Automation Engine 20

Integrating with Share & Approve

ESKO✷

Contents

1. What is Share & Approve?

Share & Approve is a web-based approval tool from Esko. It is available in a *SaaS model*. It is based on Esko Cloud architecture. Learn more on *https://www.esko.com/en/products/share-approve*.

Several dedicated Automation Engine tasks enable the communication with Share & Approve. A workflow typically publishes files to S&A, including a request for their approval, then wait until decision is made and then report this back to Automation Engine.

Setting up the connection from your Automation Engine to a Share & Approve site is explained in the 'Share & Approve Getting Started' guide. That PDF and more can be found on the documentation site for Share & Approve: *https://www.esko.com/en/Support/Product?id=Share%20and%20Approve*.
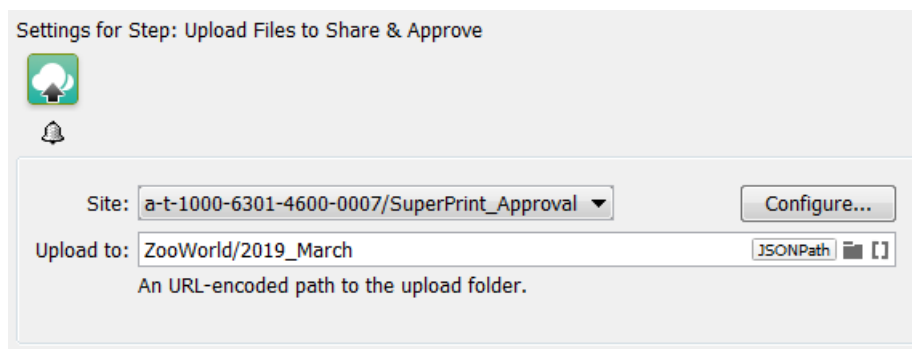
2. Upload Files to Share & Approve

Concept

This task uploads the selected files to a specific folder on your Share & Approve site. You can upload any file that resides on an Automation Engine Container.

This task will not upload folders.

This task will not start an approval cycle.

Settings

- **Site**: Select one of the sites from the list. These are the sites that your Esko Cloud account (token) allows to access. Their name is shown as *<organization-ID>/<Site-Name>*. Click **Configure...** to manage or see them in more detail.

  Note: In this ticket, we strongly advise to only select a site that was set up to serve as approval tool. Do not select a site that was set up to enable an *AE collaboration workflow*!

- **Upload to**: Specify the folder to upload to. The path is relative to the root of the selected site. Subfolders are created on Share & Approve as needed.

  When a file was already uploaded, a new version is created on Share & Approve.

  Note: This field needs to be *URL encoded*.

  Note: This field is case-sensitive! So be extra careful when typing in a path.

  ⚠️ **Attention:** When selecting files that are not in an active job folder, then do not use SmartNames that require a job context, like `[Job Customer ID]`.

  Note: Also very large files can be uploaded. For example > 1 Gb.

> **Note:** When used in a workflow ticket, see how an *empty token* is put on the output-pin '**OK**'. No other local file was generated. The output pin '**Uploaded**' links back to the local input file (when it was successfully uploaded). This makes it possible to extend the workflow on that file after that step.
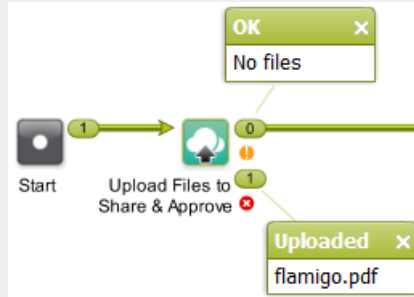
3. Start Approval Cycle on Share & Approve

Concept

This task starts an approval cycle on Share & Approve. The task ends when the approval cycle has been started.

If you want a workflow to wait until the approval cycle has ended, then have this task followed by the task *Wait For Approval Cycle on Share & Approve*.

In a workflow ticket, the input for this task needs to come from any of these tasks:

- *Upload Files to Esko Cloud Job Folder* (workflow *token*)

- *Select Files on Esko Cloud Job Folder* (.json file)

- *Upload Files to Share & Approve* (workflow *token*)

> **Attention:** Make sure that the local files for which you started an approval cycle are not changed during the that approval cycle.

> **Attention:** An approval cycle that ends in rejecting the file has no further influence in Automation Engine. You could for example still output or expose that file.

When you upload a new version of a file while its approval cycle is still ongoing, then the first cycle will be stopped immediately and a new one will be started.

Settings

- **Approval type**:

  - **Folder approval**:

    The approval cycle is started conform the approval setup for the folder in Share & Approve where the files reside, or the setup that that folder inherits it from a parent folder.

    > **Note:** When you use a SmartName to choose this type of approval, it should resolve to '`folder`'.

    > **Note:** The task will fail when no approval cycle was set up for that folder.

  - **By E-mail**:

    - **Approver**: A comma separated list of E-mail addresses.

      - When the E-mail address corresponds to a **registered user** in the Share & Approve site, then the E-mail provides a link to log on to the Share & Approve site with his Share & Approve credentials.

        Registered users are invited to the approval cycle with the role '**Approver**'.

      - When the E-mail address does not correspond to a registered user in the Share & Approve site, then the E-mail will provide a direct link that opens the file in the Viewer tool of Share & Approve. The user will not be asked for to log in. They can decide the File's status in this Viewer. They have no access to any other pages of the Share & Approve UI.

This type of user is also referred to as a 'Shared Link User'.

The link that these unregistered users get to that file on Share & Approve is temporary. Technically, such a link is also known as an 'unguessable' link.

Unregistered users are invited to the approval cycle with the role '**Reviewer**'.

Note: When using a SmartName to choose this type, it should resolve to `'email'`.

- **Due Date**: Specify a time when the approval cycle must have ended.

When this due date has been reached, and the approval cycle is not yet finished, then Share & Approve sends out an overdue notification. Also, in the UI of Share & Approve, the due date is shown in red.

**Note:** When using a SmartName, its result should be compliant with `xsd:datetime` `(ISO8601)`.

4. Wait for Approval on Share & Approve

This task waits until the Share & Approve approval cycle of each input file has ended.

The task ends when all related approval cycles have ended. Due dates have no influence here.

When the task ends, a report .json file is put on the 'OK' output pin (one report per approval cycle). Typically, this file is interpreted by the next step *'Route Approval Cycle'*.
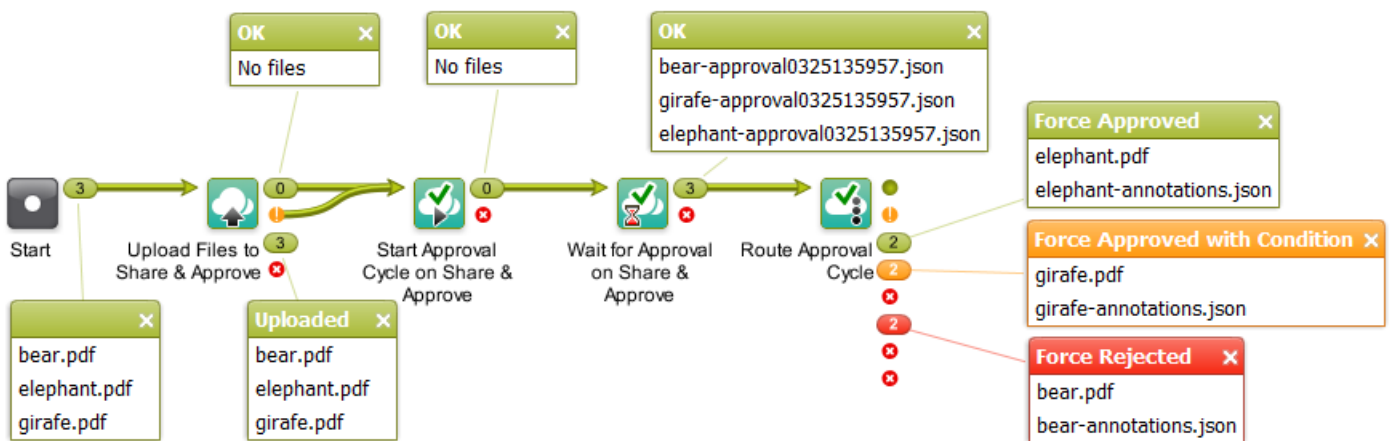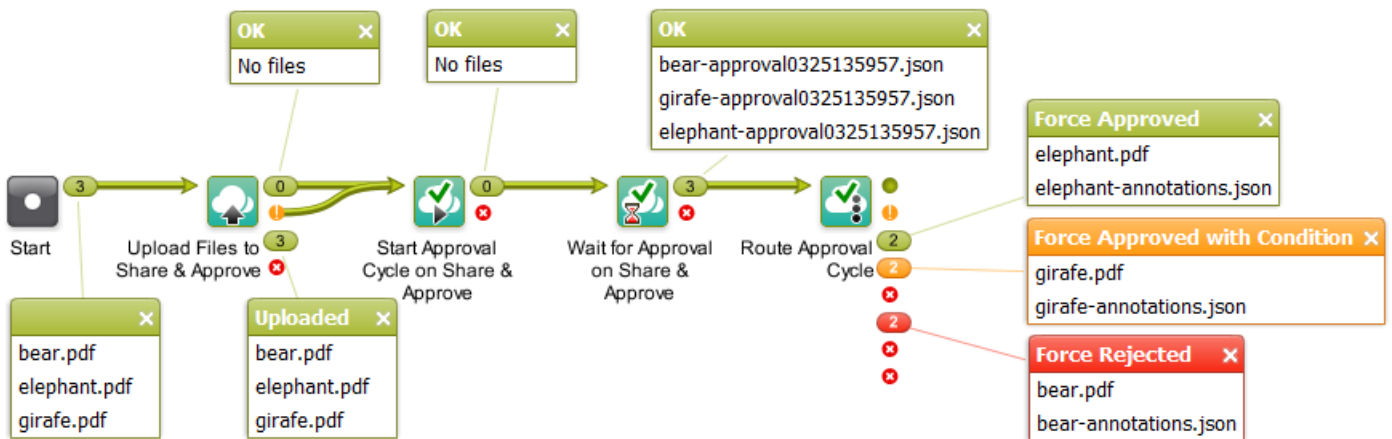

Note: Canceling this task does not stop the approval cycle. It just means that you give up waiting.

The task ticket offers no settings.

5. Route Approval Cycle

In a workflow, this task allows to take appropriate actions depending on the end state of the approval cycle.

Typically, this step is preceded by the step *Wait for Approval on Share & Approve*.

The output pin shows both the input PDF (the local one) and the .json file containing the comments.

The default output pins are

- **Approved**

- **Approved with Condition**

- **Force Approved**

- **Force Approved with Condition**

- **Rejected**

- **Force Rejected**

- **Unexpected**

- **Error**

The task ticket offers no settings.

Learn more about approval states in the documentation of *Share & Approve*.

6. FAQs

Can I use Share & Approve tasks in combination with AE Job Sharing tasks?

Yes you can.

You can for example make a workflow that selects or uploads files to an Esko Cloud Job Folder and then starts an approval cycle on them.