

# Esko Share & Approve

What's new in the 20.03 version

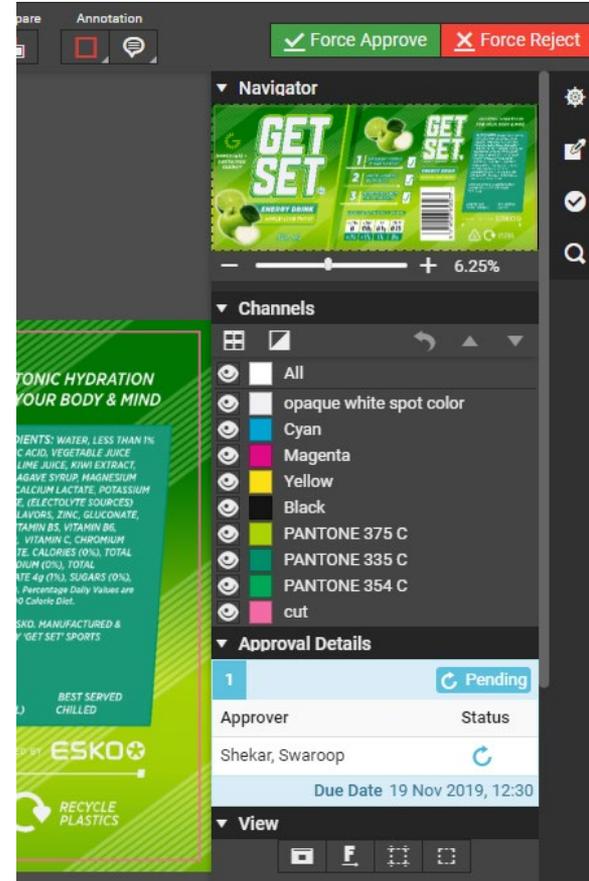
Mar 2020

## Overview of novelties for Share & Approve 20.03

- Viewer look & feel and work spaces: simplify the view experience for your users
- Notification schemes: more fine-grained control on e-mail notifications
- Approval Statistics: Done Approvals: See who did what on any version of any document and derive business understanding from it
- Forward Approval improvements
- Smaller UX improvements

## New Viewer Look & Feel

- Best of dark and light viewer brought together
- Approval buttons are 'spelled out' and drag more attention
- Better use of the screen space
- Side bars have more functionality
- Improved zoom to annotation



# Viewer Work Spaces

- Ability to simplify the viewer user interface by removing sections based on role
- Can be set by Administrator (per role) and further tweaked by each user for himself



# Administrator determines what is Visible, Available or Hidden

- Administrator: Setup/Site Setup/Viewer Preferences
- For old sites, first needs to be enabled, otherwise old behavior
- Per role: set each tool visible, available or hidden
  - Visible = tool visible by default
  - Available = tool not visible by default but user can configure it to become visible
  - Hidden = tool is not visible and cannot be made visible

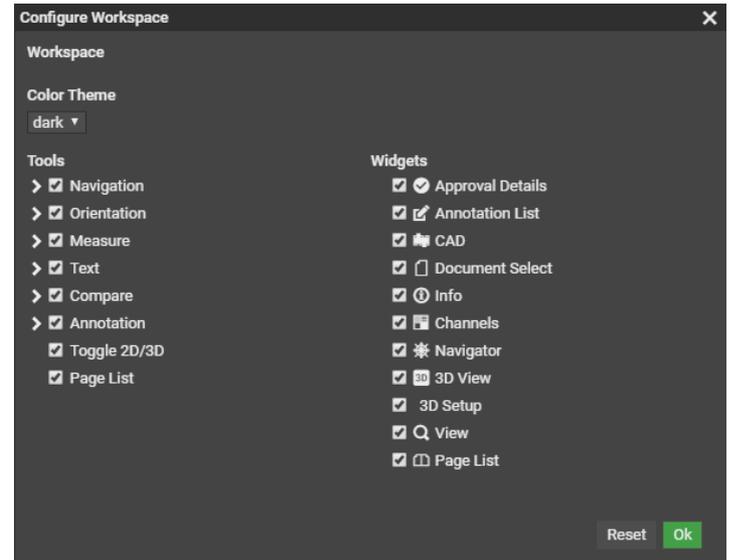
## Viewer Workspace

Reviewer	Editor	Approver	Manager	Site Administrator
Tools		Widgets		
<input checked="" type="checkbox"/> Navigation		<input type="checkbox"/> Approval Details		
<input checked="" type="checkbox"/> Orientation		<input checked="" type="checkbox"/> Annotation List		
<input checked="" type="checkbox"/> Measure		<input checked="" type="checkbox"/> CAD		
<input type="checkbox"/> Text		<input checked="" type="checkbox"/> Document Select		
<input checked="" type="checkbox"/> Compare		<input checked="" type="checkbox"/> Info		
<input checked="" type="checkbox"/> Annotation		<input type="checkbox"/> Channels		
<input checked="" type="checkbox"/> Toggle 2D/3D		<input checked="" type="checkbox"/> Navigator		
<input checked="" type="checkbox"/> Page List		<input checked="" type="checkbox"/> 3D View		
		<input type="checkbox"/> 3D Setup		
		<input type="checkbox"/> View		
		<input checked="" type="checkbox"/> Page List		

Visible by default  
 Available, can be set to visible in viewer  
 Hidden, not available in viewer

## For the user

- Open the viewer, top right aside from the name: Show/Hide widgets and tools
- Dark or light Theme
  - Does away with the functional differences between the dark and light viewers
- Tools and widgets can be switched on/off
  - Only what is set visible or available by Administrator appears here



## Typical use cases

- Switch off 3D for everybody
- Reduce measurement tools (e.g take out Braille, caliper, ...)
- Reduce annotation tools (e.g. don't allow point note annotations)
- Reduce zoom tools (e.g. zoom to 1:1 pixel makes little sense in S&A)
- Reduce compare tools
- Take out Channels for Reviewer and Approver (if it's none of their business)
- Take out text tools (certainly if you know text is always contoured)
- What not to do?
  - Switch off CAD : auto-adapts to the file type
  - Switch off page list: auto-adapts to being a multi-page file

# Notification Schemes

- More fine-grained control over who gets an e-mail for which event
- Look/content of e-mail is still controlled by the customization
- Per (set of) type(s), say who gets an e-mail
  - Users (registered or just e-mail addresses)
  - Groups
  - Roles
  - SmartNames: automatically resolved to the context
- It never sends 2 e-mails for the same event to the same user

## Notification Scheme

Name \*

Minimalistic 2

Default Language

English (en-US)

Info: This language is only used for unregistered users. For all others users, their preferred language is used.

Notifications

Type(s)	Approval Request X
Recipient(s)	Approvers X

Type(s)	Approval Cycle Finished X
Recipient(s)	Approval Master X the.salesguy@cie.com   en X Manager X

Type(s)	Approval Forward X
Recipient(s)	Forwarded Approvers X

Type(s)	Invite User On Folder X Invite User On Document X Invite User On Site X Share Link On Folder X Share Link On Document X
Recipient(s)	Shared With X

+ Add

## Define notification schemes on different levels

- Site level
  - typically to set a default notification scheme
  - Can create multiple named schemes but only 1 is the default
- Folder level
  - Overrides site default scheme when it exists
  - Typically used in combination with folder approval setup
  - First parent folder with a scheme is the valid one
- Document level
  - Overrides folder and site scheme when it exists

Named Site  
Scheme(s)

Folder  
Scheme

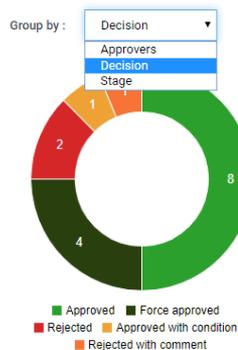
Document  
Scheme

## Use notification scheme

- Simple Approval Setup: a dropdown selector
  - Can select the folder or document scheme if it exists and any named site scheme
- Advanced Approval: advanced selector with
  - Same selections as for simple setup
  - No Notifications
  - Edit Notifications → allows editing the folder or document notification scheme

# Approval Statistics

- Was introduced in 19.11
- Only visible to internal users
- Both a follow-up tool and a KPI tool
- New: Done Approvals History
  - Shows all done approval operations in your visibility
  - Grouped by approver, decision or stage
  - Also accounts for old versions and meanwhile deleted documents



Show 10 entries

Status	Name	Uploader	Submission Date	Approver	Decision
✓	IMG_1792.JPG	Edison, Shini	Jan 25, 2019 at 17:53	-	Stage 1
✓	IMG_1792.JPG	Edison, Shini	Jan 25, 2019 at 17:53	-	Stage 1
✓	IMG_1792.JPG	Edison, Shini	Jan 25, 2019 at 17:54	-	Stage 2
✓	IMG_1792.JPG	Edison, Shini	Jan 25, 2019 at 17:56	-	Stage 2
✓	View Puh-zaz 150ml.zae	Dewitte, Hans	Jan 29, 2019 at 13:38	-	Stage 1
✗	smarties.pdf	Dewitte, Hans	Feb 15, 2019 at 11:04	-	Stage 1

## Forward Approval Improvement

- Forward approval allows to forward your approval to other people
  - You can choose whether you stay yourself in the cycle or not
  - Was already existing in 19.07 release and improved in 19.11 release
  - Did not work well together with group approval
- New: works now better together with group approval
  - All of Group approvers can forward their own approval
    - Other group members still need to approve but can also forward themselves
  - One of Group approvers can forward the approval on behalf of the entire group
  - Withdraw, keep/replace and notifications work as expected

## Smaller user experience improvements

- Setup is re-organized to better show what is Esko Cloud Account setup vs what is Site Setup
- Upload: only shows Upload and Clear button once something is added to the list
- My Approvals: documents with equal due date/uploader/folder are 'grouped'
  - By putting the equal parts in grey
  - Only when sorting on due date
- Ability to rename your Esko Cloud Account (readable name only, the code is fixed)

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