Enfocus Review App

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

Switch version required: Switch 2022 Fall or higher

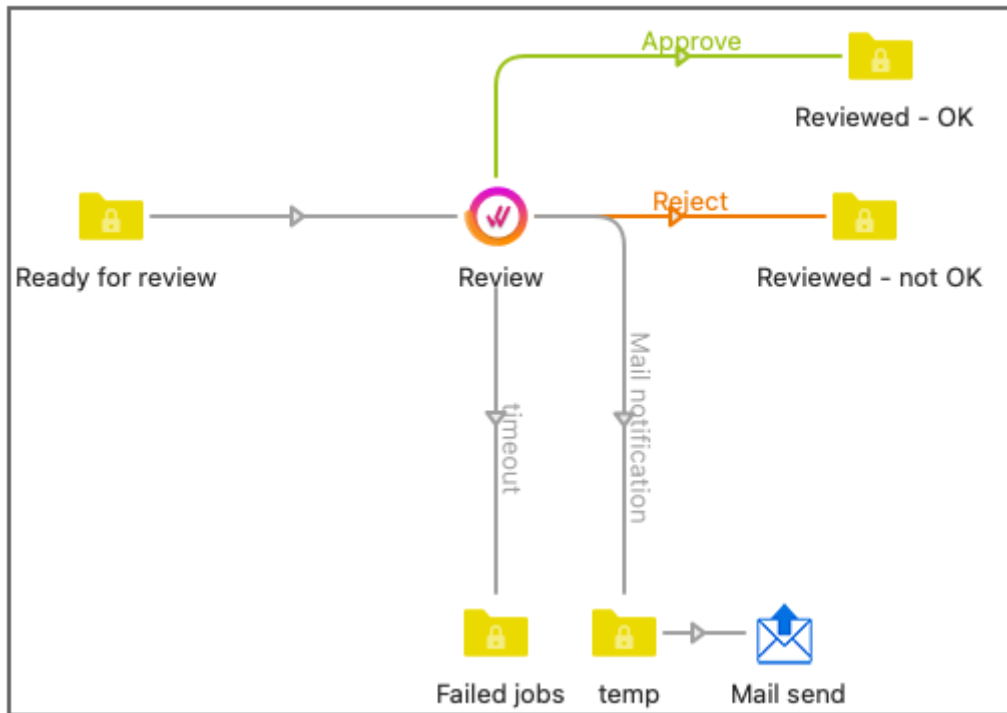3rd Party compatibility: enfocus.cloud release 2415

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/enfocus-review-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.
- Optionally (not available in this example), one or more connections for reminders.

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
	Use comment properties of outgoing connection (in the Review app) is enabled.
Enable approver name	If this option is enabled, the reviewer must add his name to the approval decision.
Accept PDF with document comments	If this option is set to No, documents with sticky notes, comments etc. cannot move through this connection (no matter if they are added before or during the review). This can be useful to avoid that files with annotations get printed by accident. This option is only taken into account when *Use comment properties of outgoing connection* (in the Review app) is enabled.
Merge annotations	If this option is set to Yes, annotations are saved to the reviewed document.
Enable translation	The *names* of the connections, or (if they have no names), the names of the *output folders* will be displayed as buttons to the reviewer. This option enables you to translate the buttons into the given languages. If no translation is available for a particular language, the string used in Switch is displayed.
Button color	The color of the button in the Viewer. 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 None is selected, the button will adopt the color scheme of the Viewer environment (= dark/light blue, depending on the chosen interface theme).

- 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: - 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.

Property	Meaning

	Options:
	
	 • 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.
	
	    • The subordinate property, *Body text*, 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.
	
	    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, *Body template* must be set to *Associated with job* and *Template dataset* to *Body* (this is the default value).
	
	 • 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, by adding the following Switch variable: [Job.PrivateData:Key="com.enfocus.Review.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!

- 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 the date set in Due date (in the properties of the Enfocus Review app).

  At least one outgoing connection of this type is mandatory.
- If the connection type is *Reminder notification*, the outgoing connection is used to define the look and feel and the content of a reminder that is sent to the reviewer. This connection type is optional, and you can add several connections of this type if you want.

This option has several subordinate properties:

Property	Meaning
Mail format	See higher (connections of the type 'Mail notification')
Mail template	See higher (connections of the type 'Mail notification')
Unit	Days/hours Combined with the next property, this option indicates when the reminders will be sent, for example 2 days before the due date.
Amount before due date	Number Combined with the previous property, this option indicates when the reminders will be sent, for example 2 days before the due date.
Exclude weekends	If weekends should not be counted when calculating the date the reminders should be sent, indicate which days are considered "weekend". None = Weekends are not excluded
Move	Indicates the type of job that will be injected in the outgoing connection. Options are: • Incoming job • Dummy job (this will inject a job with the name Dummy.txt)

App properties detailed information

Property	Meaning
Enfocus Cloud Token	The unique ID that securely connects Enfocus Review to your Switch machine. This token is generated through the Enfocus Cloud. For more info, refer to the Enfocus Review documentation.
Branding	Determines which theme (i.e. look and feel) will be used. If the entered theme cannot be found in the Enfocus Review Admin Area (under Customization), or if this field is empty, the hard coded Enfocus theme will be used. More info about themes can be found in the *Enfocus Review user documentation* on enfocus.com. **Note:** If you use the option 'Select from library', you'll get the list with all available themes.

Property	Meaning
View settings	Determines which features will be made available to the reviewer. By default, all features are enabled. Alternatively, you can choose to restrict the feature set by enabling or disabling particular features. Options: • **All Enabled**: The reviewer has access to the complete functionality of 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. Following features can be turned on or off: • *View layers*: Ability to view layer properties of the document. • *View comments*: Ability to view comments in the document. • *View tools tab*: Ability to view the Tools tab. • *View finished size*: Ability to limit the shown content to the content inside the trim box (so that objects outside the trim box are not shown). • *View rulers and guides*: Ability to show or hide the rulers and guides as required. • *View page boxes*: Ability to show or hide the page boxes as required. • *View wireframe*: Ability to display the document in wireframe mode. • *View rotation*: Ability to rotate the document. If enabled, a view rotation button is displayed in the user interface. • *View ink coverage*: Ability to show or hide an ink coverage heatmap. • *Enable double page view*: Ability to display the document in double page view instead of single page view. If enabled, a button to toggle between single and double page view is displayed in the user interface.
Double page initial view	Initial page view displayed when opening the document. Options are: • Single page • Double page
Double page cover page	Determines how the cover page and the subsequent pages will be displayed in double page view. Options: • No cover page (default): The first and the second page are placed side by side.

Property	Meaning
	• Cover page: The first page is shown as a single page. The double page view starts with pages 2 and 3. • Cover spread: The first page and the last page are placed side by side. • Cover and inside cover spread: The first page and the last page are placed side by side, as well as the second page and the penultimate page.
Double page view page box	Page box on which the double page view will be based. Default value: Trim box. **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.
Job collection	Allows you to determine whether or not jobs should be presented to the reviewer as a set of documents (on one and the same web page). Options: • No: Each document is presented separately. The reviewer will receive a separate mail with a separate URL for each PDF. The PDF is immediately opened in the Review Viewer. • Yes: Documents belonging to the same collection are presented as a set. The reviewer will receive a mail that contains the URL of the web page where the reviewer can find all PDFs that need to be reviewed. This property opens up the following fields: • *Job collection name*: This is the name that will be used for the link that will be sent to the reviewer. It's also the text that will be shown as title on the overview page that lists the PDFs that are ready for review. The default value is 'Automatic': • In case of single files, the name of the file, without the extension will be used as the job collection name. • In case of a job folder, the name of the folder will be used as the job collection name. Alternatively, you can set the value using an inline value, a variable or a script expression. In the example below, the job collection name is set to a fixed value: 'ALL CUSTOMER X FILES'. The first image shows the mail with the URL, the second shows the web page. Dear Reviewer, A job / collection of jobs is ready for your review. Please, click on the link below to access the job(s) and review. ALL CUSTOMER X FILES

Property	Meaning

	• *Resend job collection email*: This option determines if and how often an email with the URL of the job collection is sent to the reviewer. Options are:
	
	  • No: Every time a job is uploaded, a notification email is sent to the reviewer.
	  • Yes: The notification email (with the URL of the job collection web page) will be resent when a job is submitted after the set time. For example, if the time is set to 1 day, jobs submitted during that 1 day won't trigger a notification. However, when after that day a new job is submitted, the notification mail will be resent. This gives you the time to upload a set of files (without mails being sent) and avoids that reviewers get too many mail notifications (all with the same URL).

Upload PDF Report	If set to Yes, you can upload the Preflight Report to the Enfocus Cloud and present it to the reviewer along with the PDF. This triggers one extra field: • Report dataset name: The name of the dataset that contains the Preflight Report. This name must match the name of the dataset chosen in the outgoing connection of the PitStop Server configurator. **Note:** You must make sure that the PDF and the PDF Report are sent to the Review app through a *data with log* connection. Note that in the PitStop Server configurator, you should choose *PDF* as report type (not one of the other options). It's not necessary to certify the PDF (but it is allowed).

Property	Meaning
Default unit	Determines the default unit of measurement in the Viewer. Options: • pt (point) • p (pica) • in (inch) • f (foot) • mm (millimeter) • cm (centimeter) • m (meter) **Note:** The reviewer can overrule the default by changing the unit via the Settings in the Viewer.
Allow download	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. Options: • Yes: The reviewer will get a download button ⬇ in the top right corner of the user interface. • No: There will be no button to download the PDF.
Review dataset name	Review comments, annotations, the chosen connection etc. are stored in a dataset for which you must enter a name and select a type (next property). This option is mandatory.
Review dataset type	Type of the dataset that will contain the metadata (review comments, annotations, chosen connection, etc.) Options:

Property	Meaning
	• XML • JSON **Note:** Not sure how to extract the review comments afterwards? Refer to the topic on *Finding review comments in Switch* in the *Switch Reference Guide*.
Due date	Date by which all submitted files should be reviewed. Options are: • Date: This option triggers a subordinate field where you can select the date of your choice. • Relative: The due date depends on the date of submission, for example, 5 days after the job was submitted. You can decide whether or not to take into account weekend days (and even choose which days are considered "weekend"). After the due date, the files that have not been reviewed yet are moved along the outgoing connection of the type 'timeout' and removed from the Cloud. They are no longer present in the Enfocus Review Admin Area ("All Reviews"). Note that you can postpone the removal from the Cloud through the *Deletion delay* property (see description below).
Deletion delay	Number of days by which the removal of reviewed files from the Cloud is postponed. The default is 0 (days).
Use comment properties of outgoing connection	Determines whether or not the values of *Enable review comments* and *Accept PDF with document comments* of the outgoing connections are taken into account. Options: • No: The properties of the outgoing connections are ignored. Review comments are not allowed (regardless of the *Enable review comments* property of the outgoing connections); PDFs with annotations are always accepted (regardless of *Accept PDF with document comments*). • Yes: The properties of the outgoing connections are taken into acocunt. The ability to add review comments depends on *Enable review comments*; the ability to submit PDFs with annotations depends on *Accept PDF with document comments*.
Outgoing connection status	This property is used to verify if there is at least: • 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' 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).

Advanced performance tuning - additional properties

When **Show advanced element properties** in the properties of the **flow** is enabled, the following extra properties become available:

Additional property	Meaning
Number of slots	Number of slots that can be used concurrently by the Review app, so the maximum number of tasks the app can handle simultaneously. Possible values are: • *Default:* The value set in the Switch Preferences (Processing - Concurrent processing tasks) is used. • *0:* There is no limit set to the number of slots. • Any number larger than 0: The allowed number of slots that can be used concurrently.
Idle after job (secs)	Number of seconds the app should remain idle after processing a job, so the time in between jobs, in case of serialized processing.
Log debug messages	Enables log debug mode. • If set to *Default*, debug messages will only be shown if Log debug messages is enabled in the Switch preferences (See Switch preferences: Logging) • If set to *Yes*, debug messages for the Review app will be shown in the Messages overview, regardless of the value of Log debug messages in the Switch preferences.
Abort after (minutes)	Number of minutes the app can run after which it is aborted. • If set to *Default*, the value of the global *Abort processes after (minutes)* preference will be used (See Switch Preferences: Error handling). • If set to *0*, processing will never be aborted. **Note:** This property is ignored if Log debug messages is set to Yes.

Mail send

If you have configured a *Mail notification* and/or a *Reminder 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).
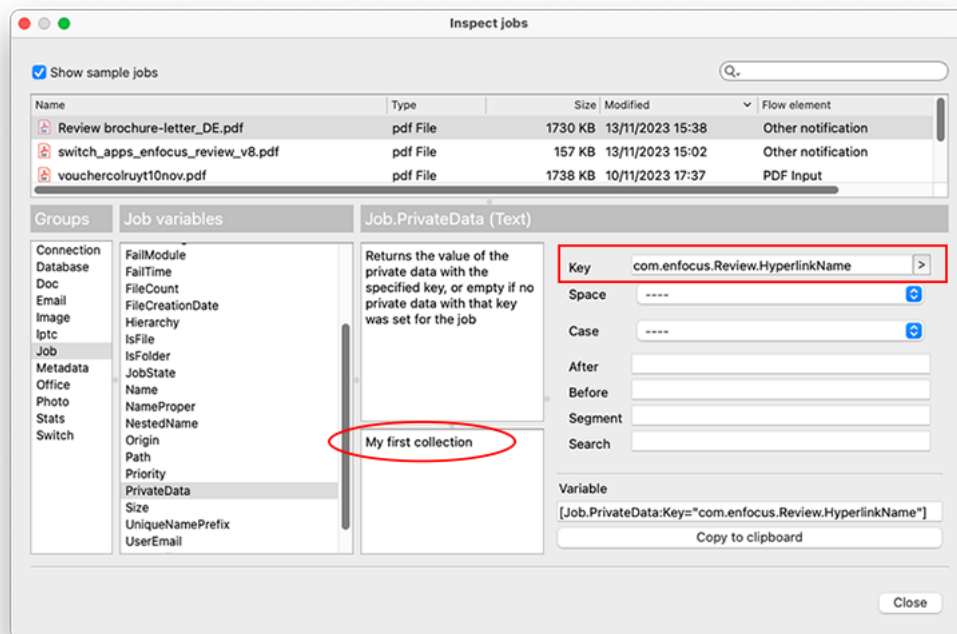
Private data

The Review app adds some private data to the outgoing jobs:

• For jobs going through the outgoing connection of the type 'Mail notification', the **URL of the job that needs to be reviewed** is stored as [Job.PrivateData:Key="com.enfocus.Review.URL"]. This variable can be used in mails to the reviewers.

Alternatively, choose **your own private data key** by adding an outgoing connection of the type '*Other notification*'. The *Private data tag name* you enter here will be stored as a private key.

- The **name of the hyperlink** typically shown in the mail notification, i.e. the name of the job (in case of separate jobs) or the name of the job collection is stored as [Job.PrivateData:Key="com.enfocus.Review.HyperlinkName"].

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