

Enfocus Review App v 2

Description



The Enfocus Review app is an application component of Enfocus Review, an Enfocus-hosted cloud-based SaaS solution that enables the integration of a PDF review and approval process in a Switch workflow.

Once the Review app is installed and the Switch flow is set up appropriately, files that arrive in the Review app are uploaded to the Enfocus Cloud environment and made available for review in an HTML5 browser, the Enfocus Review Viewer. The reviewer will receive a link to the file and can inspect the file in a user-friendly interface and give feedback using a sticky note tool. Once reviewed, the reviewer must approve or reject the file by clicking the appropriate button, and that will bring the file back into the Switch flow and move it to the appropriate output folder.

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

Compatibility

The app is compatible with Switch 2022 Spring and higher.

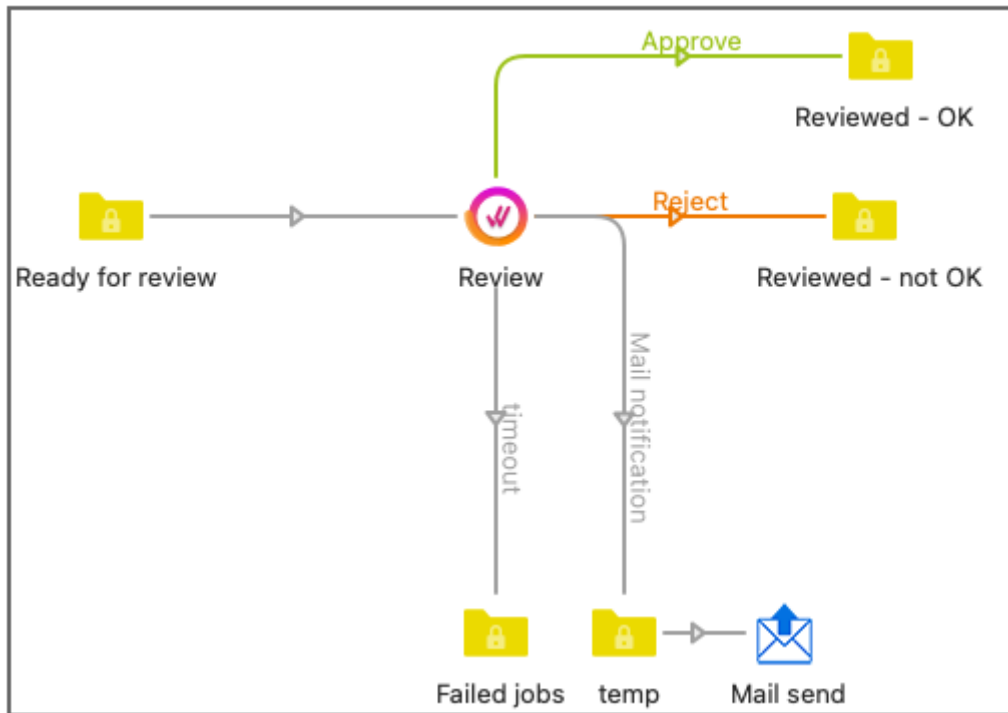
Application discovery details

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

Example flow

This is what you need in your flow:

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



This is how it works:

- As soon as a PDF arrives in the input folder for the Review app, it's uploaded to the Enfocus Review Cloud Server. The reviewer is notified that a PDF file is waiting for review.
- The PDF file remains in the input folder in Switch until it has been processed; as soon as a reviewer clicks a button in the HTML5 user interface (the Viewer), the file is sent to the corresponding outgoing connection (Approve or Reject in this example). If the reviewer has made annotations, the annotated file is downloaded back to Switch, to replace the original file.

Connections

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

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

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


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

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

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

This connection type has the following subordinate properties:

Property	Meaning
Enable review comments	If this option is enabled, the reviewer is able to give review comments after clicking the decision button, on condition that



Property	Meaning
	<i>Use comment properties of outgoing connection</i> (in the 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 when <i>Use comment properties of outgoing connection</i> (in the 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.
Button color	The color of the button in the Viewer, on condition that <i>Apply color</i> (in the Review app) is set to Yes (see below). You can select one of the colors in the list (Yellow, Orange, Green, Cyan, Blue, Magenta, or Red) or enter the hexadecimal code of the color of your choice, for example: #993333.  Note: In case of a custom color, do not forget to add the hash sign (#).

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

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

This connection type has the following mail-specific properties:

Property	Meaning
Mail format	The format of the mail message that will be sent out to inform the reviewer that a file is ready to be reviewed. Options: <ul style="list-style-type: none"> • Plain text • HTML (in this case, the email message has two bodies. The first is in HTML format and the second is a plain text version of the HTML message)
Mail template	Text of the mail message to inform the reviewer that a file is waiting for review. Options: <ul style="list-style-type: none"> • Default: The default Enfocus template for Enfocus Review is used. You cannot determine or change the text, it's fixed. • Built-in: Define the text of the mail yourself.

Property	Meaning
	<ul style="list-style-type: none"> The subordinate property, <i>Body text</i>, shows the variable for the link to the PDF (currently, this is [Job.PrivateData:Key="com.enfocus.Review.URL"]). Click the arrow button and choose Edit multi-line text (plain text) or Define multi-line text with variables (text with variables) to enter the content of the mail. <hr/> <p> Note: The text that you have entered is attached to the job as a dataset ("Body"). To make sure this text is used when sending the mail, in the properties of Mail send, <i>Body template</i> must be set to <i>Associated with job</i> and <i>Template dataset</i> to <i>Body</i> (this is the default value).</p> <hr/> <ul style="list-style-type: none"> 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. <hr/> <p> Note: If you're not using the default template, make sure that your body text contains the link to the PDF, by adding the following Switch variable: [Job.PrivateData:Key="com.enfocus.Review.URL"]</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> <hr/>

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

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

This option has one subordinate property:


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

- If the connection type is *Timeout*, the outgoing connection is used to make sure that files that were not reviewed after a certain period of time are moved to a particular folder.

At least one outgoing connection of this type is mandatory.



This connection type has the following subordinate properties:



Property	Meaning
Unit	Unit for the next property. Options are: <ul style="list-style-type: none"> Minutes Hours Days


Property	Meaning
	 Note: If you select 'Days', you can also exclude weekend days (and choose which one(s) you want to exclude).
Timeout delay	Number of minutes, hours, days (as set in Unit) that the PDF is allowed to stay in review mode.

App properties detailed information

Property	Meaning
Enfocus Cloud Token	Token that you received when purchasing Enfocus Review.
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>Options:</p> <ul style="list-style-type: none"> • All Enabled: The reviewer has access to the complete functionality of Enfocus Review. • Advanced: Restrict the feature set by enabling or disabling particular features. Note that the preferred value (yes/no) can also be triggered by Switch variables. <p>Following features can be turned on or off:</p> <ul style="list-style-type: none"> • <i>View layers:</i> Ability to view layer properties of the document. • <i>View comments:</i> Ability to view comments in the document. • <i>View tools tab:</i> Ability to view the Tools tab. • <i>View rulers and guides:</i> Ability to show or hide the rulers and guides as required. • <i>View page boxes:</i> Ability to show or hide the page boxes as required. • <i>View wireframe:</i> Ability to display the document in wireframe mode. • <i>View rotation:</i> Ability to rotate the document. If enabled, a view rotation button is displayed in the user interface. • <i>View ink coverage:</i> Ability to show or hide an ink coverage heatmap. • <i>Enable double page view:</i> Ability to display the document in double page view instead of single page view. If enabled, a button to toggle between single and double page view is displayed in the user interface.

Property	Meaning
Double page initial view	<p>Initial page view displayed when opening the document. Options are:</p> <ul style="list-style-type: none"> • Single page • Double page
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> <ul style="list-style-type: none"> • No cover page (default): The first and the second page are placed side by side. • Cover page: The first page is shown as a single page. The double page view starts with pages 2 and 3. • Cover spread: The first page and the last page are placed side by side. • Cover and inside cover spread: The first page and the last page are placed side by side, as well as the second page and the penultimate page.
Double page view page box	<p>Page box on which the double page view will be based. Default value: Trim box.</p> <hr/> <p> Note: If the selected page box is not defined in the document, the normal PDF specification rules are applied. For example, if the trim box is selected, but there is no trim box in the document, the crop box will be used.</p> <hr/>
Upload PDF Report	<p>If set to Yes, you can upload the Preflight Report to the Enfocus Cloud and present it to the reviewer along with the PDF.</p> <p>This triggers one extra field:</p> <ul style="list-style-type: none"> • 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. <hr/> <p> Note: You must make sure that the PDF and the PDF Report are sent to the Review app through a <i>data with log</i> connection. Note that in the PitStop Server configurator, you should choose <i>PDF</i> as report type (not one of the other options). It's not necessary to certify the PDF (but it is allowed).</p> <hr/>

Property	Meaning
<p>Apply color</p>	<p>Allows you to use the button colors defined in the outgoing connections of the type 'reviewed file' .</p> <ul style="list-style-type: none"> • Yes: Use the colors defined in the outgoing connections. • No: Ignore the colors defined in the connections. Instead use the color set in the Administration area of Review. <i>(Not yet available in the private beta)</i>
<p>Default unit</p>	<p>Determines the default unit of measurement in the Viewer.</p> <p>Options:</p> <ul style="list-style-type: none"> • pt (point) • p (pica) • in (inch) • f (foot) • mm (millimeter) • cm (centimeter) • m (meter) <hr/> <p> Note: The reviewer can overrule the default by changing the unit via the Settings in the Viewer.</p>
<p>Allow download</p>	<p>Determines whether or not the reviewers have the right to download the PDF file (including review comments if any) to their local system. Note that the file must be downloaded before approving or rejecting it.</p> <p>Options:</p> <ul style="list-style-type: none"> • Yes: The reviewer will get a download button  in the top right corner of the user interface. • No: There will be no button to download the PDF.

Property	Meaning
Review dataset name	Review comments, annotations, the chosen connection etc. are stored in a dataset for which you must enter a name and select a type (next property). This option is mandatory.
Review dataset type	Type of the dataset that will contain the metadata (review comments, annotations, chosen connection, etc.) Options: <ul style="list-style-type: none"> • XML • Opaque <hr/>  Note: Not sure how to extract the review comments afterwards? Refer to the topic on <i>Finding review comments in Switch</i> in the Switch Reference Guide .
Use comment properties of outgoing connection	Determines whether or not the values of <i>Enable review comments</i> and <i>Accept PDF with document comments</i> of the outgoing connections are taken into account. Options: <ul style="list-style-type: none"> • No: The properties of the outgoing connections are ignored. Review comments are not allowed (regardless of the <i>Enable review comments</i> property of the outgoing connections); PDFs with annotations are always accepted (regardless of <i>Accept PDF with document comments</i>). • Yes: The properties of the outgoing connections are taken into account. The ability to add review comments depends on <i>Enable review comments</i>; the ability to submit PDFs with annotations depends on <i>Accept PDF with document comments</i>.
Outgoing connection status	This property is used to verify if there is at least: <ul style="list-style-type: none"> • One outgoing connection of the type 'Reviewed file' • One outgoing connection of the type 'Timeout' • One outgoing connection of the type 'Mail notification' or 'Other notification' <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 Messages button in the toolbar).</p>

Mail send

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

If used with the Review app:

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

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