

# Automation Engine 20

Integrating with Share & Approve

11 - 2021

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# 1. What is Share & Approve?

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**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](#).

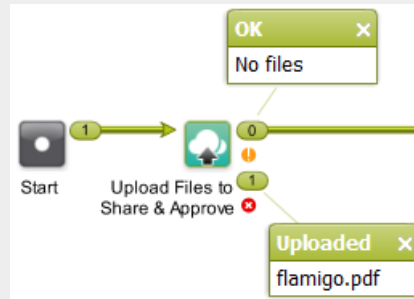
**Note:** This field is case-sensitive! So be extra careful when typing in a path.



**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:** A due date specified by a SmartName must resolve to a valid ISO 8601 string, i.e. the format `yyyy-mm-ddThh:mm:ss`. For example `2017-03-10T10:00:00`.

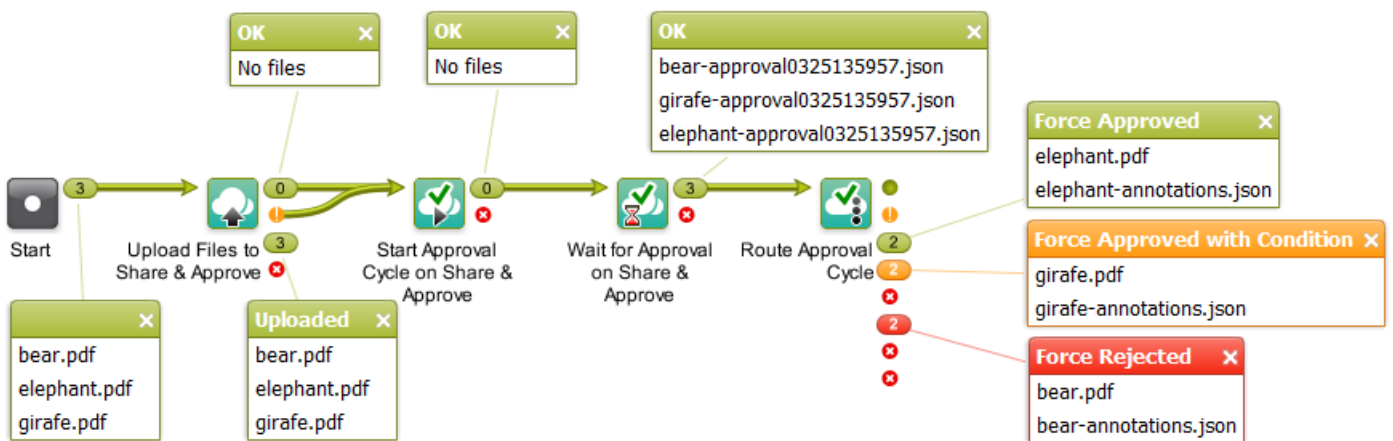
## 4. Wait for Approval on Share & Approve

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.

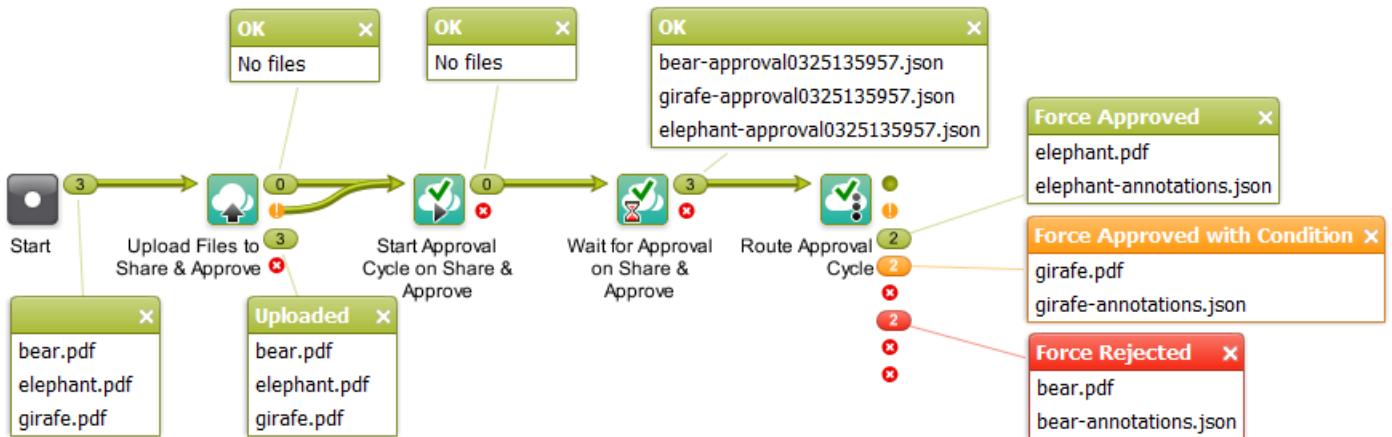
The task ticket offers no settings.



## 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

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### 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.

