Apogee WebApproval 10.0

User's Guide

AGFA

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Contents

1 Getting Started

WebApproval is an application that enables collaboration between the Printer Company and Print Buyers for uploading files and approving softproofs. This section explains how to log on and provides an overview of the main windows in the application.

NOTE: If you are working with WebApproval on a mobile device, replace *click* by **tap**, and *right-click* by **press and hold** in these instructions.

Some of the features described in this guide are only available for WebApproval Pro users.

Logging In and Out

To be able to work with WebApproval, users must receive an e-mail from the Administrator with the WebApproval URL.

▷ Log on to WebApproval the first time

The first time you log on to WebApproval you need to set your password and activate your account.

1. Click the link in the e-mail that you received from the Administrator, or copy and paste the link in the address bar of your preferred browser.

   NOTE: This link remains valid for 7 days.

   The Change your Password panel is displayed where you can enter a password of your choice.

2. Enter a password of your choice in the **Password** field and enter it a second time in the **Confirm Password** field.
3. Click **Change Password**.

   The details of your user account are displayed.

4. If you want to complete or change your account details, click **Edit** in the bottom right corner. For example, you may want to add your phone number. If you are an Administrator, you can also create additional users for your company by clicking **New** in the bottom left corner.

▷ Log on to WebApproval with an existing account

TIP: You can bookmark the WebApproval URL as a favorite, just like any other website.

1. Go to the WebApproval link you received from the Administrator.
2. Enter your e-mail address or User Name, and your password.
3. Click **Log on**.

   The **Jobs** window is displayed with an overview of all the jobs that you have access to.

   NOTE: Initially, the Jobs window may be empty if your printer has not prepared any jobs for you.

▷ Log out of WebApproval

- Open the menu in the top left corner and choose Log Out.

▷ Reset a forgotten password

1. In the WebApproval logon window, click **Forgot Your Password**.
2. Enter your e-mail address or User Name and click **Submit**.

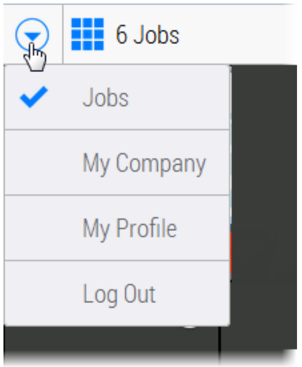
   You will receive an e-mail with instructions to reset the password.

Editing Your Account

Users can edit their own profile details once they are logged on. Administrators can edit other users and their company.

- Open the main menu in the top left corner and choose My Company or My Profile depending on what you want to edit.

Figure 1.1: Main menu



▷ Edit your own profile

1. Open the main menu and choose My Profile to display your profile.
2. Click Edit in the bottom right corner and edit or complete the details as required. See “User Settings” on page 55 for an explanation of the settings.

▷ Edit company info

NOTE: Only for users with the *Administrator* role.

- Open the main menu and choose My Company.

  In the Company window you can edit or add company information by clicking the Edit button in the bottom right corner of the Company info panel. See “Company Settings” on page 57 for an explanation of the settings.

  For example, complete the address details of your company and click Save and Continue. The new information is added to the Company panel.

▷ Edit another user's profile

NOTE: Only for users with the *Administrator* role.

- Open the main menu and choose My Company.

  In the Company window you can edit a user by clicking the user in the User panel on the right, and then Edit in the bottom right corner. See "User Settings" on page 55 for an explanation of the settings.

▷ Add a new user

NOTE: Only for users with the *Administrator* role.

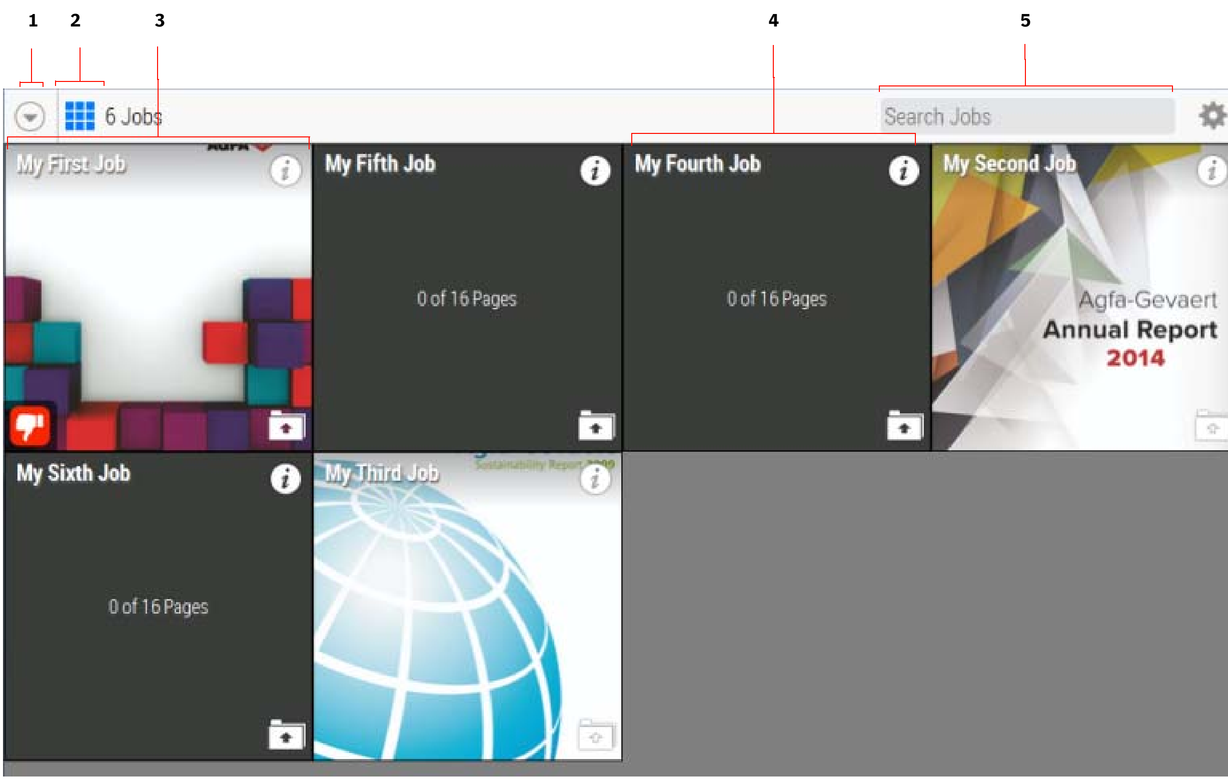
- Open the main menu and choose My Company.

  In the Company window you can add a user by clicking New at the bottom of the Users list. See "User Settings" on page 55 for an explanation of the settings.

The Jobs Window

Your print jobs are displayed as a grid of tiles in the Jobs window. These jobs are created by the Printer Company. Clicking or tapping a tile opens the job.

Figure 1.2: Jobs window



1 Main menu button
2 Grid button to return to the Jobs window
3 Job tile
4 Empty job (file not placed)
5 Search box

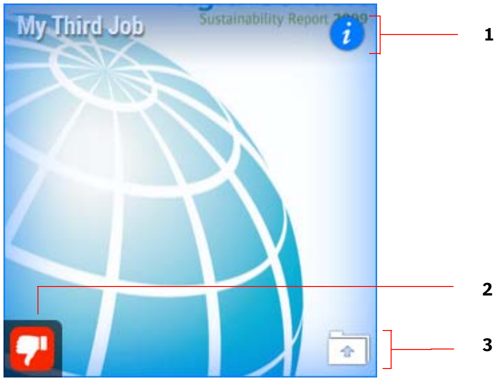
The jobs you see in the *Jobs window* are the jobs that require action by you as an approver or as an uploader. Administrators and Customer Service Representatives (CSRs) can see all the current jobs of the company. The total number of current jobs is indicated in the top left corner, next to the menu button. The *menu button* provides access to more advanced features of the application.

Job Tiles

A job tile shows a preview of the first page of the job. The tile is blank if no pages have been assigned to the job or if the first page is still empty. The title of the job is displayed in the top left corner of the tile.

An *Alert* icon in the bottom left corner of a tile indicates that the job needs attention because a deadline is about to expire or pages have been rejected. Clicking this alert icon opens the job information panel and displays information about the actions you need to take.

Figure 1.3: Job tile



1 Opens the information panel
2 Alert
3 Click to upload files

Job Icons

Alert: Job is approaching the deadline or it is overdue.

Alert: Job includes rejected pages.

Job has preflight issues

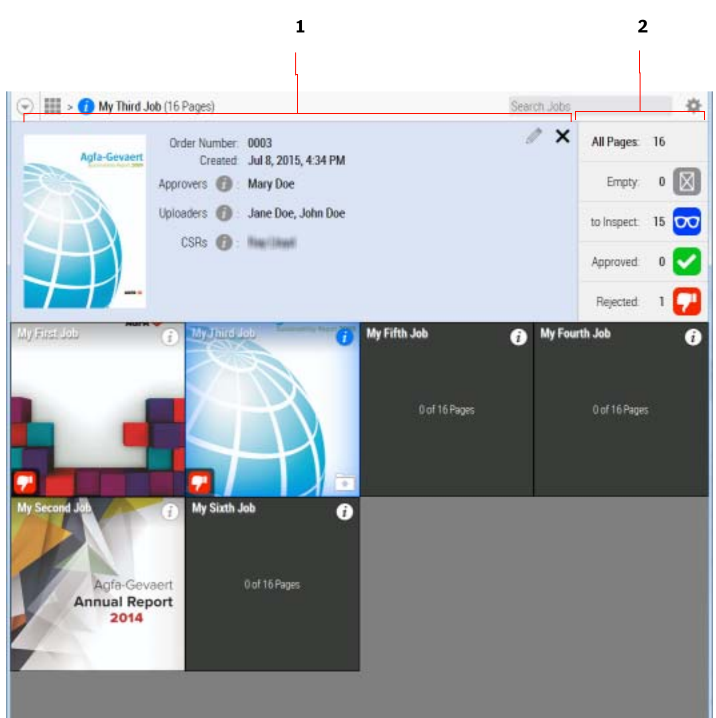
Opens the Job Information panel.

Upload: Opens the Upload Files window.

Information Panel

Additional information such as the total number of pages, approval status, users involved in the job and deadlines, can be found by clicking the *Information* icon in the top right corner of the tile.

Figure 1.4: Jobs window with the Information panel of a selected job

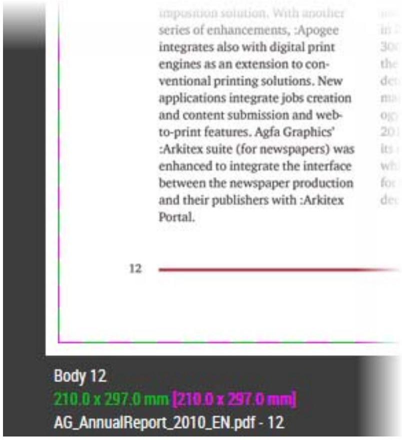


1 Information panel
2 Page status overview and filter

Clicking a page status icon opens the Flipbook and displays only the pages with the selected status. For example, click the Rejected status icon to see only the rejected pages of the job in the Flipbook.

Cogwheel menu

- Click the cogwheel in the top right corner to open a menu with the following commands (depends on current window):
  - Approve all remaining pages: All pages awaiting approval are approved in a single action; the status of rejected pages remains unchanged.
  - Download a softproof PDF: A PDF of all the rendered pages is downloaded.
  - Show/Hide Bleed & Boxes: Shows/hides the bleed zones, the Page Size box (green) and the PDF Trim box (dashed magenta) in the units specified in your profile; switch to Single Page view if you want to see the bleed zones in the spine.



  - Show Page Info: The Part (cover, body, insert) is always displayed under each page; choose this option to show/hide the Page Size (green) and the PDF Trim (magenta); under these box sizes you have the file name and the number of the page in this file. This option also displays the separation colors along the side of the Flipbook thumbnails.

- Show Help Pane: Displays the grey overlay pane with basic Help information for browsing and approving pages; you can always view this Help pane even if you clicked the **Never show this pane** again button.

- Online Help: opens the full documentation in a new browser window or tab.

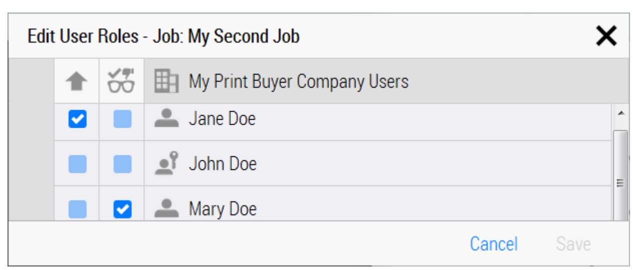
Edit the users of a job

NOTE: Only for users with the *Administrator* role.

You may want to change the default roles assigned to users for a particular job. For example, Jane's default role is Uploader and only Mary can approve pages. However, Mary's not available to approve the job at hand and you want to assign the Approver role to Jane just for this job.

1 Click the Information icon to open the information panel.

2 Click the Edit button to display a list of users and their role.



3 Select the check box next to a name in the first column to assign the Uploader role, and in the second column to assign the Approver role.

4 Click Save and click the black cross to close the information panel.

Search jobs

You can use the Search box to search for a job in the list of jobs.

1 In the Search box in the top right corner, enter your search query, for example words included in the title of the job, and press Enter.

2 If the Search box contains text, clear the box with the cross icon.

Shortcuts – Jobs Window

Press on Number Pad	To
`CTRL i`	Open the information pane
`Esc`	Close the information panel

Previewing Jobs (Flipbook)

Clicking a tile in the Jobs window opens the job and displays the document as a a flipbook that you can browse for reviewing and approving.

Figure 1.5: An open job

You can browse through the document by clicking anywhere on the page: click the left page of a spread to move back, or click the right page to move forward in a publication. You can also use the left and right arrow keys to move back and forward. Tablet users can tap/swipe forwards and backwards.

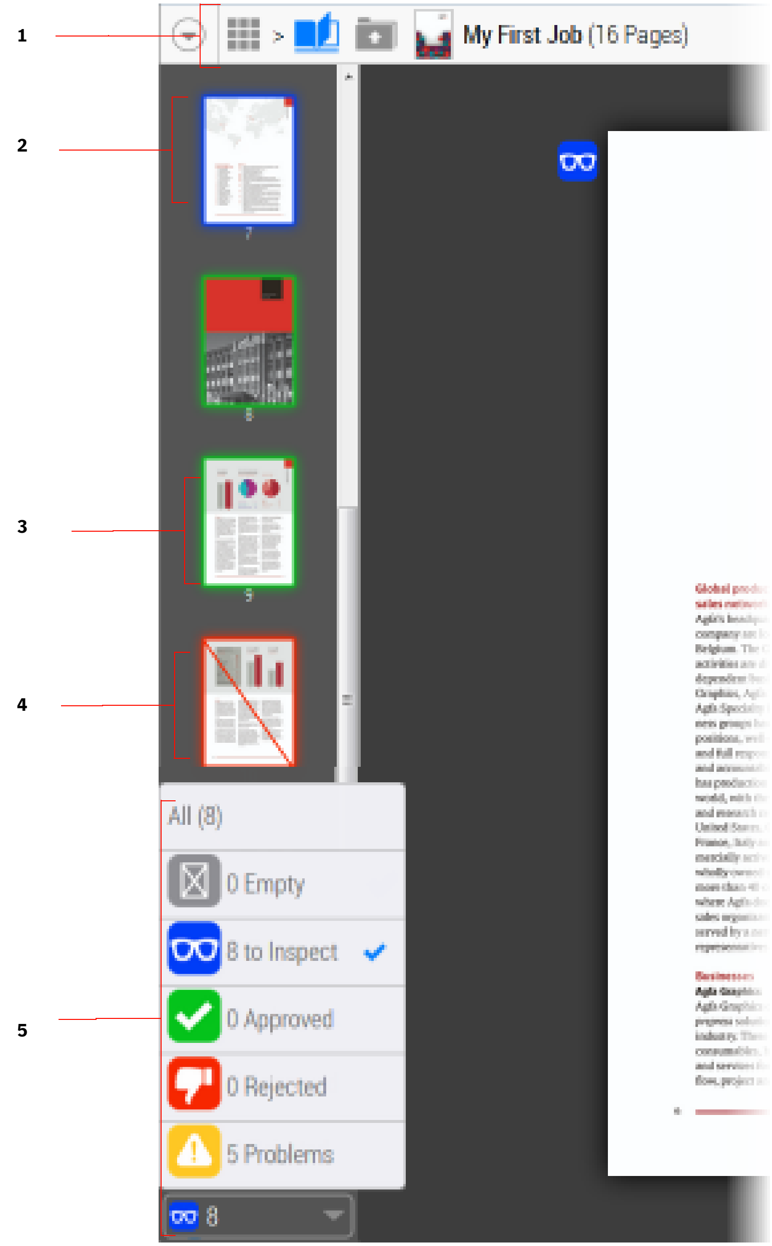
Use the buttons in the *actions panel* on the right to approve/reject a page, zoom into the document and set the page display options.

Use the thumbnails in the *navigation panel* on the left to go directly to a page. You can filter the displayed pages by opening the *filter* menu at the bottom of the panel.

Figure 1.6: Actions panel

1 Page search
2 Cogwheel menu
3 Page display options: Single page and Spread
4 Approve/Reject buttons
5 Click to open Zoom view

Figure 1.7: Navigation panel with page filter



1 Top navigation panel
2 Ready to Inspect page (blue border)
3 Approved page (green border)
4 Rejected page (red border)
5 Page filter

Page status Icons

 Empty page

 Ready to Inspect.

 Approved page

 Rejected page

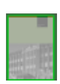
 Page has preflight issues

Page thumbnail status

 Empty page

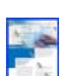
 Page is being processed

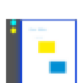
 Ready to Inspect. (blue border)

 Approved page (green border)

 Rejected page (red border)

 The page has been rejected in another version but has no version-specific content (solid grey diagonal line and grey border)

 The page has been rejected in another version but has version-specific content (dashed grey diagonal line and blue border)

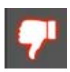
 Patches along the left edge indicate spot colors are used on this particular page; CMYK is also shown if not all four process colors are used; select Show Page Info to see these patches.

Action buttons

- Open the job and use the buttons in the Actions panel on the right to approve or reject a page.

Quick Approve
Approves the current, single page or spread without displaying a confirmation window, and takes you to the next page in the document that is awaiting approval.

Approve
Displays a confirmation window where you can confirm or cancel the approval of the left or right page or the spread.



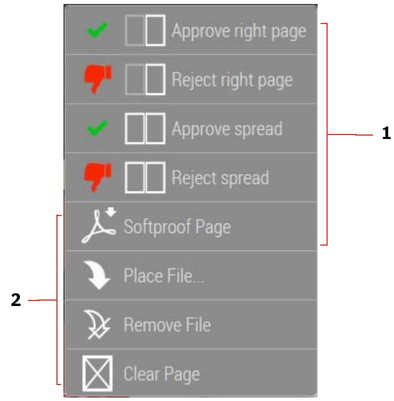
Reject
Displays a confirmation window where you can confirm or cancel the rejection of the current page or spread. You must add a reason in the comment field when rejecting.

Go to Next to Approve
If the current page has been approved or rejected, takes you to the next page in the document that is awaiting approval.

You must provide a reason for rejecting a page and this reason is visible in a page remark. The yellow remark icon opens the remark box. You must also provide a reason when approving a page that was rejected earlier.

Actions menu

- Right-click a page in the Flipbook to display the Actions menu (depends on the roles assigned to you):
  - Approve/reject right/left page: approves/rejects the current page
  - Approve/reject spread: approves/rejects both pages
  - Softproof Page: downloads a softproof of the current page
  - Place File: places a file that you select to fill the pages of a job
  - Remove File: removes the file used to fill the current page; this action empties all the pages that use this file
  - Clear Page: removes the content from the current page



1 Actions visible for Approvers
2 Actions visible for Uploaders

Shortcuts – Flipbook and Zoom View

Press	To
`right arrow`	Go to next page
`left arrow`	Go to previous page
`+` `(Number pad)`	Zoom in one level Repeat to zoom in several levels Open Zoom view from the Flipbook
`-` `(Number pad)`	Zoom out one level Repeat to zoom out several levels Return to Flipbook when at lowest zoom level
`*` `(Number pad)`	Show/hide bleed zones, page box and trim box

▷ Filter pages

1 Click the page filter button at the bottom of the left navigation panel to open the filter.

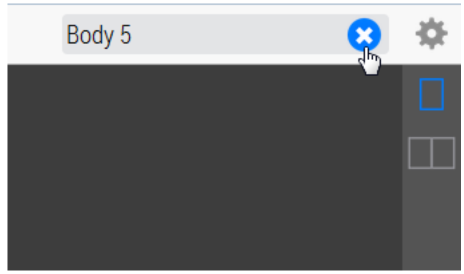
2 Choose one of the page statuses to filter the page thumbnails shown in the navigation panel.

Only the pages with the selected page status are now displayed in the navigation panel.

3 Click the page thumbnail to view the appropriate page.

▷ Jump to a specific page

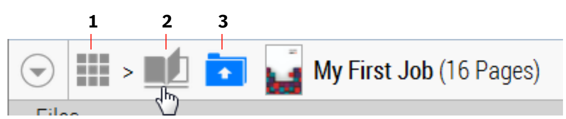
1 In the Search box in the top right corner, clear the box with the cross icon.



2 Enter the page number you want to jump to and press Enter.

▷ Go forward and backtrack

- In the Job window you can click the icons in the top navigation bar to backtrack and go forward.



1 Grid button to return to the Jobs window
2 View a job in the Flipbook
3 Go to the Files window

▷ Print a softproof

You can download a softproof PDF of the entire document or the current page.

- On any page in the document, open the cogwheel menu and choose **Download Softproof PDF** to download the entire document.

  OR

- Right-click the page and choose **Softproof Page** in the Actions menu to download the current page.

  You can save the PDF to a location of your choice.

Zoom View

In Zoom view you can take a closer look at the current page or spread, and also check separations. You cannot navigate from page to page in Zoom view.

- Click the Zoom button in the bottom right corner of Flipbook.

  OR

- Press the + key on the number pad

Zooming

In Zoom view you can use the menu in the bottom right corner to increase and decrease the zoom level:

- Exit Zoom: Closes Zoom view
- x4
- x2
- x1
- Fit: Fits the page or spread to the height or width of the Zoom window

You can also use keyboard shortcuts to zoom in and out of pages in Zoom view and open and exit Zoom view.

NOTE: When you are back in the Flipbook, using the shortcut keys may activate the zooming feature of your browser. This does not affect the zoom level of your document.

Separations

NOTE: Feature only available in WebApproval Pro.

The separations features allows you to check whether spot colors and process colors are used where you expect them to be. For example, check that a spot color is being used for a logo on the cover of your document.

♦ In Zoom view, click the Separations button in the center of the bar at the bottom of the window to display a list of the separation colors and spot colors used for the page or spread.

Select the separation color that you want to preview in Zoom view and click Apply. When you return to the Flipbook, all the separations are selected again.

2 Uploading Files and Placing Pages

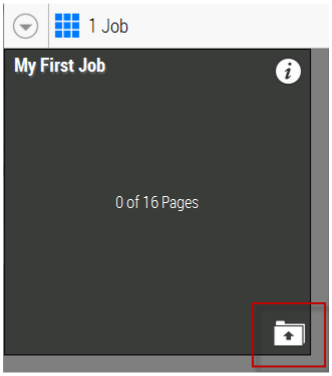
NOTE: Only for users with the *Uploader* role for the job.

Jobs appear in the Jobs window once they have been prepared by the Printer Company. If you have been assigned the Uploader role, you can upload PDF files and place the pages in the job. Files are uploaded for a particular job so you cannot use a file you uploaded for one job in a different job.

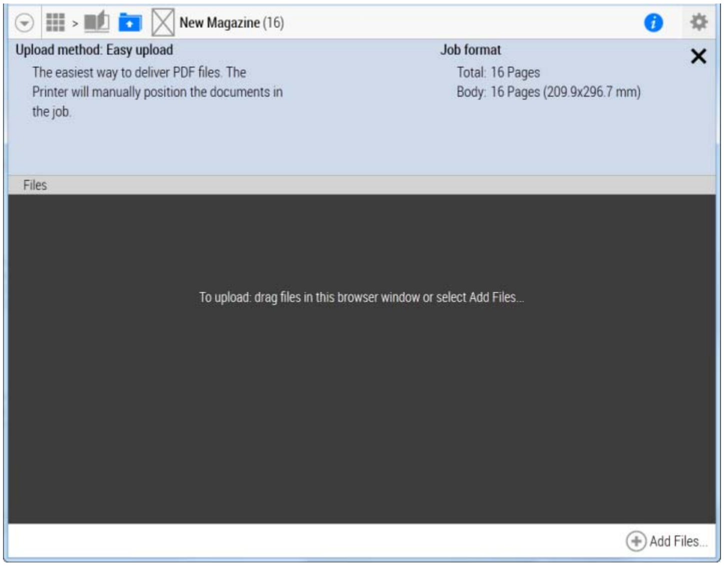
▷ Upload files

1 Go to the Jobs window and click the Upload icon in the bottom right corner of the job tile.

NOTE: If you don't see an Upload icon, you are not authorised to upload files for the job.



The Files window is displayed which consists of an information panel that can be opened and closed, and the upload panel.



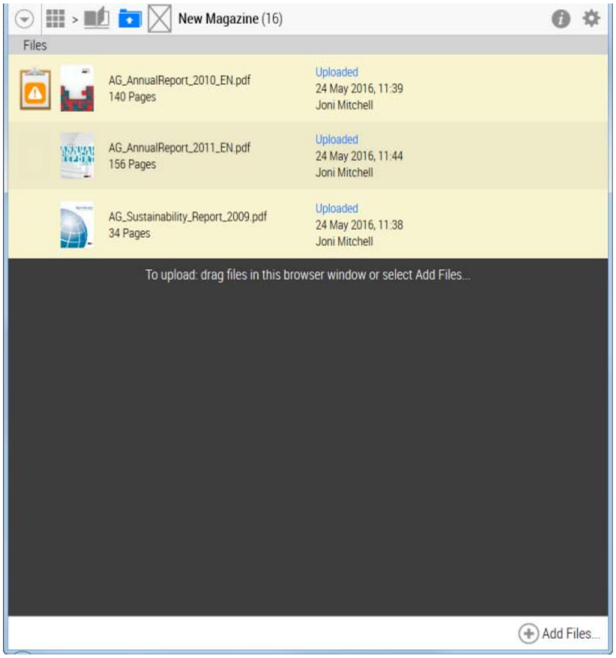
2 You have two options to upload files for the job:

Click Add Files to browse to the PDF files you want to upload.

OR

Drag the PDF files from your file browser onto the dark upload panel.

The files are added to the Files window.



3 Upload more files if necessary. If the job has different parts (cover, body, insert), you will probably want to upload different files for each part.

NOTE: See “Review uploaded files with preflight report” on page 31 if the uploaded file has preflight issues. This is indicated with a yellow preflight report icon to the left of the file thumbnail.

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4 Click the Flipbook icon in the top navigation bar to start placing the pages.

▷ Place pages

1 If you just finished uploading files for the job, click the Flipbook icon in the top navigation bar.

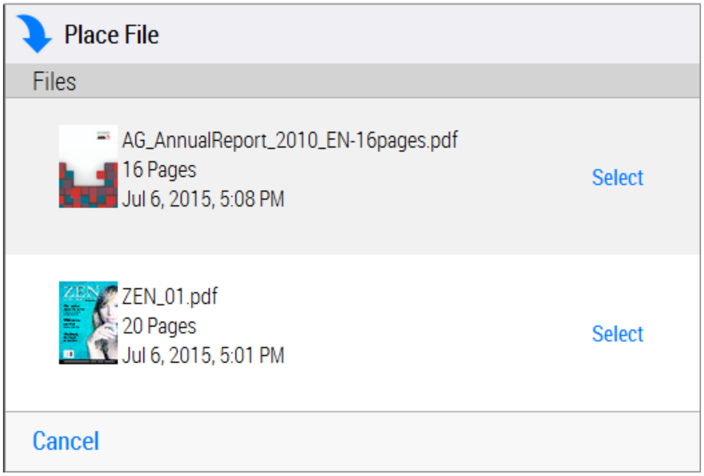
OR

If you are in the Jobs window, click the job tile to open the Flipbook.

The flipbook opens on page 1. If you want to start placing pages on a different page, go to the page by clicking the thumbnail in the navigation panel on the left.

2 Right-click the Flipbook page where you want to place a page or pages from your uploaded files, and click **Place File** in the action menu.

The Place File window appears with a list of uploaded files.



3 Click Select next to the file that you want to place.

The pages are placed, starting from the current page in the job. If the file contains more pages than the remaining pages in the job, the last pages are not placed. It is not possible to place a specific page from a file on a specific page of the job. In this case, you need to upload a file that only contains the page in question.

4 Click Place to confirm.

As the pages are processed, the thumbnails in the left navigation panel and the Flipbook pages are filled.

A blue icon in the top corner of the pages indicates that a page is ready to be inspected.

At this stage it is still possible to:

- upload more files for placement: click the Upload icon in the top navigation bar to go to the Files window.

- place a different file on pages that already have pages placed on them: right-click the page and choose Place File.

Users with the Approver role receive an e-mail notification to inform them that the pages are ready for inspection.

Replace pages

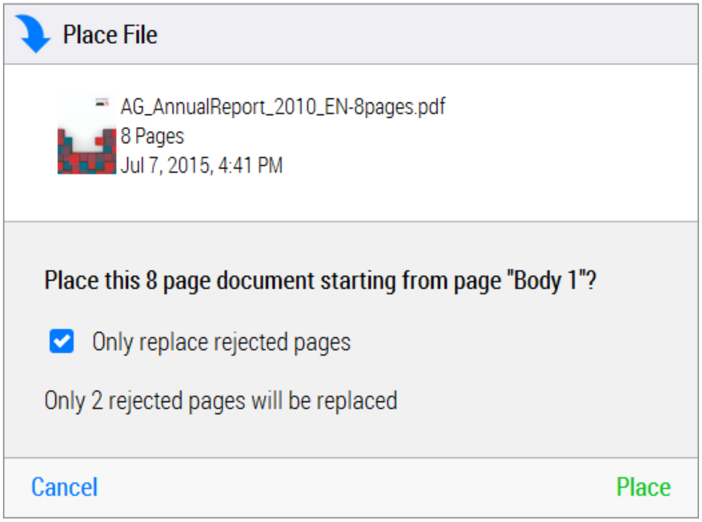
1 If you want to replace the placed pages of a job, follow the steps to Place pages.

2 In the Place File window, select a file that is not in use (i.e. which has not been placed for this job). A file which has already been placed is indicated as *in use*.

NOTE: It is not possible to replace pages using the same placed file.

3 Click Select next to the file that you want to place.

The system checks the status of the pages in the job and informs you if pages have been approved or rejected.



NOTE: Approved pages cannot be replaced.

4 If you only want to replace rejected pages, select the **Only replace rejected pages** box.

The corresponding pages in the new file will replace only the rejected pages.

OR

If you want all the pages of the new file to be used, make sure **Only replace rejected pages** box is cleared.

5 Click Place.

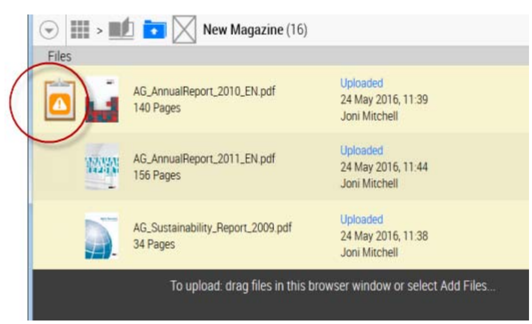
The pages are replaced as requested and reprocessed.

▷ Review uploaded files with preflight report

Files that you upload for a job are checked by the WebApproval system against a number of criteria to ensure that the job can be processed properly. This process is referred to as preflighting. Uploaded files with preflight issues are flagged with a yellow preflight report icon next to the file thumbnail. This preflight report should be reviewed before placing the file. Preflight issues will also be flagged in the Flipbook if the placed pages have issues.

NOTE: The Printer Company may decide that files with preflight errors and/or warnings cannot be placed by uploaders, and the job cannot be processed before the issues are resolved.

- In the Files window, click the preflight report button to the left of the file thumbnail.



The Problem Report is displayed with a list of errors and warnings and the pages where these issues occur in the file.

There are two types of preflight issues:

- Errors: the message describes an issue which is critical and should be resolved before placing the file
- Warnings: the message describes an issue which is not critical

For more information about each individual issue, click the blue Help icon.

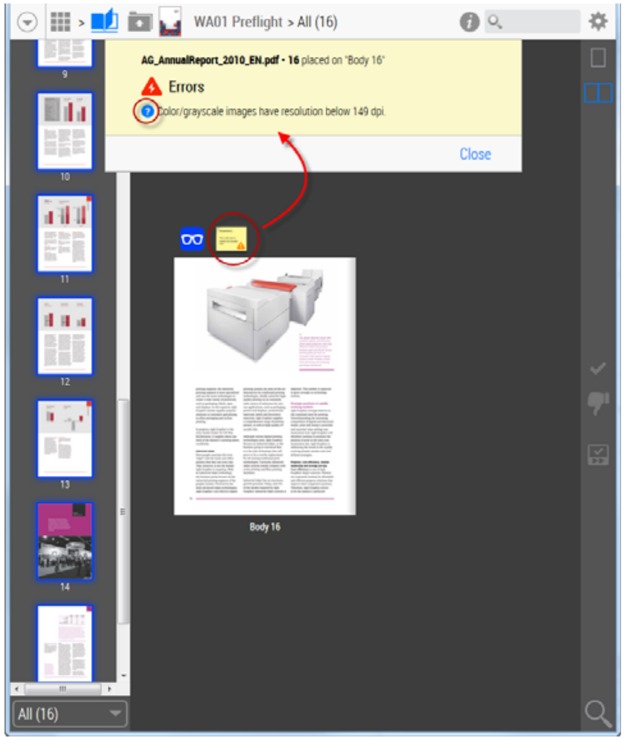
To save the Problem Report, click **Mail Problem Report** and an e-mail containing the list of issues is created in your default mail program with your profile e-mail address as recipient.

NOTE: It is recommended to discuss preflight issues with the Printer Company to avoid unexpected results in the printed product.

▷ Review and replace pages with preflight remarks

Filled pages may have preflight issues if you placed an uploaded file that has a preflight report. These preflight issues are flagged by the WebApproval system with a yellow preflight remark icon in the top corner of the filled pages in question. As an uploader, you can review these preflight remarks and replace the pages if necessary.

1 In the Flipbook, click a preflight remark icon to open the preflight remark that lists the issues for that selected page. Click the blue Help icon for more detailed information about the preflight issue.



See “Review uploaded files with preflight report” on page 31 for more information on preflight issues.

2 Close the preflight remark and context-click the page and choose **Place File** to place an uploaded file and replace the content. If you only want to replace the current page, make sure the new file is only one page. Otherwise all subsequent pages will also be replaced. See “Place pages” on page 27 for more information on placing a new file.

▷ Create a preflight report PDF

Printer Company users can create a PDF of the preflight report which contains the full specifications of the document and all the preflight issues.

- To create a PDF of the full preflight report, go to the Files window and click the PDF Report button to the right of the file.

▷ Remove a placed file and clear a page

When replacing pages, you may want to remove a placed file or page before placing the new file.

As an uploader, you can remove a placed file from the job or clear a specific page.

1. Open the job in the Flipbook and right-click a page to open the Actions menu.
2. Choose one of the following:
   - Remove File: removes the file used to fill the current page; this action empties all the pages that use this file
   - Clear Page: removes the content from the current page

   The pages are now empty.

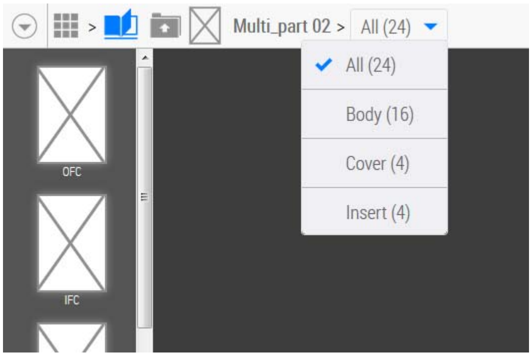
▷ Place files in multi-part jobs

A product consists of at least a Body part but may also have a separate Cover and an Insert:

- Cover: outside front cover (OFC), inside front cover (IFC), inside back cover (IBC) and outside back cover (OBC)
- Body: the pages between the front and the back cover;
- Insert: the pages inserted as a separate component inside the other two parts

If the job at hand is for a product with parts, i.e. a multi-part job, you can place a dedicated files for each part.

1 In the top navigation panel of the Flipbook, click the Parts drop-down list to display a list of the parts in your job. The Part s drop-down list is only available for multi-part jobs.



2 Select the part you want to review of for which you want to place a file.

The pages you now see in the Flipbook are for the selected part.

3 Place a dedicated file for each part as described in “Place pages” on page 27.

NOTE: The pages of a file are not placed across different parts.

3 Approving and Rejecting Pages

NOTE: Only for users with the *Approver* role for the job.

Pages which are ready to be inspected can be approved or rejected by users with the Approver role. The pages of a job can be inspected in the Flipbook once they have the Ready to Inspect status which is indicated with a blue icon.

▷ Open and inspect a job

- To open a job for inspection, do one of the following:

  Click the link in the e-mail that you received notifying you that a job is ready to inspect. The WebApproval application opens in your browser and displays the job to be inspected.

  OR

  In the Jobs window, you can see if a job has pages to inspect by opening the information panel of a job. Click the job tile to open it.

The Actions panel on the right is active and the Approve/Reject commands are displayed in the Actions menu.

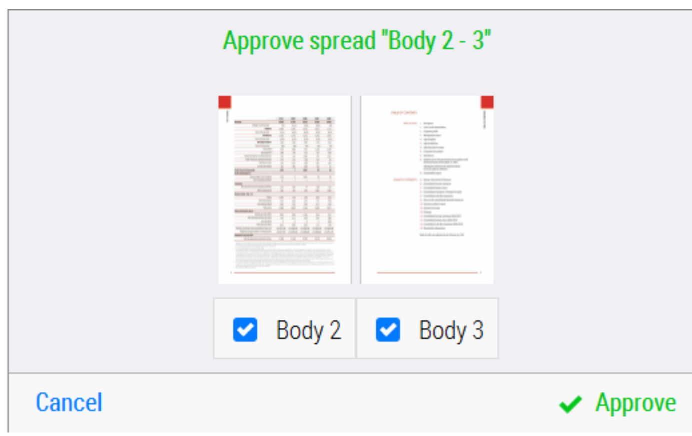
▷ Approve or reject pages (Actions panel buttons)

1 Go to the page or spread that you want to approve.

If the job is for a multi-part product, you can select a part in the Parts drop-down list in the top navigation panel.

2 Click the Approve button.

3 If you are in spread mode, select or clear the boxes for the right and the left page as required.



4 Click Approve to submit the page or spread.

The green Approve icon is displayed in the top corner of the page and the page thumbnail has a green border.

▷ Approve or reject pages (Actions menu)

This is an alternative procedure for approving or rejecting pages.

1 Open the job and right-click a page to open the Actions menu.

2 Choose one of the options in the list to approve or reject the right or left page (depending on the current page) or the spread (both pages).

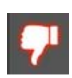
▷ Approve all pages

- On any page in the document, open the cogwheel menu and choose **Approve all remaining pages**.

  All pages with the Ready to Inspect status are approved. If you selected a part with the Parts drop-down list, only the remaining pages of the current part are approved. See “Place files in multi-part jobs” on page 34 for information on multi-part jobs.

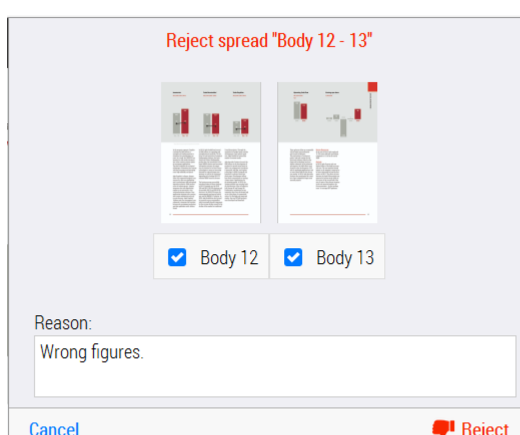
▷ Reject a page and create a remark

1 Go to the page or spread that you want to reject and click the Reject button.



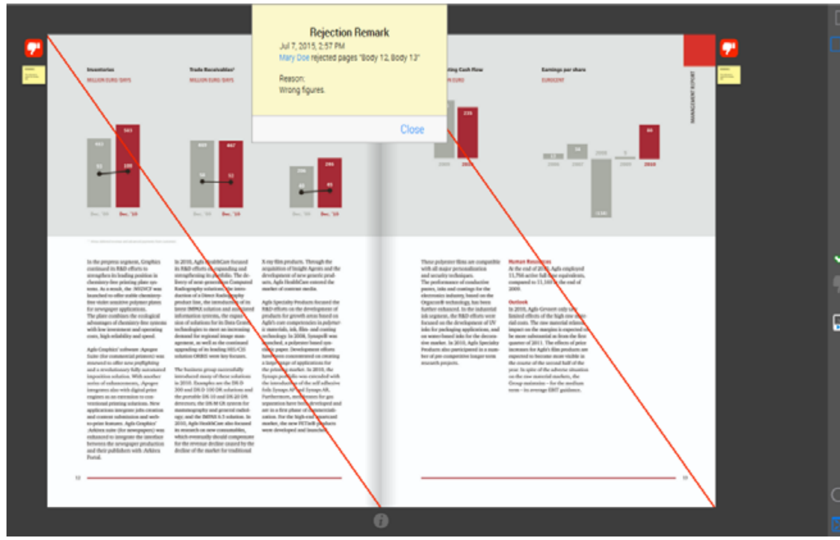
2 If you are in spread mode, select or clear the boxes for the right and the left page as required.

You must enter a reason for rejecting the page or spread.



3 Click Reject to submit the rejection and the reason.

A red diagonal line across the page indicates that the page has been rejected.



A red Reject page status icon is displayed in the top corner of the page, together with a Remark icon, and the page thumbnail has a red border.

Other WebApproval users can open and read the remark by clicking the icon. The remark is also sent to the printer.

Approve a rejected page

1 Go to the rejected page or spread that you want to approve and click the Approve button.

You must enter a reason for approving the rejected page or spread.

▷ Reject an approved page

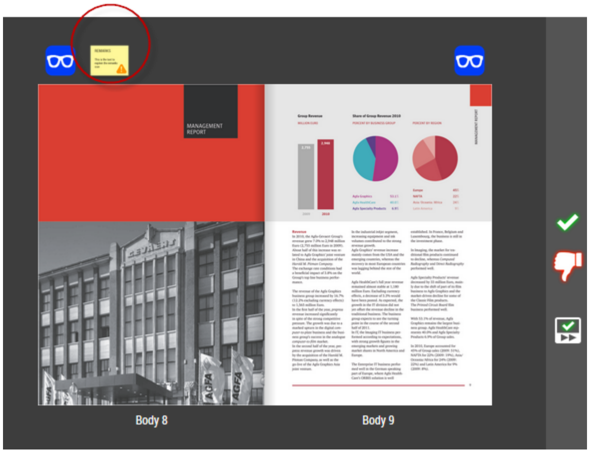
Only the users of the Printer Company are able to cancel a page approval and reject a page which has already been approved by another user.

- Follow the procedure in “Reject a page and create a remark” on page 39.

▷ Review pages with preflight remarks

Placed files may have preflight issues which are flagged by the WebApproval system with a yellow preflight remark icon in the top corner of the filled pages in question. These remarks should be reviewed and the pages should be rejected and replaced if necessary.

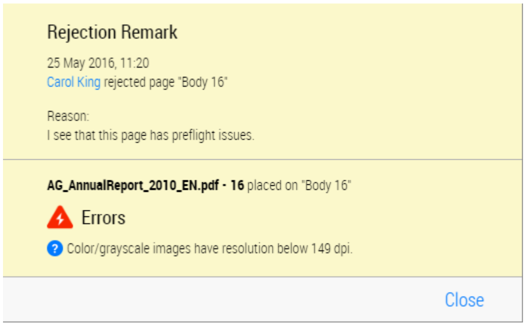
- Click a preflight remark icon to open the preflight remark that lists the issues for that selected page. Click the blue Help icon for more detailed information about the preflight issue.



See “Review uploaded files with preflight report” on page 31 for more information on preflight issues.

NOTE: It is recommended to discuss preflight issues with the Printer Company to avoid unexpected results in the printed product.

If you reject the page, your rejection remark is added to the preflight remark.



▷ Approve/reject versions

NOTE: Feature only available in WebApproval Pro.

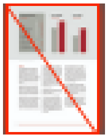
WebApproval allows you to approve/reject different versions of the same print product in a single job. These versioning jobs have content which is shared for all versions (e.g. images) and content that is specific for each version (e.g. text).

Base version The base version of a versioning job is generally the first version (v1) although any version can be set as the base version by the Printer Company. When you preview the base version, you can approve or reject the shared and the version-specific content together. The approve/reject actions are enabled for all the pages.

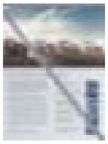
Pages with version-specific content If the pages in the other version have version-specific content, you can approve or reject the version-specific content on these pages but not the shared content (e.g. different language versions). The approve/reject actions are enabled for all these pages. If such a page has been rejected in the base version or one of the other versions, it will have the Ready to Inspect status and a dashed grey diagonal line to indicate that you can still approve/reject the version-specific content.

Pages with no version-specific content If the product of a versioning job has pages with no version-specific content (e.g. address change on the last page only), you can only approve/reject these pages in the base version. The approve/reject actions are disabled for these pages in the other versions and the pages have a solid grey diagonal line if they have been rejected.

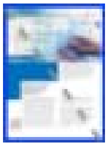
Color code for rejected pages in versions



Solid red diagonal line. The page has been rejected in the current version.



Solid grey diagonal line. The page has been rejected in another version but has no version-specific content. You cannot approve or reject this page in the current version.



Dashed grey diagonal line. The page has been rejected in another version but has version-specific content. You can approve or reject the page in the current version.

NOTE: The files for a versioning job can be uploaded by the Print Buyer but only the Printer Company can place the uploaded files.

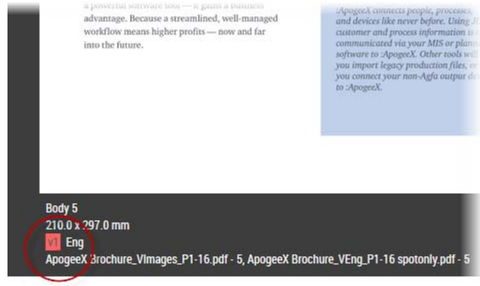
How to approve/reject versions

1 In the top navigation panel of the Flipbook, click the Versions drop-down list to display a list of the versions for your job. The Versions drop-down list is only available for versioning jobs.

2 Select the version you want to approve or reject.

The pages you now see in the Flipbook are for the selected version.

3 On the cogwheel menu, choose **Show Page Info** to display the version ID and the name of the files used to create the version, under each page.



If you are reviewing the base version, you can approve/reject the shared content and the version-specific content together for all the pages. In the other versions, you can only approve/reject pages with version-specific content, as explained above.

4 Managing Users and Companies

Administrators of the Printer Company can create Print Buyer companies for customers with whom they want to collaborate via WebApproval. They can also create users for these Print Buyer companies and also for their own Printer Company.

The Print Buyer administrator can manage the users and settings of his own company.

Initial Logon of Printer Company

When the installation of WebApproval has been completed, the system contains one company called the Printer Company which represents the printer's organization. This Printer Company initially has one Administrator who is responsible for managing the WebApproval application. To get started with WebApproval, you need to change the user settings of this initial Administrator. Once this has been done you can start setting up your system, create Print Buyer companies, add users, etc.

▷ Log on as the initial Administrator

1 In your web browser, enter your WebApproval URL followed by `/setup.html`

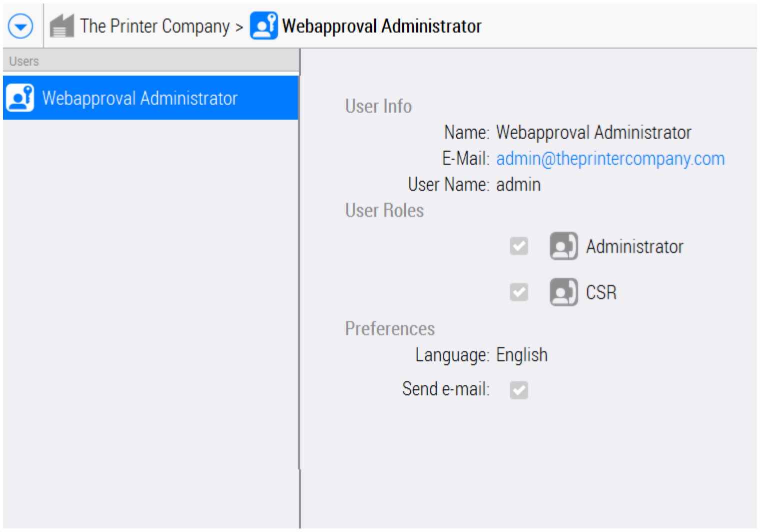
```
e.g. www.myWebApproval.com/setup.html
```

NOTE: You can find the URL in the WebApproval tab of your Apogee Prepress System Configuration.

---

2 Enter a password of your choice to go to your account settings.

The account details of the initial Printer Company Administrator are displayed.



3 Click Edit in the bottom right corner to open your account details.

4 In the User Info panel, the following details *must* be changed:

- First Name and Last Name: This is the name that appears in the WebApproval application. We recommend that you enter your actual name instead of WebApproval (first name) Administrator (last name).

- E-mail: You must enter your own e-mail address here. This e-mail address can be used to log on.

- User Name: (Optional) You can also use the user name as specified here to log on. We recommend that you change this user name or at least make a note of the default user name, i.e. **admin**.

5 Edit the User Roles and Preferences as required.

6 Click Save and Close.

The initial Printer Company Administrator user has now been set and is ready for use the next time you log on.

CAUTION: The e-mail address or user name are required to log on to WebApproval, so be sure to make a note of them.

User Roles

Users are assigned roles.

Printer Company User Roles

A user of the Printer Company is either an Administrator or a Customer Service Representative (CSR):

Printer Company Administrator

The user who is responsible for managing the WebApproval application in the Printer Company. He can create other administrators who share the admin responsibility, and CSRs. The Administrator automatically has the CSR role and the same rights as all the CSRs in the Printer Company.

CSR (Customer Service Representative)

A CSR is responsible for one or more Print Buyers, i.e. the customers of the Printer Company. He can upload documents for his customers and approve their jobs, and receives notification e-mails for events concerning their jobs. A CSR can also be assigned as uploader and/or approver for companies for which he is not a CSR.

Print Buyer User Roles

A user of a Print Buyer company can be given one or more roles. For example, a single user can have the Administrator and Approver roles:

Print Buyer Administrator

The user who is responsible for managing the WebApproval application in his company. He can add users and grant them roles. The Administrator role does not include the Approver or Uploader roles.

Approver

A user in the Print Buyer's company who is allowed to approve jobs that are assigned to him.

Uploader

A user in the Print Buyer's company who is allowed to upload documents for jobs that are assigned to him and place the pages in a job.

Users List Icons

 Printer Company Administrator

 Printer Company CSR (Customer Service Representative)

 Print Buyer user with Administrator role

 Print Buyer user with Uploader or Approver role, or both

Working with Companies and Users

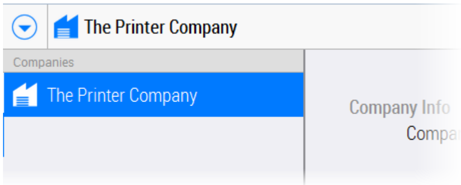
Edit your Printer Company details

NOTE: Only for Print Company users with the *Administrator* role.

You will probably want to change the default company information, and for example, specify the real name of your company. You can also specify the settings for softproof PDFs that can be downloaded by the users of your printer company.

1 Open the menu in the top left corner and choose Companies to view the list of companies.

2 Select the Printer Company.



This is the company with the *factory* icon:

NOTE: The Printer Company is initially the only company in the list.

3 Click Edit in the bottom right corner to open the company window and edit or add details. See “Company Settings” on page 57 for an explanation of the settings.

4 Click Save and Continue.

Create Users for the Printer Company

NOTE: Only for Print Company users with the *Administrator* role.

An administrator can create additional Administrators or CSRs (Customer Service Representatives) for the Printer Company.

1 Open the menu in the top left corner and choose Companies to view the list of companies.

2 Select the Printer Company.

3 Click Show Users in the top right corner to display the list of Users.

NOTE: Initially, the WebApproval Administrator is the only user in the list.

4 Click the Add icon in the bottom left corner of the list to open the user settings. See “User Settings” on page 55 for an explanation of the settings.

5 Complete the User Info and choose a User Role – Administrator or CSR. You can also set the language and messaging options.

6 Click Save and Continue.

The new administrator or CSR is added to the list of users in alphabetical order. He automatically receives an e-mail with the WebApproval URL, inviting him to participate in the collaboration workflow.

▷ Create a Print Buyer company

NOTE: Only for Print Company users with the *Administrator* or *CSR* role.

Prerequisite: create a user with CSR role first.

You will create Print Buyer companies for the customers with whom you want to collaborate via WebApproval.

1 Open the menu in the top left corner and choose Companies to view the list of companies.

2 Click the Add icon in the bottom left corner of the list to open the new company window.

3 Complete the details for the new company. All the information you enter here will be visible for the users of your Printer Company and the Print Buyer company in question. See “Company Settings” on page 57 for an explanation of the settings.

4 In the User Role Presets section you can assign CSRs, Uploaders and Approvers for this company:

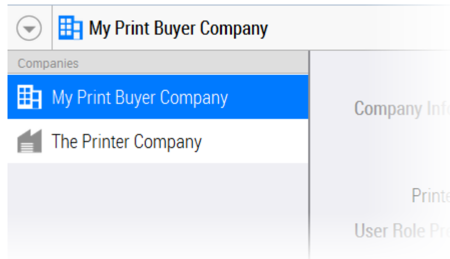
- The Printer Company CSRs: These are the Customer Service Representatives in your printer company who will be assigned to this customer.

  NOTE: All users with Administrator role are also in this list because they are automatically CSR.

- Your new company users: This list is initially empty. These users may also be added later by the administrator of the Print Buyer. They can be Uploaders, Approvers or have both roles.

5 Click Save and Continue.

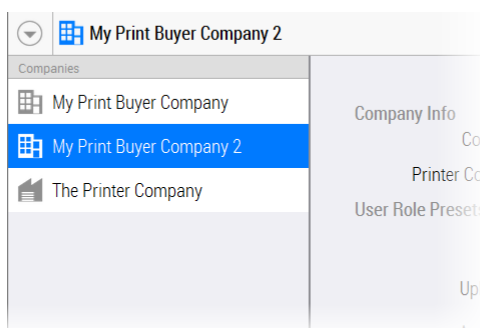
6 The new Print Buyer company is added to the list of companies.



A Print Buyer company has the *office building* icon:

You can still go back and edit the company details, or you can start adding users.

7 You can add a second Print Buyer company if you want.



Notice that the companies are arranged alphabetically in the list. The selected company is also indicated in the top navigation bar.

▷ Create Users for a Print Buyer company

NOTE: Only for Print Company users with the *Administrator* or *CSR* role.

A Printer Company Administrator must create at least one user with the Administrator role for the Print Buyer company. This is the user who is responsible for the application in his company. A Printer Company Administrator can also create Approvers and Uploaders for the Print Buyer company but these will generally be created by the Print Buyer administrator.

1 Open the menu in the top left corner and choose Companies to view the list of companies.

2 Select the Print Buyer company.

3 Click Show Users in the top right corner to display the list of Users.

Initially, this list is empty.

4 Click the Add icon in the bottom left corner of the list to open the user window.

5 Complete the User settings. See "User Settings" on page 55 for an explanation of the settings.

NOTE: Fields with a yellow background are mandatory to create the user but you should also complete the other fields.

---

6 Assign one or more User Roles and a Messaging preference.

7 Click Save and Continue.

The new user is added to the list of users in alphabetical order.

The new user automatically receives an e-mail when the user is created. This e-mail invites the user to participate in the collaboration workflow and includes the WebApproval URL.

▷ Create Users (Print Buyer administrator)

The Print Buyer administrator can create users for his company and choose the roles for these users.

1 Open the menu in the top left corner and choose My Company.

The Company window is opened with a list of users on the right.

2 Click the Add icon in the bottom left corner of the list to open the user settings.

3 Complete the User settings. See "User Settings" on page 55 for an explanation of the settings.

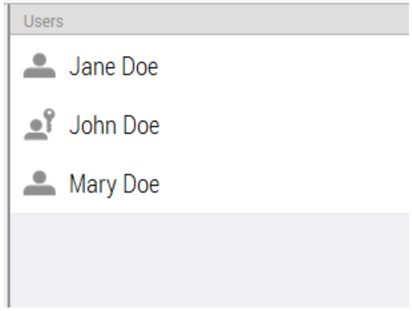
NOTE: Fields with a yellow background are mandatory to create the user but you should also complete the other fields.

---

4 Assign one or more User Roles and a Messaging preference.

5 Click Save and Continue.

The new user is added to the list of users in alphabetical order.



The new user automatically receives an e-mail when the user is created. This e-mail invites the user to participate in the collaboration workflow and includes the WebApproval URL.

▷ Delete a Print Buyer company

NOTE: Only for Print Company users with the *Administrator* role.

1. Open the menu in the top left corner and choose Companies to view the list of companies.
2. Select the company you want to delete and click the Minus icon in the bottom left corner of the list.
3. Click Delete to confirm.

User Settings

- ♦ Click the Edit button in the Users window to open the User settings.

User Info

First Name and Last Name The actual name of the user (mandatory).

E-mail A valid e-mail address where the user can be reached (mandatory). This e-mail address is used to invite the new user to join the collaboration workflow, and to send notifications.

User Name A name that can be used instead of the e-mail address to log on. This must be a unique name in your WebApproval system.

Phone, Mobile, Fax Additional user information.

Comment A free-text field for adding extra information about the user.

User Roles

Here you choose one or more roles for a user. The roles can also be edited on a job-by-job basis.

Printer Company Roles


Printer Company Administrator


Customer Service Representative (CSR)

Print Buyer Roles


Print Buyer Administrator


Approver


Uploader.

See “User Roles” on page 48 for an explanation of the different roles.

Preferences

Language The language of the portal interface and e-mail notifications. Choose the language that you want to use from the drop-down list.

Units The units for the measurements displayed in the Flipbook (e.g. page info):

- Metric (mm)
- Imperial (in)

Send e-mail Select this check box if you want the system to send notification e-mails when certain events occur.

In the Send e-mail table you can select check boxes in the first column to send notifications when the user is assigned the uploader role, in the second column when he is assigned the approver role. A third column is provided for CSRs who may need to upload or approve jobs for which they are not the CSR. The following events trigger a notification:

- First pages ready to inspect: a notification is sent while the pages are still being processed and some of the pages can be inspected.
- All pages ready to inspect: a notification is sent when all the pages have been processed and are ready to be inspected.
- All pages approved: a notification is sent when all the pages of a job have been approved.
- Page rejection: a notification is sent when a page is rejected.
- Invitation to upload: a notification is sent when a job has been prepared and uploaders can upload pages for this job.

NOTE: The messaging is based on the user's role which may be modified on a job-by-job basis. For this reason, it is recommended to specify the messaging for all the roles, not just the pre-defined role.

Company Settings

Company settings can be edited by administrators. Not all of the Company settings are available for both company types (Printer Company and Print Buyer Company).

Company Info

Company Name The actual name of the company (mandatory).

E-mail, Address, Phone, Fax Optional details about the company.

Comment A free-text field for adding extra information about the company.

Web Services

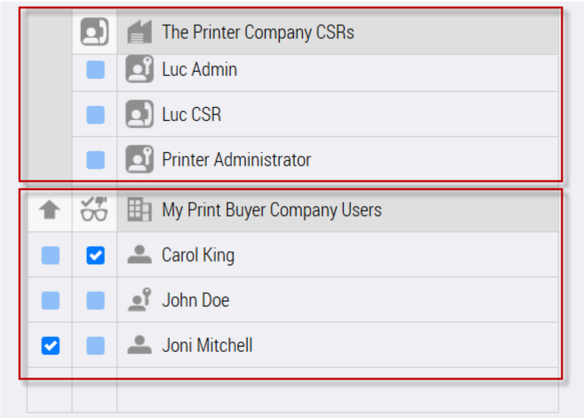
Select the service you want to enable for the Print Buyer company:

- WebApproval: the remote proofing service
- PrintSphere: the cloud service for transferring files

NOTE: A service is only displayed if you have a license for it.

User Role presets

Use the two tables to assign CSRs to the Print Buyer company, or Uploader and Approval roles to the Print Buyer users. These are the role presets for all jobs created for the Print Buyer company. Roles can be changed on a job-by-job basis.



Print Company CSRs This table lists all the administrators and CSRs in the Printer Company. The Printer Company administrator can select the check box next to a name to grant this person the CSR role for the Print Buyer company currently being edited.

Print Buyer Company Users This table lists all the users in the Print Buyer company and their current roles as set in the User Settings. Select or clear the check boxes next to a name to change the roles. These changes are reflected in the User Settings.

Preflight

The Printer Company administrator can decide to notify uploaders if uploaded files have preflight issues.

Show Preflight information Select the check box to show preflight reports and remarks to uploaders.

These are the standard preflight checks (Apogee Prepress action lists):

- Check document security: is the user allowed to print the PDF document?
- Check font embedding: is all the font data embedded in the PDF file?
- Check image resolution: is the image resolution high enough?
- Check number of separations: checks that the document contains a given number of separations, i.e. spot colors, not CMYK
- Check page size against product: checks that the page sizes comply with the product specifications

Softproof PDF

The Printer Company administrator can specify the settings for the PDFs that users can download when viewing documents in the Flipbook.

Encapsulate raster data at Raster files, both pages and flats, are sub-sampled in order to reduce their size and are then embedded in a PDF wrapper. We suggest limiting the resolution to between 60 and 300 dpi, inclusive.

Compression ZIP (lossless): Provides a lossless compression, and should be used when delivering 'Device Colors', or when the images contain text and line art.

JPEG compression options (lower quality): These are lossy, lower-quality types of compression, more suitable for composite images where the text is not so important.

Color Model You can select the color space of the generated files:

Composite (RGB): The PDF contains RGB images (depending on the color profile option, see below). The WebApproval user cannot see the individual separations. However, this mode provides a better 'overprint' preview, regardless of the PDF viewer application.

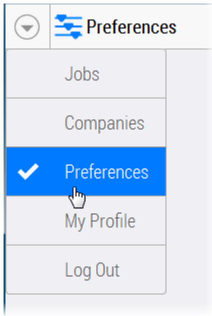
Include Color Profile: Apogee Prepress creates a composite image with the chosen profile as target, and includes that profile. The remote site can then use the client system’s color model to view the image, adjusting the colors for the display profile. The list shows all RGB 'Content Color Profiles' that are installed for the Normalizer or Render Task Processors. If the option is not selected, Apogee Prepress uses the sRGB color space.

Device colors (CMYK and spot colors): The PDF contains all separations (process colors and spot colors) as individual images. The advantage is that the WebApproval user can see the individual separations. This requires Adobe Acrobat 6.0 Professional or higher.

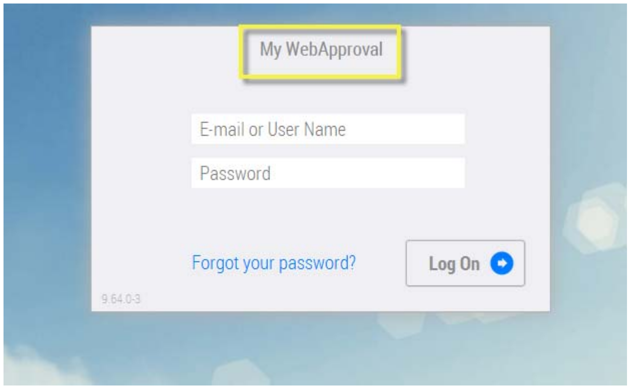
Preferences

NOTE: Only for Print Company users with the *Administrator* role.

- Open the main menu in the top left corner and choose Preferences. Click Edit to modify the settings.



Service Name The name that appears at the top of the logon dialog box.



E-mail Header The header that you can add to the e-mails which are sent by the WebApproval system. The customized text is added before the salutation. In Edit mode, a WYSIWYG HTML editor is displayed for creating the text.

E-mail Footer The footer that you can add to the e-mails which are sent by the WebApproval system, e.g. a standard closing in one or more languages and the name of the sender organization. In Edit mode, a WYSIWYG HTML editor is displayed for creating the text.

Messaging Defaults These are the default settings for the WebApproval system to send e-mails to Uploaders, Approvers and CSRs. See “User Settings” on page 55 for more information.

Service Message Enter text and choose a background color for a message that you want to display each time a user logs on. The message is displayed in the bottom right corner of the browser window. The message disappears automatically after five seconds, or the user can click the message to hide it immediately.

Online Help The URLs where the user documentation is located:

- Help URL: the link to the full user documentation that users can open by clicking Online Help on the cogwheel menu. You can edit the URL to point to your own user documentation. If you edit this URL, you can use the <product-version> and <language-code> variables in your own URL.

- Preflight Help URL: a dynamic link that users can open by clicking preflight messages. These links provide more information about the specified preflight error or warning, by preflight ID. If you edit this URL, you can use the <product-version>,<language-code>and <preflight-id> variables in your own URL.

Click Restore Default if you want to revert to the initial links where the official documentation is hosted.

Logon Screen In this panel you can choose to display a wallpaper in the logon screen. A different wallpaper can be specified for when the browser window is resized to portrait or landscape sizes. If you do not select the Use Wallpapers check box, the logon screen is gray. Click Replace File to upload a new wallpaper image for the portrait and landscape sizes.

APPENDIX

A

Icons and Shortcuts

This section gives an overview of the icons used in WebApproval.

Actions panel

Quick Approve
Approves the current, single page or spread without displaying a confirmation window, and takes you to the next page in the document that is awaiting approval.

Approve
Displays a confirmation window where you can confirm or cancel the approval of the left or right page or the spread.

Reject
Displays a confirmation window where you can confirm or cancel the rejection of the current page or spread. You must add a reason in the comment field when rejecting.

Go to Next to Approve
If the current page has been approved or rejected, takes you to the next page in the document that is awaiting approval.

Cogwheel menu

Page status

Empty page

Ready to Inspect.

Approved page

Rejected page

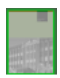
Page has preflight issues

Page thumbnail status

Empty page

Page is being processed

Ready to Inspect. (blue border)

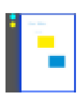


Approved page (green border)

Rejected page (red border)

The page has been rejected in another version but has no version-specific content (solid grey diagonal line and grey border)

The page has been rejected in another version but has version-specific content (dashed grey diagonal line and blue border)



Patches along the left edge indicate spot colors are used on this particular page; CMYK is also shown if not all four process colors are used; select Show Page Info to see these patches.

Job Icons

Alert: Job is approaching the deadline or it is overdue.

Alert: Job includes rejected pages.

Job has preflight issues

Opens the Job Information panel.

Upload: Opens the Files window.

Files Window

The uploaded file has preflight issues; click to open the preflight report

Click to open a detailed preflight report in PDF format (Printer Company users only)

Printer Company Roles

These icons identify the different Printer Company user roles in the User window.

Printer Company Administrator

Customer Service Representative (CSR)

Print Buyer Roles

These icons identify the different Print Buyer user roles in the User window.

Print Buyer Administrator

Approver

Uploader.

User Icons

These icons identify the different kinds of users in the Users list.

Printer Company Administrator

Printer Company CSR (Customer Service Representative)

Print Buyer user with Administrator role

Print Buyer user with Uploader or Approver role, or both

Shortcuts – Jobs Window

Press	To
`CTRL i`	Open the information pane
`Esc`	Close the information panel

Shortcuts – Flipbook and Zoom View

Press	To
`right arrow`	Go to next page
`left arrow`	Go to previous page
`+` **`(Number pad)`**	Zoom in one level Repeat to zoom in several levels Open Zoom view from the Flipbook
`-` **`(Number pad)`**	Zoom out one level Repeat to zoom out several levels Return to Flipbook when at lowest zoom level
`*` **`(Number pad)`**	Show/hide bleed zones, page box and trim box

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