Apogee WebApproval 9.1

User's Guide

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All software and hardware described in this document are subject to change without notice.

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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.

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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.

Logging On 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

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.

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

▷ 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**.

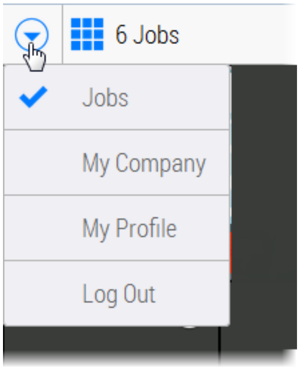
   You will receive an e-mail with instructions to reset the password.

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 41 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 43 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 41 for an explanation of the settings.

▷ Add a new user

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

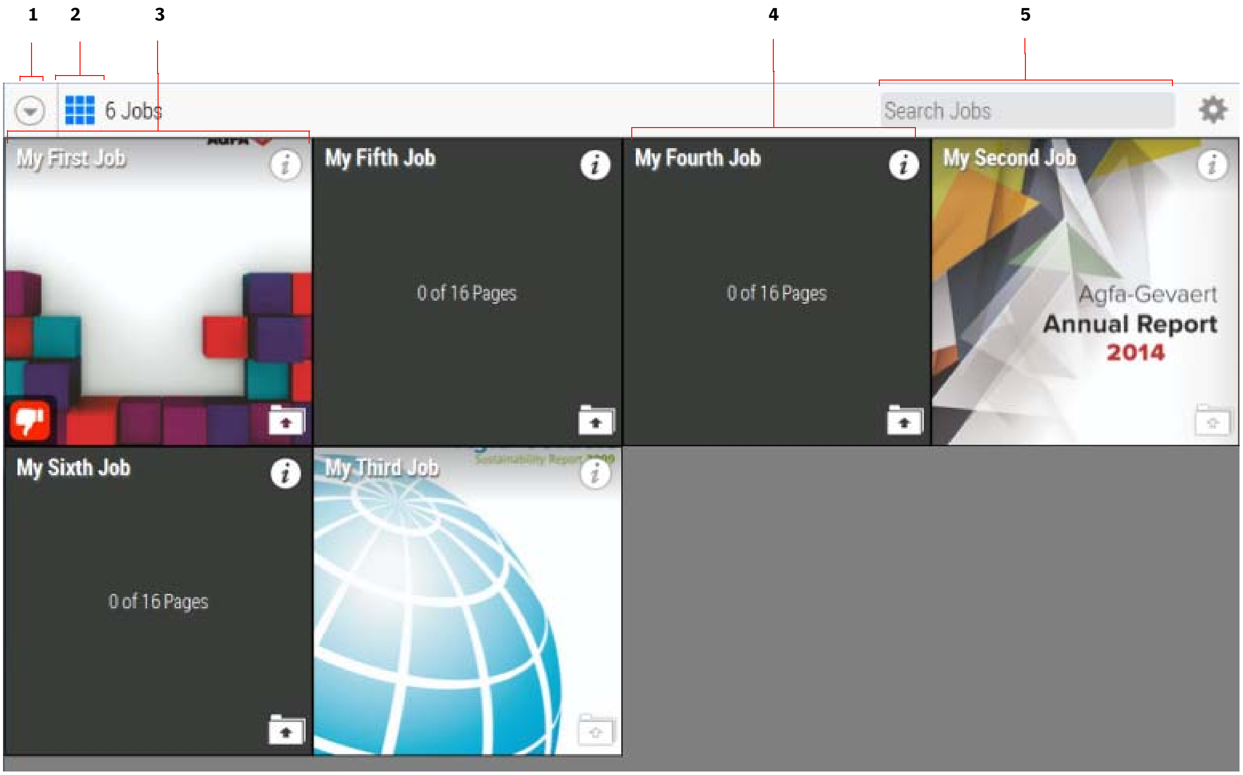
- Open the main menu and choose My Company.

  In the Company window you can add a user by clicking New at the bottom of the Users list. See "User Settings" on page 41 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
2
3
4
5
6 Jobs
Search Jobs
My First Job
My Fifth Job
0 of 16 Pages
My Fourth Job
0 of 16 Pages
My Second Job
Agfa-Gevaert
Annual Report
2014
My Sixth Job
0 of 16 Pages
My Third Job

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

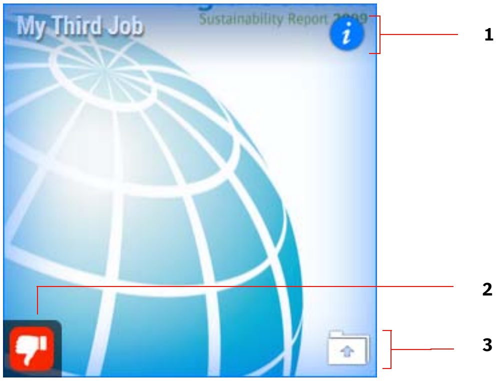
The jobs you see in the *Jobs window* are the jobs that require action by you as an approver or as an uploader. Administrators and Customer Service Representatives (CSRs) can see all the current jobs of the company. The total number of current jobs is indicated in the top left corner, next to the menu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

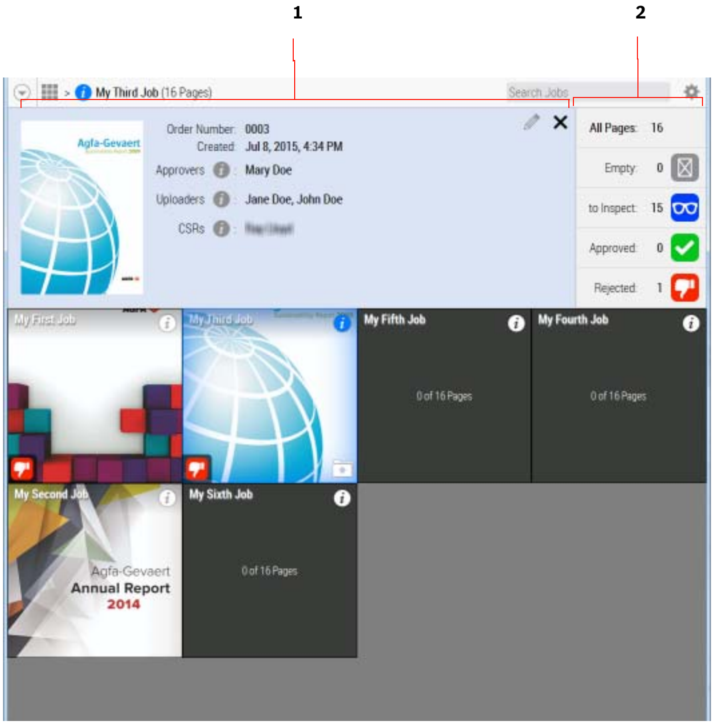
Job Icons

🕒	Alert: Job is approaching the deadline or it is overdue.
👎	Alert: Job includes rejected pages.
ℹ	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
2
My Third Job (16 Pages)
Search Jobs
My First Job
My Third Job
My Fifth Job
0 of 16 Pages
My Fourth Job
0 of 16 Pages
My Second Job
Agfa-Gevaert
Annual Report
2014
My Sixth Job
0 of 16 Pages

Order Number: 0003
Created: Jul 8, 2015, 4:34 PM
Approvers: Mary Doe
Uploaders: Jane Doe, John Doe
CSRs: [redacted]

All Pages: 16
Empty: 0
to Inspect: 15
Approved: 0
Rejected: 1

1 Information panel
2 Page status overview

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 Help pane: Displays an overlay panel with help information about basic browsing and actions.
- Online Help: Displays the full user documentation in your web browser.

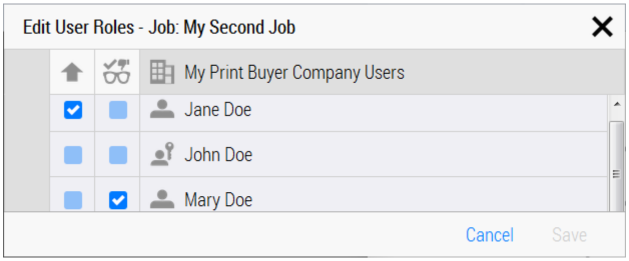
Edit the users of a job

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.



Edit User Roles - Job: My Second Job

		My Print Buyer Company Users
☑	☐	Jane Doe
☐	☐	John Doe
☐	☑	Mary Doe

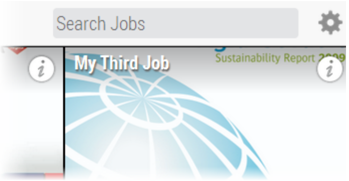
3 Select the check box next to a name in the first column to assign the Uploader role, and in the second column to assign the Approver role.

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.

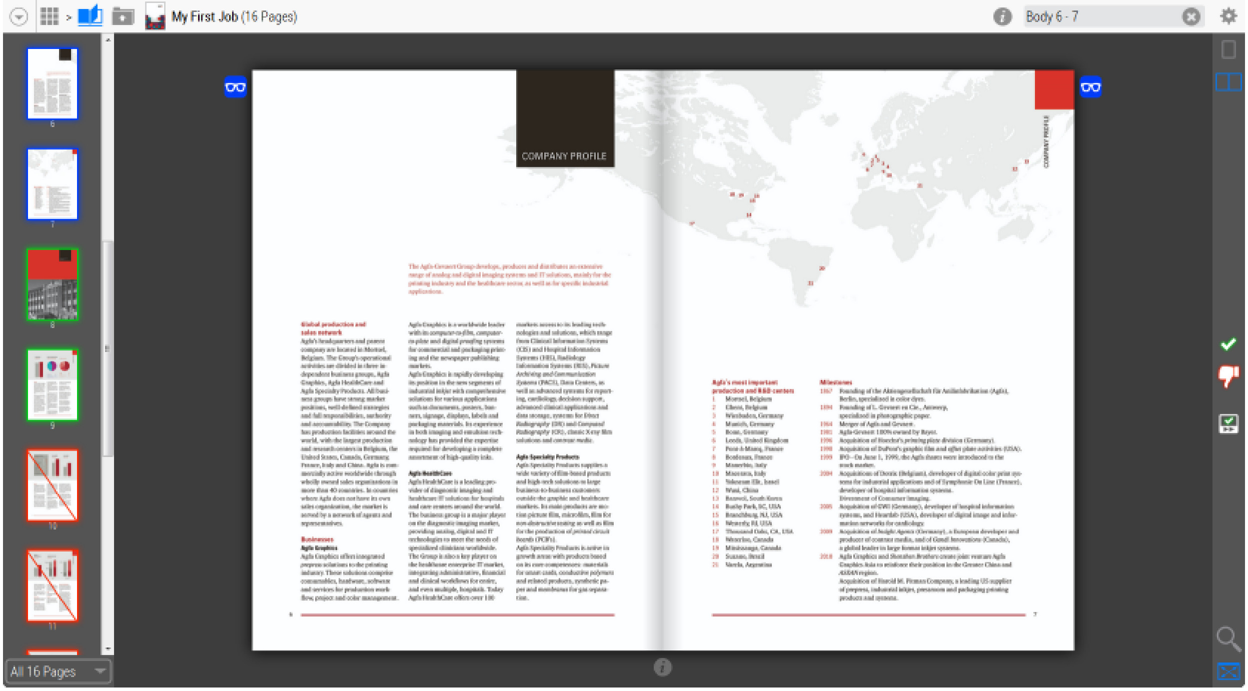


2 If the Search box contains text, clear the box with the cross icon.

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

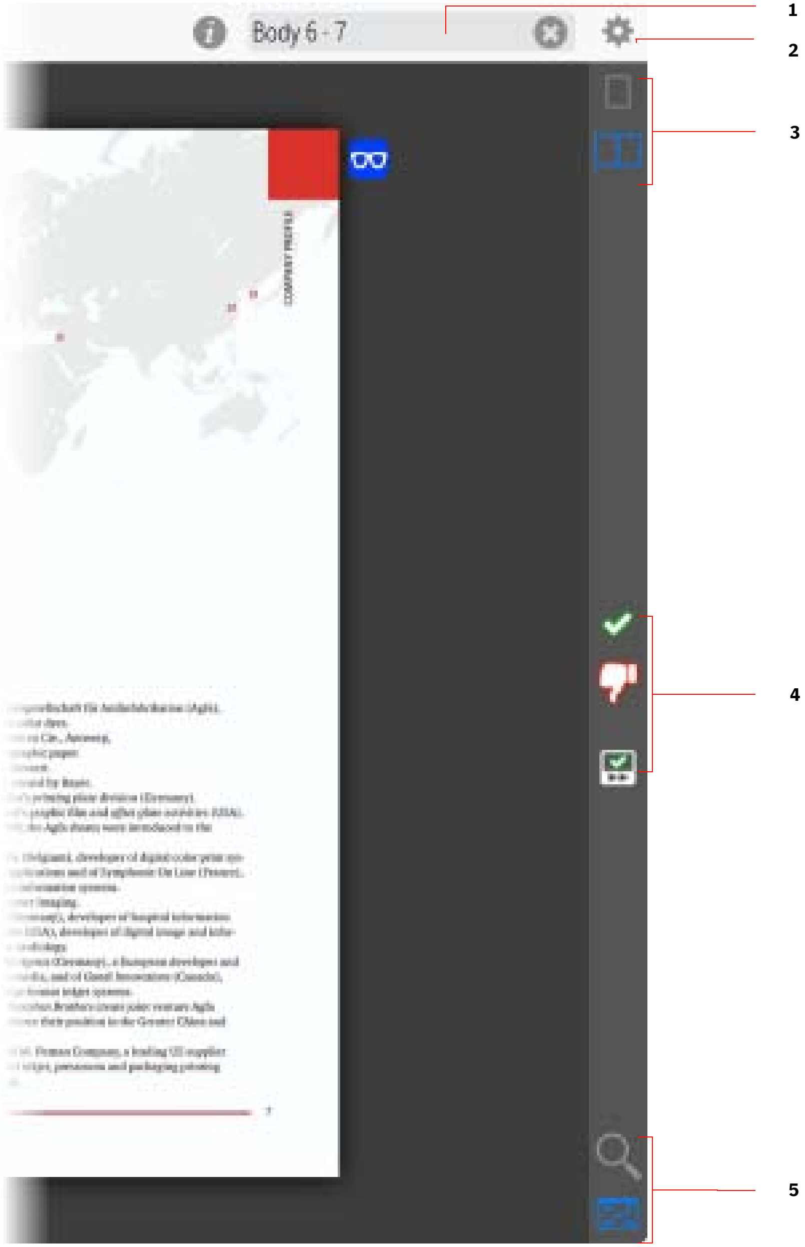


You can browse through the document by clicking anywhere on the page: click the left page of a spread to move back, or click the right page to move forward in a publication. You can also use the left and right arrow keys to move back and forward. Tablet users can tap/swipe forwards and backwards.

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.

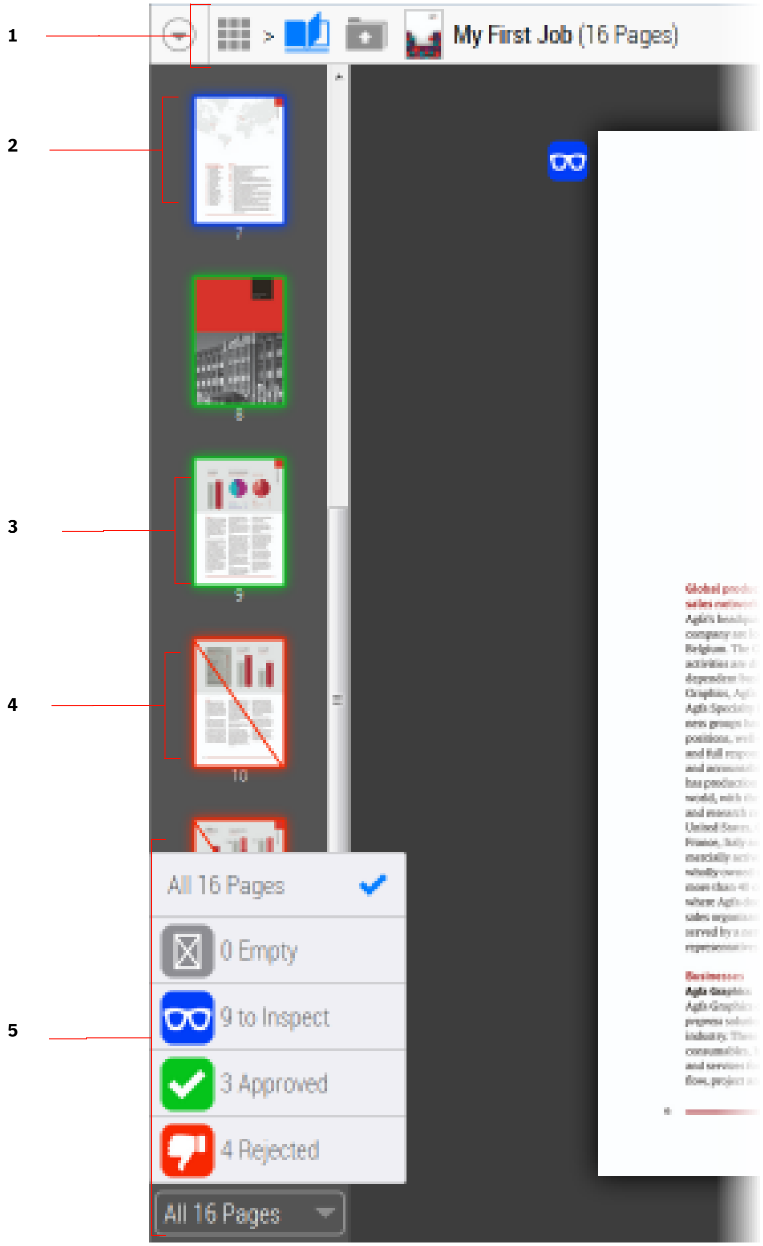
Use the thumbnails in the *navigation panel* on the left to go directly to a page. You can filter the displayed pages by opening the filter menu at the bottom of the panel.

Figure 1.6: Actions panel



1. Page search
2. Cogwheel menu
3. Page display options: Single page and Spread
4. Approve/Reject buttons
5. Page zoom: Fit in window (default) and Zoom to actual size

Figure 1.7: Navigation panel with page filter


1
2
3
4
5
My First Job (16 Pages)
7
8
9
10
All 16 Pages
0 Empty
9 to Inspect
3 Approved
4 Rejected
All 16 Pages

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 thumbnail status

☒	Empty page
🟨	Page is being processed
🟦	Ready to Inspect. (blue border)
🟩	Approved page (green border)
🟥	Rejected page (red border)

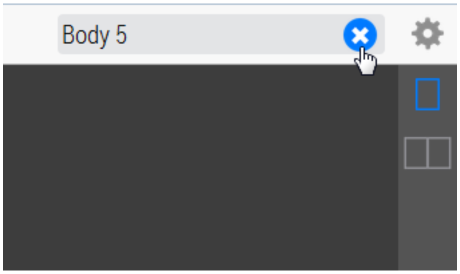
▷ Filter pages

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

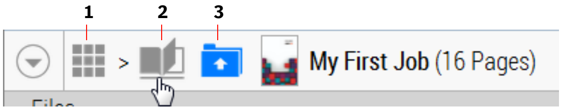
1. In the Search box in the top right corner, clear the box with the cross icon.



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 Upload Files window

▷ Print a soft proof

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

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

2

Uploading Files and Placing Pages

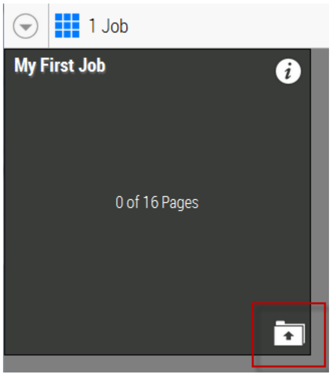
NOTE: Only for users with the *Uploader* role for the job.

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.

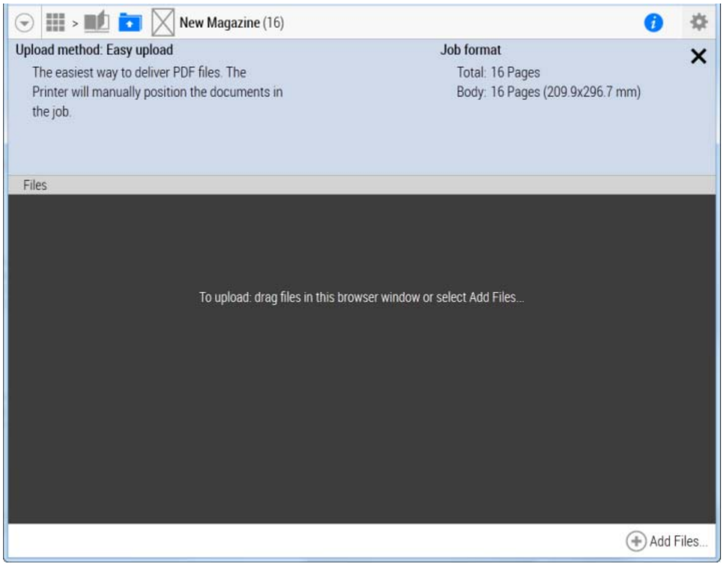
▷ Upload files

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



Upload method: Easy upload

The easiest way to deliver PDF files. The Printer will manually position the documents in the job.

Job format

Total: 16 Pages

Body: 16 Pages (209.9x296.7 mm)

To upload: drag files in this browser window or select Add Files...

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 Upload Files window.

3 Upload more files if necessary.

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

▷ Place pages

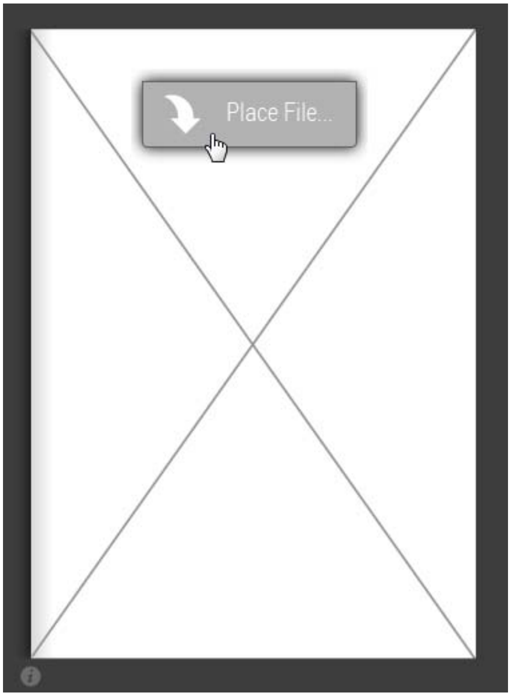
1 If you just finished uploading files for the job, click the Flipbook icon in the top navigation bar.

OR

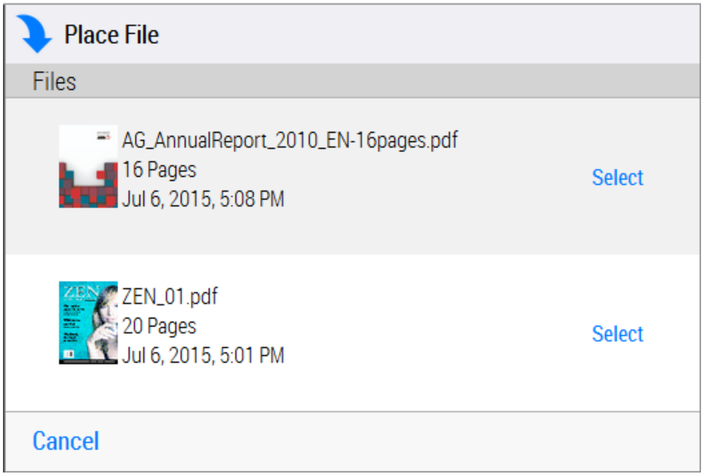
If you are in the Jobs window, click the job tile to open the Flipbook.

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 Files in the action menu.



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



Place File

Files

AG_AnnualReport_2010_EN-16pages.pdf
16 Pages
Jul 6, 2015, 5:08 PM
Select

ZEN_01.pdf
20 Pages
Jul 6, 2015, 5:01 PM
Select

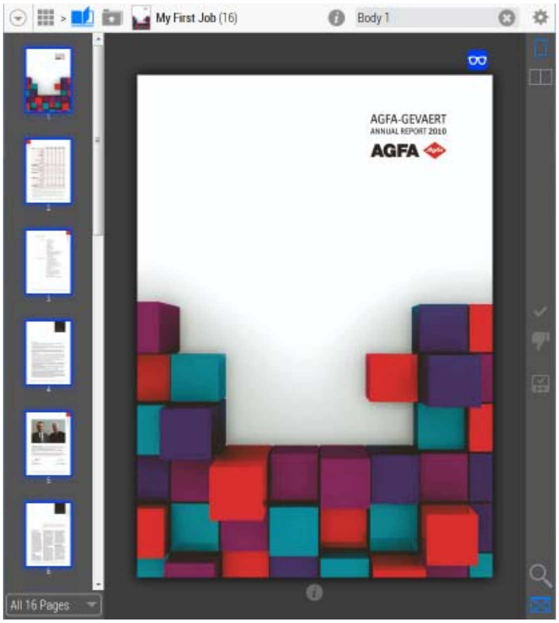
Cancel

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 Upload 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

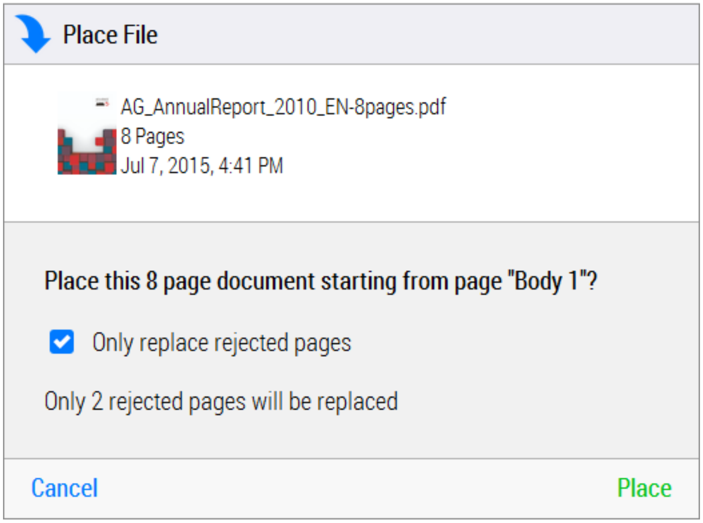
1. If you want to replace the placed pages of a job, follow the steps to place pages.
2. In the Place File window, select a file that is not in use (i.e. which has not been placed for this job). A file which has already been placed is indicated as *in use*.

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.



Place File

AG_AnnualReport_2010_EN-8pages.pdf
8 Pages
Jul 7, 2015, 4:41 PM

Place this 8 page document starting from page "Body 1"?

☑ Only replace rejected pages

Only 2 rejected pages will be replaced

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.

3

Approving and Rejecting Pages

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

Pages can be inspected and 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.

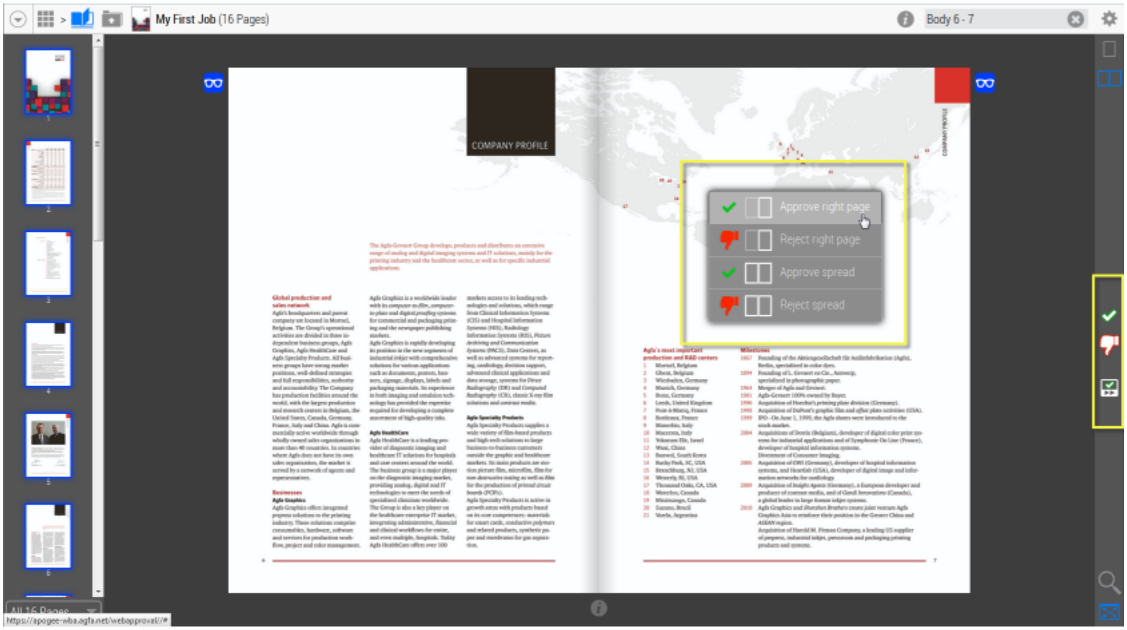
▷ Open and inspect a job

- 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

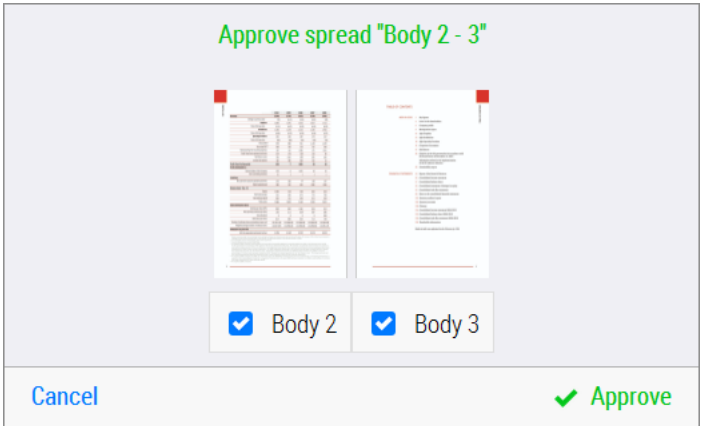
  In the Jobs window, you can see if a job has pages to inspect by opening the information panel of a job. Click the job tile to open it.


My First Job (16 Pages)
Body 6 - 7
COMPANY PROFILE
Approve right page
Reject right page
Approve spread
Reject spread
All 16 Pages
https://apogee-wba.agfa.net/webapproval/#

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.
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.


Approve spread "Body 2 - 3"
Cancel
✓ Approve

☑ Body 2 ☑ Body 3

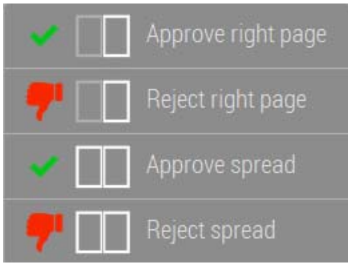
4. Click Approve to submit the page or spread.

   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.


Approve right page
Reject right page
Approve spread
Reject spread

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.

▷ Approve all pages

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

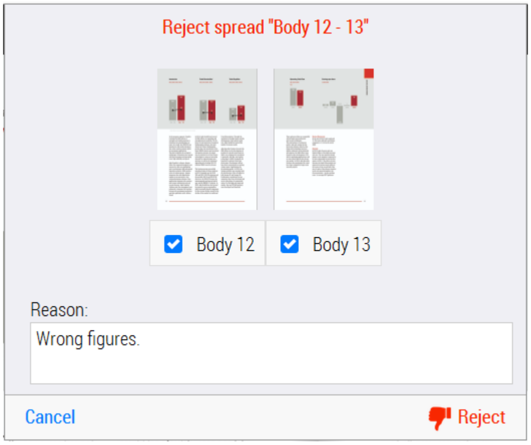
  All pages with the Ready to Inspect status are approved.

▷ 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.



Reject spread "Body 12 - 13"

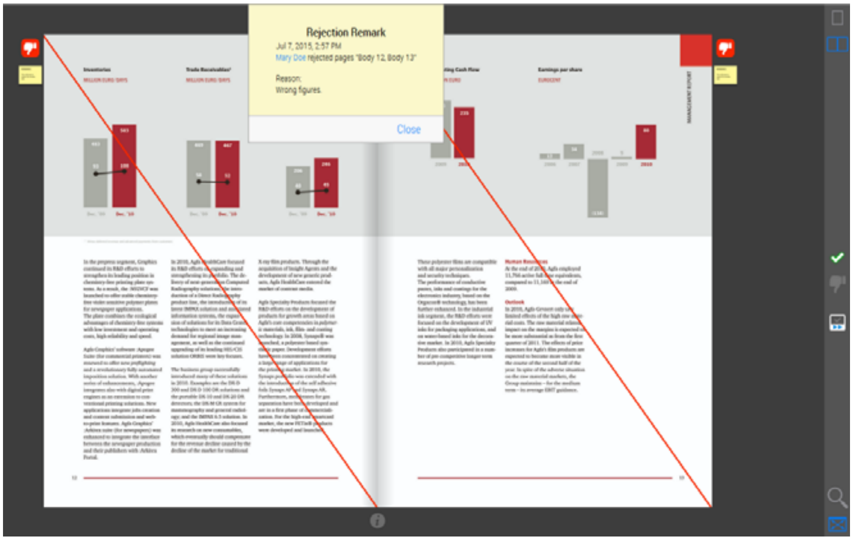
☑ Body 12 ☑ Body 13

Reason:

Wrong figures.

3 Click Reject to submit the rejection and the reason.

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



Rejection Remark

Jul 7, 2015, 2:57 PM

Mary Doe rejected pages "Body 12, Body 13"

Reason:

Wrong figures.

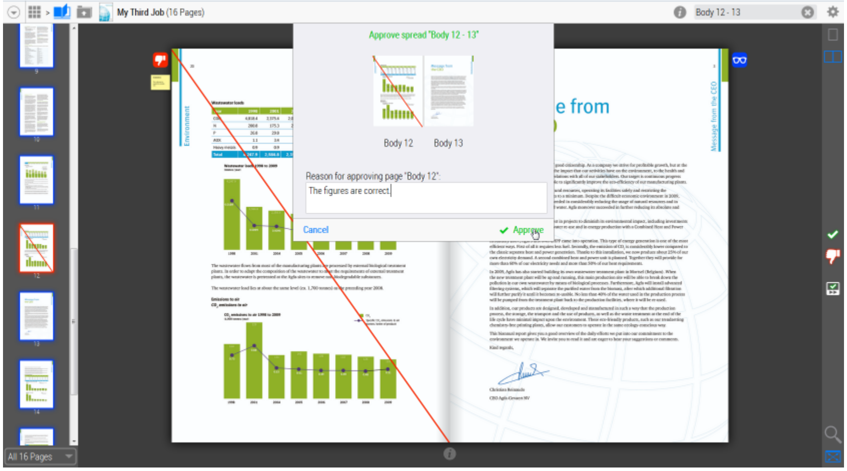
A red Reject page status icon is displayed in the top corner of the page, together with a Remark icon, and the page thumbnail has a red border.

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.



Approve spread "Body 12 - 13"

Reason for approving page "Body 12":

The figures are correct.

▷ Overview of Action buttons

- Open the job and use the icons 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.

Approve all remaining pages
Choose **Approve all remaining pages** in the cogwheel menu and all pages awaiting approval are approved in a single action; the status of rejected pages remains unchanged.

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.

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.

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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.

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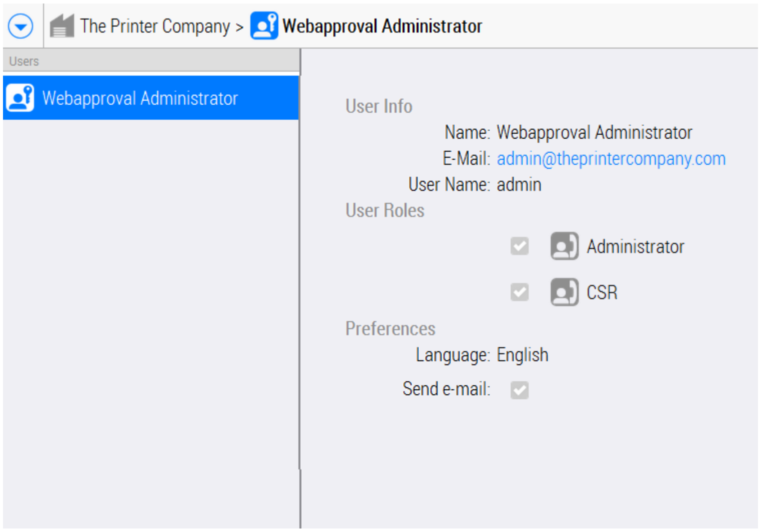
2 Enter a password of your choice to go to your account settings.

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



The Printer Company > Webapproval Administrator

User Info
Name: Webapproval Administrator
E-Mail: admin@theprintercompany.com
User Name: admin

User Roles
☑ Administrator
☑ CSR

Preferences
Language: English
Send e-mail: ☑

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: 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

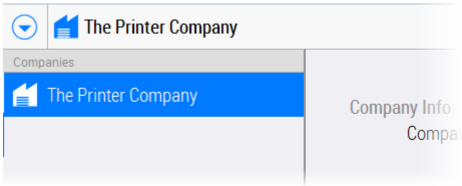
Working with Companies and Users

▷ Edit your Printer Company details

Printer Company Administrator only

You will probably want to change the default company information, and for example, specify the real name of your 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 43 for an explanation of the settings.
4. Click Save and Continue.

▷ Create Users for the Printer Company

Printer Company Administrator only

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 41 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

Printer Company Administrator only

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 43 for an explanation of the settings.

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

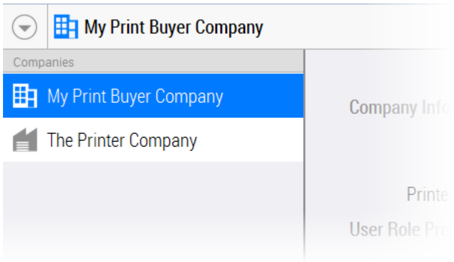
- The Printer Company CSRs: These are the Customer Service Representatives in your printer company who will be assigned to this customer.

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.

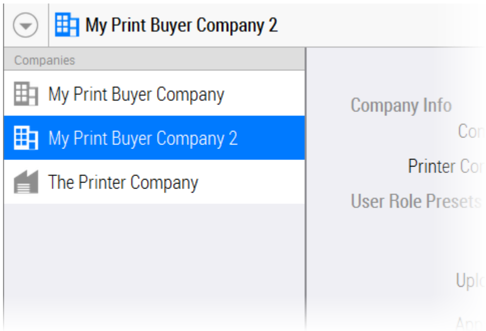
6 The new Print Buyer company is added to the list of companies.


My Print Buyer Company
Companies
My Print Buyer Company
The Printer Company
Company Info
Printe
User Role Pr

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.


My Print Buyer Company 2
Companies
My Print Buyer Company
My Print Buyer Company 2
The Printer Company
Company Info
Cor
Printer Co
User Role Presets
Uplo
App

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

Printer Company Administrator only

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 41 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 41 for an explanation of the settings.

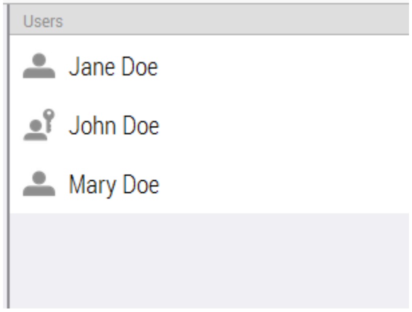
NOTE: Fields with a yellow background are mandatory to create the user but you should also complete the other fields.

---

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.



Users
Jane Doe
John Doe
Mary Doe

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

Printer Company Administrator only

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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 34 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.

Messaging: Send e-mail

Select this check box if you want the system to send e-mails to the user to notify him 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.

Send User Invite

Click to send an e-mail to the user to invite him to collaborate, for example if the user was created outside the WebApproval application.

Company Settings

Company Info

Company Name	The actual name of the company (mandatory).
E-mail, Address, Phone, Mobile	Optional details about the company.
Comment	A free-text field for adding extra information about the company.

User Role presets (for Print Buyer companies only)

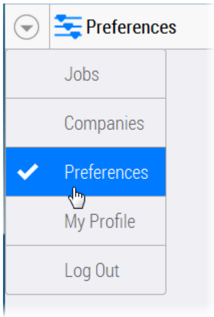
Use the two tables to assign CSRs to the Print Buyer company, or Uploader and Approval roles to the Print Buyer users. These are the role presets for all jobs created for the Print Buyer company. Roles can be changed on a job-by-job basis.

Print Company CSRs	**Printer Company Administrator only** This table lists all the administrators and CSRs in the Printer Company. Select the check box next to a name to grant this person the CSR role for the Print Buyer company you are editing.
Print Buyer Company Users	This table lists all the users in the Print Buyer company and their current roles. Select or clear the check boxes next to a name to change the roles. These changes are reflected in the User Settings.

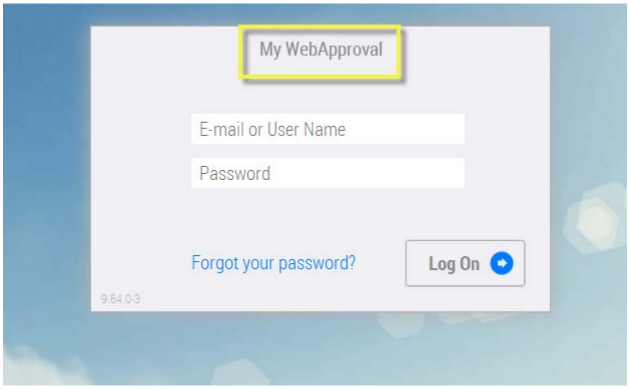
Preferences

Printer Company Administrator only

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


Preferences
Jobs
Companies
Preferences
My Profile
Log Out

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


My WebApproval
E-mail or User Name
Password
Forgot your password?
Log On
9.64.0-3

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 41 for more information.

Online Help Specifies the URL to open the Online Help. You can change the URL to point to your own Help file.

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 Overview

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 thumbnail status

☒	Empty page
🟨	Page is being processed
🟦	Ready to Inspect. (blue border)
🟩	Approved page (green border)
🟥	Rejected page (red border)

Job Icons

🕒	Alert: Job is approaching the deadline or it is overdue.
👎	Alert: Job includes rejected pages.
i	Opens the Job Information panel.
⬆	Upload: Opens the Upload Files window.

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

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