enfocus PDF REVIEW MODULE 02

User Guide

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enfocus

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1. About the PDF Review Module

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

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

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

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

2. Setting up the PDF Review Module

2.1. Before you start

Important notice

The PDF Review Module is a Switch module, so the installation and activation of Switch 13 update 1 or higher (Core Engine) is assumed and not explained in this document. For the full procedure, refer to the Switch Reference Guide.

System requirements

Make sure to check the system requirements on the Enfocus website. You can find them in the Support section.

Online trial

It is possible to try the PDF Review Module (for a period of 30 days) without installing the web server component. Instead you use the Enfocus online trial server. In that case, the first three topics described below under *Setup* are not relevant; just make sure to *install the PDF Review app*.

Setup

Before you can start using the PDF Review Module, you must:

- *Install the PDF Review Module on a Windows server.*
- *Configure the settings in the Administration area of the PDF Review Module.* This page is displayed automatically in your default browser after you have installed the PDF Review Module.
- *Activate the PDF Review Module through the Local License Manager.* This allows Enfocus to check your licenses.
- *Install the PDF Review app*, so it becomes available in Switch.

Done? Next you should set up your flows for use with the PDF Review app.

Licensing

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

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

Note: The current license count can be found on the *Statistics* tab in the Administration area.

2.2. Installing the PDF Review Module

The PDF Review Module must be installed on a Windows server. Make sure to check the system requirements on the Enfocus website. Note that the server must have enough disk space to store the (high res) PDF files.*

To install the PDF Review Module:

1. Download and double-click the PDF Review Module installer (Enfocus_PDFReviewModule_<version number>.exe).

   You should have received the download link from your Enfocus Reseller.

2. Follow the on-screen instructions.

   You can choose the language of your choice (only applies to the installation wizard) and change the installation directory. The default installation folder for 64-bit Enfocus products is C:\Program Files\Enfocus.

The PDF Review Module is installed as a Service on Windows. This means that it will start automatically as soon as the system starts. For more information about Windows services, refer to *the Microsoft website*.

You are redirected to the PDF Review Module Administration area. You must log in and preferably also change the password to be able to continue.

** A copy of the PDF files that are sent out for review is kept on the PDF Review server. The location of this folder can be changed if needed (See Changing the location where the files for review are stored.) Once the files have been reviewed (approved or rejected), they are removed from the server.*

2.3. Configuring the settings in the Administration area

The Administration area enables an administrator to customize the application, for example to change the colors, to set up a secure connection, etc. Note that changing the user credentials after installation is recommended; all other configuration is optional and can be done later when it suits you best.

To configure the settings in the Administration area, proceed as follows:

1. Display the Administration login page:

   - If you've just installed the PDF Review module, the Administration login page will open automatically in your default browser.
   - Otherwise, on the server where you installed the PDF Review Module, open a browser and enter `<IP address>:<port number>/admin` in the address bar.

   If you haven't changed the Server settings yet, you can use: `localhost:8080/admin`; if you have changed the settings, the IP address and the port number should match the values entered on the *Server Settings tab*.
   If you have forgotten the server settings, you can check the database file located at C:\Windows\System32\config\systemprofile\AppData\Roaming\Enfocus Prefs Folder\PDF

Review Module\Settings.db. You can open this file using a data browsing tool, such as DB Browser for SQLite (*http://sqlitebrowser.org/*).

2. Enter your user name and credentials.

   The first time you log in, you should use 'Admin' as user name and password.

   Note that in order to use the **Forgot your password?** link, you need to configure the *mail settings* in the administration area. We highly recommend doing that the *first time you log in*.

3. Click **Log in**.
   The Administration area is displayed in the language of your browser. Note that you can change it via the icon in the top right corner of the screen. Note that you must **refresh** the page after having selected (and saved) a different language!

4. On the **User settings** tab, enter a new user name and a password if you haven't done so already and click **Save changes** to confirm.

5. Review all settings and change the defaults as required.

   For an overview, refer to:

   - *Settings - Interface customization* on page 7
   - *Settings - Server Settings* on page 9
   - *Settings - Mail Settings* on page 11
   - *Settings - User Settings* on page 12
   - *Settings - Statistics* on page 12

   If you have entered a value that is not allowed, a feedback message is displayed just underneath the title of the page.

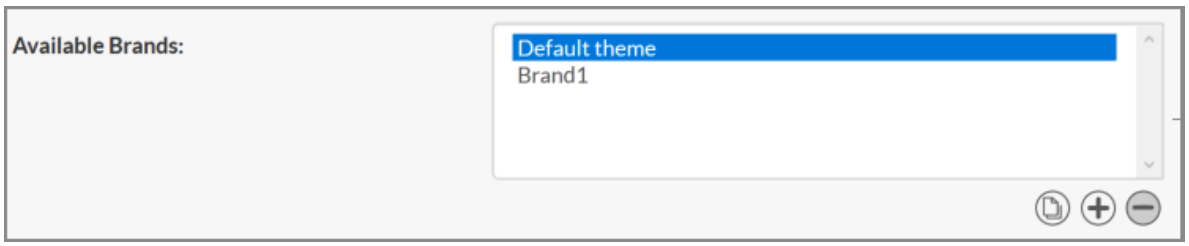
6. Before you leave a tab, make sure to click **Save changes**, otherwise your changes will be lost and set back to the default ones!

7. When you're done, click **Log out**.

2.3.1. Settings - Interface customization

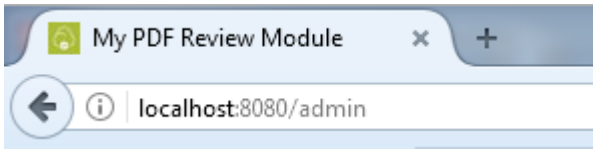
With the settings in this part of the administration area you can 'brand' the PDF Review Module user interface (that will be shown to the reviewer) and provide a corporate look and feel. You can create several brands, in addition to the Default theme, which is used as a fallback in case of issues. When configuring the PDF Review app in Switch, you can decide which brand to use for which jobs.

The buttons below the Available Brands field enable you to duplicate or delete a selected brand, or to add a new brand. Note that the Default theme cannot be deleted.



If you want to see or change the settings of a specific brand, just select the brand in the Available Brands field and the settings will be shown below.

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

Setting	Meaning
Brand Name	Name of the brand. This name will be displayed in the list of Available Brands at the top of the screen.
Brand Description	Description of the brand.
Site Title	Title displayed on the browser tab and in the tooltip when you hover over the tab.  Leaving this field empty is not allowed.
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	Logo of your company. The logo will be displayed in the top left corner of the PDF Review Module interface. Supported file types are PNG, GIF and JPG. Files are scaled if wider than 300 px and higher than 50 px.
Post-approval Page	If no post-approval page is enabled, after having finished the review, the PDF remains present in the HTML5 user interface, but the approval buttons are hidden. If a post-approval page is enabled, the web page of which the URL is entered in the 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.

Setting	Meaning
Support Page	URL of the web page that will be shown to the reviewer in case of problems, such as: • The PDF Review module is not licensed. • The reviewer is not allowed access, because the number of licensed users has been exceeded. For more information about licensing, refer to *Activating the PDF Review Module* on page 13. • The reviewer has clicked the link of a file that has been reviewed already. The URL must start with "http" or "https".
Idle Timeout Page	URL of the web page that will be shown to the reviewer when a session without activity was closed. The time after which the session is closed, is set on the *Server Settings tab*.
Override Job Collection Help	If several jobs have the same Job Collection ID (see the PDF Review app) they will be presented to the reviewer through a web page. You can customize the text or instructions on this web page (just below the title) by entering your own text.
Show message bar about storing cookies	If selected, the first time reviewers are using the PDF Review Module, they will be informed that cookies are used to save their personal preferences, such as the language they've chosen. They will have to click **I understand** to continue.
Color Customization	
Primary Accent Color Primary Accent Text 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. To choose a different color, click the color patch and pick one, or enter the HEX or RGB color code in the correct format, for example: • HEX: #abbe28 • RGB: rgb(171,190,40)

2.3.2. Settings - Server Settings

The settings on this tab allow you to change the server and server port on which the website is running. Changes require a restart of the server.

Setting	Meaning
Site Binding	
IP Address	The chosen value determines which IP addresses can be used to access the PDF Review Module.

Setting	Meaning
	Options: • **All Unassigned IP Addresses** = all IP addresses on the server (including local host) • **127.0.0.1** = only local host • **A particular IP address on the server** = only the selected IP address
HTTP Port	Upon installation, port 8080 is set, but we highly recommend changing the port number. The default HTTP value is 80. If 80 is used, it can be omitted in the server address; e.g. typing `<IP address>/admin` is sufficient to enter the Admin area.
HTTPS Site Binding	
Enable HTTPS Support	If enabled, a secure connection is made when connecting to the PDF Review Module. This triggers the following fields: • **IP Address**: See higher (Site Binding - IP Address). **Note:** To exclusively allow a secure connection, make sure to set the IP Address under Site Binding to localhost. • **HTTPS Port**: Port to be used for a secure connection. The default value is 443. • **SSL Certificate Chain File**: Upload your SSL certificate chain file. This file lists the SSL certificates from the root certificate to the end-user certificate. • **SSL Private Key File**: Upload your private key file. The private key file is used to verify the connection using the SSL certificates. **Note:** More details on creating a valid certificate can be found *here*.
Session Management	
Idle Timeout (in seconds)	This setting determines the time after which a session without activity is closed. The default is 600 seconds (10 minutes), but values between 300 seconds (5 minutes) and 7200 seconds (2 hours) are possible. After the configured time, a dialog pops up and the reviewer can extend the session if required. If the reviewer does not want to extend the session, or if

Setting	Meaning
	there's still no activity detected, the "Idle Timeout Page" (set on the *Interface customization tab*) is displayed. **Note:** Sessions without activity are also included when counting the concurrent users. By closing those sessions, you free up slots for other users. Refer to the paragraph about the *PDF Review Licensing*.
Link Timeout (in days)	This setting determines how long a link remains valid after the file was approved or rejected. During that time period, users can still open the PDF, and view the chosen option, the review comments and annotations (if any), but it's not possible to make any edits. If the job is part of a job collection, the PDF remains present on the web page during the set period of time.

2.3.3. Settings - Mail Settings

These settings are required to be able to request a new password through the **Forgot your password?** link.

Setting	Meaning
SMTP Host	The URL or IP address of the SMTP email relay server of your company network, for example: smtpmail.mycompany.com Note that the PDF Review Module does not support the encryption and authentication protocols (such as SSL, TLS,...) required by most email providers. The solution is to set up a local SMTP server that can serve as SMTP email relay server (meaning that it is configured to accept email from inside your network, either anonymously or with basic authentication, over an unencrypted connection). Configure the PDF Review Module web server to send mail to this local SMTP server, which should then further pass on the mail with the correct credentials.
SMTP Port	Port used by the SMTP server. The default port number is 25.
Sender Name	The sender's name as shown in outgoing email messages e.g. in the "From" field.
Sender Address	The sender's *reply* address for outgoing email messages.
Encryption	Options are: • None • StartTLS (optionally with SSL Verification) • TLS (optionally with SSL Verification)
Authentication	If selected, the user name and password of the mail account.

Note: First save your changes, then use the **Send Test Mail** button to verify the connection. The test mail is sent to the (mandatory) email address entered on the User Settings tab.

2.3.4. Settings - User Settings

These are the user credentials needed to log in to the Admin area. You can change them as required.

Setting	Meaning
Username	User name needed to log in to the Admin area (4 characters or more)
Choose Password	Password needed to log in to the Admin area. Requirements: • At least 8 characters, a combination of at least three out of the four different types (listed below) • Lower case letters • Upper case letters • Numbers • Special characters (!@#$%^*_+={}[]:;?,.)
Repeat Password	The passwords must match.
Email Address	The email address of the administrator. Instructions in case of a forgotten password will be sent to this email address. Note that the email address entered in the Forgot password dialog must match this email address, otherwise no mail will be sent and you will not be able to recover your password.

2.3.5. Settings - Statistics

On this tab, you can find information with regard to your license.

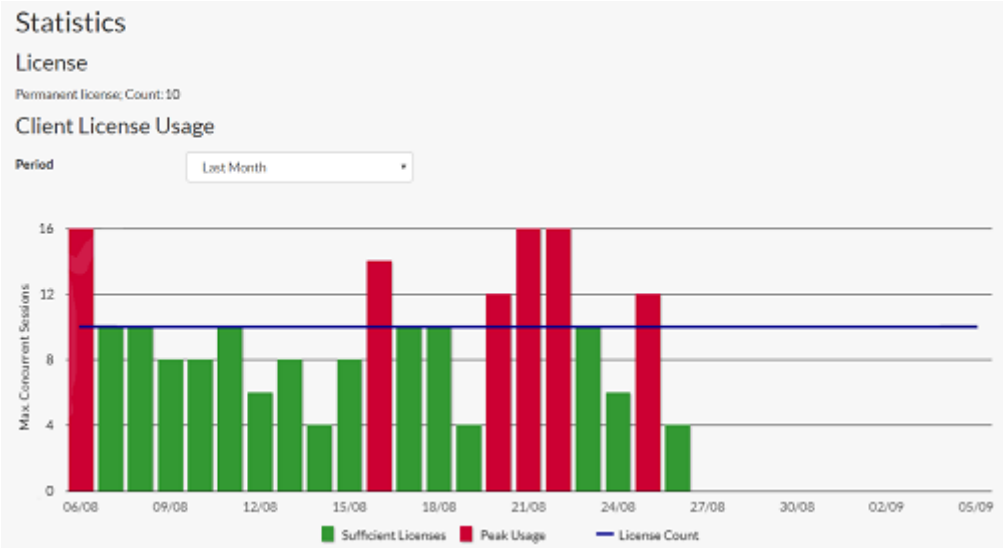
Under **License**, the type of your license (e.g. 'permanent') and the license count (e.g. 10) are mentioned. The license count indicates the number of users allowed to access the PDF Review Module concurrently.

Under **Client License Usage**, you get an overview of the actual number of users having accessed the PDF Review Module **at the same time** compared to the license count. You can visualize this information for a period of your choice (last day, last week, last month).

The green bars indicate that you had enough licenses available for all users trying to access the PDF Review Module ("Sufficient licenses").

The red bars indicate that there were more concurrent users than allowed according to your license ("Peak usage"). This includes the extra users that Enfocus allows on top of the license count (during 2 hours a day (in total), with a maximum of two times the number of licensed users).

If the number of concurrent users often exceeds the license count, you're advised to buy extra user licenses to avoid that reviewers get blocked when they try to use the application.



2.4. Activating the PDF Review Module

To enable Enfocus to check if you have licensed the software, you must enter the product key you received from your Enfocus reseller.

Note: This is also required when upgrading to a new major version of the PDF Review server. In that case you have to enter the upgrade key you received from your reseller.

Before you start:

- Your system must have internet access to communicate with the Enfocus web server.
- You must have a product key.
- If you're using a firewall, make sure to allow the PDF Review Module to communicate with *https://licensingservices.esko.com* using ports 80 and 443.

To activate the PDF Review Module:

1. Locate the Local License Manager.

   The Local License Manager is a small application that allows you to manage the licenses of all your Enfocus products. It's installed with the PDF Review Module. The default location is: C:\Program Files\Enfocus\Enfocus Local License Manager <version e.g. 19.0.0> \enfocusLMloc.exe

2. Double-click the executable.
   The Local License Manager main screen appears. It gives an overview of the Enfocus products you have licensed with their license status.

3. Click the **Activate** button (in the bottom left corner).
   The **Enfocus Software Activation** dialog box opens.

4. Make sure the **Off-Line Mode** option is disabled.

   This option is only relevant if you don't have internet access.

5. Enter your Enfocus ID and password.

   The Enfocus ID is a free account that is used for all communication with Enfocus. If you don't have one yet, click the **Create Enfocus ID** link and follow the on-screen instructions.

6. Enter your product key by doing one of the following:

   - Type or copy-paste your product key in the text field.
   - Browse to your product key license file (*.html) or drag it to the text field.

7. Click **Activate**.
   Your system communicates with the Enfocus web server and activates the PDF Review Module. If everything goes well, "PDF Review Server" is mentioned in the Activated Licenses pane, with a green checkmark next to it. If you have purchased extra user licenses, there will an extra entry: "PDF Review User".

8. To close the dialog, click **Close**.

9. Close the Local License Manager.

You have successfully activated the PDF Review Module. Note that you can find license information (such as the status and license count) on the *Statistics* tab in the Administration area of the PDF Review Module.

2.5. Installing the PDF Review app

The PDF Review app is a free Switch app available for download in the Enfocus Appstore.

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

To install the PDF Review app in Switch:

1. Go to the *Enfocus Appstore*.

2. Search for the PDF Review app and click the icon, to go to the detail page.

3. Click the **Get it now** button.

4. If you're not signed in yet, enter your Enfocus ID credentials.

5. Choose the number of licenses you need (one for each Switch installation that should have the app).

6. Click **Next**.

7. Select for each of the requested licenses a particular Switch installation.

8. Click **Assign now**.
   The app is downloaded to the selected Switch installation(s).

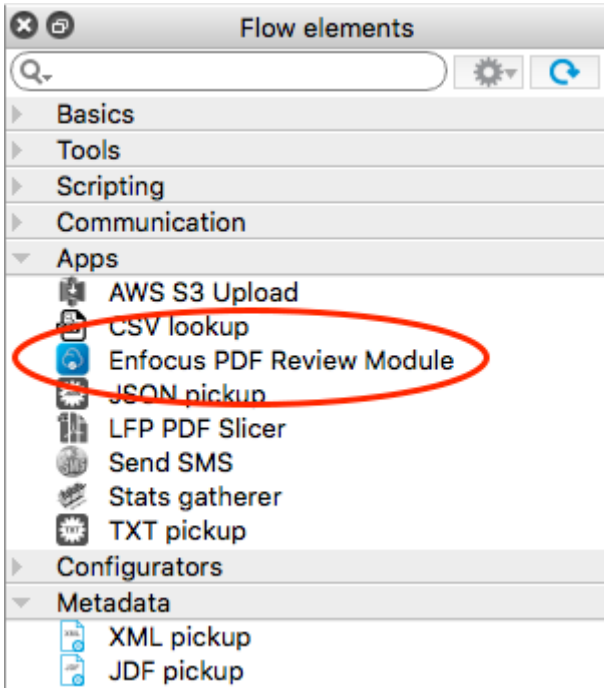
9. Do one of the following:

- 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 sign in to Switch, the app is installed automatically in the background. You don't have to do anything.

You will find the PDF 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. In that case, we recommended updating the server too (see *Installing the PDF Review Module* on page 6), so you can make use of the new features. Note that version 5.0 of the app is compatible with version 02 of the server.

3. Configuring Switch flows for the PDF Review Module

3.1. Introduction

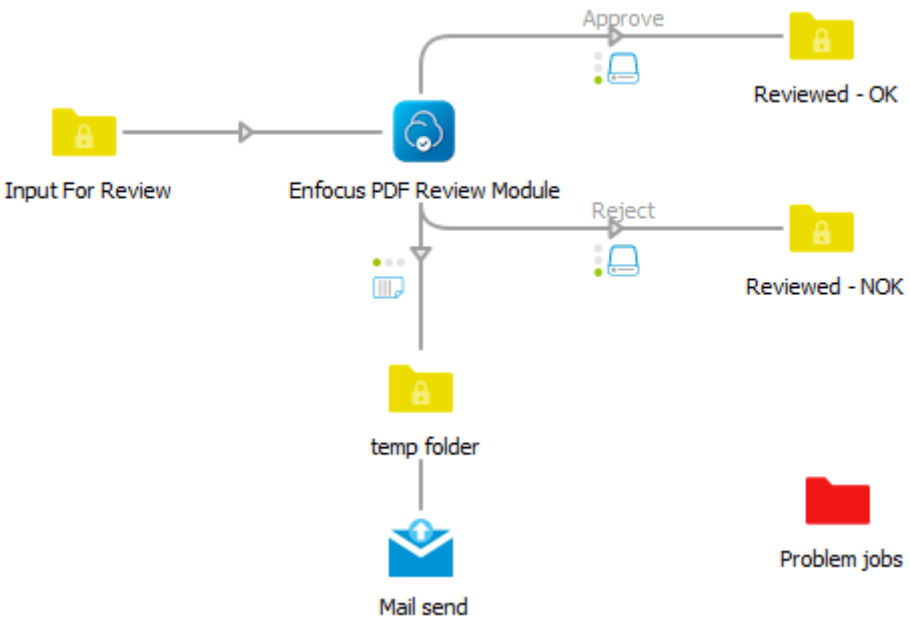
Once you have set up the PDF Review Module as described in the previous chapter, you can use the PDF Review app in your Switch flows.

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

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*.

Example Switch flow

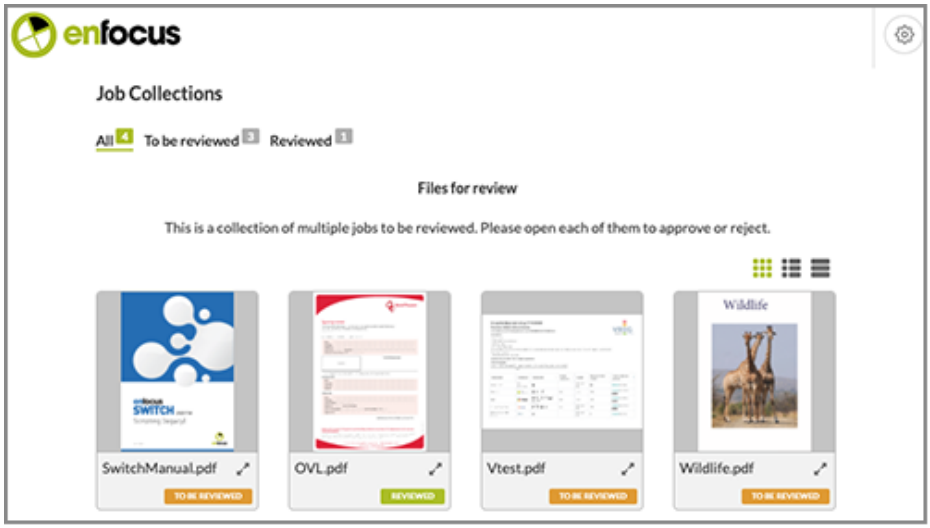


As soon as a PDF file arrives in the input folder, it is uploaded to the PDF Review server. After it has been uploaded to the server, it is sent to the outgoing log connection (Mail send in this example), so a notification can be sent.

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

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

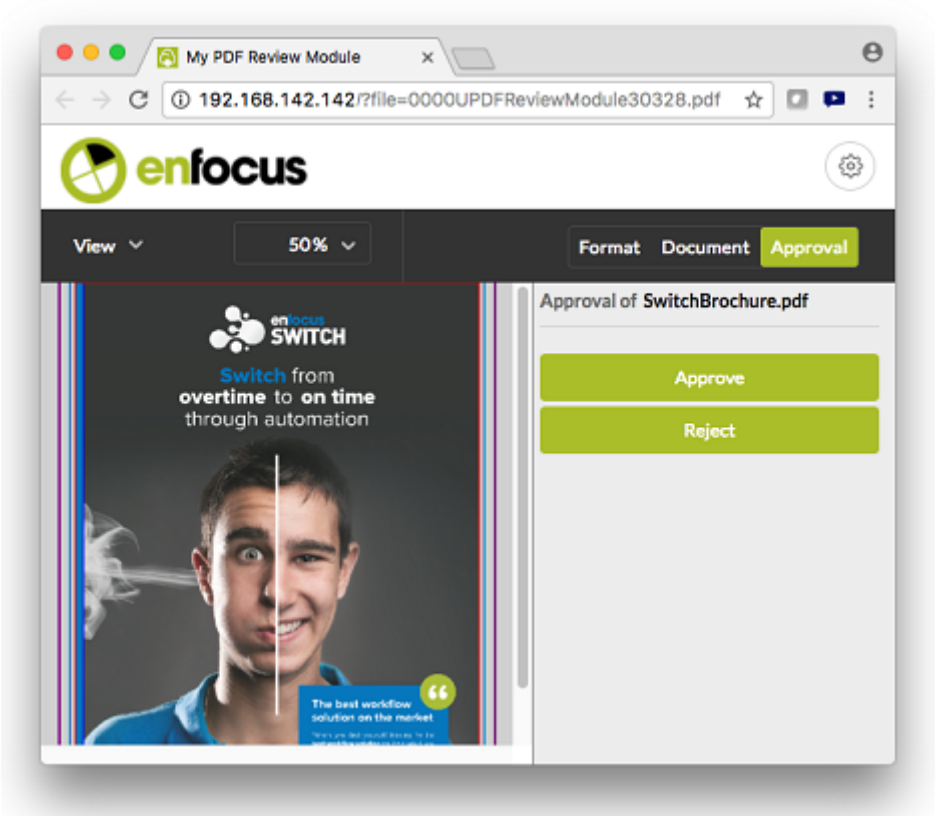
When the file is part of a job collection, the URL in the notification brings you to a web page, similar to the one shown below. It displays all files belonging to the job collection. Just click a file to open it in the PDF Review Module user interface.



When the file is not part of a job collection, the file is immediately opened in the PDF Review Module user interface, as shown below.

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

Note the names of the buttons (determined by the connections).



3.2. Step-by-step procedure

The PDF 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 PDF 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/PDF Review Module Interface. If the connection has no name, the name of the output folder will be used.
   - The *Carry this type of jobs* property must be set to *Data*!
   - The order of the buttons in the PDF Review Module 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.
   - The color of the buttons can be modified (see the 'Apply color' option in the *App properties*).
   - The outgoing connections have 2 extra properties: *Enable review comments* and *Accept PDF with document comments*.
5. Define another outgoing connection that will take care of the notification to the reviewers:
   a. Drag a **Mail send** element to the canvas.
   b. Drag an outgoing connection from the app to the Mail send element (an intermediate folder is added automatically).
   c. Make sure the *Carry this type of jobs* property is set to *Log*!
   d. Configure the **Mail send** properties:
   - *Body template* must be set to *Associated with job* (to make sure that the correct link is sent to the approver).
   - *Message format* must have the *same value as Mail format* in the PDF Review app.

   For the other properties, refer to the *Switch Reference Guide*.
6. Configure the properties of the PDF 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!

7. Save your flow, activate it, and check if it behaves as expected:
   - Upload a file to the flow.

     Note: It's also possible to submit password-protected PDFs. In that case, you must supply the reviewer with the password, so he/she can enter it upon opening the PDF in the HTML5 browser.

   - Check if it 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 PDF Review Module?
   - 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.
   - Note that in case of a full disk, you will get an error message in Switch (Upload failed with error code 500 - There is not enough space on the disk).

3.3. PDF Review app - Properties Overview

Connections

The app expects at least one incoming connection, one (but usually more) outgoing data connection and one outgoing log connection.

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

The *outgoing **data** connections* are used to move the reviewed files to the appropriate folder. The *names* of the connections will be displayed as buttons to the reviewer. If the connections have no names, the folder names will be used. Note that the order in which the connections have been made determines the order in which the buttons will be displayed in the HTML5 user interface.

The outgoing data connections have a number of properties that affect the PDF review functionality:

Property	Meaning
Color	The color of the connection can determine the color of the button in the HTML5 user interface, on condition that *Apply color* (in the PDF Review app) is set to *Yes* (see below).
Enable review comments	If this option is enabled, the reviewer is able to give review comments after clicking the decision button, on condition that *Use comment properties of outgoing connection* (in the PDF Review app) is enabled.

Property	Meaning
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 *Use comment properties of outgoing connection* (in the PDF Review app) is enabled.
Enable translation	The *names* of the connections, or (if they have no names), the names of the *output folders* 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.

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

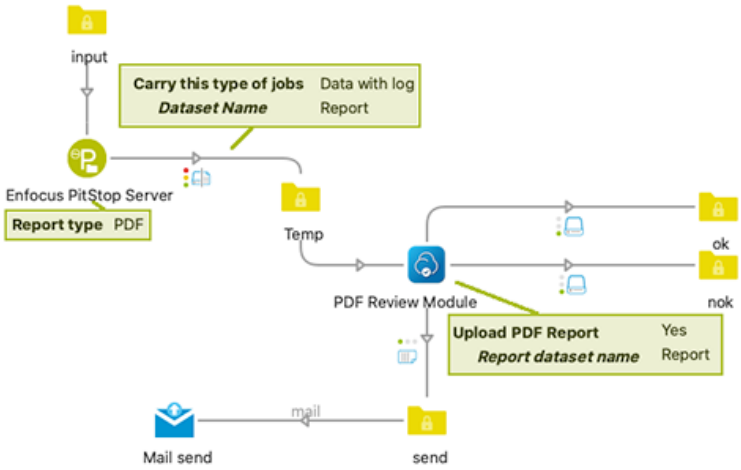
Properties detailed information

Property	Meaning
PDF Review web server	Options: • Online trial server: Select this option if you want to use the Enfocus web server to see how the PDF Review Module works. In that case, you don't have to install and configure the PDF Review Module on your own web server. The trial period is limited to 30 days and there's also a limit on the file size (max 100MB). The trial starts with the first file upload. *This option is available as of version 2.0 of the app. Upgrade via the Enfocus Appstore if you want to use the online trial. It's free.* • Local PDF Review server: Select this option to connect to the server on which you have installed the PDF Review web server. This activates the *URL of the PDF Review web server*. **Format:** <http: or htpps:><IP address or localhost>:<port number> **Examples**: http://localhost:8080 (for testing purposes), https://192.168.142.233:89 Refer to the *Server settings* in the Administration area.
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)

Property	Meaning
	Note: Make sure to that the *Message format* property in the Mail send flow element has the same value (i.e. both plain text or both HTML).
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 the PDF Review Module is used. • Built-in: Define the message text using the *Body text* field that pops up. Choose **Edit multi-line text** (plain text) or **Define multi-line text with variables** (text with variables) to edit the body text. • 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. **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 on the server, by adding the following Switch variable: [Job.PrivateData:Key="com.enfocus.PDFReviewModule.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!
Branding	Determines which brand (i.e. look and feel) will be used. If the entered brand cannot be found in the *Interface customization settings* on the PDF Review Module server, or if this field is empty, the default brand will be used. **Note:** If you use the option 'Select from library', you'll get the list with all available brands. The numbers between brackets (= the brand IDs) do not correspond with numbers added to brand names in the Admin section of the server; these are only added to distinguish between duplicates.
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 the PDF Review Module. • **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:

Property	Meaning
	• *View layers*: Ability to view layer properties of the document. • *View comments*: Ability to view comments in the document. • *View format tab*: Ability to view the Format tab. This is especially useful if a PDF Report is uploaded, because it allows the reviewer to get more information about the reported issues. • *View document tab*: Ability to view the Document tab. • *View rulers*: Ability to show or hide the rulers as required. • *View page boxes*: Ability to show or hide the page boxes as required. • *View guides*: Ability to show or hide the guides as required. • *View wireframe*: Ability to display the document in wireframe mode. • *View rotation*: Ability to rotate the document. If enabled, view rotation buttons are displayed in the user interface. • *View ink coverage*: Ability to show or hide an ink coverage heatmap. • *Enable double page view*: 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.

Property	Meaning
	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.
Fail jobs after timeout	Allows you to set a timeout for non-processed files, to make sure that files that were not reviewed after a certain period of time are moved to a particular folder. Options: • No: No timeout defined • Yes: Timeout defined If set to *Yes*, fill out the following properties: • *Unit*: Minutes, Hours, Days (unit for the next property) **Note:** You can also exclude weekend days (and choose which one(s) you want to exclude). • *Timeout delay*: Number of minutes, hours, days (as set in Unit) that the PDF is allowed to stay in review mode. • *Fail connection*: Name of the connection or folder where the file will go to after the defined period of time. All valid output folders are listed; you can select the one of your choice. **Note:** If you have chosen the Problem jobs folder, make sure you have a Problem jobs folder in your workflow!
Job collection	Allows you to determine whether or not jobs should be presented to the reviewer as a set or collection of documents. Options: • No: Each document is presented separately. The reviewer will receive a separate mail for each document. • 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. This opens up the following fields: • Job collection ID: This ID is used to determine which jobs belong together. It's also used for the link that will be sent to the reviewer. • Job collection title: This text will be shown as title on the overview page that lists the PDFs that are ready for review. • Resend job collection email: This option determines if and how often an email with the URL of the email is sent to the reviewer. • Unit (Days, Hours, Minutes)

Property	Meaning
	• After amount of time
Upload PDF Report	If set to Yes, you can upload the Preflight Report to the PDF Review server and to 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 PDF Review app through a *data with log* connection. Note that in the PitStop Server configurator, you should choose *PDF* as report type (not one of the other options). It's not necessary to certify the PDF (but it is allowed). 
Apply color	Allows you to use the color of the outgoing data connections for the corresponding buttons in the HTML5 user interface. • Yes: Use the color of the connection for the corresponding button. • No: Ignore the color of the connections. The color of the decision buttons depends on the *Interface customization settings* in the Administration area of the PDF Review Module (*Color customization*).
Default unit	Determines the default unit of measurement in the HTML5 user interface. Options: • pt (point) • p (pica) • in (inch)

Property	Meaning
	• f (foot) • mm (millimeter) • cm (centimeter) • m (meter) **Note:** The reviewer can overrule the default by changing the unit via the Preferences button.
Allow download	Determines whether or not the reviewer has the right to download the PDF file (including review comments if any) to his 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. • No: There will be no button to download the PDF.
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 • Opaque **Note:** Not sure how to extract the review comments afterwards? Refer to *Finding review comments in Switch*.
Use comment properties of outgoing connection	Determines whether or not the values of *Enable review comments* and *Accept PDF with document comments* 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 *Enable review comments* property of the outgoing connections); PDFs with annotations are always accepted (regardless of *Accept with document comments*). • Yes: The properties of the outgoing connections are taken into acocunt. The ability to add review comments depends on *Enable review comments*; the ability to submit PDFs with annotations depends on *Accept PDF with document comments*.

Property	Meaning
Connection status	This property is used to verify if the connection to the PDF Review web server is valid. To be valid, at least one log and one data connection must be defined. 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).

Mail send

A **mail send** flow element is required to make sure the reviewer is notified of the file that is ready for review.

If used with the PDF Review app, the following is mandatory:

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

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

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.

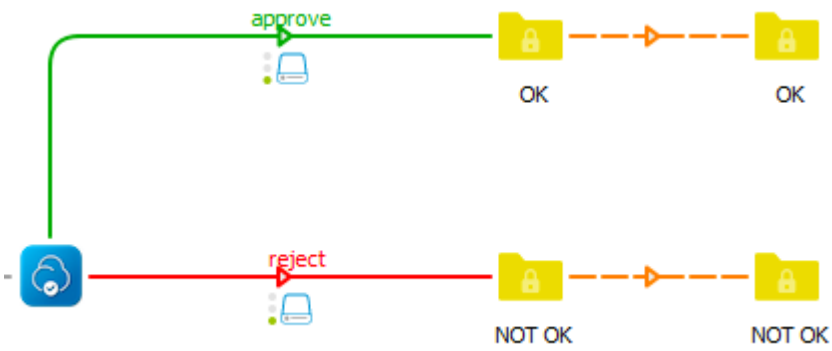
Both methods require that you make changes to your Switch flow BEFORE the files have been reviewed. Once the reviewed files have reached an output folder, the unique prefix has been removed and the metadata can no longer be accessed through the Inspect jobs dialog.

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

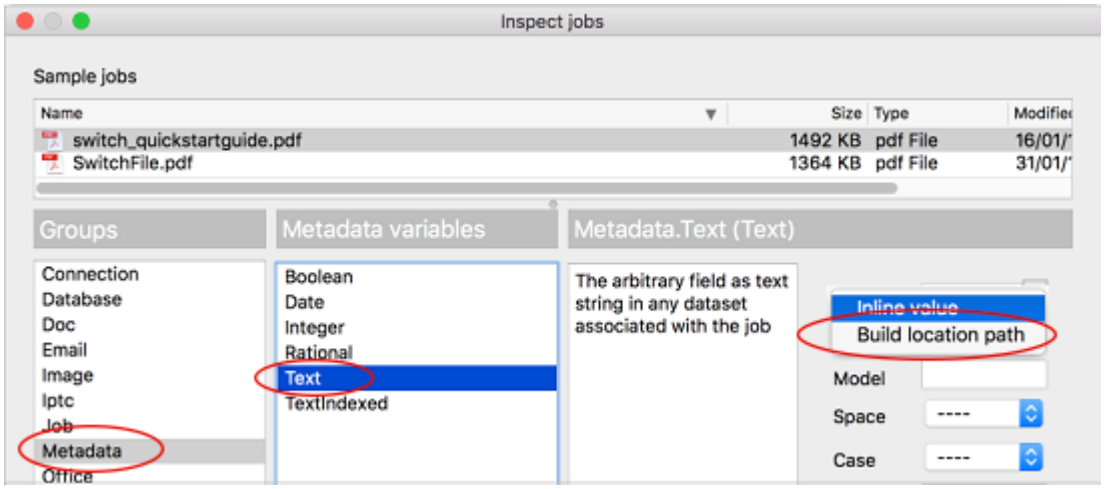
3.4.1. Checking metadata through the Inspect jobs dialog

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.

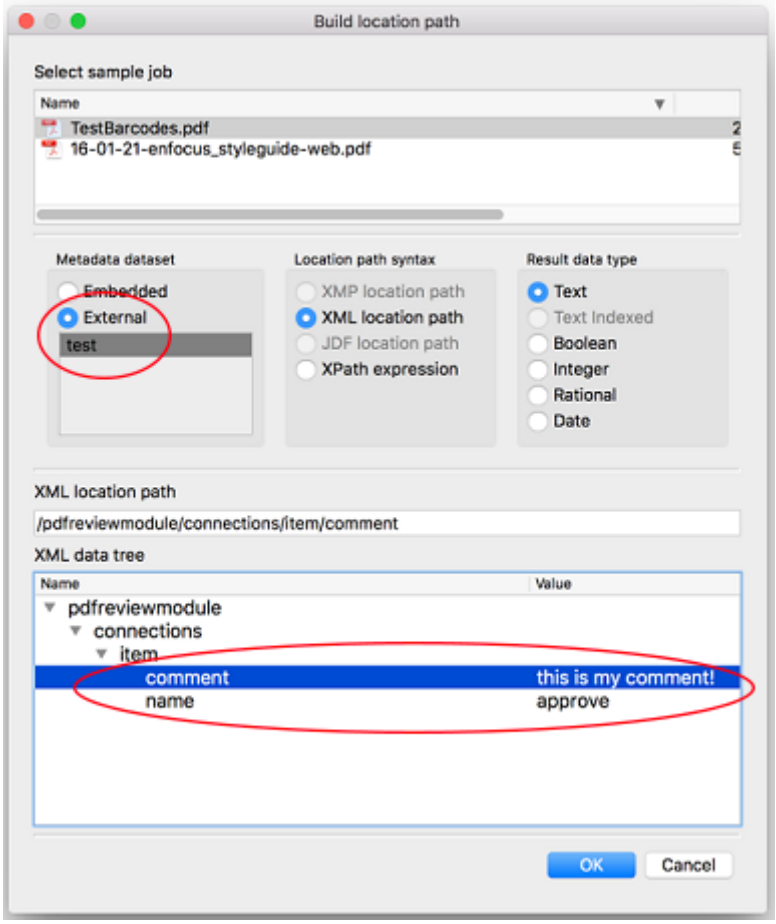


4. Activate and test the flow by dropping some PDF files on the input folder and reviewing them (for example with a comment, with a couple of sticky notes etc.).
5. Stop the flow.
6. Click the **Inspect jobs** button in the tool bar and click Metadata - Text - Path and choose Build location path.



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'.
9. Expand the XML data tree in the bottom field until you find the data you're looking for.
10. Repeat step 7 - 9 for all reviewed files.

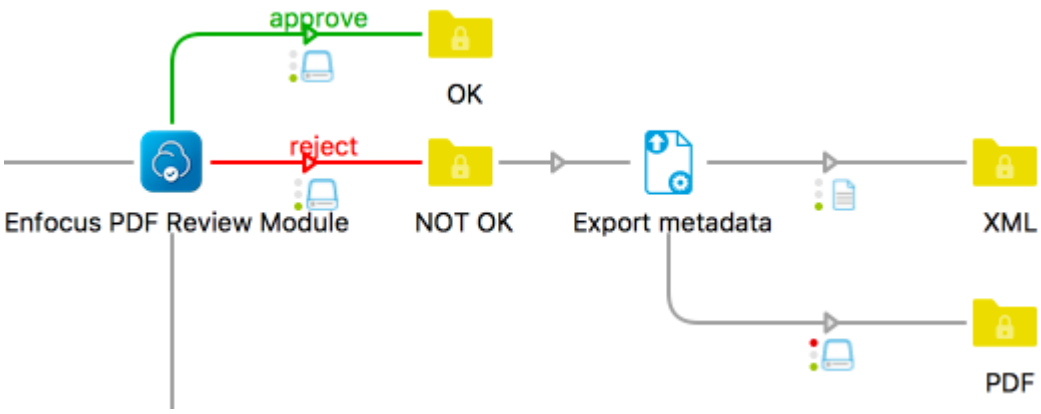


3.4.2. Exporting metadata

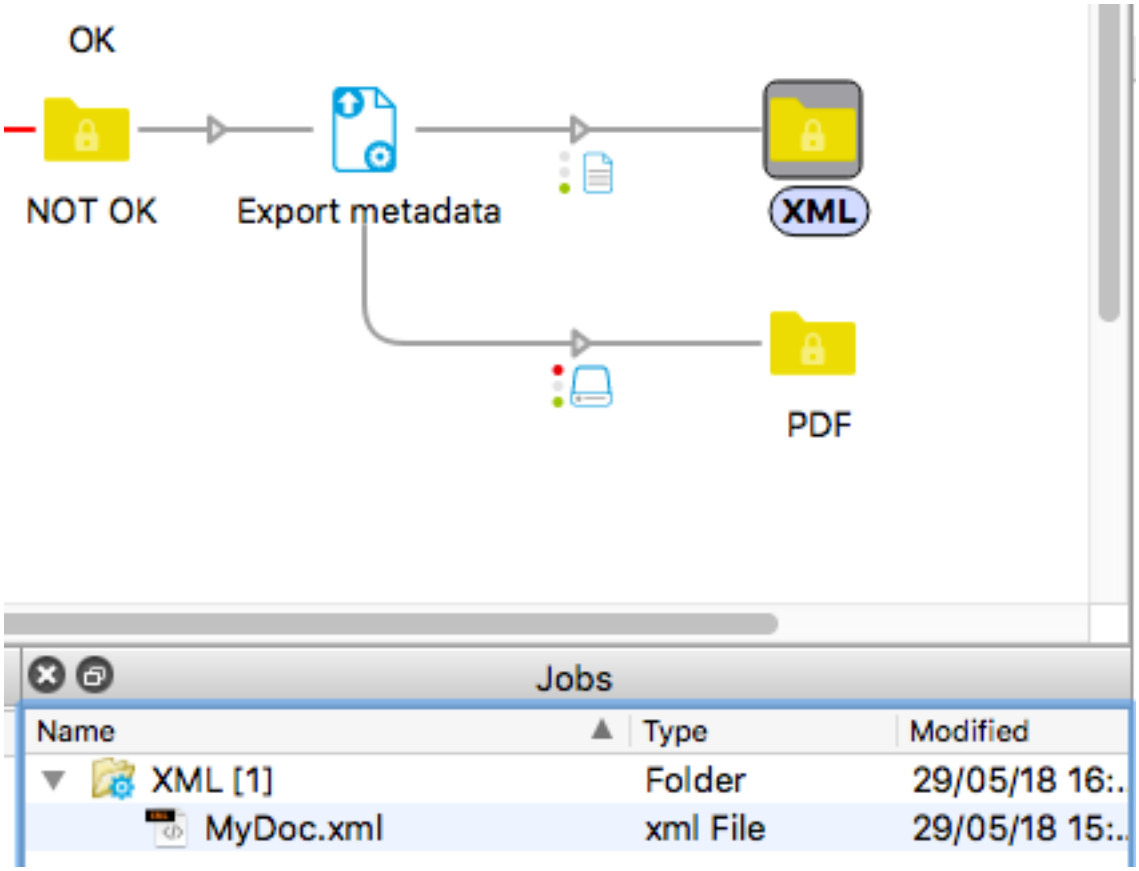
This method allows you to export the metadata to a separate metadata file (XML or opaque, depending on the chosen dataset type in the app properties).

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 PDF 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 PDF 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 opaque) can be found in the Jobs pane.



4. Reviewing a file using the PDF Review Module

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.

Note:

- Because of the small screen, some functionality (like the tool buttons and the Format and Document tab) may be unavailable on a smartphone, but the approval buttons are always present. Note that holding the phone horizontally gives access to more functionality.
- On a phone, if the tool buttons are not available, the pan tool is activated by default, so you can use your fingers to move the view and to select and drag objects. You can touch the screen with 2 fingers to zoom in or out.

4.1. Step-by-step procedure

To review a file in the PDF Review Module:

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.

   a. In case of a web page, click the file you want to review.

   b. If the file is password-protected, enter the password.

   The PDF is displayed in an HTML5 browser, the PDF Review Module user interface. We recommend using Google Chrome. If you're using Safari, the page may load slowly and you may have to refresh it.

   Note: The first time you're using the PDF Review Module 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 31. Note that is not possible to edit the file.

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

   For the full procedure, refer to *Adding, editing and removing comments* on page 40.

   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.

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

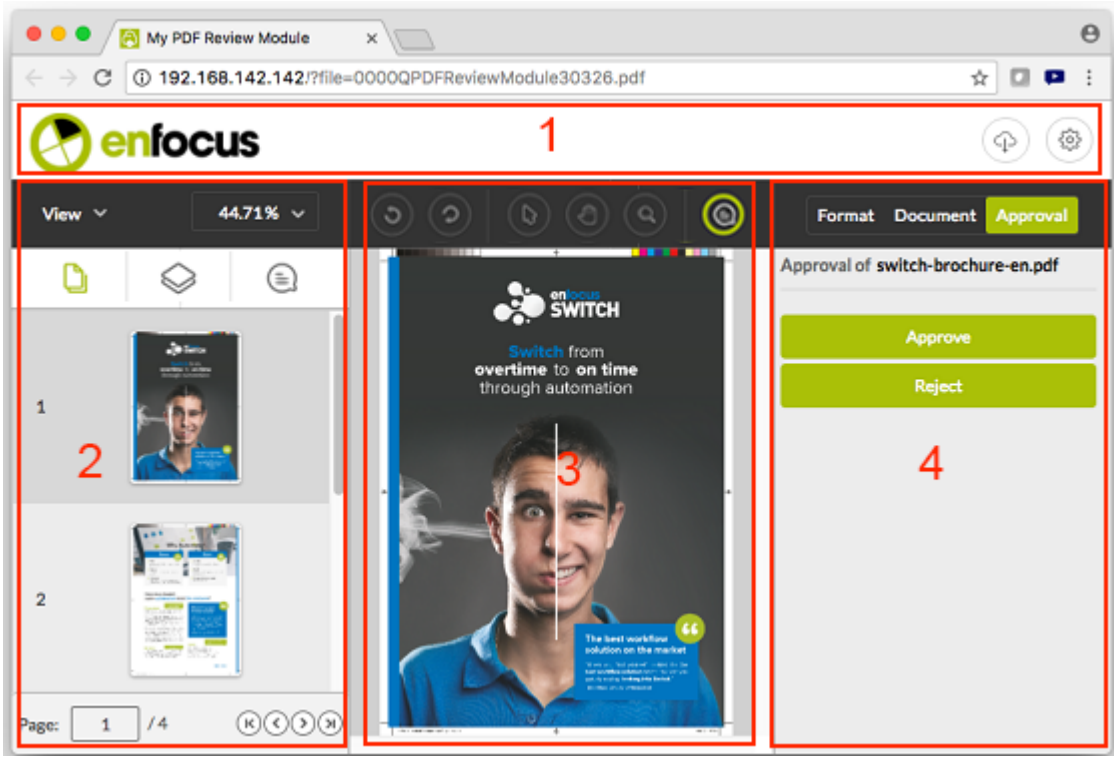
If you received the URL of a web page, the file you just reviewed is part of a job collection. Additional job files will be added whenever they are available for review. You may get a notification, but that depends on the configuration. See also *Using a job collection web page*.

4.2. User interface and functionality

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. The button in the top right corner, gives access to the User Preferences dialog, where you can change the language and the unit of measure. There may be a second button that allows you to download the PDF file locally (including the review comments if any) before sending your approval decision.	*Changing the language of the user interface* on page 34 *Changing the unit of measure* on page 34
2	The left part of the screen is the **sidebar**. The sidebar can be collapsed or expanded (as in this example) and can contain 4 different tabs: • **Thumbnails** of all pages (this tab is always available) • **Layers** if any (available if there are no layers in the document, or if the function is disabled in Switch, this tab is absent) • **Comments** (available if the *View comments* functionality is enabled in Switch) • **PDF Report** (available if *Upload PDF Report* is enabled in Switch and PitStop Server is configured to provide the PDF Report) The **View** menu above the tabs allows to hide or show certain screen elements, such as page boxes, rulers and guides, etc. (if enabled in Switch). You can also zoom in or zoom out as required.	*Walking through a multi-page PDF* on page 39 *Viewing or hiding layers* on page 40 *Adding, editing and removing comments* on page 40 *Viewing or hiding screen elements* on page 35 *Changing the zoom level of the PDF file* on page 37 *Checking the PDF Report* on page 47
3	The central part displays the PDF file. The **toolbar** gives access to a number of different tools:	*Toggling between double and single page view* on page 46 *Rotating the page view* on page 45

#	Area	Functionality
	  From left to right: • Fit page button to fit the view to the size of one page. • Button to toggle between single and double page view. This button is not always displayed; it depends on the configuration. • Two rotate tools. Just like the single/double page view button, they may be absent, depending on the configuration. • Selection tool (which behaves like the PitStop Pro selection tool). • Pan tool (for use on a tablet). • Zoom tool (to take a closer look at specific areas). • Add comments tool (depending on the configuration). The tool that is active is highlighted (in this example: the *add comments* tool).	*Viewing the properties of one or more objects* on page 44 *Moving the view horizontally or vertically* on page 45 *Adding, editing and removing comments* on page 40 *Zooming in on certain areas of the PDF file* on page 38
4	The **right panel** can contain 3 tabs: • **Format** provides information about the current page (size, orientation, page boxes) and any selected objects (text, art work, images), for example fill and stroke properties, position, ... • **Document** displays the document properties, and details about the fonts and separations used in the PDF. • **Approval** contains the reject/approve buttons as configured in Switch. This tab is always present. The active tab is highlighted (in this example: the Approval tab). **Note:** To save space, this panel may be collapsed. It will be expanded automatically	*Viewing the properties of one or more objects* on page 44 *Viewing page properties* on page 42 *Viewing document properties, fonts and separations* on page 43 *Reviewing a file in the PDF Review Module* *Approving or rejecting a document* on page 48

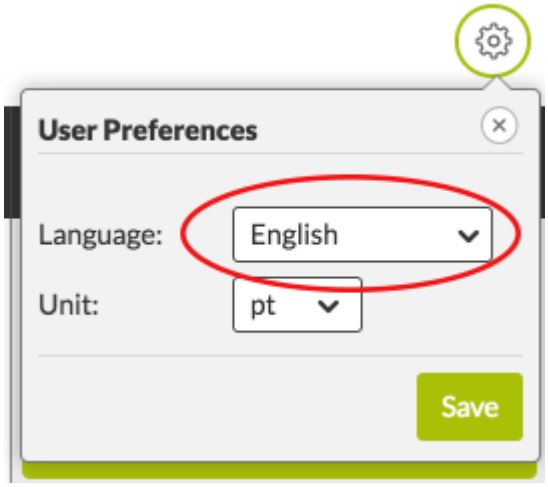
#	Area	Functionality
	whenever you click one of the tabs at the top.	

4.2.2. Changing the language of the user interface

By default, the PDF Review Module is opened in the language of your browser.

To change the language of the PDF Review Module user interface:

1. In the top right corner of the screen, click .
2. In the menu that appears, open the **Language** list.



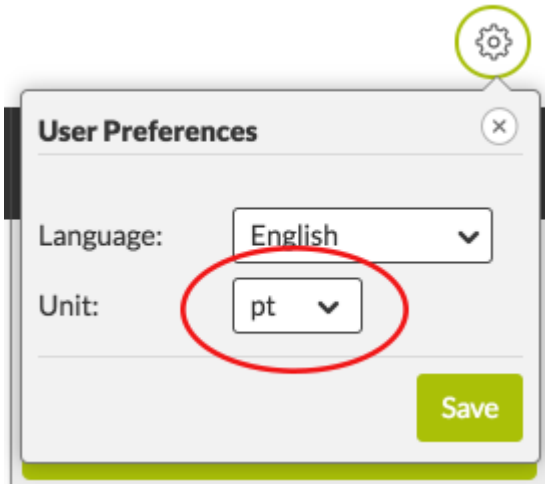
3. Select the language of your choice.
4. Click **Save**.
5. Reload the page.
   Next time you open the PDF Review Module (in the same browser and provided that your browser supports cookies), it will automatically be displayed in the language of your choice.

4.2.3. 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 menu that appears, open the **Unit** list.



3. Select the unit of your choice.

   Choices are:

   - pt (point)
   - p (pica)
   - in (inch)
   - f (foot)
   - mm (millimeter)
   - cm (centimeter)
   - m (meter)

4. Click **Save**.

The unit and values are adjusted immediately.

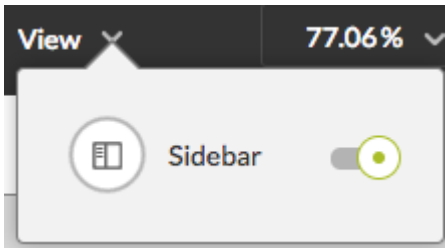
4.2.4. Viewing or hiding screen elements

Depending on what you want to do, you may want to view or hide certain screen elements, such as page boxes, rulers, guides, ... Remember that some of the options mentioned below may not be present (depending on the configuration in Switch).

1. In the top left corner (below the company logo), click **View**.

2. Beside the screen element that you want to hide or view, move the slider as required:

   - Move the slider to the right to show the screen element.
   - Move the slider to the left to hide it.



Screen element	Meaning
Sidebar (always available)	The sidebar is the area on the left. It always contains a Thumbnail tab, and it may also have a Layers and a Comments tab (if enabled in Switch). You may hide the sidebar to have more space for the PDF. Note that showing and hiding the sidebar is default functionality; this option is always available.
Rulers (default off)	Rulers allow you to measure the size of the objects in the PDF.
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. To know which color represents which page box, click the **Format** tab in the right part of the user interface. On this tab, you'll also find information about the dimensions and the position of the page boxes. The colors used to draw the page boxes cannot be changed. The used colors are: • Media box: red • Crop box: green • Trim box: blue • Bleed box: pale blue • Art box: purple 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).
Guides (default on)	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.

Screen element	Meaning
	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.
Wireframe Mode (default off)	Wireframe Mode shows the objects in the document as outlines. **Note:** If you're using Safari, you may encounter issues with large PDF files with a lot of text, or other objects that generate a lot of wireframe. If so, we recommend using a different browser (e.g. Google Chrome or Mozilla Firefox).
Ink Coverage (default off)	You can use the slider or type a value of your choice to evaluate the impact of changed ink coverage. The fluorescent green color is used to show the areas with the highest ink coverage. You can pick a different color by clicking the color patch.
Double Page (default on)	You can use the slider to display the document in double page view, so that two pages are shown side by side.

Your choices - except for wireframe mode and ink coverage - are remembered and used next time you open a document in the PDF Review Module.

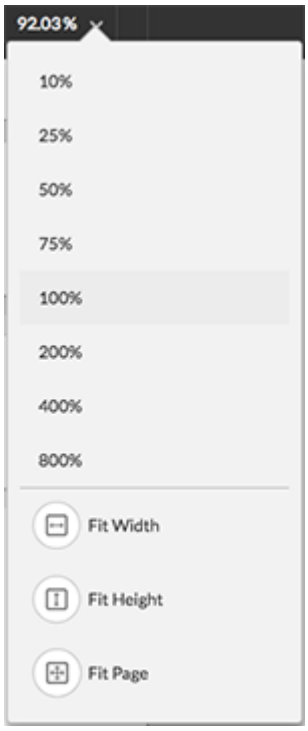
Note: Remember that the used unit for e.g. the rulers and guides, can be changed via the Preferences menu (see *Changing the unit of measure* on page 34).

4.2.5. 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.
   - Click the **<number>%** list in the toolbar and select the value of your choice. Alternatively, you can adjust the view to the available screen space (height or width of your screen), or to the size of one page.



2. Alternatively, click the Zoom button in the toolbar and click somewhere in the document.
The zoom level is adjusted. The part of the page that is visible in the work area is marked on the thumbnail in the sidebar (with the Thumbnails tab enabled). Note that you can easily navigate on the zoomed page by moving the rectangle that marks the zoomed area.

Note:

- Edge and Internet Explorer do not support the functionality to navigate on the thumbnail.
- Invalid page boxes (e.g. crop box not completely inside the media box) may cause incorrect viewing results.

4.2.6. 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 border 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, 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, beside the View list.

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:

- Edge and Internet Explorer do not support this functionality.
- Invalid page boxes (e.g. crop box not completely inside the media box) may cause incorrect viewing results.

Note that you can reset the zoom level by clicking the current zoom level displayed below the company logo, in the top left corner of the user interface. See also *Changing the zoom level of the PDF file* on page 37.

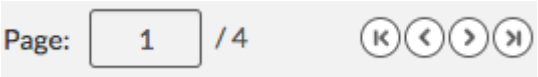
4.2.7. Walking through a multi-page PDF

To walk through a multi-page PDF:

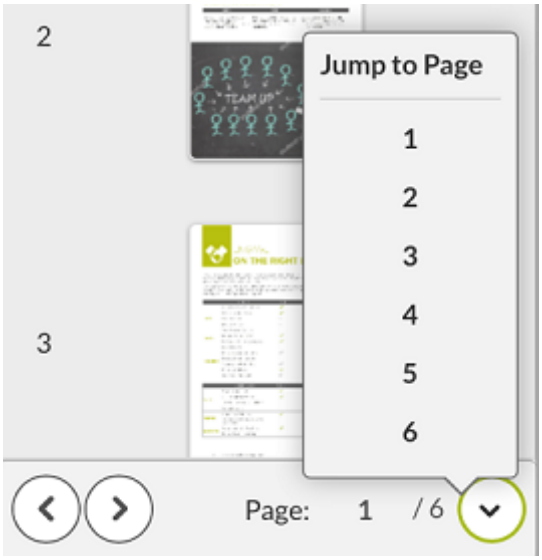
Do one of the following:

- Click the arrow buttons at the bottom of the sidebar.
- Enter a value in the Page field.
- *Desktop/laptop only*: Click the appropriate button to jump to a particular page
- *Tablet only*: Click the rightmost arrow button and click the page of your choice

Desktop/laptop:



Tablet:



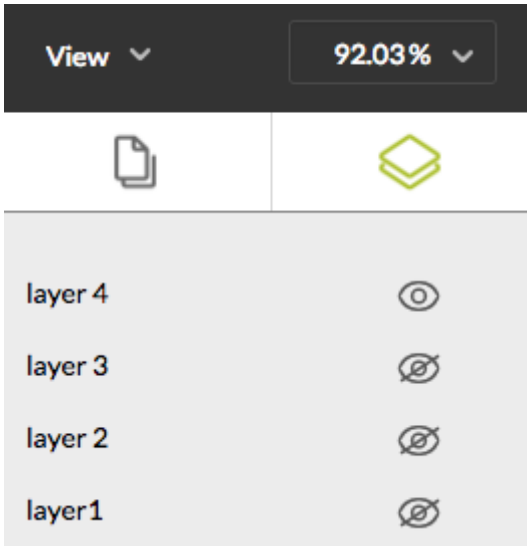
Note that in case of double page view, two pages are displayed side by side. The page that is selected, is highlighted in red. See also *Toggling between double and single page view*.

4.2.8. 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. Make sure the sidebar is displayed.
   See *Viewing or hiding screen elements* on page 35.
2. In the sidebar, click the **Layers** tab .
3. Click the eye icon to hide or display the layer(s) of your choice.
   In the example below, the document has 4 layers of which only layer 4 is visible.



4.2.9. Adding, editing and removing comments

Although it is not possible to make changes to the PDF, you do have the option to add comments, edit them afterwards and remove them as required. If the document contains a Comments tab, you can as well view comments that are already present in the document.

To add a comment:

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

The color of the border 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).

2. Click in the PDF, near the object or place where you want to put a comment.
3. In the dialog that pops up, type your name and comment.

4. 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.
5. To view and/or edit your comments
   a. Click the **Comments** tab in the sidebar.
      The comments are listed one after the other. The author of the comment, the creation date and time and the page it applies to are mentioned. Note that new comments are added to the end of the list.
   b. To edit a particular comment, select it.
      The selected comment and the corresponding sticky note are highlighted.
   c. Click the button ooo in the top right corner.
   d. Click **Edit Comment**.
   e. Change the text as required.
   f. Click **Save**.

Note:

- Alternatively, as long as the Add comments tool is active, you can select the comment by clicking the corresponding sticky note in the document. To change its content, just click it once more.
- You can also edit comments that were already included in the document!

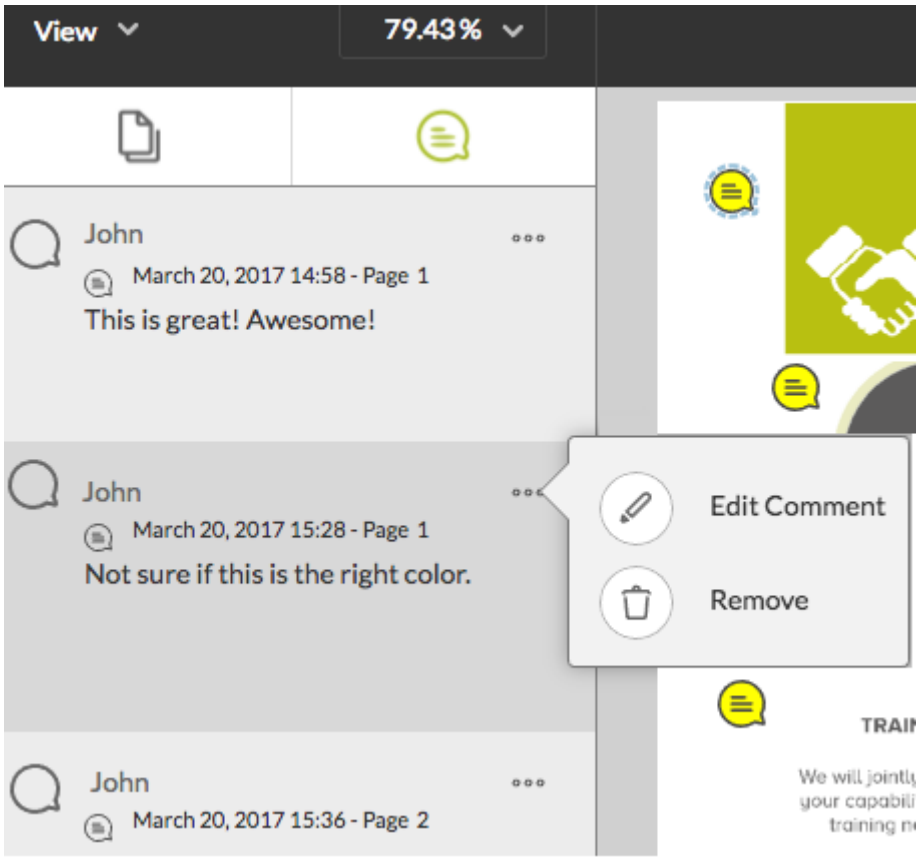
6. To remove a comment
   a. Select the comment you want to remove:

- Click the comment in the **Comments** tab of the sidebar, OR
- Click the sticky note in the document.

The selected comment and the corresponding sticky note are highlighted.

b. Do one of the following:

- In the **Comments** tab, click the button ••• in the top right corner and click **Remove**.
- Press the **Delete** key on your keyboard. Note that this will only work if the sticky note is selected (displayed with a blue border); if the Add/Edit comment dialog is opened and the cursor is inside the input field, pressing the Delete key will remove the text, but not the sticky note itself.



4.2.10. Viewing page properties

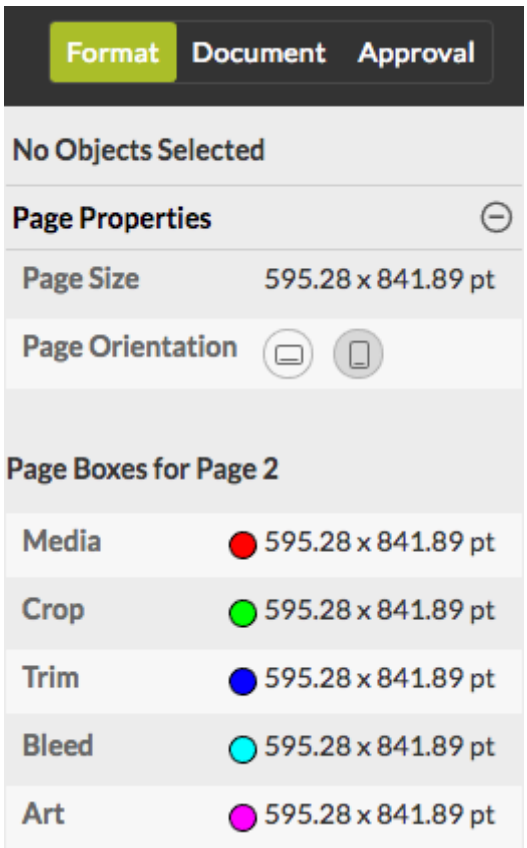
To view the properties of a particular page, such as the size, the page orientation and the dimensions of the page boxes:

1. In the right part of the screen, click the **Format** tab.

   There's only one category: Page Properties. It may be collapsed.

2. Click the ⊕ button to expand the collapsed section as required.

Remember that the unit used for the page size and the dimensions of the page boxes can be changed via the Preferences menu (see *Changing the unit of measure* on page 34) .



4.2.11. Viewing document properties, fonts and separations

To view the properties document properties, and the fonts and separations used in the document:

1. In the right part of the screen, click the **Document** tab.

   There are three categories: Document separations, Document properties and Document Fonts. They may be collapsed.

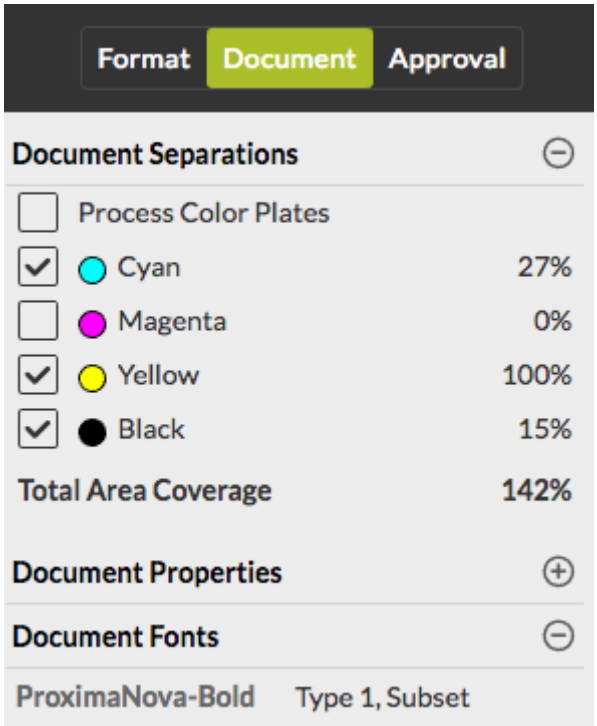
2. Click the ⊕ button to expand the collapsed sections as required.

   You can use the ⊖ button to collapse a section.

3. To display a particular separation, click the checkbox beside the separation concerned.

   - Process Color Plates and Spot Color Plates are grouped.
   - If only one separation is selected, it is shown in black.

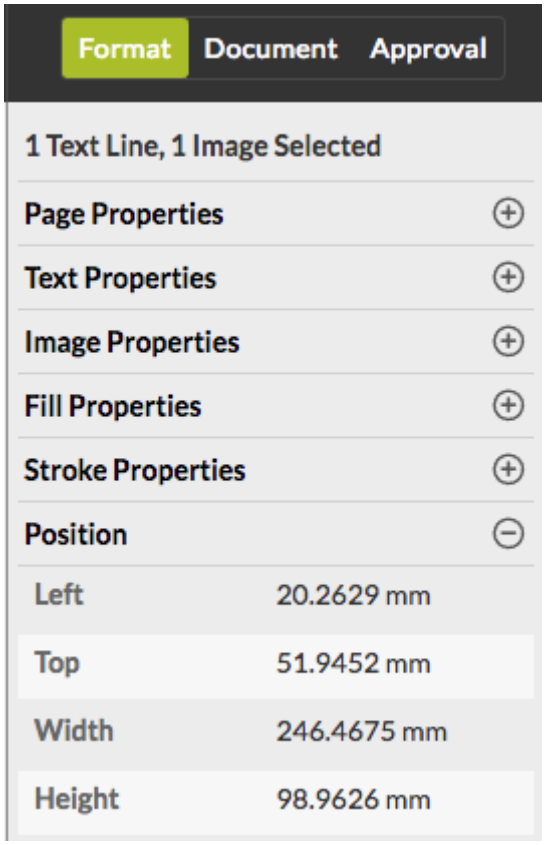
4. To get information about the ink coverage of a certain area, move your cursor over that area in the document.
   The total area coverage is mentioned and the ink coverage of each color is indicated next to the color plate.



4.2.12. 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 comments tool, you may have to activate it again. To do so, click the button in the toolbar.
   The color of the border 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.
3. Click the **Format** tab.
   At the top of the tab, it's mentioned what is contained in the selection. Depending on the selected objects, different categories are possible, such as Text Properties, Fill Properties, Image Properties, Position, etc.
4. Click the button to expand a category as required.



4.2.13. 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. This is handy when the document is opened on a tablet or smartphone.

To move the view horizontally or vertically:

1. To activate the **pan** tool, click the button in the toolbar.
   The color of the border 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.

4.2.14. Rotating the page view

You can rotate the page view on condition that the rotation buttons are 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. To rotate the view to the left, click .
   Every time you click the button, the view is rotated to the left by 90 degrees. For example, clicking twice puts the view upside down.

2. To rotate the view to the right, click .
   Every time you click the button, the view is rotated to the right by 90 degrees.

If the view rotation is not the default rotation, an indicator is shown in the bottom right corner of the screen. Note that clicking this indicator resets the rotation to the default!

4.2.15. 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:

Just click .
The view is adjusted immediately.

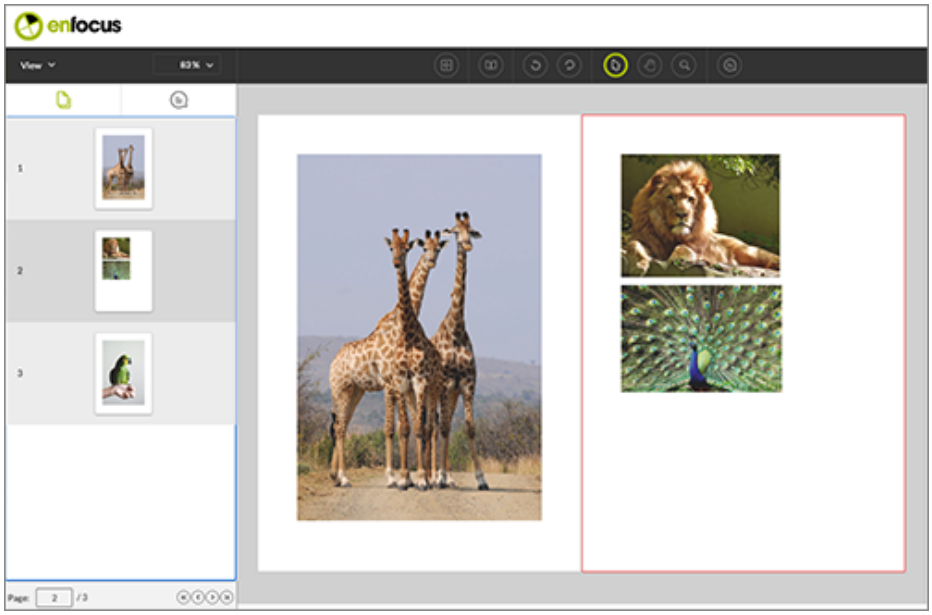
Note that the initial view (either single or double page view) depends on the configuration in Switch, as well as the way the pages are shown (for example with or without a separate cover page) and the page box the view is based upon.

Note:

- In case of double page view, ink coverage is displayed per active page, whereas the wireframe view is displayed per 2 pages.
- We recommend adding comments in single page view, to make sure that the comments are placed correctly.

Example:

In this example, the file is displayed in double page view. The first and second page are placed side by side (so there is no cover page). The red box indicates the page that is currently selected in the sidebar on the right (in this example: page 2).



4.2.16. 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.

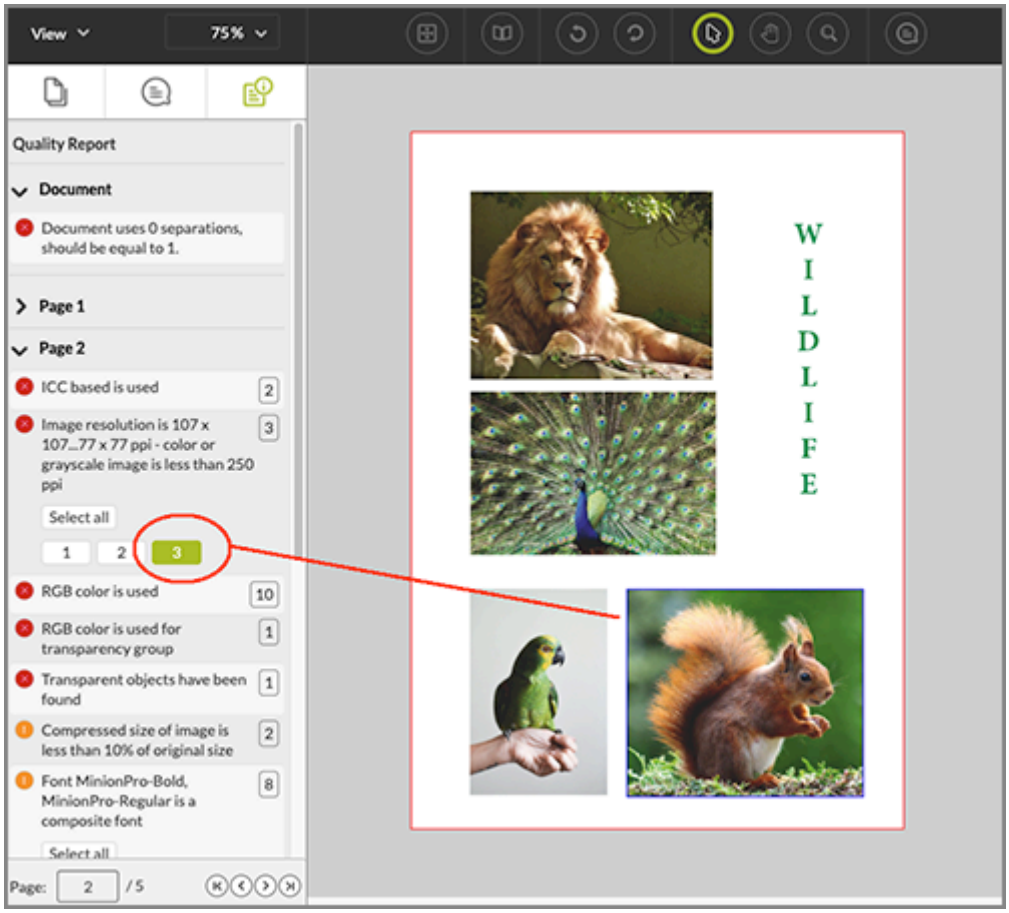
1. Click the PDF Report tab to see the content of the Report.
   At the top, you may find a number of general issues (under 'Document'). Next, you can find all other issues grouped per page.

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.

3. To learn more about a particular issue, click it.
   You'll see how many times the issue occurs and you can select the objects involved (one by one or all at once).

Example

In this example, the issues for page 2 are displayed. Three of the images on this page have an issue with image resolution. The third image, the squirrel is selected (highlighted in blue).

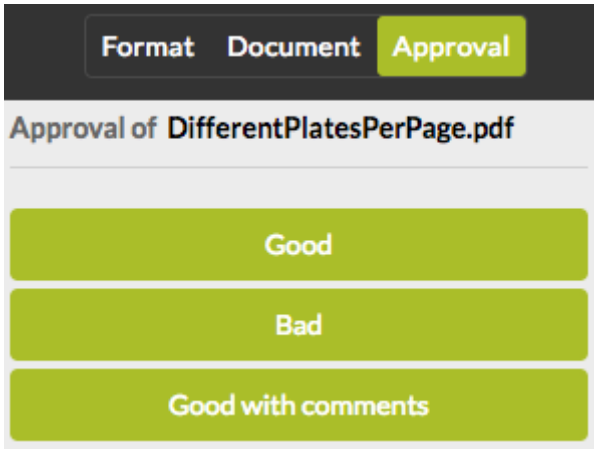


4.2.17. Approving or rejecting a document

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

To do so, proceed as follows:

1. Click the **Approval** tab.
   The name of the file you're going to approve or reject is mentioned just below the tab name.
2. Click the button of your choice.
3. Give a comment if requested.
4. 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 would notice that it is not possible anymore. As a consequence, it is not possible to send additional remarks afterwards.



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

5. Troubleshooting

5.1. Approval Service not available

Issue
A reviewer cannot access the file received via email. The error message says that the service is not available.

Solution
This message indicates that the PDF Review Module is not licensed correctly. For more information, check the license information on the *Statistics* tab in the Administration area or the log messages in Switch.

If you have no valid license, contact your Enfocus reseller. The list of resellers can be found on the Enfocus website.

If you have a license, but forgot to activate it, refer to *Activating the PDF Review Module* on page 13.

5.2. Approval Service is busy

Issue
A reviewer cannot access the file received via email. The error message says that the approval service is busy and has reached full capacity.

Solution
This message indicates that the number of concurrent users has exceeded the license count with twice the number of users during more than 2 hours a day. For more information refer to the paragraph on licensing in *Before you start* on page 5.

If this happens occasionally, you may advise the reviewer to try again later.

If this happens regularly, we recommend purchasing extra user licenses.

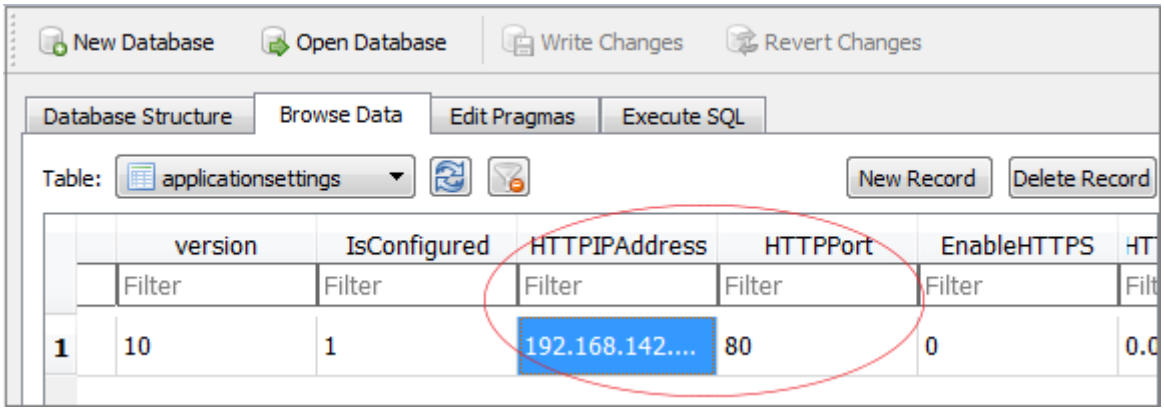
5.3. I don't remember the IP address or Port for the PDF Review Module

Issue
You can reach the Administration area by entering `<IP address>:<Port number>/admin` in the address bar of your browser. It may happen that you forgot the selected IP address or port number.

Solution

If you haven't changed the server settings, the default address is: `localhost:8080/admin`.

If you do have changed the server settings, you can check the database file located at C:\Windows\System32\config\systemprofile\AppData\Roaming\Enfocus Prefs Folder\PDF Review Module\Settings.db. You can open this file using a data browsing tool, such as DB Browser for SQLite (free download from *http://sqlitebrowser.org/*).



Note: If the IP address is *0.0.0.0*, you can use "localhost" as IP address. Note that this value matches the 'All Unassigned IP Addresses' option for the IP Address (in the *Server Settings section)*.

5.4. 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.

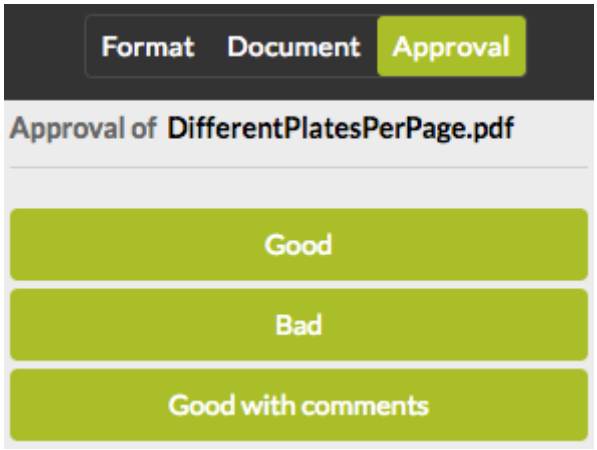
Solution

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 (so the connections between the PDF Review app and the output folders) 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



5.5. 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 the **Fail jobs after timeout** property in the PDF Review app. The timeout period you have set may be too short, causing the file to move to another folder in Switch before it is actually reviewed.

5.6. Notifications are sent as text instead of HTML

Issue

A reviewer complains that he receives the notifications in text instead of HTML format.

Solution

Check the PDF Review app property *Mail format* and the Mail send property *Message format*. Make sure they are both set to 'HTML'.

If that didn't solve the issue, ask the reviewer to check the mail settings of his 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.

5.7. When reviewing a file, the browser response is very slow

Issue

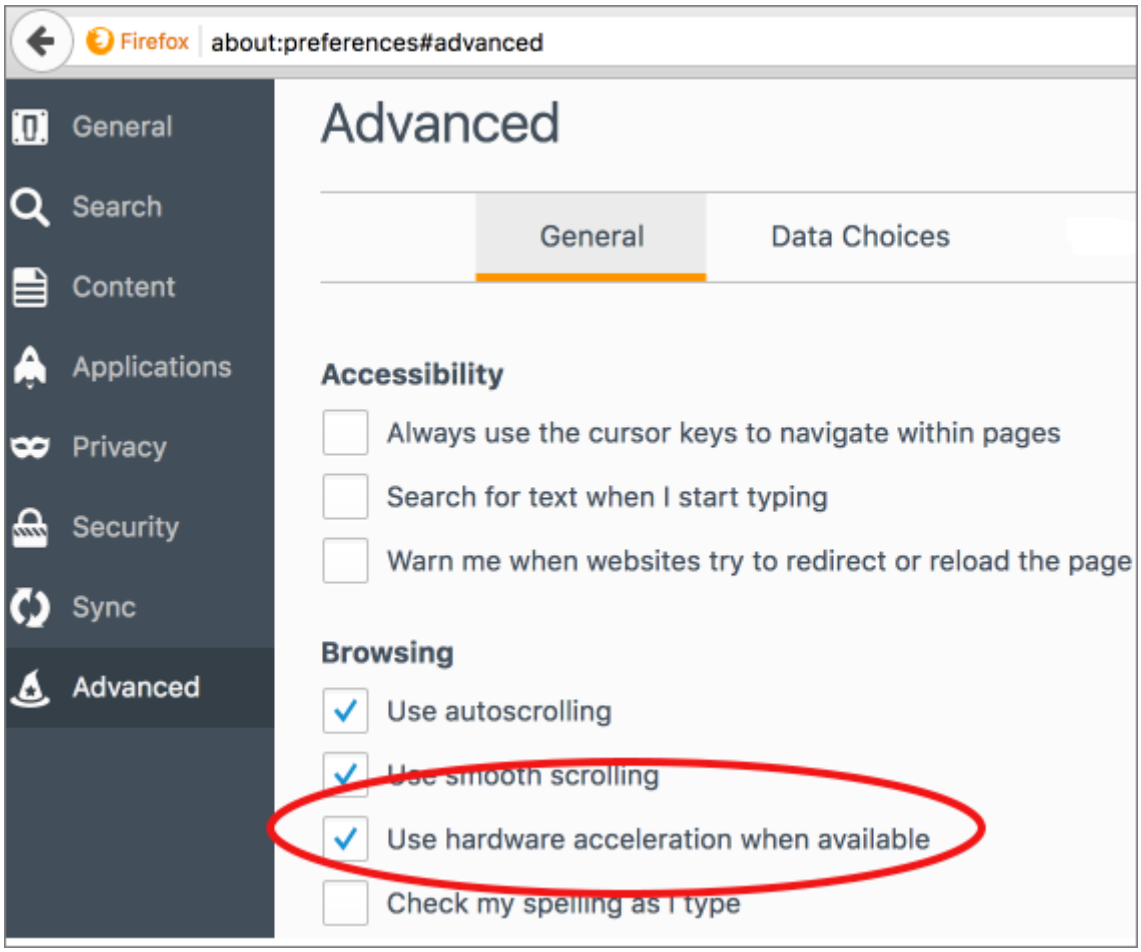
The PDF Review Module UI is very slow, e.g. when clicking a tab or a tool or when rendering a page, there is an annoying delay before something happens.

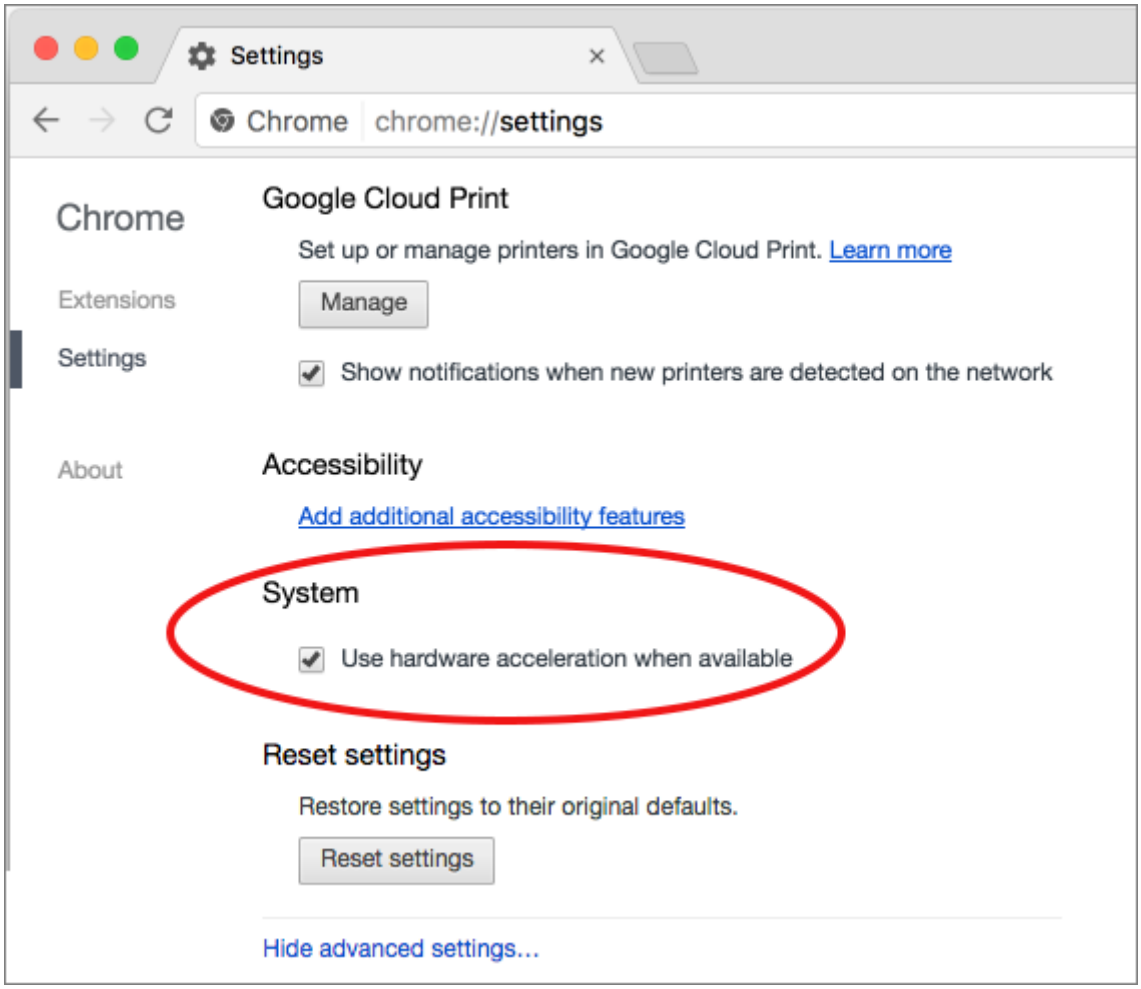
Solution

Check the settings of the (client) browser used to open the files for review.

For optimal performance, the **Use hardware acceleration when available** option in the browser settings should be enabled.

The exact location of this setting depends on the browser.





5.8. My proxy blocks the PDF Review Module

Issue

I want to use the PDF Review Module, but it is blocked by our proxy server.

Solution

If you want to use the PDF Review Module behind a proxy server, you should update the PDF Review configuration file and restart the service.

Note: It's recommended to set up the proxy for WebSocket support.

Proceed as follows:

1. Open the configuration file: C:\Program Files\Enfocus\Enfocus PDF Review Module \resources\wt_config.xml.
2. Add the following line to the application settings block:

```
<behind-reverse-proxy>true</behind-reverse-proxy>
```

3. Save the configuration file.
4. Restart the PDF Review Module service.

Example of a configuration file

```
<server>
    <application-settings location="*">
        <behind-reverse-proxy>true</behind-reverse-proxy>
        <max-request-size>500000000</max-request-size>
        <session-management>
            <indicator-timeout>60000</indicator-timeout>
            <reload-is-new-session>true</reload-is-new-session>
        </session-management>
        <log-config>-*</log-config>
        <UA-Compatible>IE=edge</UA-Compatible>
        <meta-headers>
            <meta name="viewport" content="width=device-width, initial-scale=1, user-
scalable=no" />
            <meta name="description" content="" />
            <meta name="format-detection" content="telephone=no" />
        </meta-headers>
        <web-sockets>true</web-sockets>
    </application-settings>
</server>
```

6. Appendix

6.1. Creating a valid HTTPS certificate

This topic explains how you can create a valid HTTPS certificate for the PDF Review Module. This certificate should be uploaded to *the Server Settings tab* in the Administration area.

The certificate consists of two files:

- The SSL certificate chain, which should be of the type X.509, PEM encoded, and should contain the entire chain.
- The SSL private key, which should be of the type PKCS #8 , unencrypted and PEM encoded.

Usually you receive these two files from your certificate provider. However, you may have received only one file (e.g. a file with extension .p12) instead of two, or you may run into problems when uploading the files, for example because the key is password-protected. The following procedure explains how you can solve these issues and export two valid key files.

To create a valid certificate for the PDF Review Module

1. Download and install the KeyStore Explorer app (*https://keystore-explorer.org/downloads.html*) (or a similar app).
2. Open your certificate in the KeyStore Explorer.
3. To export the certificate chain, proceed as follows:
   a. Right-click on the certificate to open the context menu and select **Export** > **Export Certificate Chain**
   b. Enter the correct export settings:
      - Set Export Length to **Entire Chain**.
      - Select **X.509** as export format. This will automatically enable PEM encoding.
      - Choose a name and a location for the exported certificate chain file.
   c. Click **Export**.
4. To export the private key, proceed as follows:
   a. Right-click on the certificate to open the context menu and select **Export** > **Export Private key**.

      You may be asked to enter the private key's password.
   b. Select **PKCS #8** as the type of private key export required and click **OK**.
   c. Enter the correct export settings:
      - Leave the **Encrypt** checkbox unselected.
      - Select **PEM**.
      - Choose a name and a location for the exported key file.

d. Click **Export**.

You have created two files (a certificate chain (*.cer) and a private key (*.pkcs8)) that should be uploaded through the Administration area of the PDF Review Module. Note that changing the server settings will cause a server restart.

6.2. 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 *Settings - Interface Customization* section of the Administration area of the PDF Review server. It's possible to customize this URL using the parameters described below.

Parameters

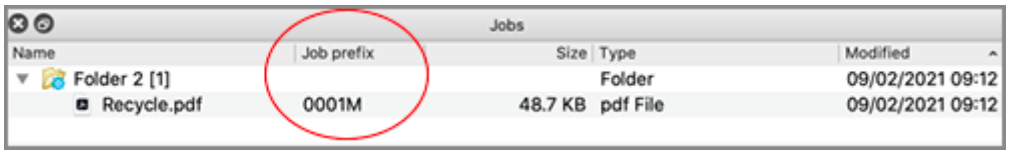
Parameter	Meaning	Examples
%option%	Name of the review button clicked by the reviewer	URL entered in the Post-approval Page field: • https://www.mywebsite.com/%option% Resulting URL for users that click the Agree button: • https://www.mywebsite.com/agree" Resulting URL for users that click the Disagree 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 AD005F: • https://www.mywebsite.com/AD005F
%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
%brandid%	Name of the brand of the client	URL entered in the Post-approval Page field: • https://www.mywebsite.com/%brandid% Resulting URL for a client with brand ID 3: • https://www.mywebsite.com/3

Note: 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.

Where to find the ID of a job or a brand?

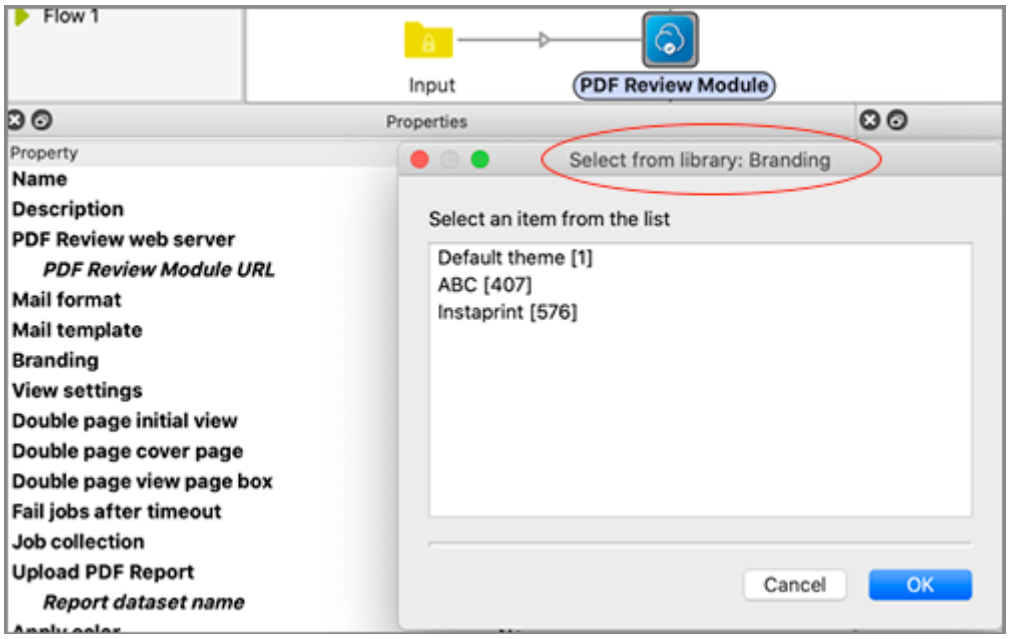
Unique job ID

The unique job ID can be found in the Jobs pane (Prefix column) or in the Switch metadata ([Job.UniqueNamePrefix]).



Brand ID

For the time being, the ID of a brand is not displayed in the Adminstration area. You can find it in Switch, via the Branding property of the PDF Review app, by choosing *Select from library*. The numbers between square brackets are the IDs.



6.3. Changing the location where the files for review are stored

By default, a copy of the PDF files that are sent out for review is kept on the PDF Review server in the following folder: C:\Windows\System32\config\systemprofile\AppData\Roaming\Enfocus Prefs Folder\PDF Review Module\files (this is the folder %appdata%\Enfocus Prefs Folder\PDF Review Module\files that we get when running the PDF Review Module as a service). Once the files have been reviewed (approved or rejected), they are removed from the server.

To change the default location of this folder (the file cache folder), proceed as follows:

1. Open the configuration file: C:\Program Files\Enfocus\Enfocus PDF Review Module \resources\wt_config.xml.
2. Add a new property (name ="FileCacheFolder") to the application settings, containing a native path (in this example: F:\TestFiles).

```
<properties>
<property name="FileCacheFolder">F:\TestFiles</property>
</properties>
```

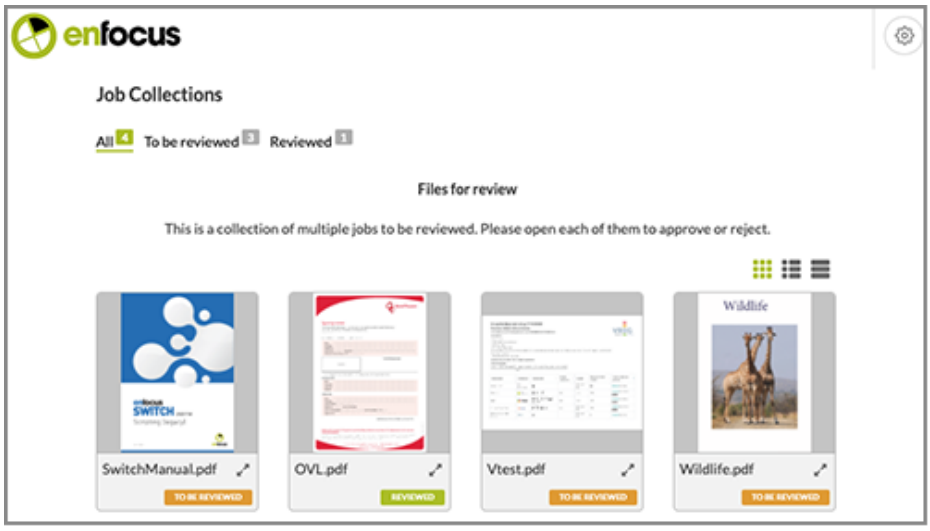
3. Save the configuration file.
4. Restart the server.

From now on, PDF files that arrive in the PDF Review app will be downloaded to the new location. Files that were still in the old location won't be affected: they can be reviewed as usual and will be removed afterwards.

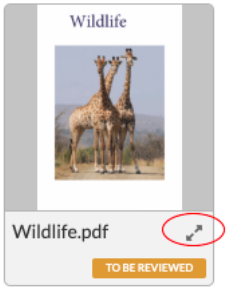
6.4. Using a job collection web page

If PDF files belong to a job collection, they are made available through a web page. As a reviewer, you can find here all files that are ready for review, as well as those that have been reviewed recently; how long they remain available depends on the configuration. New files that come in for review are added to the left.

Below you can see an example of such a web page and an explanation of the buttons.



Screen element	Description
Filters 	Filters allow you to display all files, only the files that are ready for review, or only the files that haven been reviewed. The number indicates the number of files per filter. The currently active filter is highlighted in green. In this example, all 4 files are

Screen element	Description
	displayed. Three of them still have to be reviewed, one of them has been reviewed already.
Views	There are three ways to display the thumbnails of the first page of the PDFs: in grid view, list view or compact list view. The currently active view, in this example the grid view, is highlighted in green. In list and compact list view, you can also see the file size and the date the file was uploaded. The compact list view allows you to see more files on a page.
Details 	This icon is only available in grid view, displayed on the thumbnails, just above the status of the file. If you click this icon, a pop-up opens with more details of the file (for example the creation date). You can directly open the PDF by clicking the **Go to approval page** link.
Preferences	You can change the language of the user interface through the Preferences button. If you do so, the names of the filters, the title and the instructions,... will be displayed in the selected language.

Note that you can review a file and open the HTML5 user interface by clicking the thumbnail of the file. Files that already have been reviewed but are still available can also be viewed but they cannot be changed anymore.

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