

# PDF Review Module App v 5.0

## Description



The PDF Review Module app is an application component of the Enfocus PDF Review Module. This 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 02.0

## Application discovery details

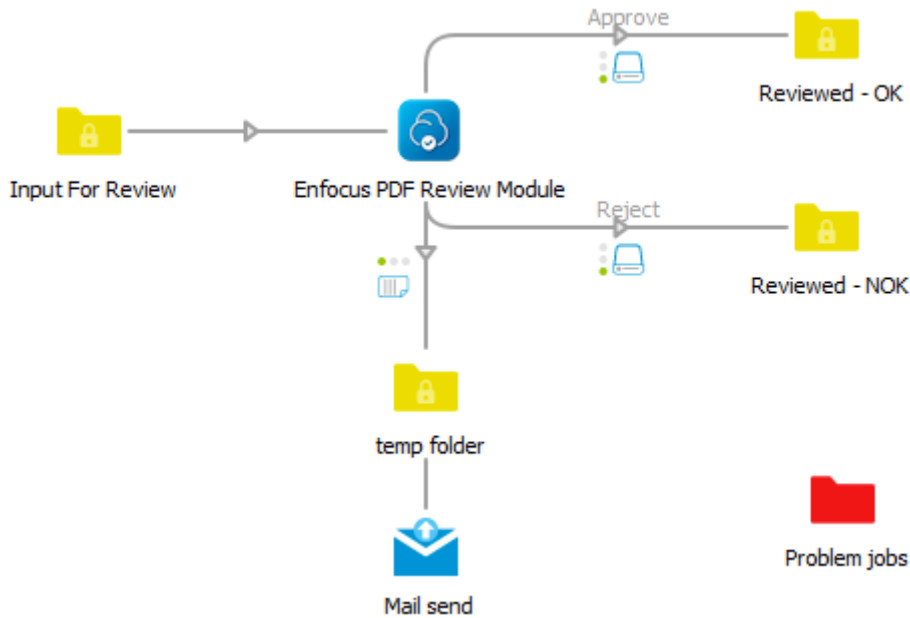
The installation and activation of the PDF Review Module is required.



**Note:** 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.

For a full description, refer to the documentation on the Enfocus website (<https://www.enfocus.com/en/support/manuals>).

### 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 <i>Apply color</i> (in the PDF Review app) is set to <i>Yes</i> (see further).

Property	Description
Enable review comments	If this option is enabled, the reviewer is able to give review comments after clicking the decision button, on condition that <i>Use comment properties of outgoing connection</i> (in the 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 <i>Use comment properties of outgoing connection</i> (in the PDF Review app) is enabled.
Enable translation	The <i>names</i> of the connections, or (if they have no names), the names of the <i>output folders</i> will be displayed as buttons to the reviewer. This option enables you to translate the buttons into the given languages.  If no translation is available for a particular language, the string used in Switch is displayed.




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.

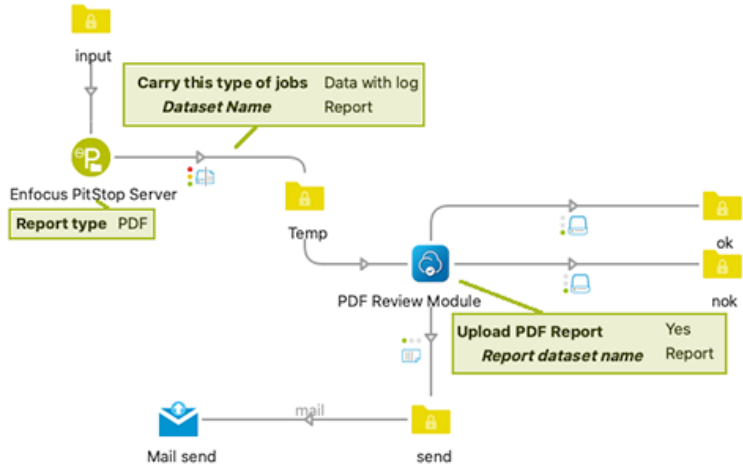
## App properties detailed info




Property	Description
PDF Review web server	<p><b>Options:</b></p> <ul style="list-style-type: none"> <li><i>Online trial server</i> Select this option if you want to use the Enfocus web server to see how the PDF Review Module works. In that case, you don't have to install and configure the PDF Review Module on your own web server. The trial period is limited to 30 days and there's also a limit on the file size (100MB). The trial starts with the first file upload.</li> <li><i>Local PDF Review server</i> 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: &lt;http: or https:&gt;&lt;IP address or localhost&gt;:&lt;port number&gt;</li> </ul> <p><b>Examples:</b></p> <p>http://localhost:80 (for testing purposes)</p> <p>https://192.168.142.233:89</p> <p>Refer to the Server settings in the Administration area of the PDF Review Module.</p>

Property	Description
Mail format	<p>The format of the mail message that will be sent out to inform the reviewer that a file is ready to be reviewed.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• <i>Plain text</i></li> <li>• <i>HTML</i> (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)</li> </ul> <hr/> <p> <b>Note:</b> 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).</p>
Mail template	<p>Text of the mail message to inform the reviewer that a file is waiting for review.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• <i>Default:</i> The default Enfocus template for the PDF Review Module is used.</li> <li>• <i>Built-in:</i> Define the message text using the Body text field that pops up. Choose Edit multi-line text (plain text) or Define multiline text with variables (text with variables) to edit the body text.</li> <li>• <i>Fixed file:</i> 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.</li> </ul> <hr/> <p> <b>Note:</b> If you're not using the default template, make sure that your body text contains the link to the PDF or to the job collection on the server, by adding the following Switch variable:  <code>[Job.PrivateData:Key="com.enfocus.PDFReviewModule.URL"]</code></p> <p>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!</p>
Branding	<p>Determines which brand (i.e. look and feel) will be used.</p> <p>If the entered brand cannot be found in the Interface customization settings on the PDF Review server, or if this field is empty, the default brand will be used.</p> <hr/> <p> <b>Note:</b> If you use the option 'Select from library', you'll get the list with all available brands. The numbers between brackets (= the brand IDs) do not correspond with numbers added to brand names in the Admin section of the server; these are only added to distinguish between duplicates.</p>

Property	Description
View settings	<p>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.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• All Enabled: The reviewer has access to the complete functionality of the PDF Review Module.</li> <li>• 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.</li> <li>• Following features can be turned on or off: <ul style="list-style-type: none"> <li>• <i>View layers</i>: Ability to view layer properties of the document.</li> <li>• <i>View comments</i>: Ability to view comments in the document.</li> <li>• <i>View format tab</i>: Ability to view the Format tab. This is especially useful if a PDF Report is uploaded, because it allows the reviewer to get more information about the reported issues.</li> <li>• <i>View document tab</i>: Ability to view the Document tab.</li> <li>• <i>View rulers</i>: Ability to show or hide the rulers as required.</li> <li>• <i>View page boxes</i>: Ability to show or hide the page boxes as required.</li> <li>• <i>View guides</i>: Ability to show or hide the guides as required.</li> <li>• <i>View wireframe</i>: Ability to display the document in wireframe mode.</li> <li>• <i>View rotation</i>: Ability to rotate the document. If enabled, view rotation buttons are displayed in the user interface.</li> <li>• <i>View ink coverage</i>: Ability to show or hide an ink coverage heat map.</li> <li>• <i>Enable double page view</i>: Ability to display the document in double page view instead of single page view. If enabled, a button to toggle between single and double page view is displayed in the user interface.</li> </ul> </li> </ul>
Double page initial view	<p>Initial page view displayed when opening the document. Options are:</p> <ul style="list-style-type: none"> <li>• Single page</li> <li>• Double page</li> </ul>
Double page cover page	<p>Determines how the cover page and the subsequent pages will be displayed in double page view.</p> <p>Options:</p>

Property	Description
	<ul style="list-style-type: none"> <li>• No cover page (default): The first and the second page are placed side by side.</li> <li>• Cover page: The first page is shown as a single page. The double page view starts with pages 2 and 3.</li> <li>• Cover spread: The first page and the last page are placed side by side.</li> <li>• Cover and inside cover spread: The first page and the last page are placed side by side, as well as the second page and the penultimate page.</li> </ul>
<p>Double page view page box</p>	<p>Page box on which the double page view will be based. Default value: Trim box.</p> <hr/>  <p><b>Note:</b> If the selected page box is not defined in the document, the normal PDF specification rules are applied. For example, if the trim box is selected, but there is no trim box in the document, the crop box will be used.</p> <hr/>
<p>Fail jobs after timeout</p>	<p>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.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• <i>No</i>: No timeout defined</li> <li>• <i>Yes</i>: Timeout defined</li> </ul> <p>If set to <i>Yes</i>, fill out the following properties:</p> <ul style="list-style-type: none"> <li>• <i>Unit</i>: Minutes, Hours, Days (unit for the next property)</li> </ul> <hr/>  <p><b>Note:</b> You can also exclude weekend days (and choose which one(s) you want to exclude).</p> <hr/> <ul style="list-style-type: none"> <li>• <i>Timeout delay</i>: Number of minutes, hours, days (as set in Unit) that the PDF is allowed to stay in review mode.</li> <li>• <i>Fail connection</i>: 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.</li> </ul> <hr/>  <p><b>Note:</b> If you have chosen the Problem jobs folder, make sure you have a Problem jobs folder in your workflow!</p> <hr/>
<p>Job collection</p>	<p>Allows you to determine whether or not jobs should be presented to the reviewer as a set or collection of documents.</p> <p>Options:</p> <ul style="list-style-type: none"> <li>• <i>No</i>: Each document is presented separately. The reviewer will receive a separate mail for each document.</li> <li>• <i>Yes</i>: Documents belonging to the same collection are presented as a set. The reviewer will receive a mail that contains the URL of</li> </ul>

Property	Description
	<p>the web page where the reviewer can find all PDFs that need to be reviewed.</p> <p>This opens up the following fields:</p> <ul style="list-style-type: none"> <li>• Job collection ID: This ID is used to determine which jobs belong together. It's also used for the link that will be sent to the reviewer.</li> <li>• Job collection title: This text will be shown as title on the overview page that lists the PDFs that are ready for review.</li> <li>• Resend job collection email: This option determines if and how often an email with the URL of the email is sent to the reviewer.                             <ul style="list-style-type: none"> <li>• Unit (Days, Hours, Minutes)</li> <li>• After amount of time</li> </ul> </li> </ul>
<p>Upload PDF Report</p>	<p>If set to Yes, you can upload the Preflight Report to the PDF Review server and to present it to the reviewer along with the PDF.</p> <p>This triggers one extra field:</p> <ul style="list-style-type: none"> <li>• Report dataset name: The name of the dataset that contains the Preflight Report. This name must match the name of the dataset chosen in the outgoing connection of the PitStop Server configurator.</li> </ul> <p><b>Note:</b> You must make sure that the PDF and the PDF Report are sent to the PDF Review app through a <i>data with log</i> connection. Note that in the PitStop Server configurator, you should choose <i>PDF</i> as report type (not one of the other options). It's not necessary to certify the PDF (but it is allowed).</p> 
<p>Apply color</p>	<p>Allows you to use the color of the outgoing data connections for the corresponding buttons in the HTML5 user interface.</p>

Property	Description
	<p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• <i>Yes:</i> Use the color of the connection for the corresponding button.</li> <li>• <i>No:</i> 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.</li> </ul>
Default unit	<p>Determines the default unit of measurement in the HTML5 user interface.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• pt (point)</li> <li>• p (pica)</li> <li>• in (inch)</li> <li>• f (foot)</li> <li>• mm (millimeter)</li> <li>• cm (centimeter)</li> <li>• m (meter)</li> </ul> <p> <b>Note:</b> The reviewer can overrule the default by changing the unit via the Preferences button in the user interface.</p>
Allow download	<p>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.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• <i>Yes:</i> The reviewer will get a download button  in the top right corner of the user interface.</li> <li>• <i>No:</i> There will be no button to download the PDF.</li> </ul>
Review dataset name	<p>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.</p>
Review dataset type	<p>Type of the dataset that will contain the metadata (review comments, annotations, chosen connection, etc.)</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• XML</li> <li>• Opaque</li> </ul> <p> <b>Note:</b> Not sure how to extract the review comments afterwards? Refer to 'Finding metadata' in the PDF Review Module documentation on the Enfocus website.</p>



Property	Description
Use comment properties of outgoing connection	<p>Determines whether or not the values of <i>Enable review comments</i> and <i>Accept PDF with document comments</i> of the outgoing connections are used.</p> <p><b>Options:</b></p> <ul style="list-style-type: none"> <li>• No: The properties of the outgoing connections are ignored. Review comments are not allowed (regardless of the <i>Enable review comments</i> property of the outgoing connections); PDFs with annotations are always accepted (regardless of <i>Accept with document comments</i>).</li> <li>• Yes: The properties of the outgoing connections are taken into account. The ability to add review comments depends on <i>Enable review comments</i>; the ability to submit PDFs with annotations depends on <i>Accept PDF with document comments</i>.</li> </ul>
Connection status	<p>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.</p> <p>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 <b>Messages</b> button in the toolbar).</p>

## 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:

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

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](#).