PDF Review Module App Documentation v 3.0

Description

The PDF Review Module app is an application component of the Enfocus PDF Review Module. This brand-new Switch module enables the integration of a PDF review and approval process in a Switch workflow.

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

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

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

Compatibility
The app is compatible with Switch 13 update 1 and higher.
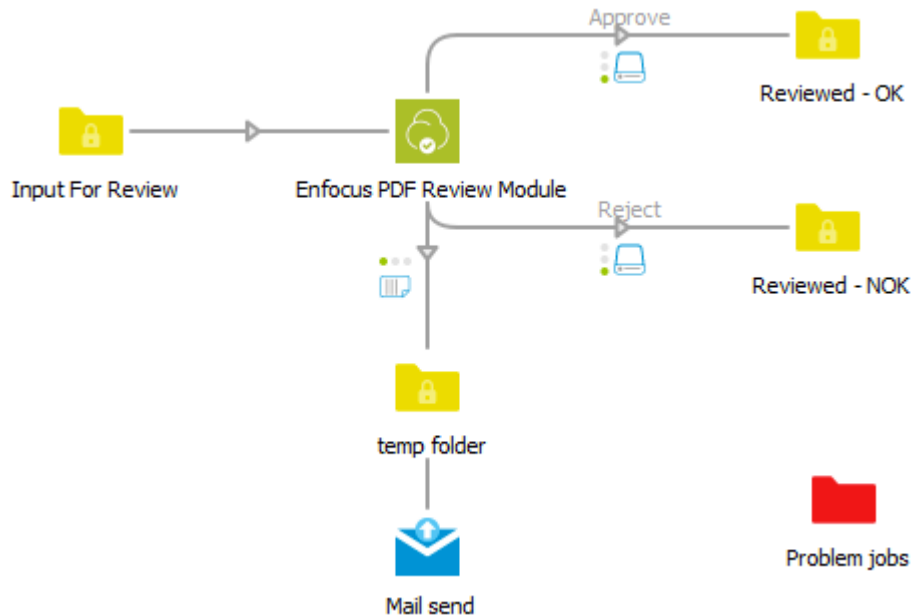
Compatibility third-party applications
Enfocus PDF Review Module version 01.01

Application discovery details
The installation and activation of the PDF Review Module is required.*
For a full description, refer to the documentation on the Enfocus website
(https://www.enfocus.com/en/support/manuals).

* During a trial period of 30 days, you can make use of the PDF Review Module installed on the Enfocus online trial server. That means that you do not have to install, configure and activate the PDF Review Module on your own server. To enable this option, choose 'Online trial server' in the app properties.

Example flow

As soon as a PDF file arrives in the input folder, it is uploaded to the PDF Review server. After it has been uploaded to the server, it is sent to the outgoing log connection (Mail send in this example), so a notification can be sent.
The PDF file remains in the input folder until it has been processed by the server; as soon as a reviewer clicks a button in the HTML5 user interface, the file is sent to the corresponding outgoing data connection (*Approve* or *Reject* in this example).

Connections

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

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

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

The outgoing data connections have a number of extra properties that can affect the PDF Review functionality:

Property	Description
Color	The color of the connection can determine the color of the button in the HTML5 user interface, on condition that *Apply color* (in the PDF Review app) is set to *Yes* (see below).
Enable review comments	If this option is enabled, the reviewer is able to give review comments after clicking the decision button, on condition that *Use comment properties of outgoing connection* (in the PDF Review app) is enabled.
Accept PDF with document comments	If this option is set to No, documents with sticky notes, comments etc. cannot move through this connection (no matter if they are added before or during the review). This can be useful to avoid that files with annotations get printed by accident. This option is only taken into account if the *Use comment properties of outgoing connection* (in the PDF Review app) is enabled.

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

App properties detailed info

Property	Description

PDF Review web server	**Options:**
	
	  o *Online trial server*
	      Select this option if you want to use the Enfocus web server to see how the PDF Review Module works. In that case, you don't have to install and configure the PDF Review Module on your own web server. The trial period is limited to 30 days and there's also a limit on the size (100MB) and the number of proofs (200). The trial starts with the first file upload.
	
	  o *Local PDF Review server*
	      Select this option to connect to the server on which you have installed the PDF Review web server.
	
	      Enter the *URL of the PDF Review web server, using the following format:* <http: or https:><IP address or localhost>:<port number>
	
	      Examples: http://localhost:80 (for testing purposes), https://192.168.142.233:89

	Refer to the Server settings in the Administration area of the PDF Review Module.

Mail format	The format of the mail message that will be sent out to inform the reviewer that a file is ready to be reviewed.
	
	Options:
	  o *Plain text*
	  o *HTML* (in this case, the email message has two bodies. The first is in HTML format and the second is a plain text version of the HTML message)
	
	Note: Make sure to that the *Message format* property in the *Mail send* flow element has the same value (i.e. both plain text or both HTML).

Mail template	Text of the mail message to inform the reviewer that a file is waiting for review.
	
	Options:
	  o *Default*: The default Enfocus template for the PDF Review Module is used.
	  o *Built-in*: Define the message text using the *Body text* field that pops up.
	     Choose *Edit multi-line text* (plain text) or *Define multi-line text with variables* (text with variables) to edit the body text.
	  o *Fixed file*: Upload your own template file (*.txt, *.htm, or *.html) or choose *Define single-line text with variables* to construct the file path and file name using variables.
	
	Note: If you're not using the default template, make sure that your body text contains the link to the PDF: [Job.PrivateData:Key="com.enfocus.PDFReviewModule.URL"]
	
	In case of a built-in text, it's present by default (so do not delete it!); in case of a fixed file you'll have to add it yourself!

View settings	Determines which features will be made available to the reviewer. By default, all features are enabled. Alternatively, you can choose to restrict the feature set by enabling or disabling particular features.
	
	Options:
	  o *All Enabled*: The reviewer has access to the complete functionality of the PDF Review Module.
	  o *Advanced*: Restrict the feature set by enabling or disabling particular features. Note that the preferred value (yes/no) can also be triggered by Switch

	variables.
	
	Following features can be turned on or off:
	   o *View layers*: Ability to view layer properties of the document.
	   o *View comments*: Ability to view comments in the document.
	   o *View format tab*: Ability to view the Format tab.
	   o *View document tab*: Ability to view the Document tab.
	   o *View rulers*: Ability to show or hide the rulers as required.
	   o *View page boxes*: Ability to show or hide the page boxes as required.
	   o *View guides*: Ability to show or hide the guides as required.
	   o *View wireframe*: Ability to display the document in wireframe mode.
	   o *View ink coverage*: Ability to show or hide an ink coverage heat map.

Fail jobs after timeout	Allows you to set a timeout for non-processed files, to make sure that files that were not reviewed after a certain period of time are moved to a particular folder.
	
	Options:
	   o *No*: No timeout defined
	   o *Yes*: Timeout defined
	
	If set to *Yes*, fill out the following properties:
	
	Unit: Minutes, Hours, Days (unit for the next property)
	Timeout delay: Number of minutes, hours, days (as set in Unit) that the PDF is allowed to stay in review mode.
	Fail connection: Name of the connection or folder where the file will go to after the defined period of time. All valid output folders are listed; you can select the one of your choice.
	
	Note: If you have chosen the Problem jobs folder, make sure you have a Problem jobs folder in your workflow!

Apply color	Allows you to use the color of the outgoing data connections for the corresponding buttons in the HTML5 user interface.
	
	Options:
	   o Yes: Use the color of the connection for the corresponding button.
	   o No: Ignore the color of the connections.
	      The color of the decision buttons is configured in the

	Administration area of the PDF Review Module. Refer to to the PDF Review Module documentation for more details.

Default unit	Determines the default unit of measurement in the HTML5 user interface.
	
	Options:
	    o pt (points)
	    o p (picas)
	    o in (inches)
	    o cm (centimeters)
	    o mm (millimeters)
	
	Note: The reviewer can overrule the default by changing the unit via the Preferences button in the user interface.

Allow download	Determines whether or not the reviewer has the right to download the PDF file (including review comments if any) to his local system. Note that the file must be downloaded before approving or rejecting it.
	
	Options:
	
	    o Yes: The reviewer will get a download button in the top right corner of the user interface.
	    o No: There will be no button to download the PDF.

Review dataset name	Review comments, annotations, the chosen connection etc. are stored in dataset for which you must enter a name and select a type (next property). This option is mandatory.

Review dataset type	Type of the dataset that will contain the metadata (review comments, annotation, chosen connection etc.).
	
	Options:
	    o XML
	    o Opaque
	
	Note: Not sure how to extract the metadata afterwards? Refer to the topic 'Finding metadata' in the PDF Review Module documentation on the Enfocus website.

Use comment properties of outgoing connection	Determines whether or not the values of *Enable review comments* and *Accept PDF with document comments* of the outgoing connections are used.

	Options:
	   o No: The properties of the outgoing connections are ignored. Review comments are not allowed (regardless of the *Enable review comments* property of the outgoing connections); PDFs with annotations are always accepted (regardless of *Accept with document comments*).
	   o Yes: The properties of the outgoing connections are used. The ability to add review comments depends on *Enable review comments*; the ability to submit PDFs with annotations depends on *Accept PDF with document comments*.

Connection status	This property is used to verify if the connection to the PDF Review web server is valid. To be valid, at least one log and one data connection must be defined. The value is always 'None'; if something is wrong with the connection, the property will be displayed in red. You'll find more details in the Switch log messages (via the Messages button in the toolbar).

Mail send

A **mail send** flow element can be used to inform the reviewer that a file is ready for review.

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

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

Remember that the connection between the PDF Review Module and the Mail send flow element must be a log connection (see higher).

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