Automation Engine 23

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*.
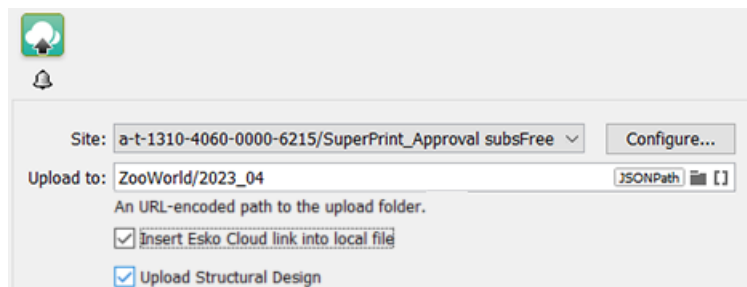
2. Task 'Upload Files to Share & Approve'

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.

  > **Attention:** 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.
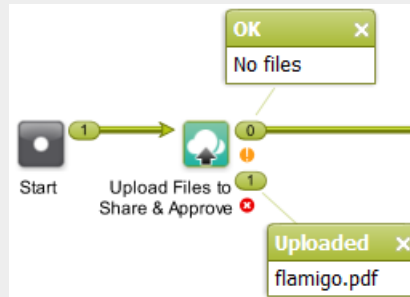

- **Insert Esko Cloud link into local file**: Select this to add a link into the PDF's metadata that enables an integration between ArtPro+, Share & Approve and the AE Viewer.

    Warning: After this link was added to its metadata, the file will have a new modification date.

When this link is inserted, these extras become possible:

- **In the AE Viewer**, annotations made on this file in Share & Approve (or ArtPro+) will be shown there as well (only when using 'As in ArtPro+, latest technology').

- **In its Info panel/page**, also this metadata will be shown. The General tab now indicates its presence with a link to **View on Esko Cloud**. It functions as a hyperlink to view that file on Esko Cloud (i.e. the Share & Approve site it was uploaded to).
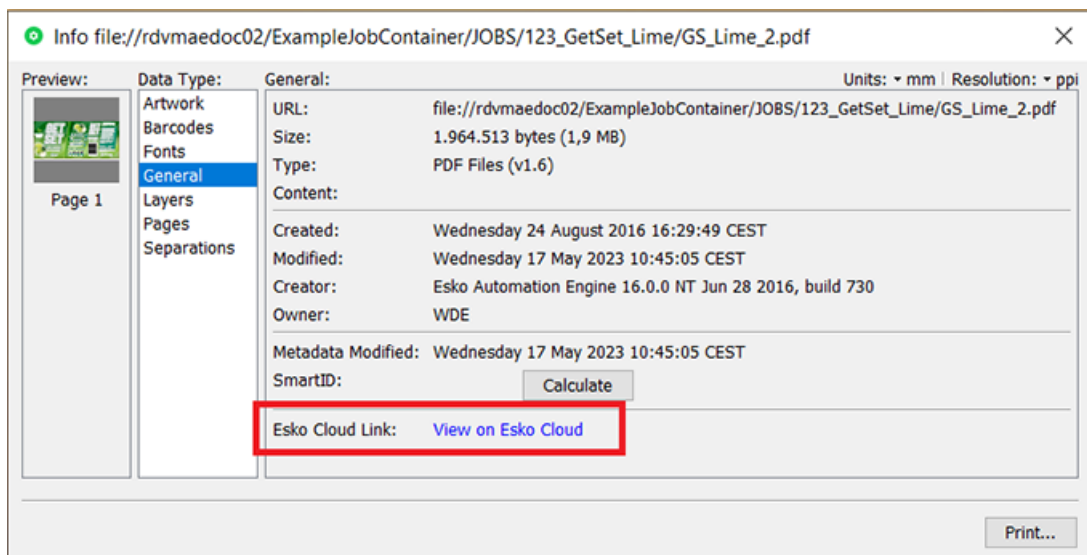
- **In ArtPro+**, after connecting with Share & Approve, the editor is now also aware of the file's approval status on Share & Approve and also shows the (saved) annotations on Share & Approve. In ArtPro+, these annotations can also be edited and will be synchronized back up to Share &

Approve. Learn more about this integration between ArtPro+ and Share & Approve in the *user guide of ArtPro+*.

- **Upload Structural Design**: When the PDF file that you upload has a linked ARD or ZAE file, you can choose to also upload it. This then enables a 3D view in Share & Approve.

  When this option is selected and the uploaded file does not have a link to a structural design file then the task will not give a warning. When there is a link but the file cannot be found, the task will end with a warning.

  - On Share & Approve, the structural design file is uploaded to a subfolder (`_3D_StructuralDesign`) of the folder where the input file is uploaded to.

  - On Share & Approve, the structural design file is protected from download (by users with role reviews/approvers/editors).

  - On Share & Approve, the meta data of the uploaded PDF file is updated with a link to the node-ID of the uploaded structural file (so that the Viewer finds the structural data and is able to render a 3D view).

  - If the input file does not contain a link to a structural design and the file was already previously uploaded, the structural design info in the uploaded file (print - finishing - settings - property) is cleared.

  - If the input file contains multiple structural designs, only 1 of them is uploaded.

  - MFG or bag files are not uploaded.

3. Task '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 sign in 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 to sign 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'`.

- **Language**: Select the language that should be used in the e-mails to unregistered users of S&A.

  When using a SmartName, it must resolve to the short language code, for example `fr`, `de`, `jp`, `nl`. etc.

  > **Note:** This requires that, on the S&A site, "Enable Localization" is selected.

  > **Note:** Before AE 22.03, you could already set this language by adding it behind the e-mail address and behind a vertical bar. For example: " `lola@bestbrand.com|sp`".
  >
  > Be aware that defining a language by means of that e-mail - suffix will overrule any choice you may have selected here in this list.

  > **Note:** This is for unregistered S&A users. Registered S&A users can just change language setting in their own S&A preferences.

- **Approval Master**: This is the S&A user that can force approve or force reject an approval cycle. In both above mentioned approval types, the approval master can be set or overruled by the here specified (single) e-mail address. Select a user from the list or use a SmartName.
  - This approval master must already exist as a registered user on S&A. If that is not the case, the approval master will not be set and a warning will describe this in the log file. The task does not fail.
  - Leaving this field empty makes the task fall back on the approval master defined in the document approval setting or the folder approval setting on S&A (by default this is the AE "Equipment" name).

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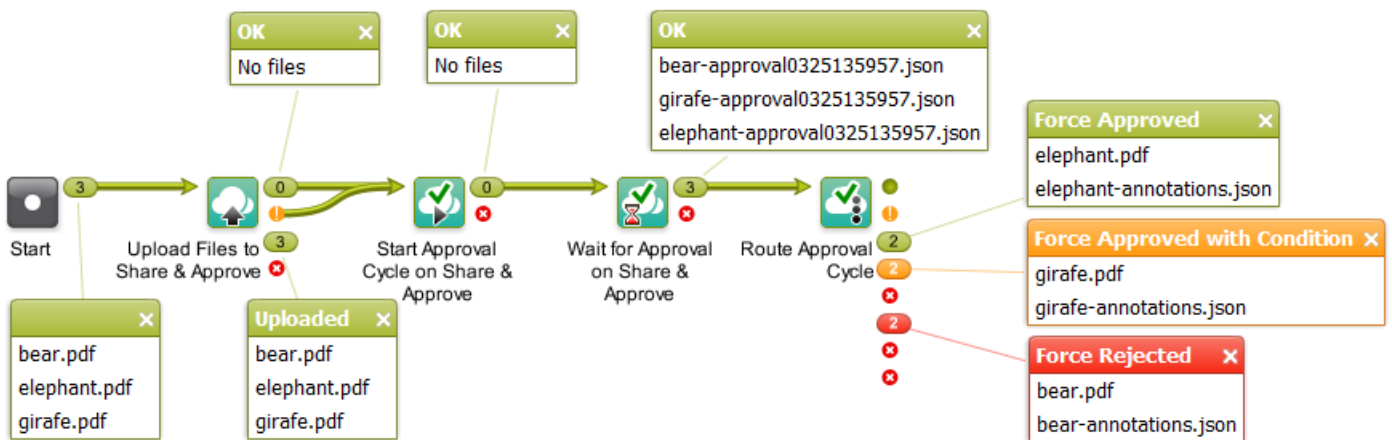
> **Note:** Canceling this task does not stop the approval cycle. It just means that you give up waiting.

The task ticket offers no settings.

5. Task 'Remove Esko Cloud Link'

This task removes the link from the input file's metadata that was added by the task *Upload files to Share & Approve*. This file can be a native or normalized PDF.

This can be used when

- You made a mistake to upload that file to S&A (and include a link). Removing it from S&A alone will not remove the link in the local file's metadata.
- You use a same file as base for a new variant design and you want to remove all traces of a prior approval cycle.
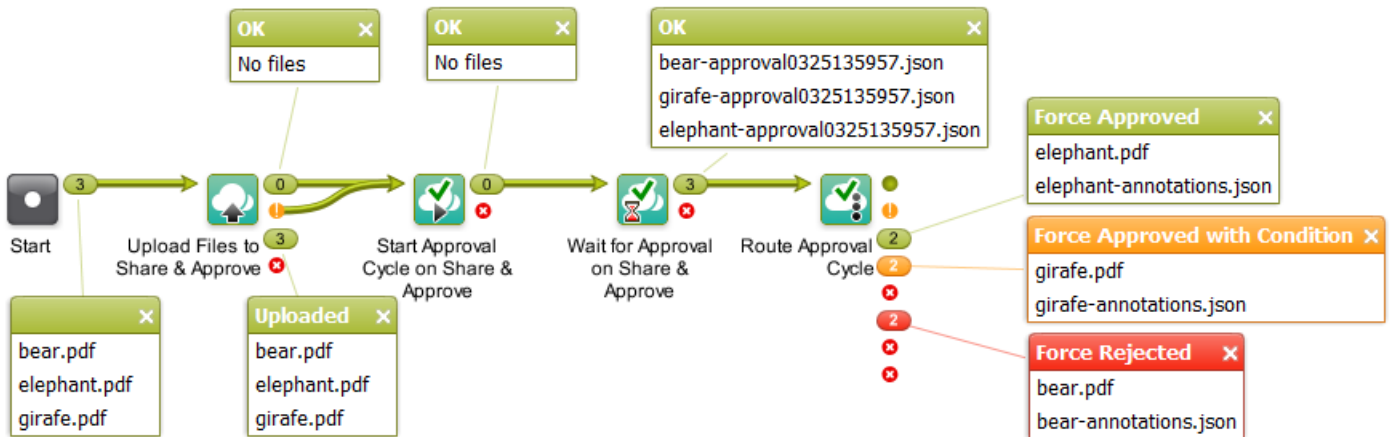
As the file's metadata is changed (again), the file also gets a new modification date.

The task ends in warning when the file does not contain such a link.

6. Routing an 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*.

7. 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.