enfocus SWITCH 2019 Fall

Switch Web Portal Documentation

enfocus

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2. Using the Switch Web Portal

The Switch Web Portal allows users to access the Switch Server through a web browser. This means that users can access the Switch Server from another computer than the one that is running the Switch Server, without the need for a Switch Designer.

Currently, the following functionality is available:

- Viewing log messages issued by the Switch Server. This includes customizing the messages overview (sorting, filtering, etc) and exporting and clearing messages as required.
- Viewing and finding jobs processed by the Switch Server. This includes creating your own job board(s), which allows you to visualize the jobs present in certain flows and with certain flow stages. If you have purchased a Reporting Module license, you can use the data on these job boards to create dashboards with counters and graphs.
- Submitting and checking jobs, on condition that you have licensed the SwitchClient Module.

Note that users should be granted access via the Users pane.

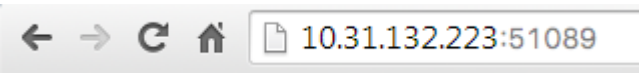
The connection can be encrypted as required (HTTPS); this can be configured through the user preferences. Refer to the Switch Reference Guide (Switch preferences: Web Services).

2.1. Signing in to the Switch Web Portal

To sign in to the Switch Web Portal

1. Open a browser.
   Google Chrome, Safari, Edge and Firefox are supported.

2. Enter the IP address or the hostname of the computer running the Switch Server followed by ":" and the port number for the Switch Web Portal (as set in the Switch Preferences (Web Services category)). The default port number is 51089.
   For example:

   A login screen appears. The first time you'll see a banner stating that cookies on the site are used to enhance the user experience.

3. In the banner, click **Accept** to allow Switch to save your preferences.
   If you accept cookies, your preferences are saved by the browser. As a consequence, you don't have to set your preferences next time you sign in; they are remembered. If you click **Do not use cookies**, you can continue to work, but you will have to set your preferences again next time you log in.

4. Enter your user name and password.

5. Optionally, select the **Remember me** checkbox.

This way, you don't have to log in each time you close your browser. If enabled, you remain logged in for 24 hours.

6. Click **Sign in**.

   The Switch Server must be running, otherwise you will not be able to sign in.

   The Switch Web Portal main screen appears. What you can see and do, depends on your permissions (as configured by the Switch administrator through the Users pane).

2.2. Changing the language of the Switch Web Portal

By default the language on the Switch Web Portal is determined by your system's local settings.

To select a different language (i.e. one of the Switch languages), proceed as follows:

1. In the top right corner of the screen, click your user name.

   The name displayed is your user name as defined in the Users pane in the Switch Designer.

2. Click the language of your choice.

   Possible languages:

   - English
   - German
   - French
   - Japanese
   - Chinese

Your choice is remembered. Next time you sign in to the Web Portal (through the same browser), the content will be displayed in the chosen language.

2.3. Viewing log messages through the Switch Web Portal

If you have the right permissions, you can view the log messages in a browser without having to open a Switch Designer. The permissions are set through the Users pane.

To view the log messages

1. Sign in to the Switch Web Portal.

   See *Signing in to the Switch Web Portal* on page 4.

2. If the messages are not displayed, in the navigation area on the left, click **Messages**. The current date's log messages are displayed, in chronological order, most recent messages at the top. If the autorefresh option is turned on (indicated by the auto refresh icon), the list is automatically renewed. Info, warning and error messages are shown by default, debug messages are hidden. See also: *The Messages overview* on page 6.

You can now show more messages or filter out the messages you're not interested in, or export the messages to a csv file. Refer to *Filtering log messages* on page 9 and *Exporting log messages* on page 11.

2.3.1. The Messages overview

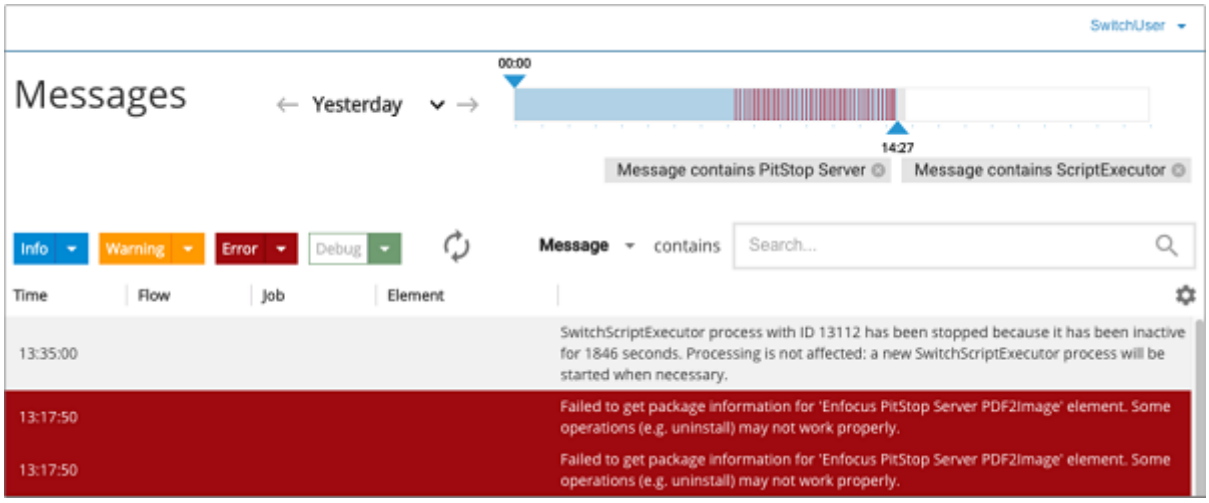
This topic describes the Messages overview shown in a browser.

You can open this overview

- Through the Switch Web Portal.
- From within Switch, on condition that **Show messages in Designer (beta feature)** is set to **No**, by clicking the **Messages** button in the toolbar of the Switch Designer. Alternatively, you can press **F6** or select **View** > **Messages**.

Buttons and menus

The table below explains the meaning of the main buttons, labels, icons and menus in the Messages overview.



Button/menu	Description
SwitchUser ▾	Shows the name of the user that logged in. If you click the icon ▾, you'll get a menu where you can change the language and sign out as required. See *Changing the language of the Switch Web Portal* on page 5. **Note:** If you open the Messages overview *from within Switch*, this option is not available. In that case, the Messages overview is displayed in the language of the Switch Designer.
← Yesterday ⌄ →	Indicates the date(s) on which the shown messages were issued, and allows you to select a different date or date range.

Button/menu	Description
	• ← : Show messages of the previous day • → : Show messages of the next day • ⌄ : Show messages of a particular date or date range. You can also choose "Full history", i.e. all messages since the last message cleanup (as defined in the Switch preferences (Application data category)).
	Indicates the time frame in which the shown messages were issued. You can move the blue arrows to enlarge or reduce the time frame. The red vertical lines represent error messages. This way you can immediately see when error messages were issued.
Message contains PitStop Server Message contains ScriptExecutor	The applied filters are listed right above the Search field. When two different filters are applied, all log messages that match one of the strings are shown (in this example: messages that have "PitStop Server" OR "ScriptExecutor" in the description).
Message contains Search...	This part of the overview allows you to configure filters, to select messages that contain certain strings (in the message itself, in the name of the flow, the name of the job, ...) Refer to *Filtering log messages* on page 9.
⚙	Opens a menu with the following options: • **Flow, Job, Module, Element, Prefix**: Refers to the columns in the overview. Click to hide or show columns as required. • **Reset view**: Allows you to reset the columns to their default size and position: only Flow, Job and Element are shown by default. • **Export**: Allows you to export the *filtered* log messages to a .csv file. You can either open the file or save it locally. • **Clear all**: Allows you to remove all log messages from the log database. Note that there is no undo for this action!
Info Warning Error Debug	Message types, indicating the severity level of the message. If colored, the messages of that type are displayed in the overview, in a background with the corresponding color. In the example, info, warning and error messages are shown, whereas debug messages are hidden (default). You can click a message type to switch from hidden to shown and

Button/menu	Description
	vice versa, or you can click the arrow to the right, to only show the messages of that particular type. **Note:** Info messages are displayed in a white and gray background. Note that the Debug button also shows or hides assert messages. See also the table below (Message types).
	By default, the page refreshes automatically, so you always have an up-to-date overview. You can turn off this option by clicking the auto refresh button , which will turn into a blue arrow .

Columns

The following table describes the columns in the Messages overview.

Remember that you can hide columns as required via the icon just below the search field. It's also possible to resize the columns.

Column	Description
Time	Time when the message was triggered.
Flow	The name of the flow that triggered the message.
Job	The name of the job for which this message was issued.
Module	The Switch module (such as Control) or type of flow element (such as folder, Mail receive, ...) that triggered the message.
Element	The name of the flow element that triggered the message.
Prefix	The unique name prefix of the job referred to in the message, or blank if there is no unique name prefix.
Message	The message itself.

Message types

The following table describes the different types of messages that can appear in the Type column of the Messages overview.

Type	Description
Info	An informational message that has no other purpose than to inform the user of a certain occurrence. *Info messages are always shown in the Messages overview (unless a filter is applied).*

Type	Description
	The Messages overview displays all types of info messages (related to Switch Server and to Switch Designer).
Warning	A warning message that informs the user of a recoverable problem or non-fatal error. *Warnings are always shown (in orange) in the Messages overview (unless a filter is applied).*
Error	An error message that informs the user of a fatal error. *Errors are always shown (in red) in the Messages overview (unless a filter is applied).*
Debug	An informational message solely intended for debugging purposes (often generated by configurators). *Debug messages are not shown by default. If the **Log debug messages** preference is enabled*, you can display them using the Debug message type filter. Refer to the documentation about Switch Preferences: Logging in the Switch Reference Guide.
Assert	A message solely intended for debugging purposes that is issued only when a coding error is discovered. *Assert messages are not shown by default. If the **Log debug messages** preference is enabled*, you can display them using the Debug message type filter. Refer to the documentation about Switch Preferences: Logging in the Switch Reference Guide.

Note: Scripters have access to all messages, to be able to debug their scripts.

2.3.2. Filtering log messages

By default, all info, warning, and error messages issued on the current date are shown in the Messages overview. You can however change this and only display the messages you're interested in.

To filter the log messages

1. Pick the **date(s)** of which you want to see the messages.

   By default, today's messages are shown.

To ...	Do the following ...
Show messages of the previous day	Click ←
Show messages of the next day	Click →

To ...	Do the following ...
Show messages of a particular date or date range	Click ⌄
Show messages of a particular date or date range	Click ⌄ and select the appropriate option from the menu: • Today • Yesterday • Choose date(s): Opens a calendar. Click the date you want to select. In case of a date range, click the first and the last date. • Full history: Displays all messages since the last messages cleanup (as defined in the Switch preferences (Application data category)).

2. Pick the appropriate **time frame**:
   - To indicate the start time, click the blue indicator to the left of the slider and drag it to the time of your choice.
   - To indicate the end time, click the blue indicator at the right of the slider and drag it to the time of your choice.

   By default, the messages of the current date are shown. The blue part indicates the currently shown time. The red vertical lines indicate when time error messages were issued.

   Note: If the end time is not the current time, the auto refresh is disabled and the auto refresh button will turn into a blue arrow. If you click this blue arrow, auto refresh is turned on again and the end time is reset to the current time.

3. Pick the **type of messages** you want to see in the overview:
   - Click the name of the message type to show or hide it in the overview. If the name is shown in a colored background, the messages are shown in the same background color, if the name is shown in white, the messages are hidden. Note that info messages are shown in a white and grey background.
   - Click the small arrow next to the message type to open a menu with two options:
     - Hide messages of this type
     - Only show messages of this type

   By default, all types except for debug messages are shown.

4. Set a **filter** as required:
   a. Select the column in which you want to search for a particular string. If the column doesn't matter, choose **Any**.
   b. In the search field, enter one or more strings to only view the messages that contain those strings. The case of the entered strings is not taken into account.

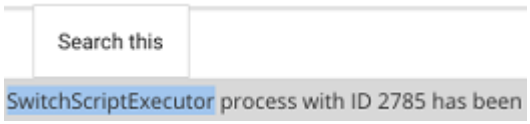
c. Press enter or click the button.

The filter is applied immediately. The messages that match the filter are shown, and the filter definition is displayed just above the filter field.

Remarks:

- Alternatively, you can select a string somewhere in the overview and click **Search this** (which appears automatically). The filter is configured and applied automatically.

  Example:

  Resulting filter:

- To view messages that contain several strings in one entry (e.g. configurator AND workflow), type those strings in one filter field.

- To view messages that contain either string x or string y (e.g. configurator OR workflow), type those strings in two different filter fields (see screenshot).

5. To clear a filter, click the cross button in the filter label.
   The label is removed and the messages overview is updated immediately.

Note: Remark for Web Portal users only: You can save your message filters by clicking the **+ Save current filter** button in the blue navigation area.

2.3.3. Exporting log messages

Log messages can be exported to a CSV file for processing by third-party tools. If you have set filters, these filters are taken into account; only the messages that are shown will be exported to a file.

To export log messages

1. Open the Log messages overview.
2. Click the icon below the search field.

3. Click **Export**.
   A log.csv file is created.

2.3.4. Clearing log messages

Log messages are stored in a database on disk and thus remain available after quitting and restarting Switch. The application data preferences determine for how long messages are retained.

To permanently clear all log messages

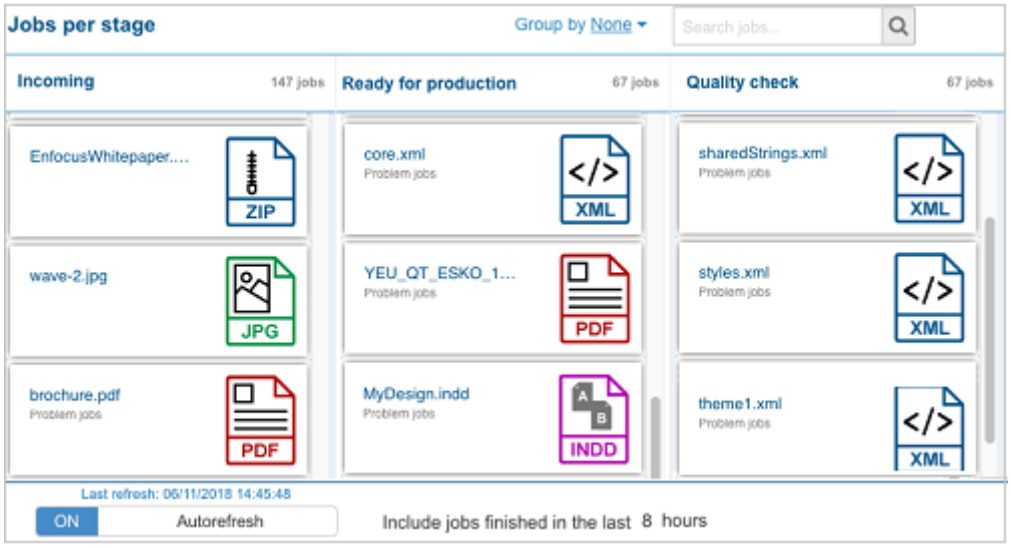
1. Open the Log messages overview.
2. Click the icon ⚙ below the search field.
3. Click **Clear all**.
   A confirmation dialog appears. If you click **Clear**, all messages will be removed from the log database. **Note that there is no undo for this action!**

2.4. Finding Switch jobs through the Switch Web Portal

2.4.1. About job boards

Job boards (aka Job finder boards) provide you with a handy tool to follow up on the status of your jobs. No need to use a (Remote) Designer to watch how your jobs move through the flows; instead you can open a browser on any computer, log into the Switch Web Portal and create your own job board(s) with only those flows and jobs that are of interest to you.

Here is an example of a job board that shows you which jobs are in which stage. The jobs can be further grouped by flow or state, using the *Group by* field in the top right corner of the screen.



At the bottom of the screen, there is an extra filter 'Include jobs finished in the last x* hours', which allows you to determine how long finished jobs should remain on the job board.

Note: Access to job boards and dashboards is configured through the Users pane in Switch, hence it's possible that you don't have access to this functionality or that you can only view shared boards but not create new ones yourself.

* *Remark for Switch administrators:* Note that this value cannot be higher than the value of Keep internal job tickets for (hours) in the *Switch Application data preferences*; if the internal job ticket is removed, the job does not exist anymore in Switch, hence it cannot be shown anymore on a job board.

2.4.2. Creating a job board

A job board on the Switch Web Portal can display the jobs of your choice. You can select the flows for which you want to display jobs and - if you want to - only show those jobs that have a certain job status or that are in a certain job stage.

Note: Job boards are linked to your user account. Other users can't see them, unless you share them.

To create a job board

1. With the **Boards** view selected, click **+ Manage**.

   If you don't see + Manage in the expanded navigation area on the left, you may not have the permissions to create boards.

   The **Manage boards** dialog appears.

2. In the bottom right corner of the dialog, click **New job board**.

   If you don't see the New job board button, you may not have the permission to create boards.

3. Configure your board:

   a. Enter a name for your board.

   b. Click **Select flows** (the blue button to the right of the navigation area).

c. In the dialog that appears, select the flows you want to see on your job board. To do so, click **Select all** (if applicable) or click the flow name of the flows you want to select.

   Flow groups are shown in gray, flow names in blue. You can select all flows in a group by clicking the group name.

   Note: Make sure to select all flows you want to see on your job board; in the next step you can divide these flows over different columns.

d. Click **Apply**.

4. Configure the first column of your job board:
   a. Enter a column name.
   b. Select at least one flow.
   c. Select the flow stages if applicable.

      Problem jobs and **No stage** are by default available. If stages have been defined in the selected flows, they will be added and can be shown as well.

      If nothing is selected, all jobs are shown, regardless of their job stage.

5. To add another column, click the plus button to the right of the configured column and proceed in the same way. You can add as many columns as you need.

6. Click **Save**.

2.4.3. Managing a job board

This topic explains how to handle the custom job boards on the Switch Web Portal.

Proceed as follows:

1. In the navigation area on the left, click **Boards**.

   Make sure the navigation area is expanded (by clicking).

2. Click **+ Manage**.
   The **Manage boards** dialog appears. This dialog gives an overview of the boards you have access to. The grayed out boards are shared by other users; you can view them but not make any changes. The other boards are your own boards and are fully controlled by you.

3. Do one of the following as required:

To...	Do the following:
To create a new job board	Click **New job board** (blue button in the bottom right corner). See also *Creating a job board* on page 13.
To show or hide a job board in the navigation area	Click the slider in front of the job board you want to show or hide. If the slider is blue, the job board is visible in the sidebar. **Note:** This functionality is useful for job boards you want to keep for later use or for job boards

To...	Do the following:
	that you want to use as dataset for a dashboard (for users of the Reporting module).
To edit a job board	Click the edit button (which becomes visible when you hover over the job board concerned). **Note:** Alternatively, you can click the edit button beside the job board name in the navigation area. You can now edit the board name and the columns: • To change the number of flows on board level, you should click the *blue button* ("x flows selected") next to the board name. • To add a new column, click the plus icon to the right of the last configured column. • To move the columns to another position, click the icon and drag the columns you want to move sideways. **Note:** Instead of dragging the sliders to make a selection, you can just click the group, flow or stage name to make a selection or to undo a selection. To return to view mode, click the **Save** button (in the top left corner, next to the name of the board).
To share a job board or to stop sharing it	Job boards can be shared with other members of the same user group (as configured in Switch). To share or stop sharing, in the Sharing column of the board concerned: **1.** Click **Private/Shared**. **2.** In the dialog that pops up, select or clear the checkbox of the group(s) with whom you want to share your board. If no dialog pops up, you cannot share the board (for example because you're not configured as member of a group). **Note:** Shared boards can only be viewed (not edited!) by other users.
To import or export a job board	Boards can be exported (and kept as a backup) and imported again if needed.

To...	Do the following:
	To export a board, click the export button next to the board you want to export. A Switch board is saved with extension .sboard. Note that the export button becomes visible when you hover over the board concerned. To import a board, click the **Import** button at the bottom of the dialog and select the board (*.sboard) of your choice.
To permanently remove a job board	Click the remove button.

4. To save the changes made in the Manage jobs dialog, click **Apply**.

2.4.4. Viewing and finding jobs on a job board

If you have the right permissions, you can view Switch jobs through the Switch Web Portal. The permissions are set by the Switch administrator through the Users pane.

To find jobs on a job board

1. In the navigation area on the left, click **Boards**.

   Make sure the navigation area is expanded (by clicking).

2. Select one of the boards in the navigation area, below the divider.

   There are two types of boards listed below the divider: job boards and dashboards (only available if the Reporting Module is licensed). The board type is mentioned in the Manage boards dialog (which can be opened by clicking **+ Manage**). Boards displayed in white are owned by you, boards displayed in blue are shared boards (which cannot be edited by you).

   The selected job board is shown to the right of the navigation area. The jobs are listed in columns. What is shown depends on the configuration of the board.

3. To reorganize the overview, click the **Group by** list field in the top right corner of the screen, and select the option of your choice (**Flow**, **Stage**, **State** or **None** (which removes any previous grouping).

   A group adds an extra level to a column.

   For example, suppose one of the columns of your board lists all problem jobs of all flows. With *'Group by' set to 'None'*, the jobs are put arbitrary one after the other. With *'Group by' set to 'Flow'*, the Problem jobs column is divided into different sections per flow, so you can easily see which problem job belongs to which job.

4. To search for a particular job for example to see if it reached a particular flow stage, enter (part of) the job name in the search field in the top right corner of the screen.

   The search is limited to the file name (name and extension).

5. To display recently finished jobs (by default, they are not shown), enter a value in the **Include jobs finished in the last x hours** field at the bottom of the job board.

6. To see the log messages, metadata or private data of a particular job on the board, simply click the job concerned.

   Note that this feature is only available if you have turned off the autorefresh option (by clicking it at the bottom of the screen).

2.5. Managing dashboards on the Switch Web Portal

2.5.1. About dashboards and widgets

As of Switch 2018 update 1, it is possible to create your own dashboards on the Switch Portal. This requires a license for the Reporting Module.

Dashboards on the Switch Web Portal can give you a quick overview of the *number of jobs* that are being processed by the Switch Server. You can for example display a counter (how many jobs failed, how many jobs are in a particular stage,...) or a graph with numbers per file type, flow,... It's also possible to visualize historical job data (e.g. number of problem jobs per week over the past 3 months).

The graphs and counters are actually **widgets** that can be configured at wish. The input for these widgets (i.e. the data that is visualized) comes from a job board. The widgets can be customized to a certain level: you can for example add a frame around a widget in the color of your choice, you can add a title, in case of a graph you have the choice between a bar, a donut or a pie chart,...

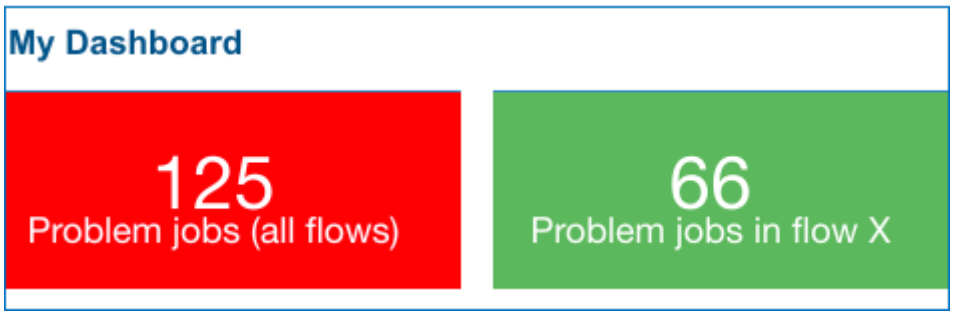
Currently, seven different widgets are available for use on the Switch Web Portal. They are listed below.

Note: Access to job boards and dashboards is configured through the Users pane in Switch, hence it's possible that you don't have access to this functionality or that you can only view shared boards but not create new ones yourself.

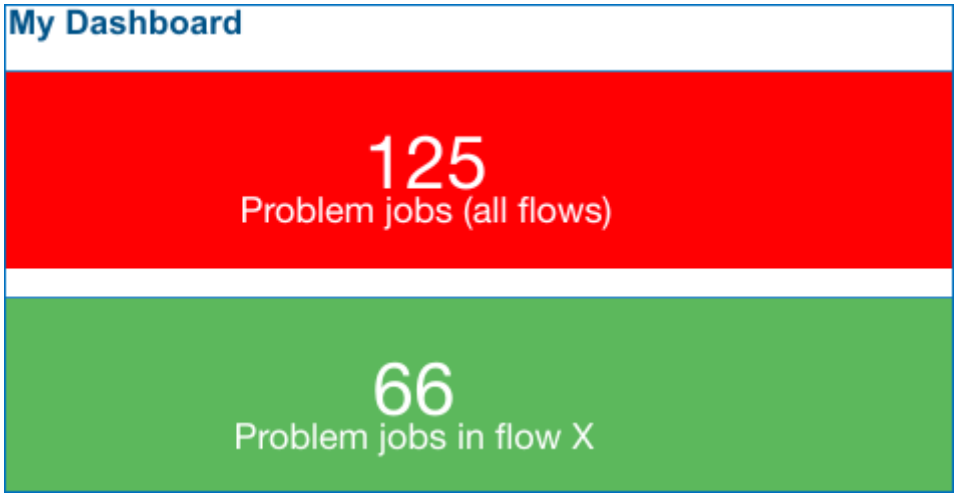
Column layout

This is actually a layout that helps you position the widgets on the screen. You need it to put different widgets next to each other. If you want to put the widgets one after the other, in a vertical arrangement, you don't need a layout.

Example of 2 live counters in a column layout (horizontal arrangement):



Example of 2 live counters without column layout (vertical arrangement):



See also: *Dashboard widgets - Column layout* on page 25

Custom HTML

This widget allows you to add a title, a logo, text and even a movie to your dashboard.

See also: *Dashboard widgets - Custom HTML* on page 26

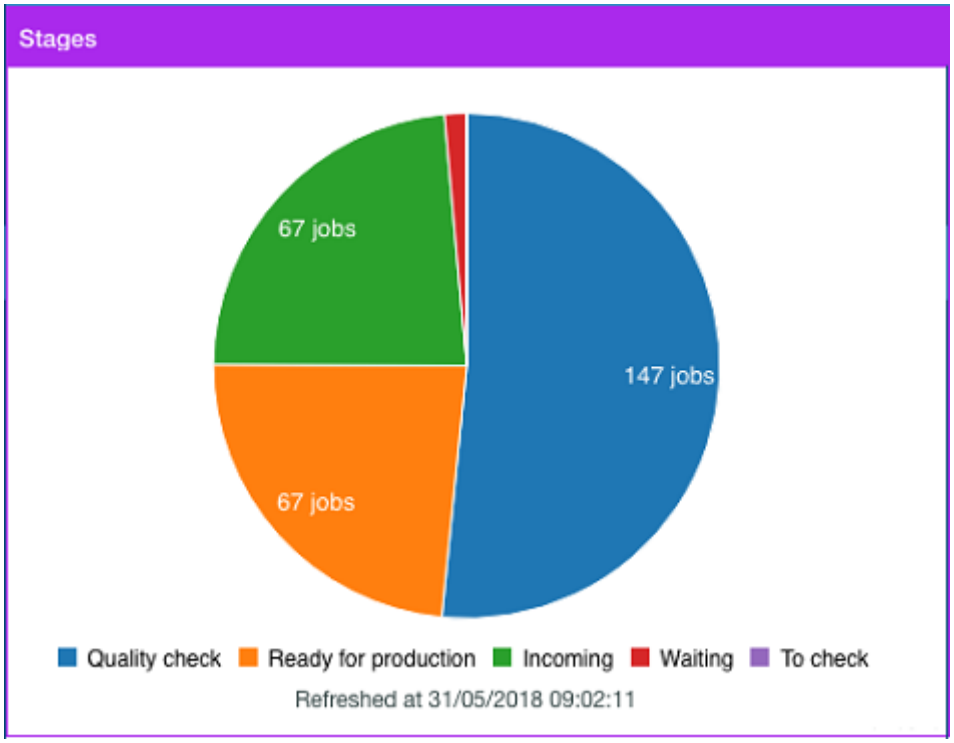
Live counter

This widget displays a number, representing the amount of jobs currently present on the selected job board.

See also: *Dashboard widgets - Live counter* on page 26

Live graph

This widget counts both the total number of the jobs on the selected job board and the number of jobs per column, and presents this data as a graph.



See also: *Dashboard widgets - Live graph* on page 27

Live table

This widget displays **information about the jobs** counted in a live graph on the same dashboard. For example, if your graph gives an overview of the number of jobs per flow, the live table displays detailed information about these jobs (job name, flow name, stage and state of the job).

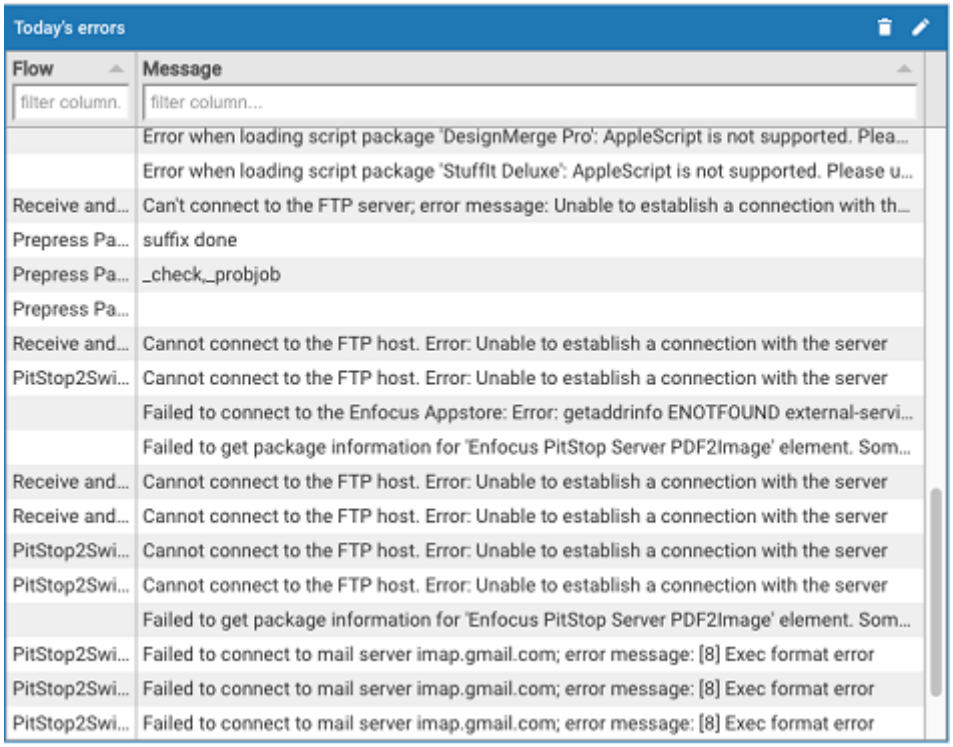
Details

Set	Name	Flow	Stage	State
filter column...	filter column...	filter c	filter column...	filter column
Jobs in production	20pp.ppp	FlowB	Problem jobs	Input
Jobs in production	switch_quickstar	FlowC	Problem jobs	Production
Jobs in production	switch_quickstar	FlowC	Problem jobs	Production
Jobs in production	masked text 2.pc	FlowC	Problem jobs	Production
Jobs in production	masked text 2.pc	FlowC	Problem jobs	Production
Jobs in production	Enfocus_PriceLis	FlowC	Problem jobs	Production
Jobs in production	[Content_Types].	FlowC	Problem jobs	Production
Jobs in production	Enfocus_PriceLis	FlowC	Problem jobs	Production

See also: *Dashboard widgets - Live table* on page 29

Messages

This widget gives a real-time overview of messages based on a messages filter (that you have configured yourself). You can choose the columns you want to display and the maximum number of messages.



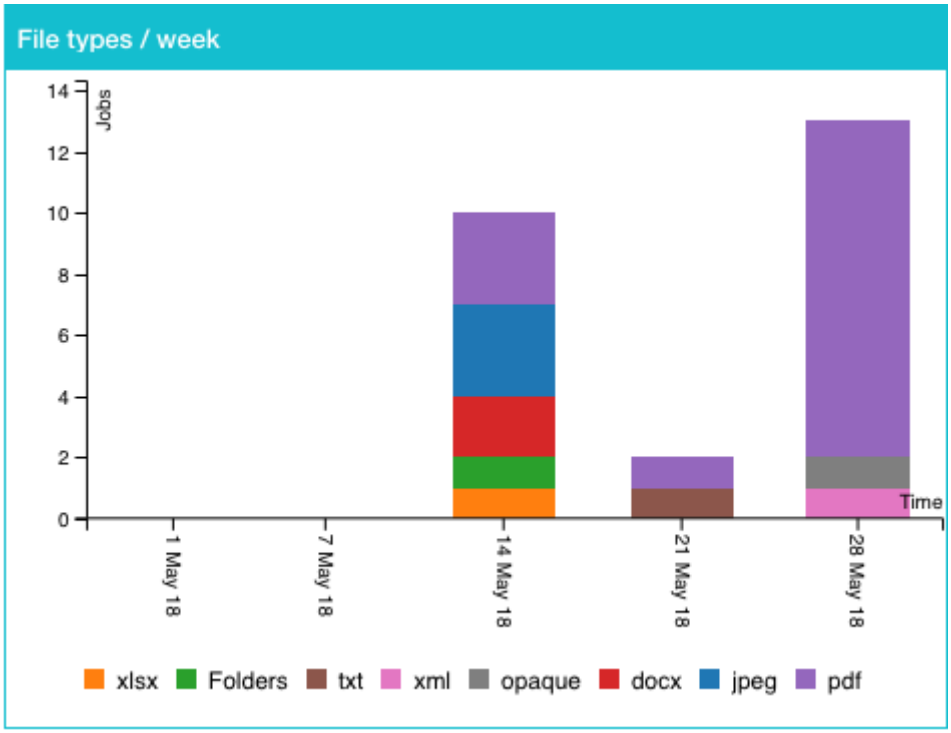
Today's errors

Flow	Message
filter column...	filter column...
	Error when loading script package 'DesignMerge Pro': AppleScript is not supported. Plea...
	Error when loading script package 'StuffIt Deluxe': AppleScript is not supported. Please u...
Receive and...	Can't connect to the FTP server; error message: Unable to establish a connection with th...
Prepress Pa...	suffix done
Prepress Pa...	_check,_probjob
Prepress Pa...	
Receive and...	Cannot connect to the FTP host. Error: Unable to establish a connection with the server
PitStop2Swi...	Cannot connect to the FTP host. Error: Unable to establish a connection with the server
	Failed to connect to the Enfocus Appstore: Error: getaddrinfo ENOTFOUND external-servi...
	Failed to get package information for 'Enfocus PitStop Server PDF2Image' element. Som...
Receive and...	Cannot connect to the FTP host. Error: Unable to establish a connection with the server
Receive and...	Cannot connect to the FTP host. Error: Unable to establish a connection with the server
PitStop2Swi...	Cannot connect to the FTP host. Error: Unable to establish a connection with the server
PitStop2Swi...	Cannot connect to the FTP host. Error: Unable to establish a connection with the server
	Failed to get package information for 'Enfocus PitStop Server PDF2Image' element. Som...
PitStop2Swi...	Failed to connect to mail server imap.gmail.com; error message: [8] Exec format error
PitStop2Swi...	Failed to connect to mail server imap.gmail.com; error message: [8] Exec format error
PitStop2Swi...	Failed to connect to mail server imap.gmail.com; error message: [8] Exec format error

See also: *Dashboard widgets - Messages* on page 30

History graph

This widget visualizes the evolution of the number of jobs or the job size over a particular period of time, for example the total number of problem jobs of the last month, grouped by week.



See also: *Dashboard widgets - History graph* on page 31

2.5.2. Creating a dashboard

A dashboard is an overview screen with one or more widgets that visualize job data.

Before you start, make sure to *create a job board* with the data you want to display on the dashboard. Alternatively, you may use a shared job board. A job board to start from is necessary for all widgets, except for the history graphs and custom HTML. For example, if you want your dashboard to display the total number of problem jobs on the server, you need a job board that collects all problem jobs.

Note: Job boards are linked to your user account. Other users can't see them, unless you share them.

To create a dashboard

1. With the **Boards** view selected, click **+ Manage**.

   If you don't see + Manage, you may not have the permission to create boards.

   The **Manage boards** dialog appears.

2. In the bottom right corner of the dialog, click **New dashboard**.

   If you don't see the New dashboard button, you may not have the permission to create boards.

3. Configure your board:

   a. Enter a name for your board.

   b. Choose a layout:

- If you want to place the different widgets one below the other (**vertical arrangement**), you don't need a layout. If there is one on your dashboard (default configuration when creating a new board), click the remove button to remove it.
- If you want a **horizontal arrangement with two or more columns** next to each other, you need a column layout. If there is one on your dashboard (default configuration when creating a new board), click the edit button to configure it. Refer to *Dashboard widgets - Column layout* on page 25.

c. Drag and drop one or more widgets onto the column of your choice (in case of a column layout) or directly onto the dashboard and configure them as required:

- *Dashboard widgets - Custom HTML* on page 26
- *Dashboard widgets - Live counter* on page 26
- *Dashboard widgets - Live graph* on page 27
- *Dashboard widgets - Live table* on page 29
- *Dashboard widgets - History graph* on page 31

d. To switch between configuration or edit mode and view mode:

- Click the edit button in the header of the widget to make changes.
- Click the view button in the header of the widget to view the result of your changes.

4. Click **Save**.
The dashboard is added to the navigation area.

Note that you can still make changes by clicking the edit button beside the name of the dashboard in the navigation area.

2.5.3. Managing a dashboard

This topic explains how to handle the custom dashboards on the Switch Web Portal.

Remember that dashboards are only available if the Reporting Module is licensed.

Proceed as follows:

1. In the navigation area on the left, click **Boards**.

Make sure the navigation area is expanded (by clicking).

2. Click **+ Manage**.
The **Manage boards** dialog appears. This dialog gives an overview of the boards you have access to. The grayed out boards are shared by other users; you can view them but not make any changes. The other boards are your own boards and are fully controlled by you.

3. Do one of the following as required:

To...	Do the following:
To create a new dashboard	Click **New dashboard** (blue button in the bottom right corner). See also *Creating a dashboard* on page 21.
To show or hide a dashboard in the navigation area	Click the slider in front of the dashboard you want to show or hide. If the slider is blue, the dashboard is visible in the sidebar. **Note:** This functionality is useful for dashboards you want to keep for later use.
To edit a dashboard	Click the edit button (which becomes visible when you hover over the dashboard concerned). **Note:** Alternatively, you can click the edit button beside the dashboard name in the navigation area. You can now add or remove widgets and make changes to the widgets as required: • To add a widget, click it (in the right part of the screen) and drag it onto the dashboard. • To remove a widget, click the remove button in the header of the widget. • To make changes to a widget, click the edit button in the header of the widget. • To view your changes, click the view button in the header of the widget. Do not forget to save your changes, by clicking the **Save** button (in the top left corner, next to the name of the dashboard). By saving your changes, you automatically switch to view mode.
To share a dashboard or to stop sharing it	Dashboards can be shared with other members of the same user group (as configured in Switch). To share or stop sharing, in the Sharing column of the board concerned: **1.** Click **Private/Shared**. **2.** In the dialog that pops up, select or clear the checkbox of the group(s) with whom you want to share your board. If no dialog pops up, you cannot share the board (for example because you're not configured as member of a group).

To...	Do the following:
	Note: Shared boards can only be viewed (not edited!) by other users.
To import or export a dashboard	Boards can be exported (and kept as a backup) and imported again if needed. To export a board, click the export button next to the board you want to export. A Switch board is saved with extension .sboard. Note that the export button becomes visible when you hover over the board concerned. To import a board, click the **Import** button at the bottom of the dialog and select the board (*.sboard) of your choice.
To permanently remove a dashboard	Click the remove button.

4. To save the changes made in the Manage jobs dialog, click **Apply**.

2.5.4. Viewing a dashboard

If you have the right permissions, you can create and view dashboards through the Switch Web Portal. The permissions are set by the Switch administrator through the Users pane.

To view your (earlier created or shared) dashboards on the Switch Web Portal

1. In the navigation area on the left, click **Boards**.

   Make sure the navigation area is expanded (by clicking).

2. Click one of the boards in the navigation area, below the divider.

   There are two types of boards listed below the divider: job boards and dashboards (only available if the Reporting Module is licensed). The board type is mentioned in the Manage boards dialog (which can be opened by clicking **+ Manage**). Boards displayed in white are your own boards, boards displayed in blue are shared boards (which cannot be edited by you).

   The dashboard is shown to the right of the navigation area. There may be several widgets present on the dashboard. Some of the widgets show extra information when hovering or

clicking the legend. For more information, refer to the description of the widgets (*Dashboard widgets overview* on page 25).

2.5.5. Dashboard widgets overview

This is an overview of the widgets available for use on a Dashboard on the Switch Web Portal.

2.5.5.1. Dashboard widgets - Column layout

About the Column layout

The column layout is actually a layout, so not a graph or a counter. It allows you to place several widgets next to each other in columns, for a horizontal arrangement. If no column layout is chosen, the widgets will be placed one after the other, in a vertical arrangement.

How to configure the Column layout

By default, two columns are available, but you can add more columns by switching to edit mode and clicking the button.

Note that you should first *configure* the column layout; afterwards (after having saved/having clicked the button) you can drag the widgets onto the layout.

Properties

Property	Description
Spacing	White space between two columns. You can enter a value expressed in the unit of your choice: px, em or % When using pixels or em, the size of the white space will be fixed; when using a percentage, the white space will adjust when the screen is resized. Note that this setting is optional and only needed when you want separate the widgets.
Columns with width settings	For each of the individual columns you can either define a **column width** or a **minimum and/or maximum width**. The width can be fixed (expressed in px or %) or "fit the content" (meaning that you let Switch decide which is the best size).
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.

Property	Description
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

2.5.5.2. Dashboard widgets - Custom HTML

About the Custom HTML widget

This widget allows you to add text, tables, pictures, movies and links to your dashboard. You can use the text color and font of your choice, insert bullets, ...

How to configure the Custom HTML widget

You can type text in the text field and modify it using the tools in the editor.

An overview of shortcuts is available behind the question mark button. ?

Properties

Property	Description
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

2.5.5.3. Dashboard widgets - Live counter

About the Live counter widget

This widget displays a number, representing the amount of jobs currently present on the selected job board. Note that all jobs in all columns are taken together, resulting in one number, for example the number of problem jobs.

This number can be linked with a color, for example, if the number of jobs remains below a certain threshold, the background of the widget turns green; otherwise it turns orange or red.

The counter is updated at regular intervals (see properties), giving a live view on the Switch server.

How to configure the Live counter widget

You can configure the properties listed in the table below.

Properties

Property	Description
Job board	Job board data that will be used for the dashboard.

Property	Description
	'None' is not a valid option.
Set	By default, the data in all columns of the selected job board will be used ("All"), unless you select one particular column.
Include jobs finished in the last (hours)	The value chosen here determines how long after finishing the jobs will be included in the live counter. If you enter '0', only jobs that are still moving through the flow and haven't reached an output folder will be included. If the widget doesn't behave as expected, contact your Switch administrator. There may be a conflict with the Keep internal job tickets for (hours) in the *Switch Application data preferences*.
Color	Background color of the widget based on the value of the counter. To change a value, click it and increase or decrease the value using the small arrow buttons. To change a color, click it to open the color picker and select the color of your choice. Note that there's also a small text field below the color patches. You can click it and type the text of your choice. This text will be displayed below the counter.
Refresh interval (in seconds)	This value indicates how often the number of jobs is recalculated.
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

2.5.5.4. Dashboard widgets - Live graph

About the Live graph widget

This widget counts both the total number of the jobs on the selected job board and the number of jobs per column, and presents this info in a graph.

Note that this requires a job board with more than one column; each column is represented as a separate section in the graph. You can choose between a pie, a bar and a donut chart.

How to configure the Live graph widget

You can configure the properties listed in the table below.

Properties

Property	Description
Chart	Type of chart to be used. Options are: • Pie • Donut • Bar **Tip:** Use "Pie" and "Donut" to show how the parts (i.e. values per column) compare to the whole (total number of jobs); use "Bar" to show how the parts compare to each other or to show trends.
Show grid lines	If selected, grid lines are shown to make it easier to read the values. **Note:** This option is not relevant (hence not available) for pie and donut charts.
Job board	Data that will be used for the dashboard. For this type of charts, you should have a board with more than one column. 'None' is not a valid option.
Include jobs finished in the last (hours)	The value chosen here determines how long after finishing the jobs will be included in the live graph. If you enter '0', only jobs that are still moving through the flow and haven't reached an output folder will be included. If the widget doesn't behave as expected, contact your Switch administrator. There maybe a conflict with the Keep internal job tickets for (hours) in the *Switch Application data preferences*.
Refresh interval (in seconds)	This value indicates how often the values are recalculated.
Pick custom colors	When selected, you can change the default colors of each column that will be used in the graph. To change a color, simply click the color page and then click the color of your choice.
Use column names as labels	("Pie" only) When selected the names of the columns are displayed on the graph. • Default: "<number of jobs> jobs" e.g. "15 jobs" • This option enabled: "<column name>: <number of jobs>" e.g. "column1: 15"
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

How to use Live graphs

Smaller parts are not always easy to read, so when **hovering over one particular part of the chart**, this part is highlighted and you get a small dialog with the column name and the percentage value of the highlighted part.

When **clicking an item in the legend**, the corresponding part of the chart is disabled (grayed out in the legend) and taken out of the chart. Clicking once more will bring it back.

2.5.5.5. Dashboard widgets - Live table

About the Live table widget

This widget displays **information about the jobs** counted in a live graph or a live counter on the same dashboard. For example, if your graph gives an overview of the number of jobs per flow, the live table can display detailed information about these jobs (job name, flow name, stage and state of the job).

How to configure the Live table widget

You can configure the properties listed in the table below.

Properties

Property	Description
Height	Size of the table. Options: • Small • Medium • Large (default)
Parent	Live graph or live counter that is used as dataset for the live table. 'None' is not a valid option.
Visible columns	Enable the column(s) you want to see in the live table. Options are: • Set • Name • Flow • Stage • State At least one column must be selected.
Show header	When selected, the columns in the table have a column header.
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

How to use live tables

To **see the details of a particular part/category in the chart**, e.g. one slice of the pie, just click in the chart. Only the details of the corresponding jobs will be shown in the table. Clicking once more will reset the table.

To **search for a particular job/a set of jobs**, you can filter the table by entering a key word in the filter fields below the column headers. Note that these filter fields are not case sensitive.

To **sort the list in ascending or descending order**, click the column header of the column by which you want to order it. Note that the small arrow in the column header will become a bit darker, to indicate this.

2.5.5.6. Dashboard widgets - Messages

About the Messages widget

This widget displays log messages based on a saved messages filter. Refer to *Filtering log messages* on page 9.

How to configure the Messages widget

You can configure the properties listed in the table below.

Properties

Property	Description
Height	Size of the table. Options: • Small • Medium • Large (default)
Filter	Messages filter that is used as dataset for the live table. 'None' is not a valid option. **Note:** If the messages filter is removed afterwards, the widget won't work anymore... you'll get a warning ("Data could not be loaded").
Visible columns	The columns of the Messages overview that will be shown in the widget. Options: • Time • Type • Flow • Job • Module • Element • Prefix • Message

Property	Description
	At least one column must be selected.
Number of messages	Maximum number of messages to be shown. Options: • 10 • 20 • 50 • 100
Refresh interval (in seconds)	Indicates how often (e.g. every 10 seconds) Switch checks for new messages.
Show header	When selected, the columns in the table have a column header.
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

How to use the Messages widget

To **search for a particular message/a set of messages**, you can filter the table by entering a key word in the filter fields below the column headers. Note that these filter fields are not case sensitive.

To **sort the list in ascending or descending order**, click the column header of the column by which you want to order it. Note that the small arrow in the column header will become a bit darker, to indicate this.

2.5.5.7. Dashboard widgets - History graph

About the History graph widget

A history graph **visualizes the evolution of the number of jobs or the job size over a particular period of time**, for example the total number of problem jobs of the last month, grouped by week. A further subdivision is possible, you can for example further group the jobs by file type, flow, stage or state.

Note that this graph only counts jobs that are completely finished, meaning that they have left the Switch flows. Data is available for the time period set in the user preferences, for example for 120 days. Refer to the Switch Reference Guide (Switch Preferences: Dashboard)

How to configure the History graph widget

You can configure the properties listed in the table below.

Properties

Property	Description
Chart	Type of chart to be used. Options are: • Line • Spline (curved line) • Bar • Pie
Show grid lines	If selected, grid lines are shown to make it easier to read the values. **Note:** This option is not relevant (hence not available) for pie charts.
Job board	Job board to be used for the history graph. 'None' is a valid option for history graphs: if selected, all jobs on the Switch server are taken into account!
Set	Column to be used. If 'None' is selected as Job board, this option is not available.
Unit	Determines what is counted and displayed: • Number of jobs • Total size
Group by	Determines how the values are grouped: • **None**: no grouping; the total number of jobs or the total size is mentioned. For example, 200 jobs on day1, 190 jobs on day 2, etc. • **Type**: the total number or the total size is further divided by file type. For example, 100 PDF files and 100 text files on day1, 90 PDF files and 100 text files on day2, ... • **Stage**: the total number or the total size is further divided by flow stage. For example, 75 jobs in stage1 and 125 in stage2 on day1, 70 in stage1 and 120 in stage2 on day2, ... **Note:** Stages that were not selected on the job board are not shown. • **State**: the total number or the total size is further divided by job state. For example, 33 jobs in state1 and 167 in state2 on day1, 22 in state1 and 168 in state2 on day2, ... • **Flow**: the total number or the total size is further divided by flow. For example, 50 jobs in flow1, 50 in flow2 and 100 in flow3 on day1, 99 in flow, 1 in flow2 and 90 in flow3 on day2, ... **Note:** Flows that were not selected on the job board are not shown.

Property	Description
	• **Element**: the total number or the total size is further divided by flow element. For example, 2 jobs have been put in the recycle bin, 7 jobs have been processed by the Enfocus PitStop Server configurator, ... Note that all elements in all flows are taken together, regardless of the name of the instance in the flows. For example, even if the recycle bins in your flows are called 'Trash1', 'Trash2', Trash3', in the graph you'll see 1 flow element 'recycle bin' (with all jobs collected in all 3 trash folders). As for the folder element: only input folders are taken into account. Intermediate and output folders nor problem folders are represented in the graph.
Period	Determines how the data will be grouped, i.e. which data will be taken together. • Day • Week • Month For example, if grouped by week, you'll get one value for all jobs of a particular week (optionally further divided by flow, file type, etc.) **Note:** This field is not available if the 'Pie' chart is chosen.
Days previously	Refers to the time period that will be shown in the graph. For example, if set to '200', the data of the last 200 days (= today minus 200 days) will be shown. Note that the maximum number of days that is possible is determined by the Reporting preference (see higher).

Use group names as labels	("Pie" only) When selected, the names of the grouped items (see the *Group by* option) are displayed on the graph.
	• Default: "<number of jobs> jobs" e.g. "15 jobs"
	• This option enabled:
	  • Group by set to *None*: "Overall: <number of jobs>" e.g. "Overall: 15"
	  • Group by set to *<item>*: for each <item>, <name of the item>:<number of jobs> e.g. if grouped by 'Element': "Submit point: 9","Checkpoint: 6",...

Show target line	("Spline" and "Line" only) When selected, a line will be drawn at a given target value. This option triggers the following property:
Target value	Value that determines where the target line will be drawn on the spline or line graph.
Show frame	When selected, a thin frame is drawn around the widget and the following additional properties are displayed:
Title	Text that will be shown in the title bar of the widget. You can leave it empty as required.
Frame color	Color that will be used for the title bar and the frame around the widget. Clicking the color patch will open a color picker dialog.

How to use history graphs

Smaller parts are not always easy to read, so when **hovering over one particular part of the chart**, this part is highlighted and you get a small dialog with more information (for example the number of jobs/the total size per group; if there is no grouping, the dialog mentions the "overall" value).

When **clicking an item in the legend**, the corresponding part of the chart is disabled (grayed out in the legend) and taken out of the chart. Clicking once more will bring it back.

2.6. Submitting and checking jobs through the Switch Web Portal

Submitting and checking jobs through the Switch Web Portal is only possible if you have licensed the **SwitchClient Module** or the **Web Services Module**.

Overview

An active SwitchClient/Switch Services Module gives access to the following functionality:

- Connect to one or more Switch Servers on the local network/internet.
- Submit jobs (files or job folders) and metadata describing these jobs to a Submit point in a flow.
- Review and act on jobs being held in a Checkpoint in a flow.
- View progress information and the status of submitted jobs.
- View log messages issued by processes on the server.

Good to know

- Access to particular Submit points and Checkpoints can be restricted, by configuring access rights at user or user group level.
- Metadata information attached to a job can be used to make automated routing decisions or to provide variable input to various tools and configurators.
- If you want to connect to more than one Switch Server at a time, you must open a browser window per server and sign in to the Switch Web Portal for each server separately. The IP address of the server is displayed in the URL.

2.6.1. Setup in Switch

Allowing users to submit and check jobs via the Switch Web Portal, requires **some preparation in Switch**, usually done by a system administrator.

This includes:

- Installing and activating Switch (this includes activating the SwitchClient Module)
- Designing and activating one or more flows that will process the jobs submitted and monitored through the Switch Web Portal.
- Configuring user access rights (in the Users pane)

- Configuring or checking the communication settings (through the Switch user Preferences)

2.6.1.1. Installing and activating Switch and the SwitchClient Module

Licenses

A regular SwitchClient Module includes a license for **up to five concurrent connections**. If this is not sufficient, you can purchase additional licenses. The number of licenses can be raised by entering a new activation key in the **Manage licenses** dialog in Switch.

An active SwitchClient Module allows you access to the following flow elements:

- Submit point
- Checkpoint
- Checkpoint via mail

If SwitchClient is not licensed, the above flow elements will not be available and you will not be able to submit and check jobs through the Switch Web Portal.

How to proceed

Follow the guidelines and instructions described in the Switch Reference Guide ("Installing, activating and starting Switch"):

1. Install Switch.
2. Activate Switch, including the SwitchClient Module.
3. Activate additional licenses if required.

2.6.1.2. Designing flows for use with the Switch Web Portal

Managing files through the Switch Web Portal requires a particular flow design in Switch.

About flows in Switch

To design a flow, the Switch user drags flow elements (such as Submit points, processors and folders) on the canvas and connects them according to the desired job flow. After configuring appropriate property values for each flow element (and in some cases, the connections), the Switch user can activate the flow for execution. From then on, Switch automatically moves and processes jobs along the flow.

If you're new to Switch, we recommend having a look at the Switch Quick Start Guide (available on the *Enfocus website*).

Dedicated flow elements

Submit points and **Checkpoints** are flow elements designed for use with the Switch Web Portal. For more information, refer to the Switch Reference Guide (Flow elements: overview > Communication).

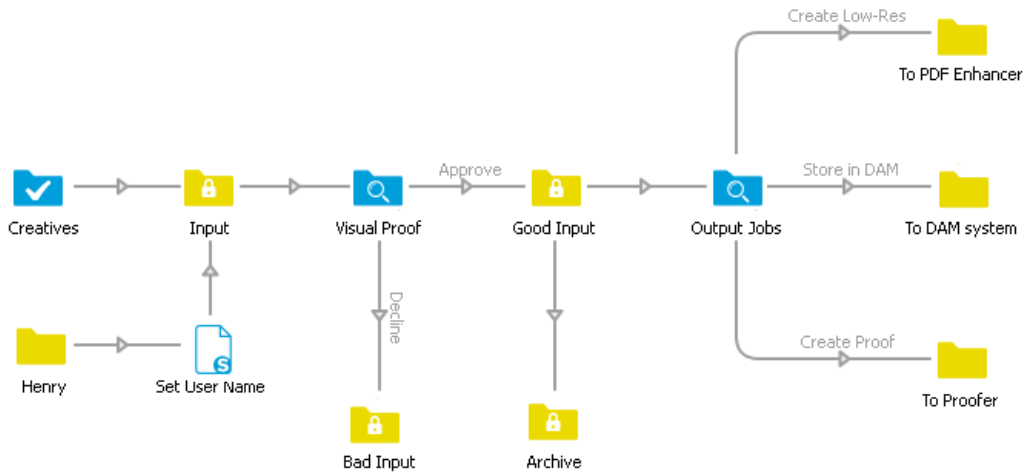
Note:

- Make sure the **flows you want to use with the Switch Web Portal are active**. A user with the appropriate access rights can *access* Submit points, Checkpoints and jobs in inactive flows but the jobs will not move along the flow.

- **The Switch Web Portal only interacts with the Switch Server**, not with the Switch Designer. Users can safely quit the Designer without disturbing the operations via the Portal as long as the Switch Server is running. For more info on the behavior of Switch when exiting the flow designer, refer to the Switch user preferences (User interface).

Example flow

Here's a flow example as it is shown on the Switch canvas:



Since this example focuses on Web Portal features, there is a lot of interaction with human operators and little automated processing (other than moving jobs around). Real-life flows would probably include processing steps such as preflight or color conversion.

The **Submit point on the left** (*Creatives*) allows submitting jobs to the flow in a controlled way using the Switch Web Portal. The user's name is automatically remembered; multiple users can use the same Submit point since each user is identified to Switch through his/her user name and password. The "Set User Name" script serves to add a user name for jobs submitted through a regular hot folder (Henry).

The **first Checkpoint** (*Visual Proof*) holds the incoming jobs for inspection by a user through the Switch Web Portal. The user will see the names of the output connections (Approve and Decline) as buttons in the job card. Pressing one of these buttons moves a job along the corresponding connection.

The **second Checkpoint** (*Output Jobs*) allows a Switch Web Portal user to decide how the jobs will be stored or processed. This Checkpoint is configured to allow multiple outputs at the same time; for example both "Store in DAM" and "Create Proof".

Setting up a Submit point

When setting up a Submit point (*Creatives* in the example flow), you can configure it in such a way that the user must enter one or more data fields before submitting a job to this Submit point. The entered values are associated with the job as metadata.

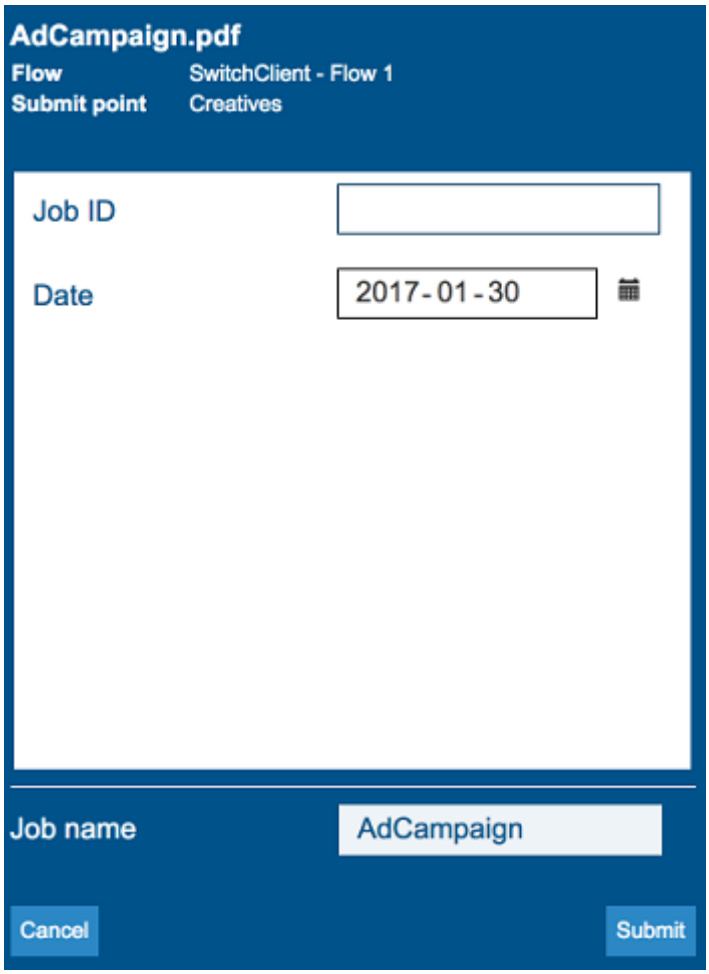
To enable this option, in the properties of the Submit point element:

1. Set **Submit** to **Job and metadata** or **Metadata only** (if the user should only submit a form, without a job).

2. In the **Metadata fields** property, define the metadata fields for which the user should provide a value, for example a Job ID and the date of submission.
3. The **Dataset name** field is completed automatically. This is the name of the dataset that will be created containing the contents of the metadata fields entered by the user.
4. **Invalidate user metadata cache on login** and **Invalidate metadata cache condition** have to do with caching dynamic values, which can be useful to speed up processing.

For a full description, refer to "Defining metadata fields" in the Switch Reference Guide.

The following screenshot shows how a user will have to enter the data (Job ID and Date) configured in the Submit point.



Note: As of Switch 2019 spring, it's also possible to set up a Submit point that triggers an Action. In that case, the Submit point on the Switch Web Portal acts like a button: when a user clicks it, a dummy job (*.dummy) moves through the Switch flow and (depending on the flow) this job can start a process, call a database, ...

Setting up a Checkpoint

Similarly, when setting up a Checkpoint (*Visual Proof* and *Output Jobs* in the example flow), you can ask Switch to display additional information about the job, and the user may be asked to

enter additional data fields before acknowledging a job. (This is the case if the **Enter and display metadata** property is set).

Furthermore, the **output connections of the Checkpoint determine which buttons will be shown** to the user for acknowledging a job.

For example, the *Visual Proof* Checkpoint in the example flow is configured in such a way that the user will see two radio buttons ('Decline' and 'Approve', named after the connections); clicking one of the buttons causes the job to move along the corresponding connection. This is the default behavior of a Checkpoint if two output connections are defined and no metadata has been enabled.

On the other hand, the *Output Jobs* Checkpoint in the example flow is configured in such a way that the user can select **more than one option**, causing a duplicate of the job to be sent out over each of those connections. This is possible if the **Allow multiple outputs** property is enabled.

In this example, the user that has to review the files will see 3 checkboxes (the names come from the output connections in Switch) and can select one, two, or three checkboxes as required.

For an overview of all properties, refer to the description of the Checkpoint flow element in the Switch Reference Guide.

Metadata in Submit points and Checkpoints - default values

When defining the default values for the metadata fields, you can use a number of variables that automatically retrieve information from the computer that is used to submit or check jobs. As a consequence, this information does not need to be entered explicitly by the user; it can even be sent along with the job without being displayed.

The variables concerned are the so-called Connection variables:

- [Connection.Email]
- [Connection.FullUserName]
- [Connection.IP]
- [Connection.UserName]

If you use those as default values for your metadata fields, they will be replaced automatically with their actual values.

To make this happen, "bidirectional communication" is established between Switch and the Switch Web Portal:

1. The Switch Web Portal requests the default value of the metadata fields, being a connection variable.
2. Switch Server sends the connection variable e.g. [Connection.IP] to the Portal.

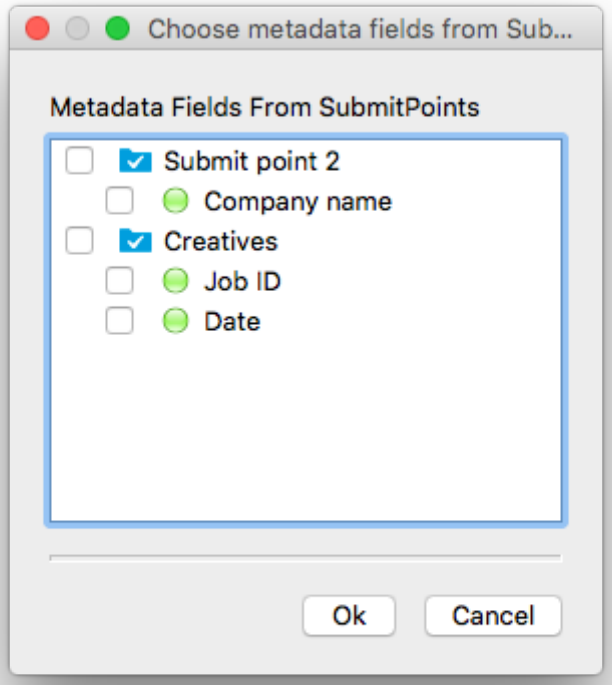
3. The Portal replaces the variable with its actual value and sends the actual value along with the job back to Switch Server.

Use case: To keep track of the clients used to submits jobs, you could configure a metadata field "IP address" and set the default to [Connection.IP]. When a file is submitted, the IP address of the system used to submit this file is entered automatically and sent along with the job. It depends on the metadata field properties whether or not this field (with the actual value) is shown to the user and whether or not it can be changed.

Re-using metadata fields from a Submit point in a Checkpoint

Switch provides an easy way to re-use the metadata fields defined for Submit points in a particular Checkpoint.

To re-use an existing metadata field, simply click the button (instead of the green plus button) in the Define metadata fields dialog. This will open a dialog like the one shown below.



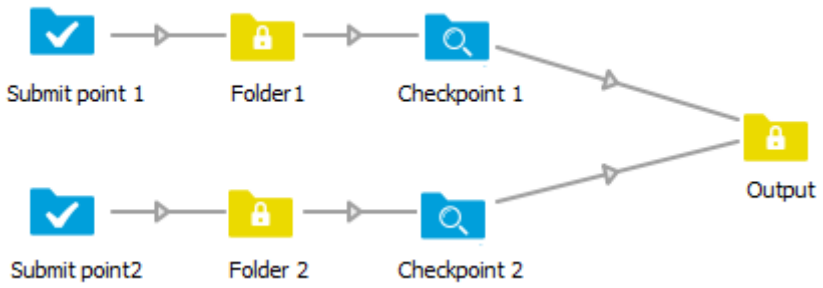
You can now select the metadata fields you want to re-use (based on the Submit points defined for the current flow). Note that the added metadata fields have only two editable options: **Read only** (yes/no) and **Display metadata field** (yes/no). The other options are grayed out and cannot be changed.

Remark: Although all Submit points present in the flow are shown, you must keep in mind that only the Submit point that is used for the job will send metadata. Refer to the example below:

since all jobs in Checkpoint 1 come from Submit point 1, it does not make sense to add metadata from Submit point 2 to Checkpoint 1 (and vice versa).

If configured incorrectly, the connection variables (if used) will not be replaced with the actual values (users will see e.g. [Connection.UserName]) and metadata fields for which there is no value entered will be blank.

If configured correctly, when checking the Alert job on the Portal, the connection variables (if used) will be replaced with the actual values (e.g. EAW13DL399 instead of the [Connection.IP]) and the metadata fields that were completed at the time of submission will show the entered data.



2.6.1.3. Configuring user access

How to proceed

Follow the guidelines and instructions described in the Switch Reference Guide ('Configuring users'):

1. Set up the appropriate users and configure their user name, password, email address,...
2. Give them access to the appropriate Submit points and Checkpoints.

2.6.1.4. Configuring the communication settings

To configure the communication settings for communication with the Switch Web Portal

1. Navigate to:
   - On Windows: **Edit** > **Preferences**.
   - On Mac OS: **Enfocus Switch** > **Preferences**.

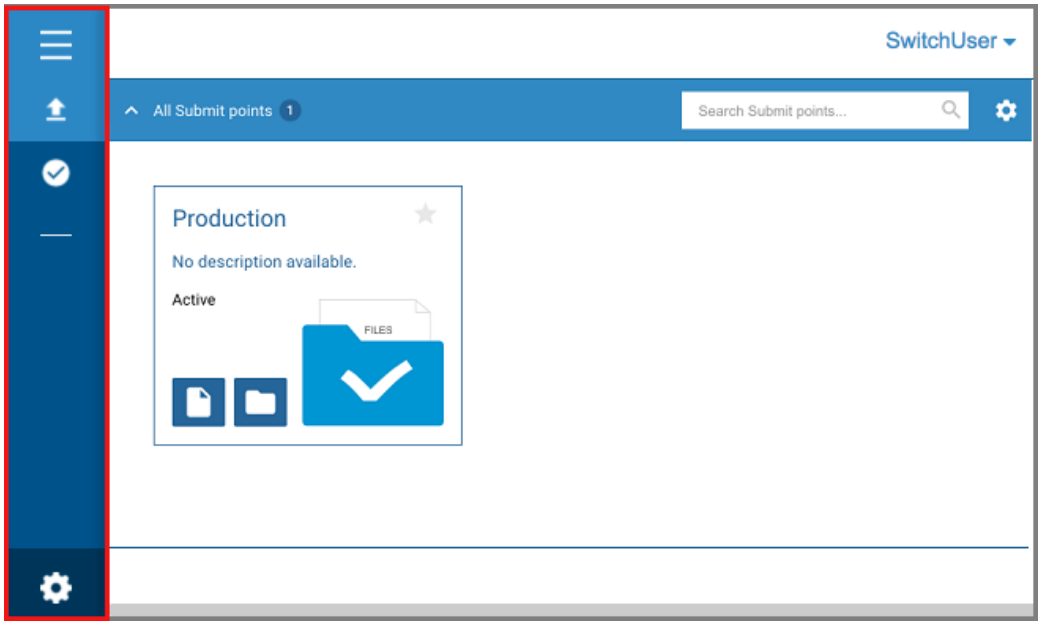
   The User preferences dialog appears.
2. In the left part of the dialog, click the **Web services** category.
3. Make sure the **Port for the Switch Web Portal** preference is set to 51089, unless there is a good reason to change it.

4. Click **OK**.

2.6.2. The Switch Web Portal User Interface

2.6.2.1. The navigation area

When opening the Switch Web Portal, you can access the functionality to submit and check jobs through the navigation area in the left part of the screen. This area can be collapsed or expanded; when collapsed (see screenshot), the icons remain visible allowing you to switch to the appropriate view. The view that is active is highlighted; in this example, that is the Submit jobs view.



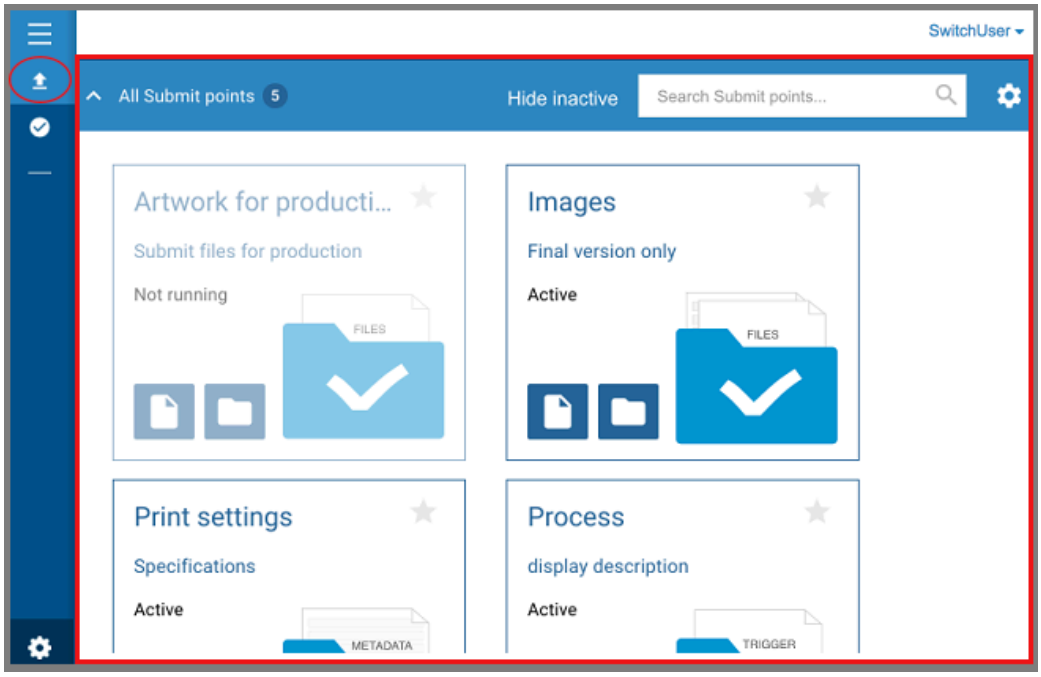
The table below explains the meaning of the buttons in the navigation area.

Button	Click this button to...
	Expand or collapse the menu.
	Display the Submit jobs view.
	Display the Check jobs view.
	Find more info. A new dialog is opened with links to: • The Switch documentation on the website • The Enfocus Support Portal (to report a problem) • The Support page on the Enfocus website • The Switch system requirements.

Note: Depending on your permissions, you may see two extra buttons in the navigation area, giving access to the log messages and the boards. For more information, refer to *Finding Switch jobs through the Switch Web Portal* on page 12, *Managing dashboards on the Switch Web Portal* on page 17 and *Viewing log messages through the Switch Web Portal* on page 5.

2.6.2.2. Submit jobs view

The Submit jobs view allows you to submit jobs to the Switch Server. You can see all Submit points that you have access to, based on your permissions (as set in the Users pane in Switch).



Note: The first Submit point ("Artwork for production") is slightly grayed out, because the Switch flow is currently not running. As a consequence it is not possible to submit jobs to that Submit point. You can hide these inactive Submit points by clicking the **Hide Inactive** button next to the search field.

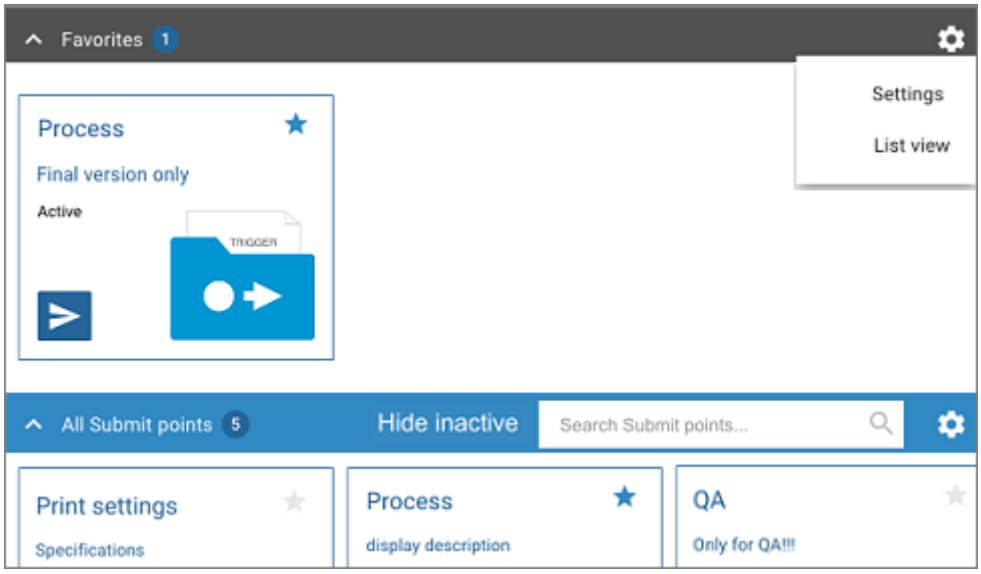
Submit point types

There are four different types of Submit points. You can recognize them by the image and text mentioned on the Submit point. It depends on the configuration in Switch which types are available on the Portal.

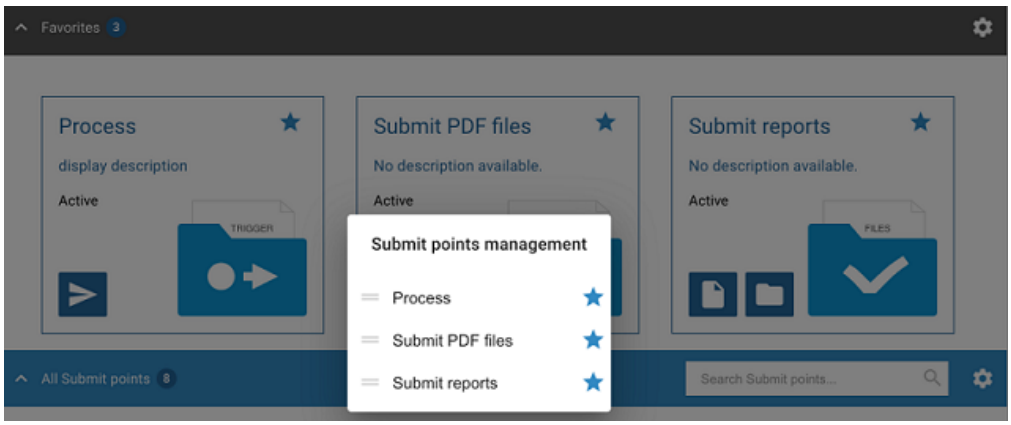
Submit point	Description
	This Submit point only accepts **job files and folders**, no metadata. Click the first button to upload files, click the second button to upload folders. Note that you can also drag and drop jobs onto the Submit point.
	This Submit point accepts both **job files and folders and metadata** (= extra information about the job that has to be supplied when uploading a job). Click the first button to upload files, click the second button to upload folders. Note that you can also drag and drop jobs onto the Submit point. Once you have uploaded the job(s), a form is opened where you can enter the requested information.
	This Submit point **only** accepts **metadata**. You need to fill out a form. Click the button to open the form and supply the requested information.
	This Submit point allows you to send a **trigger**. When you click the button, a database is called, a process is started, ... (depending on the configuration in Switch). A notification will be shown to confirm that the trigger was sent.

Favorite Submit points

You can mark your favorite Submit point(s) by clicking the star icon , so it turns blue . Favorites are displayed in a collapsible, separate section at the top of the page. The number of favorites is mentioned in the header.



Via the menu in the top right corner, you can switch to List view (see further) and open the Submit points management dialog (by clicking "Settings"). The table below lists what you can do through this dialog.

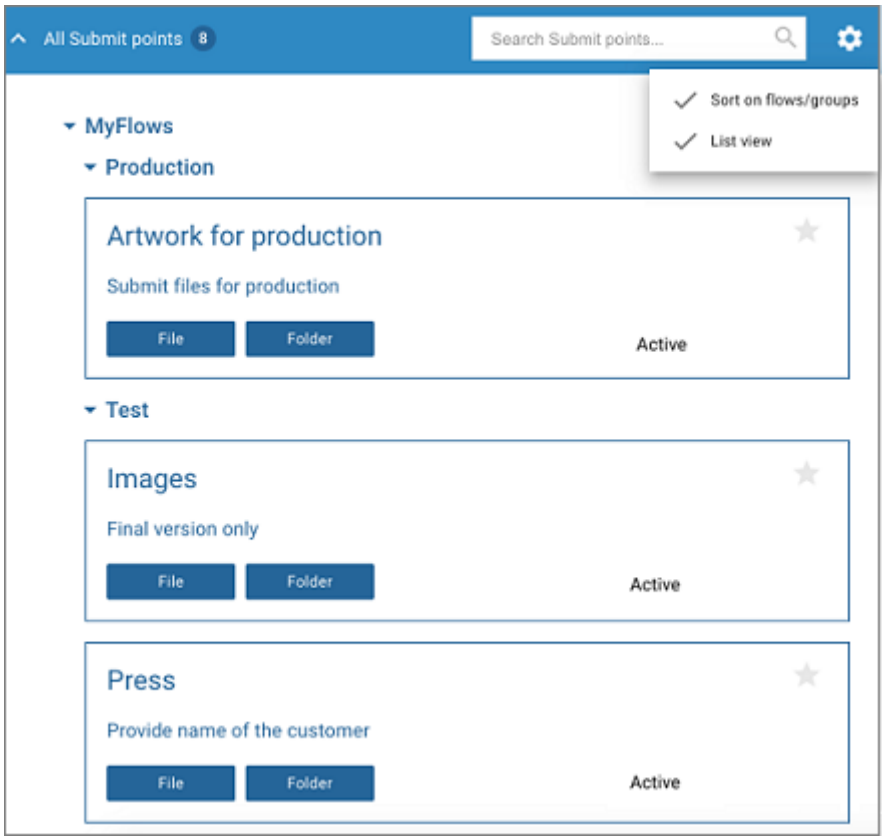


What you can do:	How:
Remove Submit points from the Favorites overview	Click the blue star icon ★ next to the Submit point you want to remove. Note that it's only removed from the Favorites section, not from the All Submit points section.
Change the order of the Submit points in the Favorites overview	Click the icon ═ preceding the Submit point and drag and drop the Submit point upwards or downwards as required.

List view

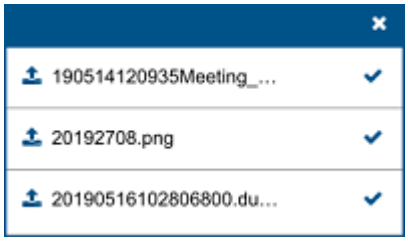
It's possible to display the Submit points in "list view", optionally even sorted by flow and flow group.

This view can be displayed via the gear wheel button next to the Search field.



Progress indicator

Once you have submitted a job, you may see one of the following icons in the sidebar:

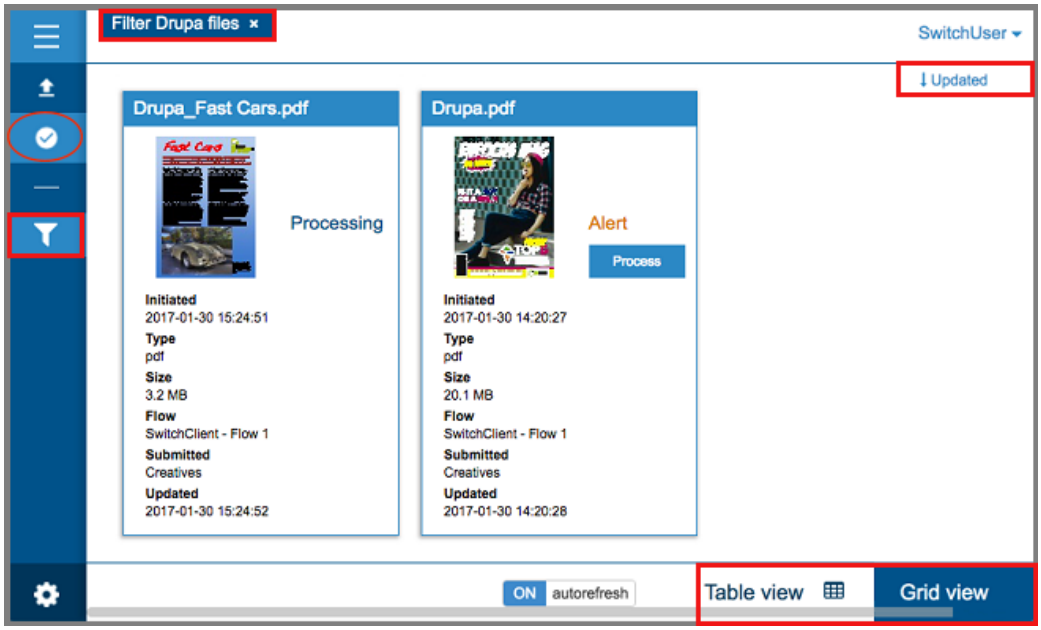
Icon	Meaning
	Indicates that a job is being uploaded. You can click it to see the percentage of completion.
	Indicates that the jobs that were submitted in the current session were uploaded successfully. You can click the icon to see which jobs were uploaded. 

Icon	Meaning
	Note that trigger jobs and metadata only jobs are also present in this overview. They get a name with extension "dummy", e.g. 2019051712345.dummy.

2.6.2.3. Check jobs view

This view allows you to view jobs submitted through a Submit point on the Switch Web Portal, and to check and route jobs waiting in a Checkpoint.

It depends on your user permissions (set in the Users pane in Switch) which jobs you can see and/or further process.



This view has a couple of extra buttons:

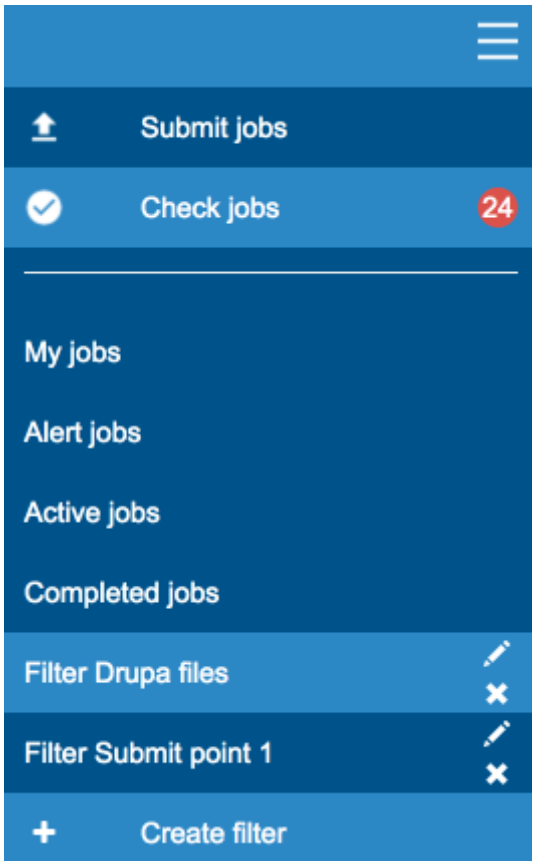
Button	Meaning
	Click this button to manage the filters that allow you to only display a *subset* of the jobs that you have access to. When you click this button, the navigation area expands automatically, so you can see the pre-configured filters (My jobs, Alert jobs, Active jobs, Completed jobs) and the ones you have created yourself (see screenshot below).
	The label in the upper part of the overview refers to the *custom* filter that is currently applied. If you want to stop filtering based upon that filter, you can click the cross icon.

Button	Meaning
	Note that *pre-configured* filters are not marked by a label when they are applied. You can see that they are applied, when they are highlighted in the navigation area.
↓ Updated	This button allows you to change the sort order of the jobs in the overview. In this example, the jobs are sorted in descending order (arrow down) by the date they were last updated (= value of the field "Updated").
Table view Grid view	This button allows you to Switch between table view and grid view (as on the screenshot): • In table view, every row represents a job; the job details are shown in the different columns. • In grid view, every job card represents a job; the job details are listed on this card.

Filters

This is an example of how the navigation area looks when expanded.

The filter that is applied ("Filter Drupa files" in this example) is highlighted.



Note the counter next to 'Check jobs'. It indicates the number of "alert" jobs waiting to be processed.

2.6.3. Submitting jobs through the Switch Web Portal

It is possible to submit single files or multiple files, or files contained in a folder (for example a page layout with its accompanying images and fonts or the individual pages in a book). A job folder may contain nested subfolders (which can contain other files and folders, recursively).

If the files are contained in a folder, they will be considered as one job with one dataset; it will not be possible to enter metadata for each file separately.

As of Switch 2019 spring, it's also possible to submit metadata only (so a form without a job), or to send a trigger.

Note:

- Remember that the Switch Server must be running and that the Switch flow must be activated. Otherwise, the jobs will not be processed.
- Some Submit point require that you install Switch Helper on your computer. If (the appropriate version of) Switch Helper is not installed, you will get a warning and a link to download this free tool from the Enfocus website. Note that the Switch Helper tool does not function well when you're launching the Web Portal through an HTTPS connection in Firefox or Safari (due to security constraints implemented in these browsers), so we recommend using HTTP, or HTTPS but with a different browser (like Google Chrome or Edge).

To submit a job to a particular Submit point:

1. In the Switch Web Portal, in the navigation area, click **Submit jobs**.
   You can see the Submit points you have access to. Note that not all Submit points accept all types of jobs... the accepted type ("files", "metadata", "trigger") is mentioned on the Submit point. Refer to *Submit jobs view*.

2. Do one of the following:
   - To upload job files or folders, "drag and drop" the file(s) or folder(s) you want to submit onto the Submit point of your choice (that accepts files). Alternatively, click to upload a file or to upload a job folder.

     Note: To select multiple files or folders, hold down the **Ctrl** key while selecting.
   - To upload metadata only, click the "metadata only" Submit point and proceed to step 4 of this procedure.
   - To send a trigger, simply click the "trigger" Submit point. The trigger is sent immediately. You're done!

3. *If you have selected several files*, you must first decide if you want to process them as **separate jobs** or as **one job**. Click the button of your choice.
   If you choose to process them as one job, the files will be submitted to and moved along the flow as a single entity.

4. *If the Submit point has been configured to request additional information about the job* ("metadata"), you'll get a dialog with one or more entry fields. Enter the requested information.

5. Change the job name as required.

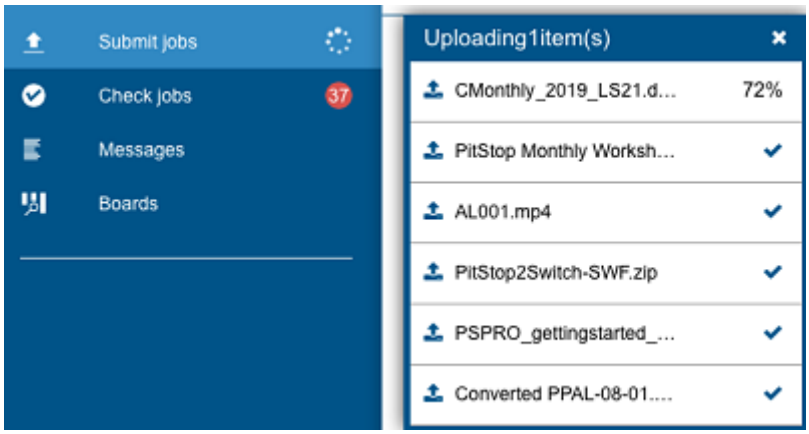
   The chosen job name will replace the file name. For example, if the job name is "testjob", the job file "customerX.pdf " will be renamed "testjob.pdf". The file extension remains the same.

   In case of a job folder, the job name will replace the name of the folder. The files contained in this folder will not be renamed.

   In case of multiple files being submitted in one go, you cannot enter a job name, unless you have chosen to process them as one job; in that case, they are put in a folder and the chosen job name will be the folder name.

6. Click **Submit**.

Note that there is a progress indicator in the sidebar. When you click the icon, you can see which files have been submitted successfully, and/or which are still uploading.



When uploading is finished, the progress indicator changes from to .

2.6.4. Creating a shareable Submit points URL

Submit point URLs are direct links to one or more Submit points. The URLs can easily be distributed, for example via email.

Note that only Switch administrators (= Switch users registered as administrator in the Switch Users pane) have the right to create shareable URLs.

To create a shareable Submit point URL

1. With the **Submit jobs** view selected, click **+ Manage**.

   If you don't see the **+Manage** link, you may not have the required user permissions.

2. In the Manage Submit points URL dialog, click **New URL**.
   A row is added to the dialog. The first column is empty: the URL will be added after you have selected the Submit point(s) and after having clicked **Apply**.

3. Enter a description.

4. Drag the slider to the left to disable the authentication option as required.

   - Note that the authentication option is only available if the Web Services Module is licensed. If that is not the case, users will always need to enter their credentials before getting access to the Submit point(s).
   - By default, authentication is enabled, meaning that the user needs to enter his Switch credentials to get access to the Submit point(s). Note that the user's other permissions are also taken into account. For example, if the user has no right to submit jobs, he won't see the Submit jobs view, so he won't be able to use the URL. The other way around, if the user has access to other functionality, or to more Submit points, he will have the same options as when he had signed in through the regular Web Portal address.
   - If authentication is disabled, everyone who clicks the link will have access to the selected Submit point(s). No credentials will be required. Only the selected Submit points are accessible, all other functionality on the Portal is hidden.

5. In the Submit points column, click **Select** to select the Submit point(s) concerned.

6. In the Expiration date column, click the **None** link to enter an expiration date as required.

   The URL will become invalid as of the set date. The format in which the date is displayed, is determined by your browser settings.

7. Click **Apply**.
   The URL is added.

8. To copy the URL (for distribution), click the **Copy URL to clipboard** icon.

You can later make changes to the configuration of the URL, for example add extra Submit points or change the authentication setting. This won't change the (probably already distributed) URL in the first column.

2.6.5. Viewing jobs through the Switch Web Portal

To view Switch jobs through the Switch Web Portal

1. In the Switch Web Portal, in the navigation area, click **Check jobs**.
   You can see all jobs you are allowed to see based on your user permissions (set in the Switch Users pane). The counter (only shown if the menu is expanded) indicates the number of files waiting in a Checkpoint.

2. To view only a particular set of jobs, apply a filter.

   Make sure the navigation area is expanded (by clicking or).

   - Click one of the pre-configured filters in the navigation area below **Check jobs**, for example 'My jobs'. Refer to *Job filters* on page 52.
   - Create a filter yourself. Refer to *Creating a custom filter* on page 53.

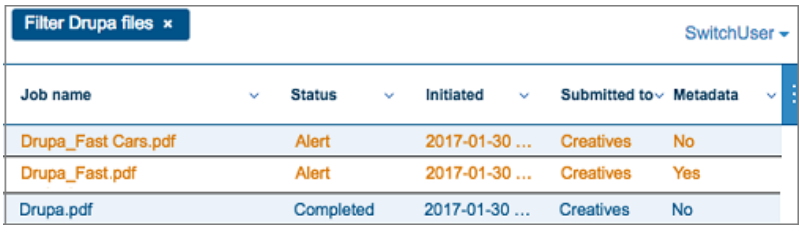
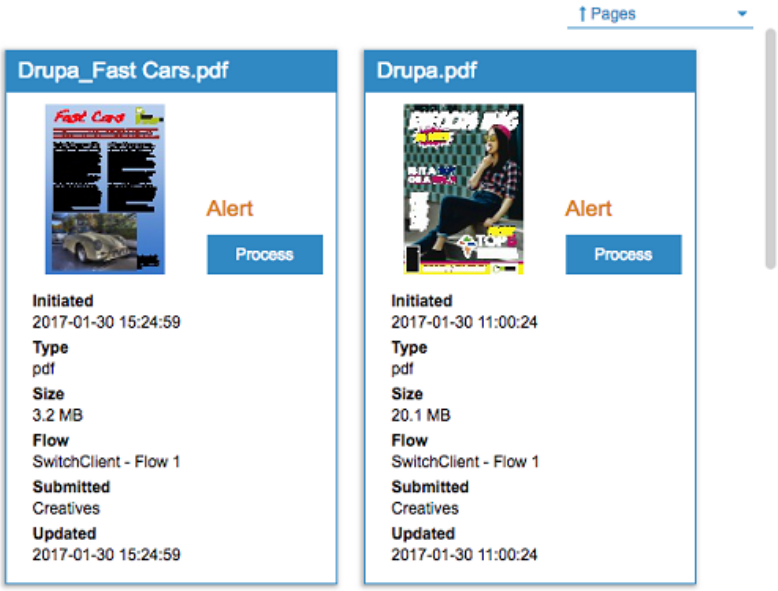
   The jobs matching the selected filter (now highlighted in the navigation area) are shown. If you don't see the jobs you expected to see, check if:

   - The Switch Server is running.

- The information displayed is up-to-date. Refresh your browser window to update the information from the Switch Server.

Note that you can stop filtering by clicking the filter name in the navigation area once more. Alternatively, in case of a custom filter, you can create the cross icon in the *label* (shown in the upper part of the overview).

3. To view the jobs presented in a different way, click the table view or the grid view button at the bottom of the screen.

View	Example
Table	 Table-specific options: • To hide a column, click the icon in the top right corner and clear the checkbox of the column you want to hide. Note that you can go back to the default view (and column size/position) via the Refresh columns option at the bottom of this list. • To move the columns, drag them sideways. • To sort the overview, click the header of the column you want to use to sort the overview and click the order of your choice (A-Z or Z-A).
Grid view	

4. To view the details of a job and eventually review and process the job:

- In table view, click the row concerned.
- In grid view, click the **Process** button of the job you want to check and/or process.

See also: *Reviewing and processing jobs through the Switch Web Portal* on page 55.

2.6.5.1. Job statuses

The following table gives an overview of the statuses a job can have on the Switch Web Portal.

Status	Meaning
Processing	The job resides somewhere in the flow but not in a Checkpoint, and it is not finished yet. This includes jobs in the Problem jobs flow element.
Alert	The job resides in a Checkpoint and is waiting for intervention by an operator. The number of alert jobs is indicated by a counter in the navigation area of the Web Portal.
Error	The job failed. You should contact your system administrator for more information.
Completed	The job has been processed and has arrived in the output folder of the flow.

2.6.5.2. Job filters

Default job filters

The table below provides an overview of the default, pre-configured filters in the Check jobs view on the Switch Web Portal.

Filter	Displays:
My Jobs	All jobs submitted by you, i.e. the current user, regardless of their current status (processing, alert, completed).
Alert Jobs	All jobs waiting in a Checkpoint. **Note:** You can only see the jobs in a Checkpoint that you are allowed to access (as configured in the Users pane in Switch).
Active Jobs	All jobs that are somewhere in the flow, but not in an end folder (that is, not yet completed). This includes files that reside in the Problem jobs folder. **Note:** This only applies to jobs that are visible to you.
Completed Jobs	Displays all the jobs that reside in an end folder in Switch. **Note:** This only applies to jobs that are visible to you.

Custom job filters

You can as well create your own filters, for example you can create a filter to display all jobs in a particular Submit point or Checkpoint, all jobs with a particular status, all jobs initiated before or after a particular time, etc.

Refer to *Creating a custom filter* on page 53.

Note that these filters are not visible to other Switch users signing in to the Switch Web Portal.

No filter applied

If no filter is applied, you can see all jobs you are allowed to manage.

2.6.5.3. Creating a custom filter

In the Check jobs view on the Switch Web Portal, you can create your own, custom filters.

You could for example create a filter that displays all jobs with a certain status that were submitted to a particular Submit point.

To create a custom filter

1. Do one of the following:
   - In the navigation area, click **+ Create filter**.
   - Click in the upper part of the screen on "Create filter".
2. In the dialog that pops up, beside the **Close** button, enter a meaningful name for the custom filter.

   Each filter needs to have a unique name.
3. Configure a filter rule: select the appropriate filter field, choose an operator and enter the value of your choice.

   Example filter fields are: Checkpoint, On alert since, Files, Flow, ... "Familystarter" refers to the first job in a job family, being a set of jobs that have been generated from the same original job. For example, a PDF, its Preflight Report, the preflighted and the low res version, ... they all belong to the same job family.
4. To configure a second rule or rule set, click the appropriate button:
   - To add one rule, click the green **Add rule** button.
   - To add several rules, which are related to each other (through an AND/OR relation), click the green **Add group** button.

   If you have made a mistake, you can remove the rule concerned by clicking the red **Delete** button.
5. Once you have configured your rules, make sure to indicate the relation between the rules and the rule groups, by clicking the appropriate button:

- And means that for each job it is checked if all rules apply. For example, with *Checkpoint = Checkpoint 1 AND job status = alert* only the jobs in Checkpoint 1 that have the alert status will be shown.
- Or means that at least one of the rules should apply. For example, with *Checkpoint = Checkpoint 1 OR job status = alert*, all jobs in Checkpoint 1 are shown (regardless of their status) and all jobs that have the alert status (regardless of the Checkpoint they are in).

The And/Or option is only relevant if you're configuring more than one rule.

The following example results in a list of jobs submitted to Submit point 1 AND having a certain status, which can be either Alert OR Error.

6. If required, repeat step 5 until you have configured all rules you need.
7. Click **Apply** or **Apply and save** as required.

The newly created filter is displayed in the blue navigation area on the left and in the upper part of the screen as a blue label. The label indicates that the filter is applied; to stop filtering the jobs, simply click the cross icon in the label. The filter remains available for later use in the navigation area.

2.6.5.4. Managing custom filters

This topic explains how to handle the **custom** filters in the Check jobs view on the Switch Web Portal.

The filters are listed in the blue navigation area below the pre-configured filters.

- To create a new filter, in the blue navigation area, click **+ Create filter**.

  Refer to *Creating a custom filter* on page 53.
- To edit a custom filter, click the pencil button beside the filter name.

  Refer to *Creating a custom filter* on page 53.
- To apply a filter, simply click the filter name in the blue navigation area. The filter will be applied immediately, and you'll see the filter name appear in a blue label just above the jobs overview.
- To stop applying a filter, click the filter name once more (so it's no longer highlighted) or click the cross button in the label.

- To remove a custom filter permanently, in the navigation area, click the cross button beside the filter name.

2.6.6. Reviewing and processing jobs through the Switch Web Portal

Checkpoints are intermediate folders in a flow where jobs that arrive are being held until they are reviewed by an operator. Once reviewed, the operator indicates how they should move along the flow.

You can review these jobs one by one, or in batch as described below.

2.6.6.1. Processing one job at a time

To review a job being held in a Checkpoint:

1. In the Switch Web Portal, click to expand the navigation area as required.
2. In the navigation area, click **Check jobs**.
   All jobs that you have access to, regardless of their status, are displayed in the overview. The counter indicates the number of jobs that are waiting in a Checkpoint, so all jobs with the 'alert' status.
3. Click **Alert jobs**.
   This is a pre-configured filter.
   The selected filter is highlighted in the navigation area and applied immediately. In the overview, you will see all jobs that arrive in the Checkpoints you have access to. Remember that you can switch between table and grid view as required (buttons at the bottom of the screen).
4. Select the job you want to review and route:
   - In table view: Double-click the job concerned.
   - In grid view: In the job card of the job concerned, click the **Process** button.

   A dialog opens and displays more detailed information about the selected job.
5. Review the job as required, using the buttons in the top left corner of the dialog.
   For an overview, refer to *Review options* on page 57.
6. Enter extra info ("metadata") if requested.
   This depends on the setup in Switch.

   Note: If you entered metadata before locking or replacing a job, you will be requested to enter it again.
7. Route the job:
   - If you see radio buttons, choose one of the options.
   - If you see checkboxes, you can select more than one option if appropriate.
8. Click **Push**.

The dialog is closed automatically. The job will move along the chosen connection(s) in Switch. The job status will change over 'processing' to 'completed', so it will no longer be present in the Alert jobs overview.

2.6.6.2. Processing multiple jobs as one

This topic explains how you can process a number of alert jobs in one go.

Note that this is only possible for:

- Alert jobs waiting in the same Checkpoint,
- Which all need to be moved along the same output connection,
- With the same metadata values.

To process multiple jobs proceed as follows:

1. In the Switch Web Portal, click to expand the navigation area as required.
2. In the navigation area, click **Check jobs**.
   All jobs that you have access to, regardless of their status, are displayed in the overview. The counter indicates the number of jobs that are waiting in a Checkpoint, so all jobs with the 'alert' status.
3. Click **Alert jobs**.
   This is a pre-configured filter.
   The selected filter is highlighted in the navigation area and applied immediately. In the overview, you will see all jobs that arrive in the Checkpoints you have access to. Remember that you can switch between table and grid view as required (buttons at the bottom of the screen).
4. In the Check jobs area, with the Alert jobs filter selected, click the checkboxes of the jobs you want to combine.
   In grid view, the checkboxes become visible when you hover over the job cards. As soon as you have selected a job, the jobs waiting in a different Checkpoint are grayed out, because you can only combine jobs that are waiting in the same Checkpoint.
5. Click **Process multiple** in the bottom right corner of the screen.
   The number of jobs contained in the selection is shown.
6. To review the jobs one by one, use the arrows in the top left corner to navigate between them.
   For more information about the buttons, refer to *Review options* on page 57.
7. Enter extra info ("metadata") if requested.
   This depends on the setup in Switch. The metadata value should be valid for all jobs in the selection; it's not possible to have a different value per job file.
8. Route the job:
   - If you see radio buttons, choose one of the options.
   - If you see checkboxes, you can select more than one option if appropriate.

   Note that your choice applies to all jobs in the selection.

9. Click **Push**.
   The dialog is closed automatically. The jobs will move along the chosen connection(s) in Switch. The job status will change over 'processing' to 'completed', so it will no longer be present in the Alert jobs overview.

2.6.6.3. Review options

This is an overview of the buttons that are available when you're reviewing a job that is held in a Checkpoint.

Some of the buttons may be missing; this depends on the setup in Switch. For example, if editing or report viewing are not allowed, these buttons do not show up.

Option	Meaning
View	Allows you to view the job file(s). The job is opened in the browser, if the browser supports the job's file type (e.g. PDF, JPEG). If the browser cannot open the file and also in case of a job folder, you will be asked to save the file(s) or folder locally, or they will be downloaded. The behavior depends on your browser settings. When a job is being viewed, it cannot be modified or saved. The job is not locked automatically, so it remains editable for other users, unless you lock it by clicking the **Lock** button (see further). **Note:** You may have to turn off pop-up blockers.
Save	Allows you to save the job locally. In case of a job folder, the job folder content is compressed and you can download the zip file.
Replace	Allows you to replace the current job file with another one. The uploaded file(s) will be further moved along the Switch flow. **Note:** If another user is trying to replace the job at the same time, a warning is displayed. You can then either cancel your replacement request or overrule the other user's replacement process and start your own. This can be useful if the other user has left the computer in the middle of a replacement request and cannot be reached, or in case of a system crash.
Report	Allows you to view a report with metadata, if there is one associated with the job. For more information, refer to the documentation on Checkpoints in the Switch Reference Guide.
Lock / Unlock	Lock: Allows you to lock the job, so that the job (and the report) cannot be processed, edited, reverted or replaced by any other user. Other users can still view the job, save a local copy and open the individual job card, but they will get a message stating that the job is in use by another user.

Option	Meaning
	Unlock: Allows you to unlock jobs you have locked yourself. **Note:** Users that belong to the administrator group can unlock all jobs; group managers can unlock all jobs from users in their group.
Edit in (application)	Allows you to edit the job file in the native application. While a job is being edited, following buttons are displayed: • : to upload the changed job file • : to cancel editing For the full procedure, refer to *Editing a job in a Checkpoint (Switch Helper)* on page 58. **Note:** This option is only available if you have installed the Switch Helper (a small tool that you can download from the *the Enfocus website*). If you haven't, you can also edit the job file, but you'll first have to download and save it locally. Refer to *Editing a job in a Checkpoint (no Switch Helper)* on page 58.

Editing a job in a Checkpoint (Switch Helper)

If you have installed the Switch Helper (a small tool that you can download from the *the Enfocus website*), you'll have an **Edit <in application>** button.

Note: This option is not available if you're launching the Web Portal through an HTTPS connection in Firefox or Safari (due to security constraints implemented in these browsers).

To edit a job

1. Click the **Edit** button .
   The file is opened in the native application, for example Adobe Acrobat. The **Edit** button on the Portal is replaced with an **Update** and a **Cancel** button .
2. Make the required changes.
3. Save the file in the native application.
4. Click the **Update** button to upload the changed version.

Editing a job in a Checkpoint (no Switch Helper)

This procedure is applicable if you're using Switch 2017 or if you haven't installed the Switch Helper application.

To edit a job

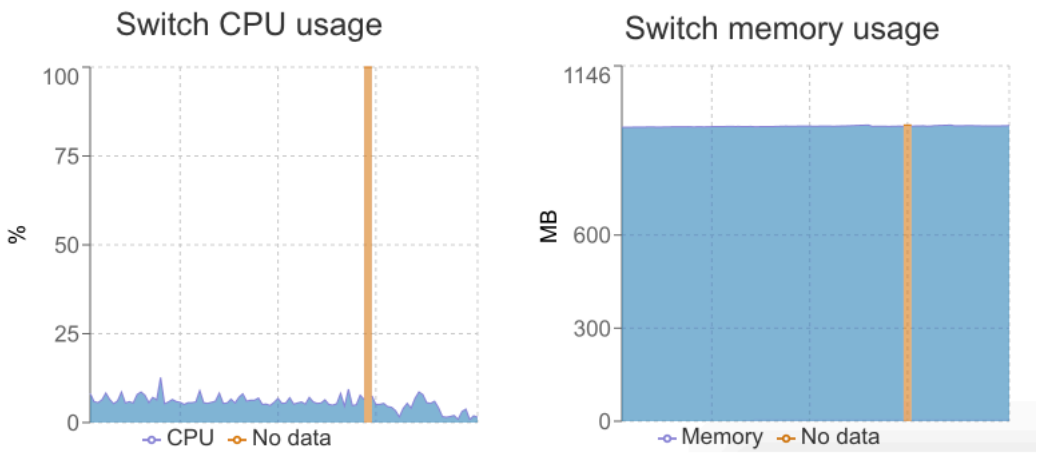
1. Lock the job file(s), so no one else can make changes while you're busy with the file.
2. Save the job locally.
3. Make the required changes to your local copy.
4. Use the **Replace** button to upload the changed version.

2.7. The Admin view

The Admin view is only available for Switch administrators (i.e. users that are part of the Administrators group as set in the Users pane).

It gives access to a number of additional pages:

- **Switch news**: Here you can find info related to Switch: the announcement of a new version, the publication of an interesting article, tips and tricks, ...
- **Flows**: Here you can start and stop your Switch flows. It's not possible to edit the flow properties; to do that, you still need Switch Designer.
- **System info**: Here you can find info about the Switch processes (CPU, memory, Pid, time the process was started) and a live graph that shows the total Switch CPU usage and memory usage.



The orange bars indicate that there is no information for that time period (e.g. because the browser was minimized, or because you switched to a different tab etc.)

You get detailed information about the data on the graph by hovering over it (as shown in the image above).

- **Logins**: This is an overview of the active users (currently logged in), as well as an overview of the users that logged in during the last 30 days.
- **Customization**: Here you can upload your own logo for display on the Web Portal login page. The logo must be a PNG file. The size is adjusted automatically; best fit is 400x400 px. In case you want to revert to the Switch log, click the **Reset log** button.