are preceded by an orange icon 🚩, whereas blocking or very severe issues are preceded by a red icon. ❌ The number in a blue square indicates how many times the issue occurs on the given page.
3. To see where the issue occurs on the page, click the issue.
You'll see how many times the issue occurs and you can select the objects involved (one by one or all at once).



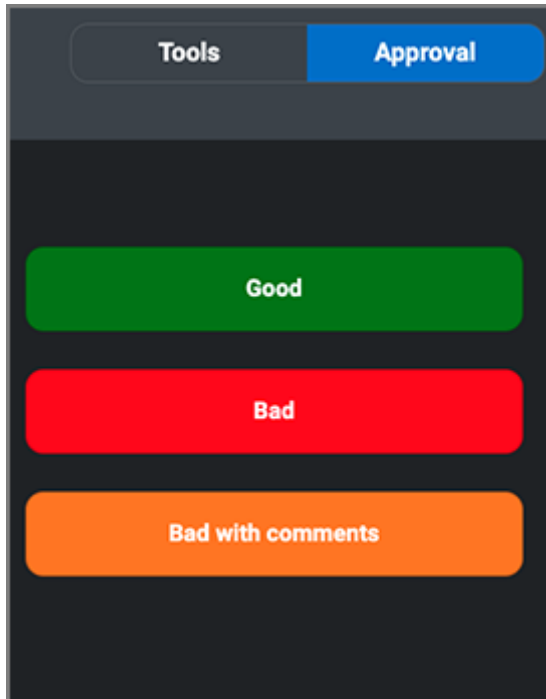
4.2.23. Approving or rejecting a document

After inspection, you must decide whether or not to approve the file.

To do so, proceed as follows:

1. Click the **Approval** tab.
The decision buttons are displayed.
2. Click the button of your choice.
3. Give a comment if requested.
This depends on the setup in Switch.
4. Enter your name and/or your email address if requested.
This depends on the setup in Switch.
5. Confirm your choice.

Once you have reviewed the file, you will be redirected to the website of the sender of the PDF. If you would try to open the file once more using the URL you received via email, you might be able to open it (this depends on the configuration), but it won't be possible to change the approval decision or to send additional remarks afterwards.



Note: It is possible that the sender of the document has set a deadline for reviewing the file. If so, the document link will become unavailable when the deadline expires.

4.3. Handling job collections

Depending on the configuration in Switch, you will receive a link that points to a single PDF that is displayed in the Enfocus Review Viewer, or to a web page that shows a number of files, a so called job collection. Each file of the job collection can be opened and handled in the Viewer (just like single files), but the web page provides some additional features, such as the option to:

- Set a number of collection page preferences, such as the theme and the language of the user interface.
- Create a link to share the job collection.
- Download all files belonging to the collection in one ZIP file (if this option is enabled in the configuration).
- Make an approval decision without opening the file in the Viewer.

- Reviewing all files in the collection at once (if this option is enabled in the configuration).

4.3.1. Changing the job collection page preferences

A job collection page is a page where a number of files that belong together are displayed as one set. You can change the language of the interface and the theme.

To change the job collection page preferences:

1. Open the job collection page through the link you received.
2. To open the Preferences dialog, in the top right corner of the screen, click the Preferences icon . The Preferences dialog is displayed.

3. Select the interface theme of your choice.

Choices are:

- Light
- Dark
- Auto (matches your system settings)



Note: If the Switch admin configured the current theme for dark or light mode only, this option is not available.

4. Select the language you want to see in the user interface.

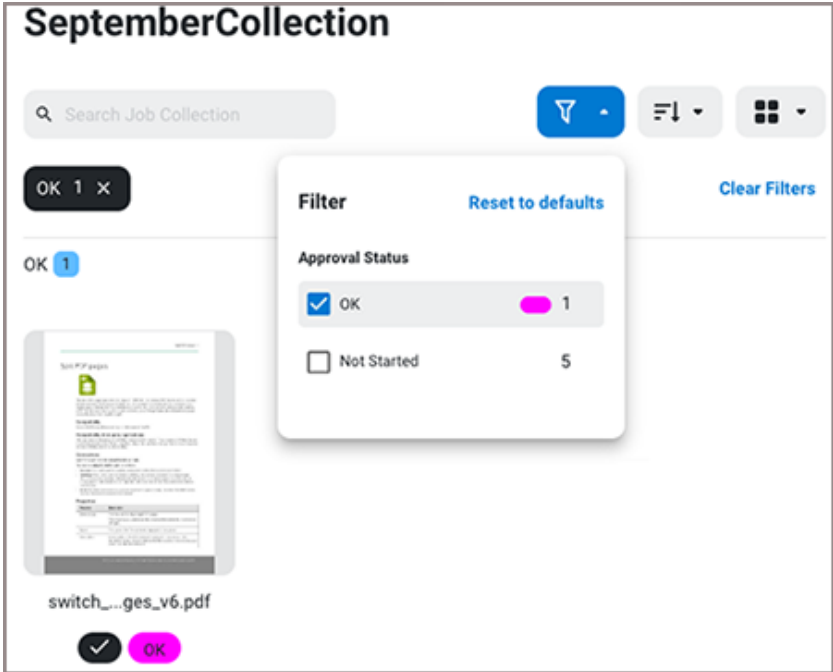
Available languages are the PitStop languages (Dutch, French, German, Italian, Spanish, Chinese or Japanese) + Portuguese, Polish, Norwegian, Swedish, Estonian, Latvian, Lithuanian and Finnish.

5. Close the dialog.

Your changes are applied immediately.

Note that you can also switch between grid and list view, change the sort order of the files that belong to the collection, and filter the files by approval status. You can find more info in the following table.

Button	Description
	Search for a particular file within the job collection by entering (part of the) file name.
	Filter by approval status. Options are: • Not Started • For files that have been reviewed already: the chosen approval option, e.g. the name of the button in the Viewer. You can select several statuses if wanted. When selected, the selected filters are shown at the top of the page as well as the number of jobs matching each filter.

Button	Description
	In the following example, 5 files haven't been reviewed yet. One file has been approved with option 'OK'. 
	Change the sort order: - To change the sort order of the jobs in the overview, select the desired option from the list at the top: - Newest on Top (= default) - Oldest on Top - A to Z - Z to A  Note: The sort order is based on the date the job files were uploaded.
 (grid view is active) 	Switch between grid and list view. Click the button and select the view of your choice.

Button	Description
(list view is active)	

4.3.2. Downloading a job collection



Note: Downloading must be enabled in the configuration. If it is not enabled, the cloud icon (see step 2) will not be visible on the job collection page.

To download all files that belong to a job collection:

1. Click the link you received to open the job collection page.

2. In the top right corner of the page, click the cloud icon. 

All files belonging to the job collection are downloaded and packed in a ZIP file named after the job collection.

4.3.3. Reviewing a job collection

You can review the files within a job collection through the Viewer, as explained in [Step-by-step procedure](#) on page 40. Alternatively, you can review the files through the job collection page, without having to open the Viewer.

To do so, proceed as follows:

1. Open the job collection page through the link you received.
2. On the job collection page, do one of the following:
 - In grid view, either select the thumbnail of the file that you want to review or hover your mouse over it and click the info icon  that appears.
 - In list view, select the row of the file that you want to review.

In the side panel on the right of the screen, you can see the file's review status (e.g. Not started).



Note: in case the file has been reviewed already, the status is 'Done' and the chosen approval option and the approval decision comment (if any) are displayed as well. You can still view the PDF through the Review File button, but you cannot change the approval decision anymore.

3. At the bottom of the side panel, click the **Make Approval Decision** list.
4. Select the approval option of your choice.
5. If applicable, enter a comment and click **Continue**.
6. Click **Close**.

The file's review status on the collection page is updated immediately. You can repeat this procedure for all files in the job collection.



Note: Alternatively, you can review multiple files in a single step, as long as they all have the same approval decision:

- Select the relevant files. Then, next to the label **x Assets Selected**, click **Set Approval Decision**.
- If bulk approval is enabled in the configuration, you can also review *all* files at once using the **Approve All Files** button at the bottom of the right-hand panel.

4.3.4. Sharing a job collection

If you want to delegate the review to someone else, you can share the job collection for 30 days.

To share a job collection

1. On the job collection page, in the top right corner, click the **Share** button .
2. In the dialog that appears, click **Create Link**.
The link is created and displayed in the dialog.
3. To copy the link to your clipboard, click **Copy Link**.
4. Paste the link into an email or chat to share it with another reviewer.

Anyone with this link can view, download, and review the files in this job collection without logging in to Enfocus Cloud. The link remains valid for 30 days.

5. Troubleshooting

In this section, you'll find some known issues and suggestions on how to solve them.

Note that we also have a web page where you can check the uptime status of the Enfocus Cloud Services: <https://www.enfocus.com/en/support/status>.

5.1. The approve/reject buttons are not shown in the correct order

Issue

The buttons in the user interface are shown to the reviewer in a different order than expected/wanted.

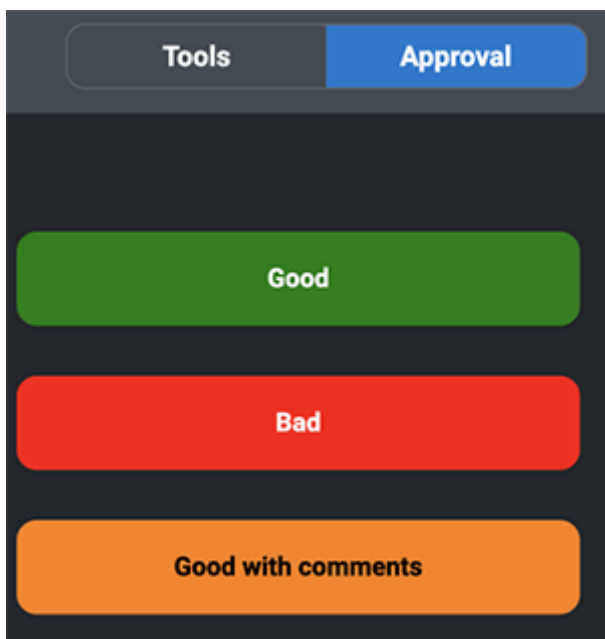
Solution

The order of the buttons is determined by the order in which they were created. There is no way to change the order afterwards.

To change the order, you must remove the outgoing connections of the type 'Reviewed file' and create them again, starting with the folder that should be shown at the top.

In the example below, the output connections were created in the following order:

1. Good
2. Bad
3. Good with comments



5.2. Squares appear in the active PDF

Issue

If a required font is not embedded in the PDF and it's also not available on the Enfocus Review Cloud server, squares are shown instead of the required characters. That is also the case if the font is wrong.

Solution

Select the squares in the Enfocus Review Viewer and check the Font properties. If the font is not embedded, make sure to fix the PDF (for example using PitStop Pro) before uploading it to the Enfocus Cloud.

5.3. Files are sent back to Switch without being reviewed

Issue

When a reviewer clicks the link to review a PDF file, he gets a warning that the file has been already reviewed and sent back to Switch. The reviewer is surprised because he has not yet reviewed the file.

Solution

Check if there is an outgoing connection of the Review app that has the connection type set to **'Timeout'**. The timeout period may be too short, causing the file to move to another folder in Switch before it is actually reviewed.

5.4. Notifications are sent as text instead of HTML

Issue

Reviewers complain that they receive notifications in text instead of HTML format.

Solution

Both the *Mail format* property (of the Mail notification connection) and the *Message format* property (of the Mail send flow element) must be set to HTML.

If that didn't solve the issue, ask the reviewers to check the mail settings of their mail application; it's possible that all incoming mail is converted to text by default. For example, in Outlook 2010 this is the case if **Read all standard mail in plain text** (a security setting in the Trust Center Settings) is enabled.

6. Appendix

6.1. Customizing the post-approval URL

About the post-approval URL

The URL of the web page that will be shown to the reviewer after having finished the review is set in the Customization section of the Enfocus Review Admin Area. It's possible to customize this URL using the parameters described below.

Parameters

Parameter	Meaning	Examples
%option%	Name of the review button clicked by the reviewer	URL entered in the Post-approval Page field: - https://www.mywebsite.com/%option% Resulting URL for users that click the Agree button: - https://www.mywebsite.com/agree" Resulting URL for users that click the Disagree button: - https://www.mywebsite.com/disagree"
%jobid%	Unique ID of the job	URL entered in the Post-approval Page field: - https://www.mywebsite.com/%jobid% Resulting URL for a user who reviewed a job with unique ID ADO05F: - https://www.mywebsite.com/ADO05F
%lang%	Language of the client	URL entered in the Post-approval Page field: - https://www.mywebsite.com/%lang% Resulting URL for a French-speaking user: - https://www.mywebsite.com/fr
%themenam e%	Name of the theme	URL entered in the Post-approval Page field: - https://www.mywebsite.com/%themenam e% Resulting URL for a client with theme name "customer1": - https://www.mywebsite.com/customer1

**Note:**

- Upper case characters are converted to lowercase characters, and spaces are converted to hyphens. For example, if the approval option is 'Approved to Print', in the post-approval URL this will become 'approved-to-print'.
- Parameters can also be combined, for example <https://www.mywebsite.com/%option%/%lang%> will redirect the reviewer to a different page, depending on the user's approval decision and language.

6.2. Granting another user administrator rights

You can grant another user access to the Enfocus Review Admin Area (based on their Enfocus ID), allowing the user to manage reviews.

To do so, proceed as follows:

1. Navigate to:
 - <https://iam.eu.enfocus.cloud/> (EU customers)
 - <https://iam.us.enfocus.cloud/> (customers outside the EU)
2. Sign in with your Enfocus ID.
3. In the top left corner, click the menu icon .
4. Select your organization.
5. In the sidebar, click **Users**.
6. Click the **+ Add User** button in the top right corner.
7. Enter the name of the user who should receive administrator rights and click **Add User**.



Note: Make sure to use the email address linked to the user's Enfocus ID.

The new user appears in the list of users.

8. In the sidebar, click **Groups**.
9. Click the **Administrators** group.
10. In the right-hand panel, click **Add Member**.
11. Select the user.
12. Click **Add to Group**.

The user is added to the Administrators group and now has access to the Enfocus Review Admin Area.

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