Share and Approve 22.47

User Guide

ESKO✲

Contents

1. Copyright Notice

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2. Introduction to Share & Approve

Share & Approve is an Esko-hosted Cloud based SaaS application to upload, share and approve files, especially aimed at packaging assets like PDF or Illustrator graphics files, ArtiosCAD files, and Esko Studio Collada files.

The user can get access to the service, either by starting a quick deployment oneself or via Esko services helping. The setup itself typically takes less than 2 minutes.

What is then created is:

- An Esko Cloud Account: It is used for billing purposes.

At least one site: The Site is the part that is visible to the invited people and the business partners, based on invitations. It has a folder structure with sharing capabilities and also, there is a high-end 2D and 3D viewer which provides an extensive approval experience.

Share & Approve streamlines the approval cycle of a product.

Share & Approve is always linked to an Esko Account. The Administrator creates a site for the company on the Share and Approve platform and configures the site.

The Administrator will create a project folder and identifies a manager for this folder. The approval project goes through three steps.

1. The Manager adds a folder for the project. Creates one or more editors, users who create and upload artwork.
2. The Manager sets up the approval cycle which can have just one or multiple stages. The Manager assigns the users as approvers to approve these. The approvers can be internal or external.
3. Approvers view the artwork and can either approves or reject it.

2.1. Concepts

Esko Cloud

Esko Cloud is a cloud environment that deploy applications like Share & Approve/Job Onboarding. It is hosted on Amazon Web Services in different regions (currently Europe and North America).

Esko Cloud Account

Esko Cloud is a cloud platform. Esko Cloud Account is used to keep different installations of Esko Cloud apart from each other. An Esko Cloud Account can have multiple Share & Approve/Job Onboarding sites. All data can be stored under one Esko Cloud Account for all Share & Approve/Job Onboarding sites.

This Account is required for billing. It is charged for the storage, certain operations ('transactions') and a monthly fee for the Share & Approve site. Most companies will only need one Esko Cloud Account. Multiple Esko Cloud Accounts can be created to get independent environments with a separate bill and no overlap of data.

Esko ID

Esko ID is the authentication system used for Share & Approve/Job Onboarding (and other Esko services). When a new user is invited, the system will check whether they already have an Esko ID. If so, it will re-use this Esko ID and allow access to the sites via that Esko ID. (people can have access to multiple sites with the same username/password). A new Esko ID can be created free of charge and an invitation with clear instructions is sent to the new user.

Site (Website)

The site is the User Interface of Share & Approve/Job Onboarding. It is essentially a folder structure and a set of functionalities to execute on the folders and the files in them. The user can access the site using a web browser such as Google Chrome or any other industry-standard web browsers.

An Esko Cloud Account would initially have one site. Creating extra sites would:

- Give specific customers a different user experience.
- Set site settings differently for each site.
- Create a sandbox environment.
- The preferences per site can be set differently.

Access Rights and Roles

Access to folders and documents is given via the Sharing functionality. What the user can do in the folder is dependent on the role they get when sharing. Higher roles (e.g. Manager can upload/download/delete/force approve, …) can do more than lower roles (e.g. Reviewer can only view & download but not upload or delete).

Share & Approve currently have the following roles:

Role Name	Rights	Use cases
Reviewer	Read	People who need to see documents for any reason. Lowest access-right in Share and Approve. Typically given to external people.
Approver	Read Annotate	Comparable to Reviewer but specifically indicates that this person will have to approve the document. The default approval cycle asks all people with the Approval role to approve
Editor	Read Upload/Create Delete	Mostly document creators, designers, prepress operators, customer service reps.
Manager	As Editor, plus all approval operations (including force approval)	Project Managers and responsible people
Owner	All rights except force approve and force reject	Automatic Role: the owner is currently always the creator of the folder or document. This role allows doing obvious operations

		like deleting whatever was just created.
		Moving the owner role to somebody else is currently not foreseen
Approval Master	Read and all approval operations	Manage the approval cycle (including force approve and force reject).
		Automatically assigned when starting the approval cycle. Can be re-assigned through the advanced approval User Interface.
Administrator	Full rights on everything	Assigned to the site creator. Normally never re-assigned.

Editors and Managers are often internal users, Reviewers and Approvers are often External Users. However, nothing enforces this. The Administrator can invite both internal as External users to any of the roles.

Roles are dependent on where a user is in the folder structure. Being the manager of one folder does not make the user the manager of another.

Roles are also hierarchical. When a person is the Manager of a folder, this person is also the Manager of a subfolder and the documents within.

There can be multiple people assigned to the same role (each can do the actions) and a person can also have multiple roles, even on the same folders or documents (then the person can do any of the actions of each of the roles).

Online Help

Most of the functions (especially the advanced ones) have online help within the site explaining every function.

Click on the info icon to open a flap-out section with on-line help. Users can maximize the section or close it again with its top-right buttons. Hovering over certain online help icons will also provide information about the function.

Inheriting Behaviour

Share & Approve has a hierarchical permission system. This means:

- Each folder or document can have its own set of people who can see or change the folder or document (local permissions).
- Permissions given on a higher up folder are automatically inherited by the content and sub-folder of the folder (inherited permissions).

Whether the access is only on the current folder (and down) or document or 'inherited' from higher-up is made clear via the word 'inherited' shown after the role.

There is no function to 'stop inheriting'. It is better to put the folder aside when there is a folder with too much access.

2.2. Share & Approve Viewer

Share & Approve Viewer is used to review files directly on the platform. The supported files are PDF or Illustrator graphics files, ArtiosCAD files, Esko Studio Collada files, and Digital Film Sets.

There is no need for downloading files which can create a lot of versions of the same file causing confusion. The system has an advanced viewer for the files.

Click the file to open it in the viewer (certainly the first time this can take a moment).

> **Note:** If you need help with the viewer, click the **?** icon on top right of the viewer.

To read the Viewer documentation, refer *Share & Approve 21.07 Viewer Guide*.

2.3. Login

The login interface allows a user to login to the Share & Approve site using the Esko ID. Different users may view different names other than 'Share & Approve' in the login interface while they login. This happens when your company might have configured the page with a logo and custom name, which often reflects each company name and their respective logo.

- **Signing in for the first time. Need Help**: This link will redirect the user to the Knowledge base article which has detailed information on How to log on to Share and Approve for the first time? *https://wiki.esko.com/pages/viewpage.action?pageId=265753399*

- **Forgot Password**: This link sends a request for getting instructions via e-mail to reset the password for the Esko ID.

- **Help**: By clicking Help a user is redirected to the Knowledge Base article on Help to login *https://wiki.esko.com/display/KBA/KB288331687%3A+Esko+Cloud+-+Help+with+Log+In*

2.3.1. Session Expired

A session is a period through which a user could continue working with the system without logging in again. Typical time-out for a session is 30 minutes.

While working with Share & Approve continuously, there will not be a session time-out.

When the user is not working continuously with Share & Approve, the user will get a message that the session is expired and whether to reload the page.
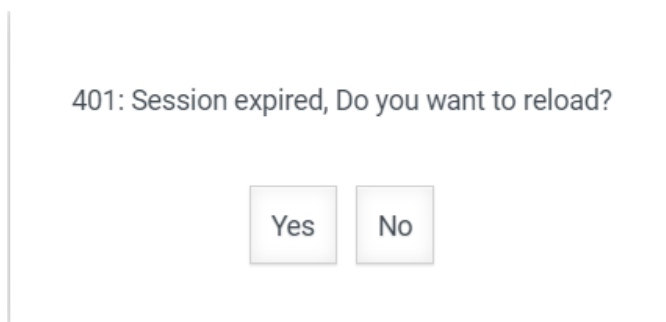
Answering **Yes** can lead to two possibilities. The user can:

- continue without providing the password.
- Will be redirected to the login page. The user can re-enter the password.

When reloading, the site will bring the user back to the page which was previously opened. In certain circumstances, there might be a loss of some information like typing in a form that was not submitted yet.

Less frequently, there will be a session expiration because of a cloud service restart. The behavior will be the same as described above.

3. User Interface Overview

This section contains an overview of the basic parts of Share & Approve's Web UI. The following sections covers the detailed information on each feature.

The user usually lands on the Documents Folder page. If the user wants a different landing page, then it can be changed via My Preferences. **Refer *My Preferences***. The top right-side corner displays the user Avatar (if not set, it displays the initials of the user) and the name of the current user.
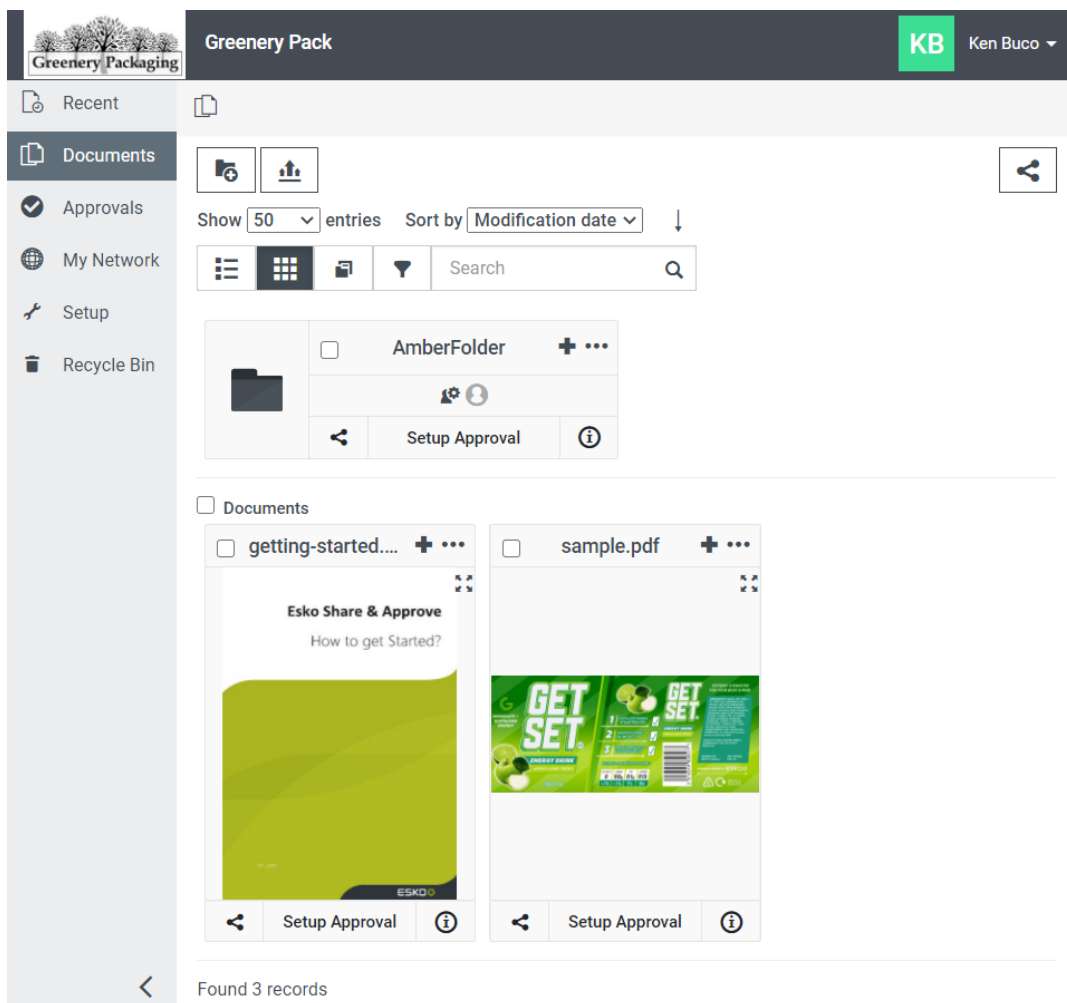
The **<** icon on the left-bottom corner collapses left menu icons. Clicking **>** icon retrieves the action.

When the user clicks the username, a drop-down list is displayed which shows the option **User Preferences**.

4. User Preferences

The users have the privilege to set various preferences as per their choice. The top left corner of the Share & Approve site displays the site name and the name of the user who has currently logged in. Same users can have different settings for each sites.
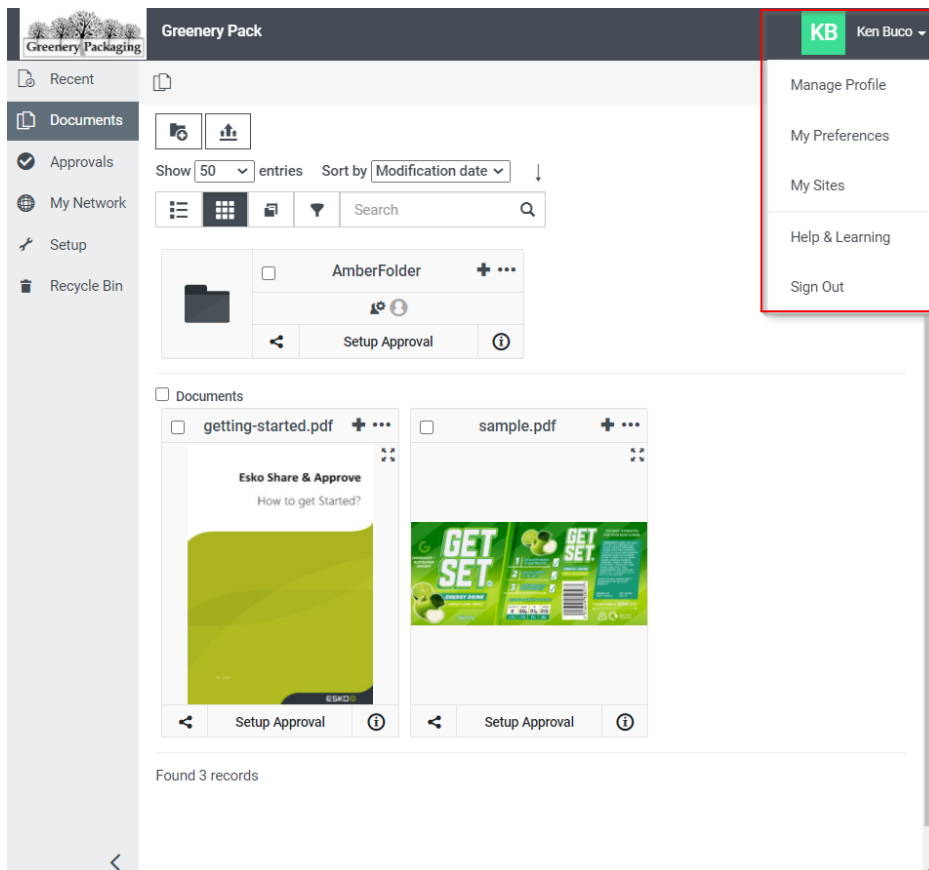
When the users click their name, a drop-down list appears with the following options:

- *Manage Profile*
- *My Preferences*
- *My Sites*
- *Help and Learning*

4.1. Manage Profile

An avatar is the user's visual representation (image) shown in the application header besides the name in the top-right corner and in the user information pop-ups.

By default, an icon created from your initials is shown in a random color.

Users can upload a picture to replace their initials in the avatars used.
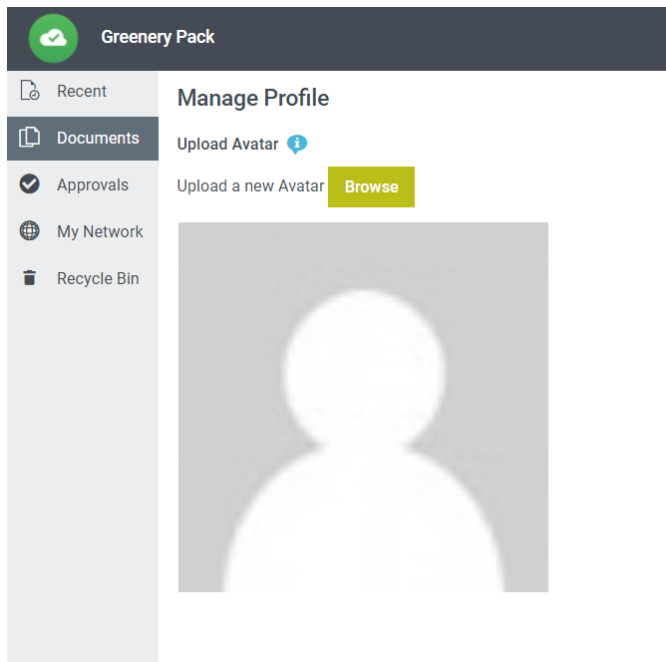
Users can change the avatar by clicking on the icon or they can either upload a new profile picture by browsing or clicking again on the avatar space. On selecting an image to upload, a preview is shown with zoom/pan/cropping functionalities. When a user selects Change, the cropped image of the fixed size 200x200px (irrespective of the uploaded file size) is uploaded. On upload, the higher resolution images are reduced, and the lower resolution images are re sampled.

Accepted file types: JPG, JPEG, PNG, GIF

Animated GIFs can be uploaded but the animations are lost on upload.

User can choose Reset to Default at any point to revert the changes.

4.2. My Preferences

Users can change the site preference according to their need. Following are the preferences that can be customized:
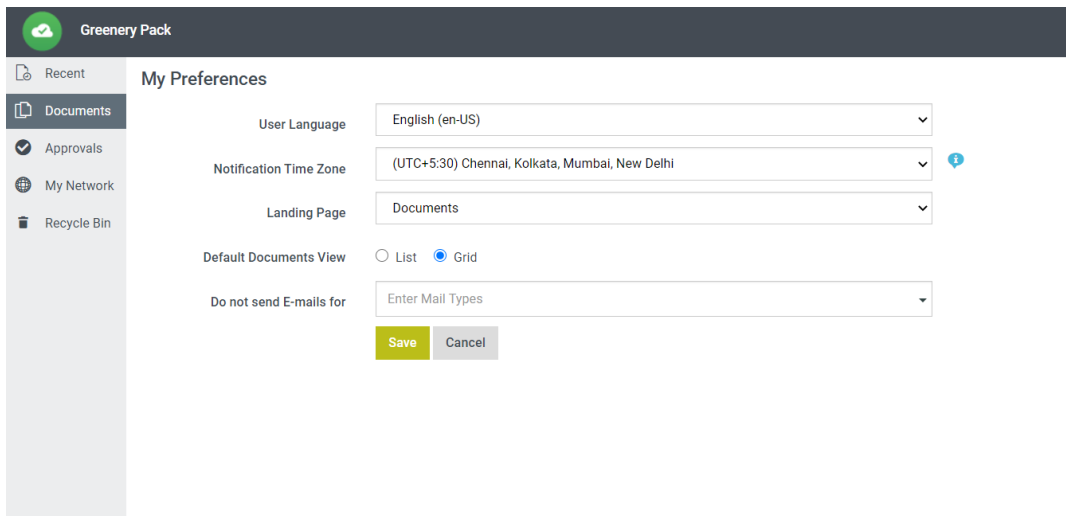
- User Language: Esko Cloud support multiple languages. The language of the user interface and optionally e-mails can be set by choosing from the drop-down showing the supported language. The languages are displayed in its own language script. For example, German appears as Deutsch. This helps any non- English speaker to know which language they need to select. The default language is English.
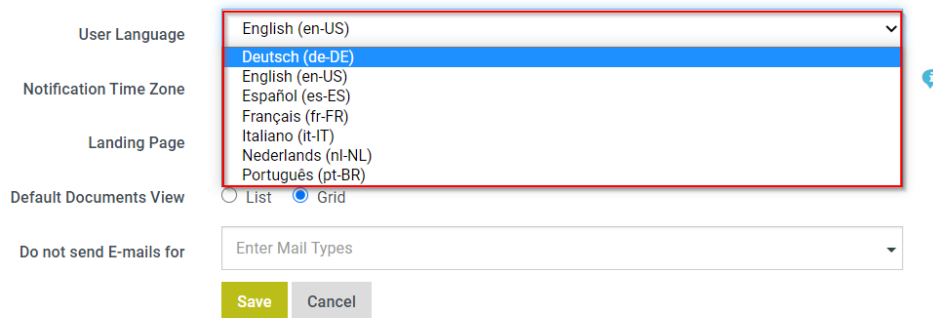
- Notification Time Zone: Time or dates (e.g. due dates, creation date) indicated in the Share & Approve application in your browser is aligned to the time zone of your local system. The time zone used in e-mail communication (e.g. due dates of approvals) are the time zone of your local system. Ensure to set the time zone correctly here. Notification Time Zone can be set by choosing from the drop-down list. It has a balloon help indicating the time zone and displays the time in UTC.

- Landing Page: Users can change the landing page in which they get directed in each login according to their preferences. The user can choose the landing page within the Recent Document page, Documents page, or Approvals page from the drop-down list.

- Default Documents View: Users can arrange the folders and files in the Share & Approve either in a grid view or in list view. The view in the Documents page can also be changed by clicking the list or grid button available on top of the folders and documents.

- In List view, the documents and folders are displayed as rows of information and the details of each folder or document are beside the name. The actions for each document or folder are available next to it.
- In grid view, the documents and folders are displayed in a more tabular view. This is the default view.
- Do not send E-mails for: Users can choose whether they need to receive certain emails. The e-mail notification types which you do not need can be chosen from the drop-down.

Following table shows the email types and the event which triggers them

Type	Event triggering it
Approval Setup Changed	The Approval Setup details got changed. Not seen as changes are any of the other events.
Approval Cycle Stopped	The Approval Cycle was stopped manually (without a result).
Approval Cycle Finished	The approval cycle came to its final conclusion and reached a final status.
Approval Cycle Started	The initial stage. The approval has started for the document.
Approval Comment Added	An approver has added a comment in the approval cycle. Remark that comments are different from annotations in the viewer.
Approval Stage Start	An approval stage is started. 1 event per stage. Is also sent for the single stage of a simple approval.
Approval Request	An approval stage is started and needs an Approver to approve. 1 event is generated per approver
Approval Stage Finished	An approval stage is finished. 1 event per stage. Is also sent for the single stage of a simple approval. Is not sent for stopping the approval cycle.
Approval Overdue	An approval request was not answered by the due date. 1 event per approver who is overdue.
Approval Forward	An approval is forwarded from one user (possibly representing a group) to another user. 1 event per forward.
Invite User on Site	A registered user was invited to the site root (and everything under it)
Invite User on Document	A registered user was invited to a single document (not using 'Share a Link').
Invite User on Folder	A registered user was invited to a folder (not using 'Share a Link').
Document Rejected	A document is approved or conditionally approved by a single approver. 1 event per approval operation

Type	Event triggering it
Document Approved	A document is approved or conditionally approved by a single approver. 1 event per approval operation

> **Note:** After choosing the preferences, always hit save.

4.3. My Sites

My Sites page shows all the sites in the Esko Cloud Account in which a user have access to (in each region). In many cases, certainly, when a person is new to Esko Cloud, My Sites will show one organization and one site.

Share & Approve has single sign-on experience. That is, when the user is invited to multiple sites in Esko Cloud (e.g. two of the suppliers use Esko Cloud for the approvals), login to the Esko Cloud will allow easy navigation between the two without logging out and logging in to the other.

Organizations and Sites

An Organization is mostly a company. The organization name shown in My Sites is the chosen 'readable name' of the Esko Cloud Account on which the site is deployed. The user can choose to have a department or business unit as an organization or can have any name.

A Site is a visible website the user interacts with. An organization can have multiple sites that differ in the data they contain and the way it is presented (look and feel). The user can also provide access to a specific site within an organization where there are multiple organizations.

The user can find an account or a site within the given list using the Find drop-down menu.
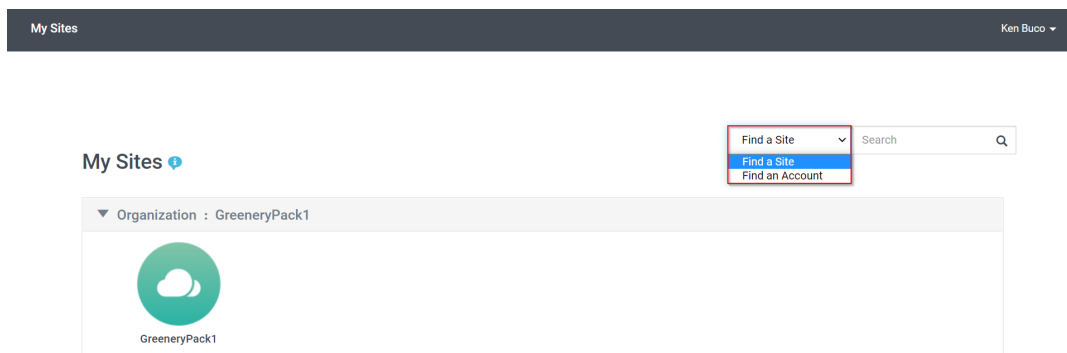
The page can be searched using the name of the site or the organization.

Regions

In case the user has access to Esko Cloud in more than a region (e.g. USA and Europe), only see the sites of the region the user logged in to is visible. approve.eu.esko.cloud is shown in the URL of the browser if the user is logged to the European region while approve.us.esko.cloud is shown for the USA region. Users cannot single sign-on between the regions although the password is the same (since it is logged in to both regions with the EskoID).

Click on the site name to navigate to the site. Users can return to the My Sites page via the top-right menu (where the name is)

4.4. Help and Learning

Help and Learning redirects the user to a page containing module videos regarding an overview on Share & Approve. The page also contains interactive eLearning modules, covering everything from subscribing and activating right up to approving files.

5. Documents Page

Documents are files uploaded to a folder. A document can have multiple versions. Each time the user uploads a file as a new version (or upload a file with the exact same name as an existing file in that folder), the user gets a new version.

Documents can be individually shared.
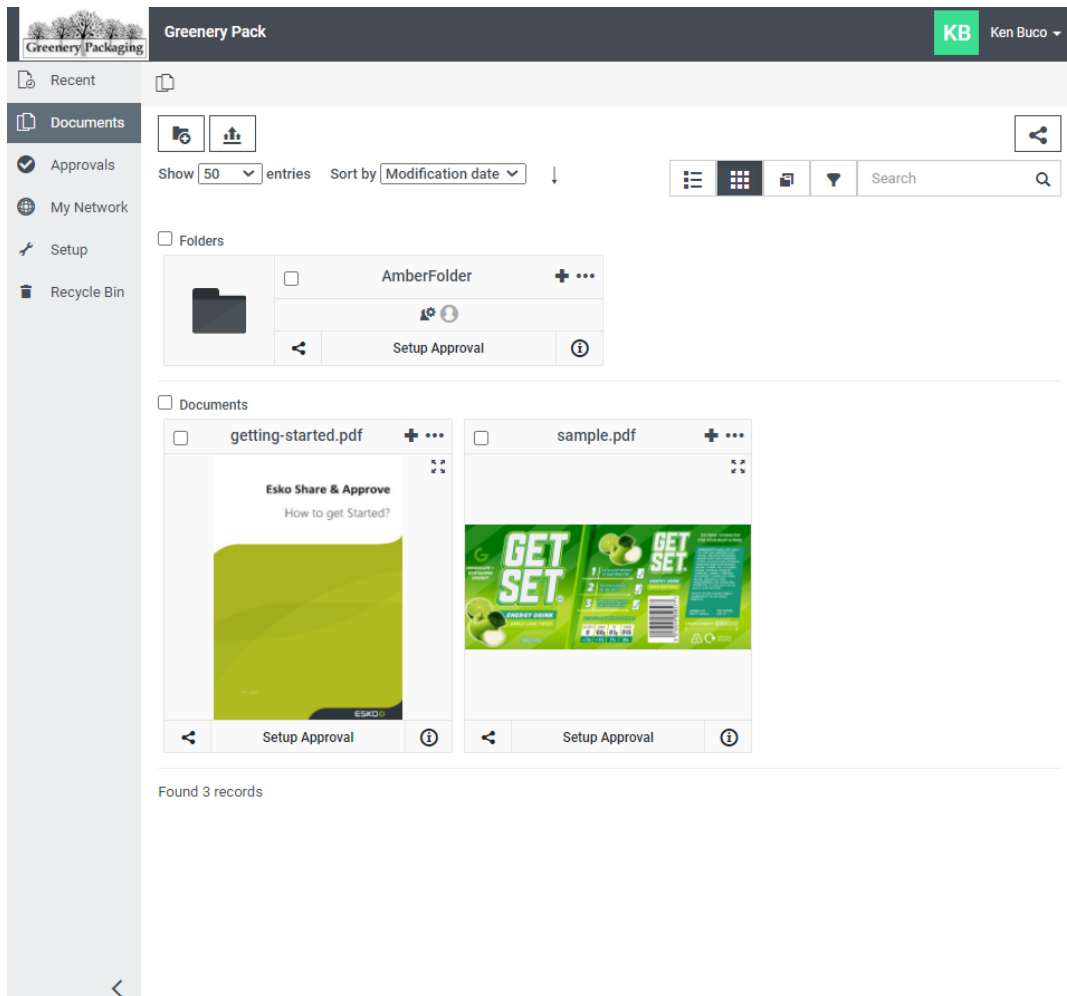
The Documents UI offers the users with the various folder and files that have been uploaded, along with other options.

- Path: The grey bar below the Site name shows the user where they currently are. A user can navigate between pages clicking Path hierarchy.
- Creating Folder: Refer *Creating a Folder page*.

- Upload: Upload option enables the user to upload single or multiple files using either drag and drop or selecting multiple files using Upload multiple documents icon
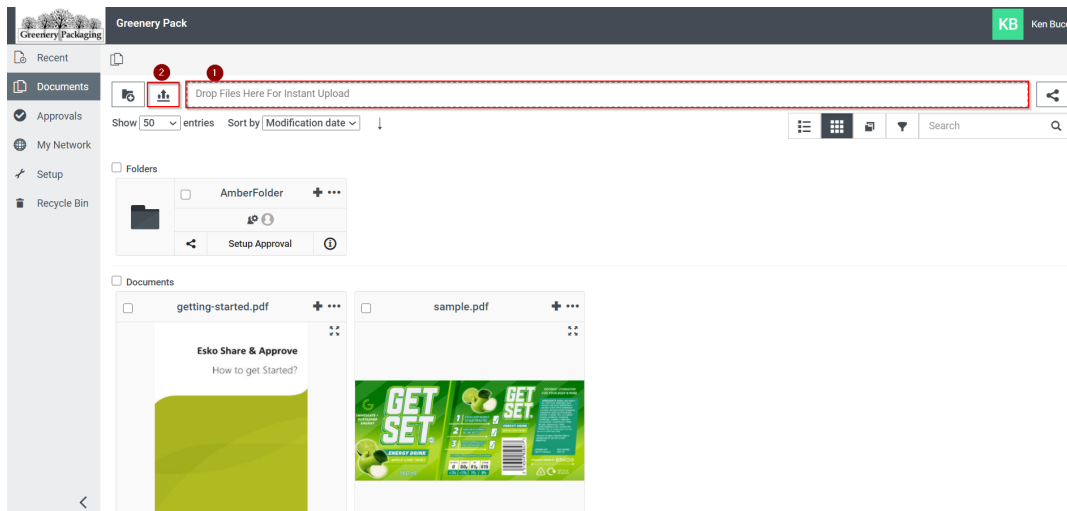
1. Drag and Drop: A user can drag and drop the files from Windows Explorer or Apple Finder directly to#"Drop files here"#and the files are added to the update list.
2. Select Multiple Files: A user can navigate to the folder where the file needs to be uploaded and click on#Upload Multiple documents#option. Click on#Select Files#button and browse to select the files that is to be uploaded.

To read more about upload refer *Upload*.

• View: A user can arrange the folders and files either in grid view or in list view.

   • In List view, the documents and folders are displayed as rows of information along with the details of it.
   • In grid view, the documents and folders are displayed in a more tabular view.

> **Note:** The user can make the view default. Refer *My Preferences* on page 13.

• Search: A user can search through the documents and files using search menu or by simply searching a key word in the Search filter tab.
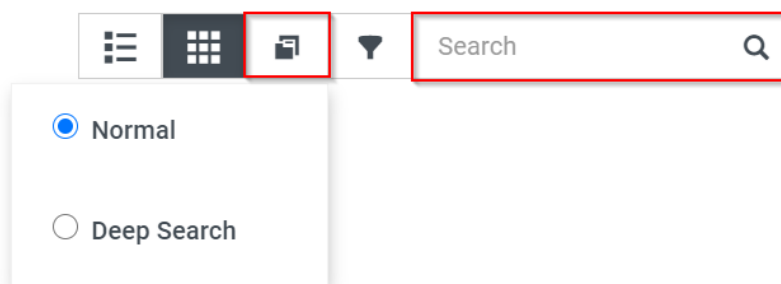
The search menu consists of

• Normal Search: When a user selects Normal search the search cue is done under one layer of the documents uploaded (search happens within the same hierarchy).
• Deep Search: When a user selects Deep Search, the search is done on more layers (down the hierarchy.

- Folders and Document Filter: A user can filter within documents and folders using this filter next to Search.
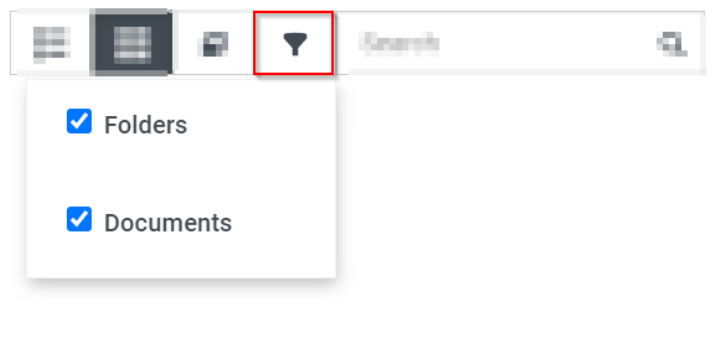
- Share this space: Share this Place icon enables the user to Invite users and to Manage Permissions for the site.

- Show entries & Sort by: The documents page can be sorted using the Sort by option available on the panel. Sorting can be done by direction, modification date, created by, size and name.
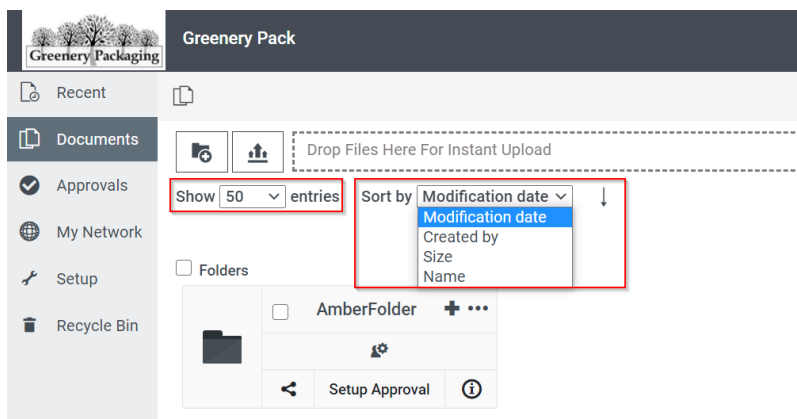
Show entries has a drop-down list showing the number of entries which a user can sort the documents and folders.

List View Layout

The List view displays the documents and folders in the page as rows of information. The details regarding each individual item is displayed next to the respective document or folder.
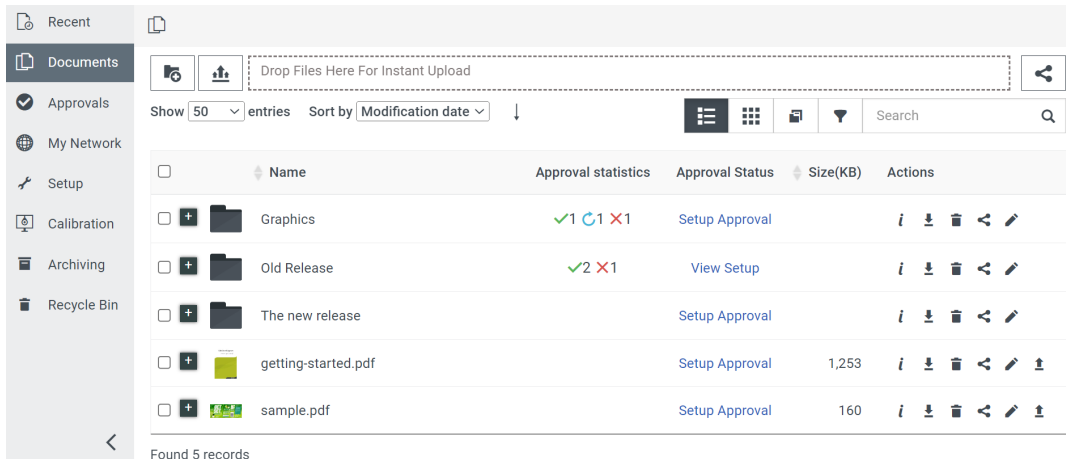
- Name: Name of the folder or the document.
- Approval Statistics: The approval statuses of the documents that have approval cycles initiated. Approval Statistics column is empty for a document. Note that the statistics of the immediate files in the folder are displayed. For more details refer to the section **Approval Statistics on the Documents page** below.
- Approval Status: The current status of each folder or document. Refer *Overview of Approval Statuses* on page 63
- Size: The size of the folder or document in KB.
- Created By: Name of the user who created it.
- Modified On: Date and time in which the folder or document was modified.
- Shared With: Displays the user who has access to the current folder or document. Clicking Go to Manage Permissions icon takes you to the Invited Members page. This page displays a list of users who has access to the current folder or document along with their roles and permissions. Refer *Manage Permissions* on page 22.
- Actions: Displays various options such as

  - More Details: Opens the Folder Details page or Documents Details page as per your selection.
  - Download: Downloads the folder or document. Folders will be downloaded as a zip file.
  - Delete: Moves the item to the Recycle Bin.
  - Share: Refer *Invite and Share*.

  - Modify: Clicking Modify icon gives you options for Rename, Move and Copy. Refer Folder options in *Creating Folder* on page 22.

  - Upload New Version: The user can upload a new version of the document. Folders does not have this option.

Approval Statistics on the Documents page

The Approval Statistics of the documents in a folder are presented as icons, provided the approval cycles are initiated. Approval Statistics are displayed as a separate column in the list view.

> **Note:** Users can see only the statistics of the immediate files in the folder.

The icons are not displayed:

- If the parent folder does not contain a document with the above mentioned criteria.

- If the folder is empty.
- If the folder contains no documents but one or multiple folders.

5.1. Manage Permissions

Managers and Administrators have full power over a site. They can invite and uninvite users. Using manage permissions, they can invite or uninvite a user.

A user can access a document or a folder in two ways:

- An individual user is directly invited to the document or folder. A 'user' icon appears in front of the name and the user's name and e-mail address are displayed.
- A group is invited, where each group member is provided with the rights to the folder or document. A 'group' icon appears in front of the group name.

When the user selects Manage Permissions, they are redirected to the Permissions page which contains the list of invited users along with their E-mail, role and permissions.

The Permissions page is divided into Invited Members and Shared Links.

The Invited Members section contains the following:

- **Invite Button:** Refer *Invite and Share* to read more on how to invite a user.
- **Uninvite Button:** The Uninvite user button appears when a user or group is selected. To remove the user's or group's access, select those no longer required or needed and click Uninvite.
- **Name:** Names of the users (groups and members) who have access to the current folder or document.
- **E-mail:** E-mails of the members.
- **Roles:** Defines the actions a member can perform. There are various roles either inherited or invited to. Refer Access Rights and Roles and Inherited in *Concepts* on page 6 page.
- **Permissions:** Various roles have permissions set accordingly. Therefore users or a groups possess permissions set by the role they have invited to.

The Shared Links section contains similar columns like Roles and Permissions. Permissions column shows **This link has expired** if the link exceeds the expiration date.

Other columns are:

- **Expire now Button:** When you select a user, the Expire now button becomes active. Clicking this button expires the users link to access the document or folder.
- **Shared link icon:** If the icon is blue, it means that the link given to the user is not expired. Red icon shows the users who have expired links.
- **Shared With:** E-mail address to which the link was sent.
- **Expiration Date:** Expiration date and time of the link.
- **Shared by:** Name of the user who shared the link.

5.2. Creating Folder

Each site has a site root folder (which has no name) and can create any number of folders and subfolders. Folders can be shared with other users or groups.

A user can create a new folder within the site by clicking Add Folder button.

1. Click on the Add Folder Button. This takes the user to a new page.

Add folder

* Folder Name	

Create   Cancel

2. Enter the Folder Name.
3. Click Create button.
4. The User is taken to the confirmation page along with other options:

Folder Colors for Code was created successfully.

What do you want to do next?

Add another folder

Navigate inside the folder

Invite Users

Back

a. **Add another folder:** Allows the user to create another folder without going back to the Documents page.
b. **Navigate inside the folder:** Enables the user to work with the newly created folder.
c. **Invite Users:** To start approving the documents within the folder, the creator of the folder should give access to other users. Only invited users can collaborate with the documents. Refer *Invite and Share*.
d. **Back:** Leads the user back to the Documents Page.

Folder Options
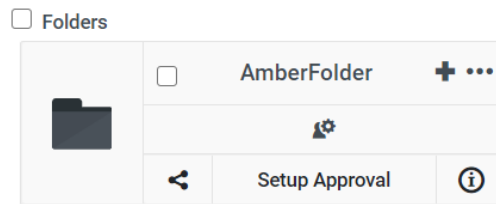
- Selection: A folder can be selected by clicking on the check box icon in the left side of a folder. A user can select all the folders by selecting the Folder check box right above the folders.
- Folder Info: A user can view the folder information by clicking on the plus sign on each folder. The folder info box can be closed by clicking the triangle below it. Refer *Folder Details Page* on page 37

- More Actions: A user can view more actions by clicking the dot menu on the right side of a folder. More actions include

- Rename: The folder can be renamed using this action.
- Move: The folder can be moved to any other desired location within the site. By clicking on Move,

a pop up dialog box opens
> click on the desired folder > Click Move.

- Copy: The folder can be copied to any location within the site. By clicking on copy action, a pop-up dialog box opens

Copy folder **AmberFolder** ✕

○ Copy to current location

○ Copy to other location

New Name

AmberFolder-copy

☑ Copy Approval Setup   ☑ Copy Subfolders   ☑ Copy Documents

Close   Copy

A user can move the folder to the desired location according to the need. It can either be copied to the current location or any other location. Also, the user can make a copy with the same Approval set up, Subfolders and Documents or not.

- Download: The documents can be downloaded as a zip using this option.
- Delete: The folder can be deleted using this action. A confirmation box appears after clicking on the delete option.

Are you sure you want to delete this folder?

Yes   No

- Sharing: The folder can be shared to users by 'Invite Users' or 'Share a link'. Refer *Invite and Share*.

- Manage Permissions: The user is redirected to Invited members and manage permissions page. This page shows the list of users who has access to the current folder.

- Share Folder: The folder can be shared to users by 'Invite Users' or 'Share a link'. Refer *Invite and Share*
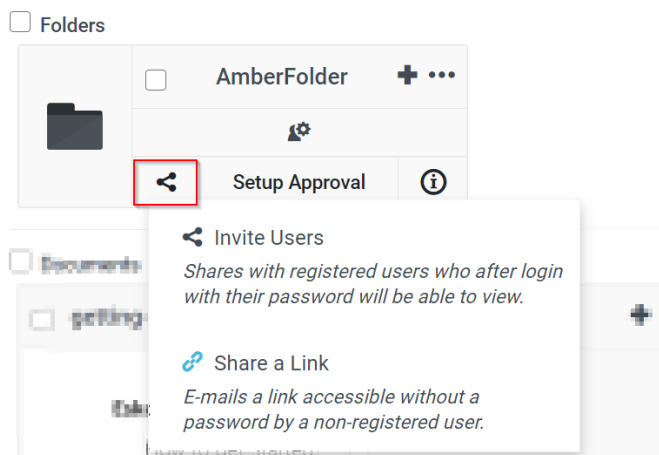
- Go to Manage Permissions: By clicking on the icon in the middle of the folder, a user is redirected to Invited members and manage permissions page.
- More Details: More details on the folder can be seen by clicking on the 'i' icon on the folder. Refer *Folder Details Page* on page 37
- Open Folder: Open Folder Icon Opens the folder to view the sub folders and documents inside it. An Opened folder is similar to documents page.

> **Note:** Folder name need to be unique at same hierarchy. The user will receive an error message otherwise.

To upload a document refer *Upload* on page 40.

5.3. Documents Details Page

In the Document details page, a document is displayed as a thumbnail.
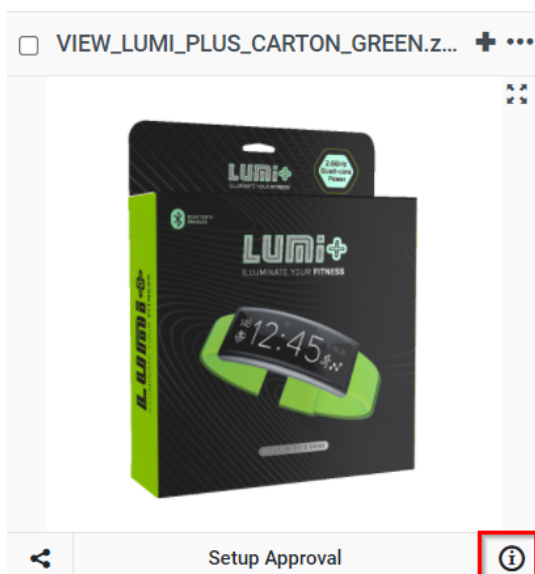
Click the More Info icon to open the page.
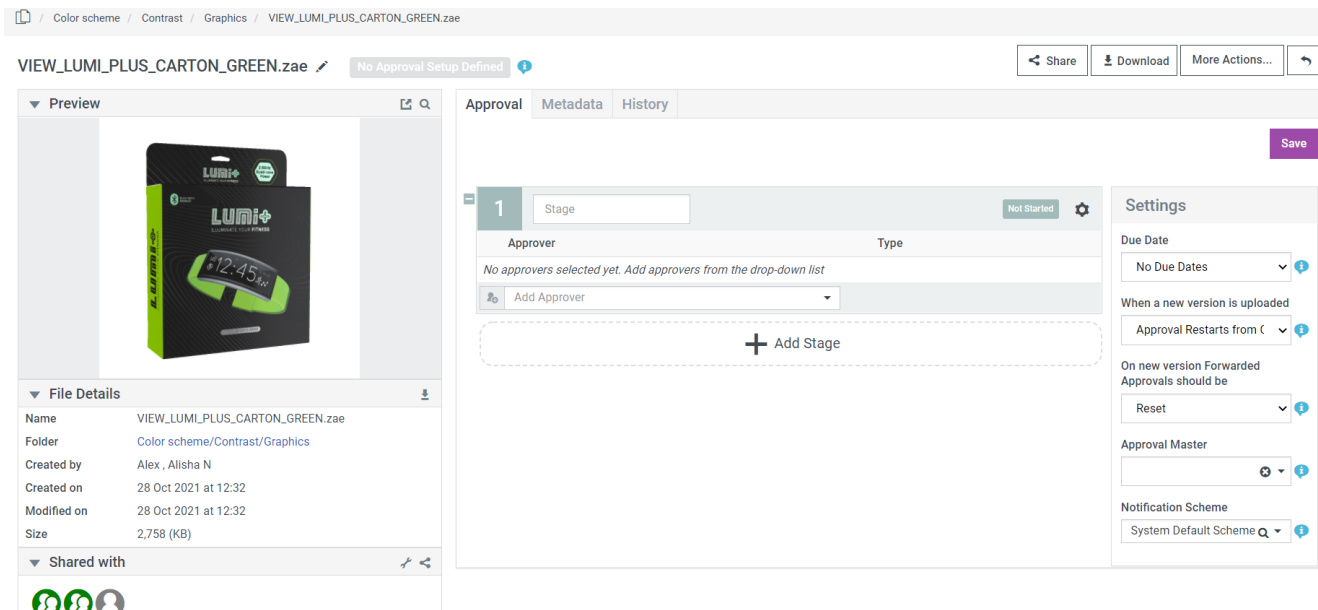
Bread crumb under the site title displays the path of the current document from site root: Documents

icon / folder name(s) / document name. The Documents icon redirects the user to the site root.

Below the preview (thumbnail of the document), the details of the document are displayed.

- **Name:** Name of the document.
- **Folder:** The complete path of the document is displayed. Clicking the path redirects the user to its parent folder, if the user has permissions to that folder.
- **Created by:** Name of the user who created this document.
- **Created on:** Date (Month Day and Year) and Time (Hour and Minute) respectively when the document was created.
- **Modified on:** The recent Date and Time respectively on which this document was updated.

> **Note:** When a user points the cursor above Created on or Modified on, it will show more details about the date and time.

Shared with displays the users who have access to the document. To navigate to Manage Permissions, click on the users or the Manage Permissions icon. Share icon can be used to *Invite and Share* on page 70 the document to users.

This page contains the preview of the document and other details like the size, metadata, and history. In case there are no specific details on the approvals the document inherits from the folder or the user can set up a new approval cycle.

More actions has the following options:

- **Delete:** Delete option allows a user to delete the document. The document will be moved to the Recycle Bin. Refer *Recycle Bin* on page 80.
- **Create Notification Scheme:** A notification scheme allows a user to specify which User or Groups or Roles receives the E-mail notifications. Refer *Folder/ Document Notification Scheme* on page 41.
- **Upload New Version:** A user can upload a new version of the document. Uploading a document with the same name also results in versioning of that document.

• **Download Report:** Refer *Annotation and Approval Report* on page 65.

• **Open in Viewer:** Opens the document in the viewer. Refer *Viewer Documentation*.

> **Note:** Permanent Deletion of a document destroys the document along with the approval information regarding the document.

MetaData Tab

The MetaData tab shows the calculated information about a document.

The data displayed is dependent on the file format.

For graphic documents such as PDF, AI, PSD, following information is shown:

• General information including mediabox, trimbox, shrink values, number of pages and references (e.g. fonts).
• Ink information included the name of each ink, ink group (process/pantone/...), ink type (Normal/opaque/...), coverage and halftone information. Some information may be blank if there is no information is stored in the file.
• Layers with for each layer its name, whether it's printable and processing step information according to ISO19593 *https://www.iso.org/standard/65428.html*

For CAD formats (ARD, MFG)

• Design information such as blank size, Area, rule length, grain direction, board code, caliper, flute and size of printable areas. If a topic is not shown (e.g. grain direction), it means that this information is not stored in the file.

For Collada files (ZAE, DAE)

• Design information, listing the printable areas with their name and size.

For Images (JP(E)G, PNG)

• Dimensions in pixels.
• Resolution.

The metadata widget has top-right gear icon to change the units. This is remembered per user/ browser combination.

Metadata is calculated at upload. When clicking on the Metadata tab, an attempt will be made to calculate metadata. This can take a moment.

Note: Data uploaded prior to the 20.11 release does not have metadata.

History Tab

History Table displays the version details, the event history of approvals, the user details, file details, date and actions. The actions include icons to download and view the document.

- **Download:** Icon can be used to download different versions of the same document.

- **View:** Icon can be used to view the different versions of the same document.

5.3.1. Approval Stage

The other part of the folder details includes the Approval Stage and its various options.

A user can add and view different stages of the approval through this dialog box. By clicking on the Add Stage button a user can add more stages to the Approval. The settings icon on the right side of the dialog box opens to various options.

Allow Conditional Approval: Select this box to allow approval with a condition. When the approval is made, the user will get notification saying that the document is approved with a condition and it will also be reflected in My Approvals.

Inherit Previously Submitted Approvals: Approvers will be inherited from the folder or from the hierarchy. This option will give inherited role to the approvers.

Forward approval: Forward approval has three options in its drop-down list.

Forward Approvals

Don't Allow	⌄
Don't Allow	
Allow Approval Forwarding to Registered users	

- **Don't Allow**: This option doesn't allow approvals to get forwarded.

- **Allow Approval Forwarding to Registered users**: As the name suggests, approvals are forwarded only to the registered users (users with EskoID).

- **Allow Approval Forwarding to Registered and Unregistered users**: By selecting this, approvals can be forwarded to external and internal users.

  > **Note:** The forward approval option is displayed only when the Administrator enables it. The default choice is the choice made by the Administrator. If the Administrator hasn't made any choice, then Don't Allow is the default option for forward approvals.

When one User rejects: As long as all approvers approve the document, then the approval cycle is straightforward. But when a user rejects, some approvers still continue the workflow while others restart the approval cycle.

When one User rejects

Stop Approval cycle after every approver decided	⌄
Stop Approval Cycle Immediately	
Stop Approval cycle after every approver decided	

- **Stop Approval Cycle Immediately**: The entire approval cycle is stopped when an approver rejects, and the following happens.

  - The document version gets the final approval status as "Rejected".
  - The approval request gets removed from the to-do list of the pending approvers.

- **Stop Approval Cycle after every Approver Decided/ Stop Approval Cycle at the end**: Approval Cycle continues till every approver in the cycle decides on the document. This option is only available for a simple approval. When one user rejects, the approval cycle continues until all the approvers have completed the approval, after which the approval cycle stops with the status as "Rejected". The advantage in this option is that, all approvers give comments on the document before a new version is created. This ensures that the next version is approved.

5.3.2. Approver
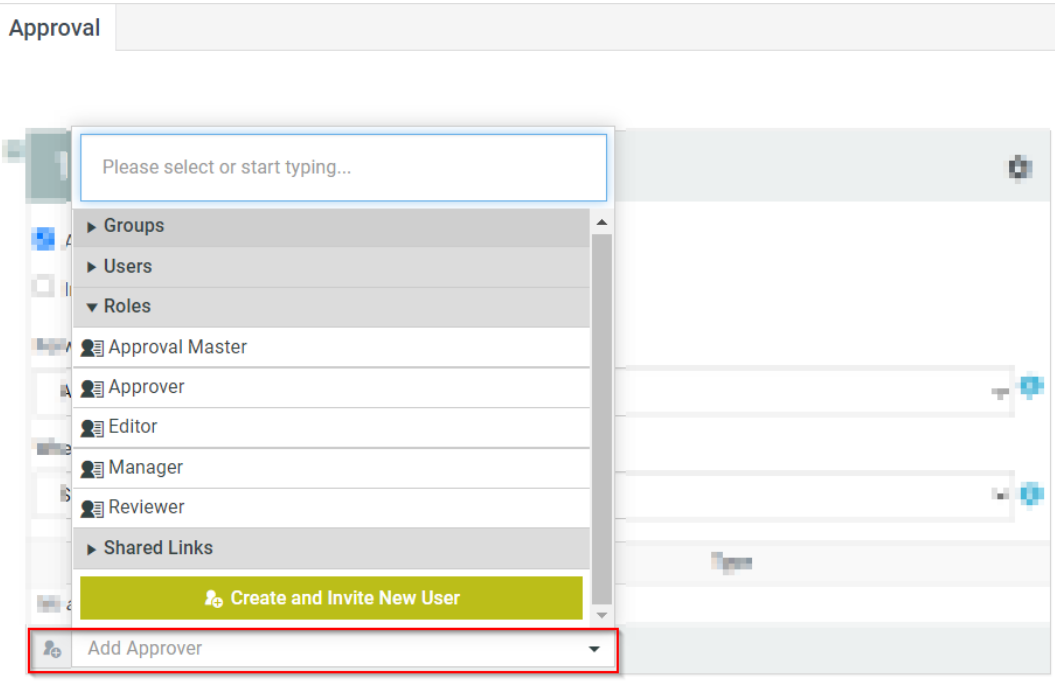
- **Users and Groups**: An approver can be a group which is already created and can be different Users. A user can click on Add Approver and select the required from the already existing options. A user can also type user id and filter to select.

- **Roles**: Approver can be selected between the roles. There are usually 3 options, any one from role can approve, all who has this role should approve and also any one per different group of all Editors. For example, if Editor is selected from the drop-down list as an approver, then the user can set that approvals can be made by all of the users having Editors role, or any one of the role or can be all of the role where one per each group.

- **Shared Links**: Usually unregistered users can be invited using a link and they can still approve the document

Refer *Add Approvers*.

5.3.3. Due Dates

User can set the due date for the approval. The due date is mentioned in the e-mail and the approver receives an overdue notification, if it is not approved or rejected by the due date. The due date defaults to 'tomorrow end of business day' in the respective time zone.
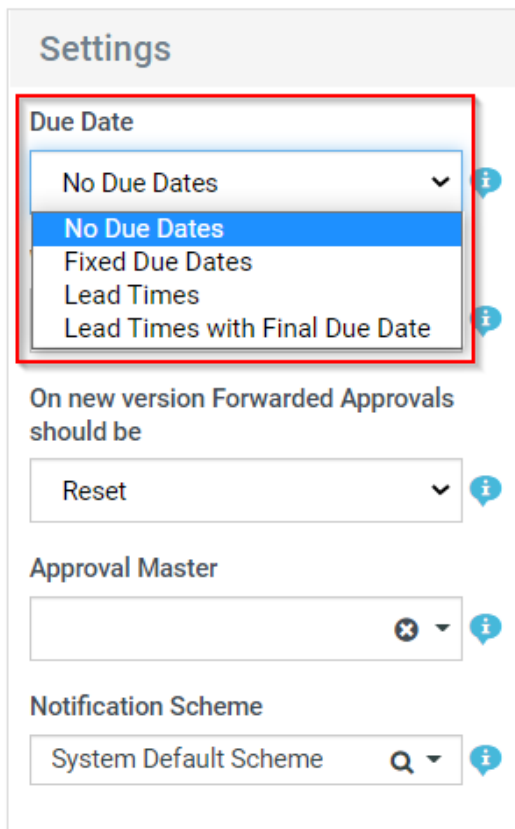
- **Due Dates**: Due dates are the date and time within the approver need to complete the necessary action. The system allows keeping Fixed Due Dates or lead times. This decision is taken once for the entire approval cycle. The user cannot have mixtures of due dates and lead times in the setup. For a simple approval, a single due date is possible, and is therefore same for all approvers. For a staged approval, user can set a due date for each stage. Normally, user can add the due dates for later stages as the approval stages progress. This is however not enforced by the system.

- **No Due dates**: This is the default option where no due date is specified for the approval. Approvers can decide when they want to approve their documents.

  The effects of no due date in the system are the following

  - Approvers do not get a due date in their My Approvals list.
  - The approvals without due date in the My Approvals list never turn red.
  - When the My Approvals list is sorted on due date (which it is by default), the approvals without due date shift down when there are other approvals with due dates.
  - No overdue notification is sent to the approver.

- **Fixed due dates**:

  For a simple approval, the user can specify a due date for the approval cycle. For the advanced approval with multiple stages, user can choose a due date for each stage.

  The due date and hour can be set via the calendar and the hour dropdown.

  The effects of fixed due dates in the system are the following

  - Approvers get the due date of their stage in#My Approvals list

- Approvals in the#My Approvals#list turn red when the due date is crossed.
- The to-do list is sorted on due date
- When not disabled by the system administrator, overdue notifications are sent to the approver

Using fixed due dates is easy and the best method for non-repeating approvals or when the approval is started by a connected workflow system.

- **Lead Time**:

A user can enter required number of days and/or a number of hours. For staged approval, this can be done for each stage.

When the approval cycle or approval stage is started, a due date is calculated by adding the lead time to the current time. Once the approval has started, the effects on the My Approvals list of the approvers in this stage are the same as for the fixed due date.

Lead times for Staged Approval are adhered as follows

- When starting the approval cycle, the lead time of stage one is applied to the current date and hour which becomes the due date of this stage.
- Each time a stage is approved, the lead time of the next stage is applied to the approval date/ hour of the previous stage. This means the lost time is not recuperated.
- When a new version is uploaded, the restart of the approval cycle is used as the start moment to calculate the due date of the first stage needing (re-approval).

When inheriting an approval setup from a folder approval setup, the lead times are copied to the new approval setup and due dates are calculated accordingly.

- **Lead Time with Final Due Date**:

This works like normal lead times, but the user get an option to enter a Final Due Date. The system will try getting the approvals done by this final due date. If approvals happen on time, there is no difference with the normal lead time method. But when approvals start delaying, lead times will be compressed to keep the final due date. When the final due date is in the past, due dates will be put on immediate to enforce quick handling.

> **Note:** Weekends are adhered to as Saturday and Sunday but working hours or general holidays are not kept in consideration while calculating lead times. For examples, day after Friday is Monday when Christmas is a weekday, approvals are kept due.

5.3.4. New Version Uploading

Versions are a way to maintain different historic/subsequent versions of a file in one single Share and Approve document. This way, older versions are not lost (e.g. they can still be used to compare in the viewer) but they are no longer visible in overview listings (e.g. folder contents or search results), this way avoiding that people get confused by historic information that is no longer actual.

When a new version is uploaded the user gets three options:

- **Approval restarts from the beginning:** A new approval cycle is started. All approval operations on the previous version are reset although the user can view them in the action history.
- **Approval restarts from current stage:** The already completed stages are not impacted and the Approvers in the completed stages need not re-approve the new version. The current stage is reset, and the approvers in the current stage have to approve the document again.
- **Approval Continues:** All approval operations are copied to the new version. Rejections in the current stage are however reset, to enable the approvers to evaluate and approve the document again.

5.3.5. Approval Master

Approval master is a user who follows up on the approval. Approval cycles may take a long time when certain approvers delay their decision.

In such instances, Approval master can view the delayed approvals and follow-up based on document's approval status. When there are many documents under approval, it is very tedious to keep track of

which documents need special attention and which do not. The system therefore foresees special features to follow-up on approvals.

My approvals to follow up: When there are many documents due for approval, it is easier to follow-up with this feature.

Approvals page has a section called#My approvals to follow up#which shows all the approvals for which each person is the approval master. **Refer to Approvals for more information**

5.4. Folder Details Page

More details about a folder can be opened by clicking on the More info (i) icon on a folder.
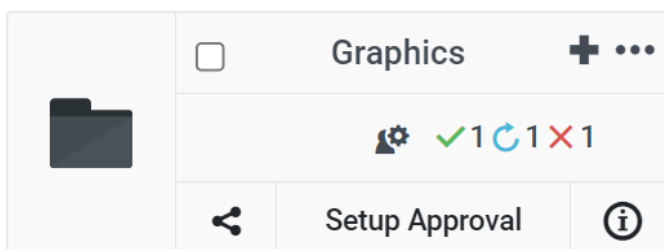
This will bring the user to a different page.
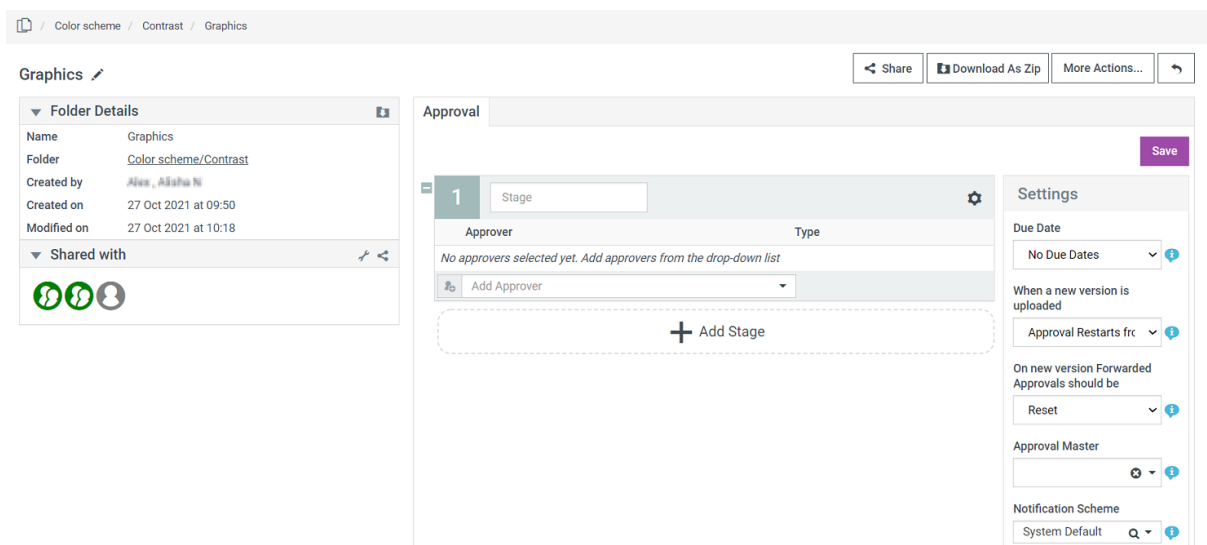
The title bar of the folder page has a pencil icon next to the name of the folder, that can be used to rename the folder name.

This panel contains different options such as:

- **Share:** Users can share this folder using either 'Invite users' or by using Share a link. Refer *Invite and Share* on page 70.

- **Download as Zip:** Users can download the documents as a zip file using this option. The downloaded zip file can be extracted into the system. When a user clicks on this option the download is initiated immediately and the notifier is visible on the right-side corner of the page.

- **More Actions:** By clicking more actions, a user can avail two options:

  - Delete: Delete option allows a user to delete the folder. The folder will be moved to the Recycle Bin. Refer *Recycle Bin* on page 80.

  - Create Notification Scheme: A notification scheme allows a user to specify which User or Groups or Roles receives the E-mail notifications.

- **Back:** A user can go back to the previous page by clicking on the back icon.

The left side of the Folder Info page contains the folder details and the user information i.e., to whom the folder is shared to.

By clicking on block header, folder details can be collapsed and expanded. Folder details are expanded by default.

The Folder Details include:

- **Name:** Name of the currently opened folder.

- **Folder:** The complete path of the folder is displayed. Clicking the path redirects the user to its parent folder, if the user has permissions to that folder.

- **Created by:** Name of the user who created this folder.

- **Created on:** Date (Month Day and Year) and Time (Hour and Minute) respectively when this folder was created.

- **Modified on:** The recent Date and Time respectively on which this folder was updated.

> **Note:** When a user points the cursor above Created on or Modified on, it will show more details about the date and time.

By clicking the icons present under 'Shared with, navigates the user to the Manage Permissions page. Shared with can also be opened by clicking on the small down arrow triangle on the left side. The right side of Shared with enables the user to Manage permissions of the folder and Invite new users to the folder. Shared with contains user icons who are in different roles with the folder.

> **Note:** Folder Details Page is similar to Document Details page. But users cannot set approval for a folder. The User can only set Folder Approval for the documents inside it.

Refer *Document details page* for more information about how to set different options for the approval. Refer *Approvals* page to know how to set up an approval.

6. Recent Documents

Recent Documents consists of documents that have recently modified or viewed.

Any of the following actions make a document appear in the Recent list.

- Setup Approval Cycle for the document: Single Stage (Simple) Approval or Advanced Stage (Complex) Approval.
- View the Document in Viewer.
- View Document Details.
- Manage permissions of the document.
- Share the document or share a link to the document.
- Approve, Reject, Force Approve, Force Reject, or add Annotations to the document.
- Upload a document. Bulk upload of more than 5 documents do not appear in the Recent.

Note:

Recent list may differ for each user, device or the browser used.

Recent list has a maximum of 20 accessed documents is displayed for the user

7. Upload

Upload can be done either by drag and drop inside the Documents page or by using the Upload Multiple documents option.

Upload by Drag and Drop in the Documents page

User can upload directly in the Documents page by navigating to the folder where they want to upload files. Select the files in Windows Explorer or Apple Finder and drag them over Drop Files Here For Instant Upload. The file starts uploading instantly and the overall progress bar appears.

Upload via the Advanced Upload Page

Users can navigate to the folder where they want to upload the file and click on Upload Multiple documents option. Click on Select Files button and browse to select the files to upload.

A progress bar is shown for each uploaded file and an overall progress bar at the right-bottom. Closing the browser stops the upload along with a warning prior to closing.

Users can edit or rename the file name using the pencil icon when they are uploading. Users can however cancel the upload, and add the file again, then rename it and restart the upload.

The upload list is maintained as long as upload are still in progress. Users can also add files while uploading is in progress. Users can clear the list by clicking on Clear.

Versioning

If the New version option is selected on a document and the file is chosen, then a new version of the existing document will be uploaded.

Uploading documents with same name also results in new version. The user can drag and drop the documents. Refer *New Version Uploading* on page 35.

Upload progress bar

When navigating away from the upload page, the upload continues. The overall progress bar remains visible at the bottom of the page. When any of the upload fails, the color turns red. Users can navigate back to the upload page by either clicking on the progress bar or by clicking again on the Upload button. Once all uploads are completed, upload page shows an empty list.

Drag and Drop to the upload list

Users can drag and drop the files from Windows Explorer or Apple Finder directly to Drop files here and the files are added to the update list.

When the file already exists, a new version is created. There is an additional drop zone below the files/folders. It appears when the user drags the files over the folder. When dropping in that area, the files are not be uploaded to the current folder but to the folder on which the user drop the files.

To set Approval to the uploaded document refer *Single Stage Approval* on page 44.

To add users refer *Users* on page 68.

8. Folder/ Document Notification Scheme

Notification scheme is a saved configuration of different notifications to be sent to various recipients. This feature allows you to customize the notifications.
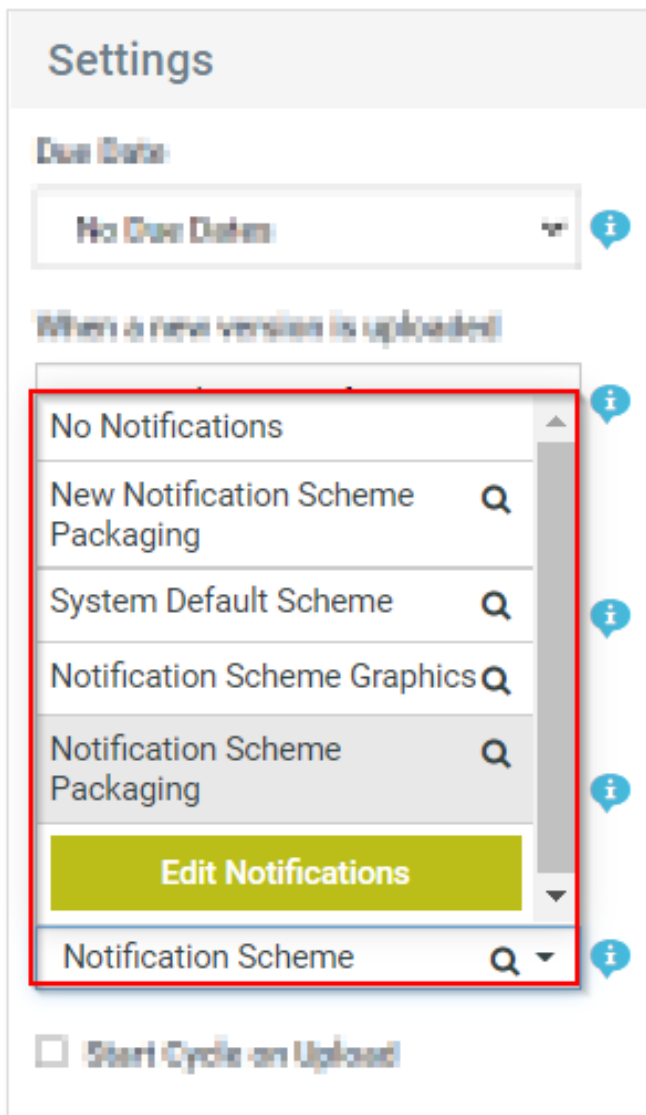
On Folders and Documents, anybody with Edit right over that folder or document can set a local notification scheme, which is then just called the Folder Scheme or the Document Scheme. Each folder or document can only have one notification scheme. They can also inherit the notification scheme from higher up in the folder hierarchy, including all the way up to the site level.

This replaces the previous hard-coded notification setup and approval cycle notification setup. In approval cycles, user can select a notification scheme. It will default to whatever it finds in the hierarchical path. This means:

- Once a document notification scheme is created, that will be used for a new approval cycle on that document. The document notification scheme and its approval cycle will often be created together.
- If a folder notification scheme exists and document notification scheme does not exist, the folder notification scheme will be used. This goes up the folder hierarchy until one is found. If nothing is found, the Site default notification scheme is used.

> **Note:** It is possible to set 'No Notifications' for an approval cycle, if selected then notifications will not be send for that approval cycle.

Creating Folder/ Document Notification Scheme

1. Click Edit Notifications Button. A dialog box opens

2. Select the required type of notification and the recipients who need to send the notification. The user can add or delete a whole block of the scheme using the delete icon next to it. To delete a type/ recipient use the close button next to it. To add unregistered users in default loaded scheme, type their e-mail id on the recipients column.
3. Click Update to save the changes.

If user clicks on the updated Notification scheme, it displays the information regarding the type and the recipients.

9. Approvals

An approval is a sequence of requesting approval for 1 or multiple people, followed by these people's decisions (approve or reject) leading to a final approval state.

> 📄 **Note:** Folders cannot be approved.

Share & Approve offers several ways of setting up approval cycles, ranging from a single stage approval (simple) to an advanced approval (complex) including multiple approves and stages.

The approval of a document runs through an approval cycle. A cycle is created behind the scenes and has

- The ability to inherit the behavior of a cycle from the previous setup or from the setup attached to a folder or the site.
- The cycle can have multiple stages.
- Deleting a document destroys the approval cycle. When the document is restored the approval cycle continues with the approval cycle. Refer *Recycle Bin* on page 80.

9.1. Single Stage Approval

Single stage approval is the default approval. An approval request is sent to one or multiple approvers. Based on the approval decisions they make the document is approved or rejected. The users with the role of approver can approve – One per group.

Single Document

1. Click on Setup Approval in the document overview page.

2. Add Approvers, Notification Scheme, Message, Due Date.
3. Click on the Start Approval button. There will be a confirmation message that the approval cycle is started while the approval status column shows Pending. The invited approvers receive an e-mail invitation with a link to the current document.

Multiple Documents

1. Select Multiple documents.
2. On document actions a setup approval button will be enabled if no approval setup was done for any documents. Click Setup approval button.
3. A dialog box appears similar to the setup of single existing document.

4. Click Start Approval Cycle.

9.1.1. Add Approvers

Add Approvers to set up the approval cycle for the document. User can select existing registered Users, Groups and un-registered users or Create and Invite New user, based on the permissions set.

Shared links are sent to approvers who do not have an EskoID and are specifically invited to approve this document. These users can view the document without a password. To select the approver from the existing users, start typing the name or e-mail address, then select the user from the filtered list.

If the user does not appear, the person is probably not yet invited to the system. The Administrator or Manager can either add users using *My Network* or can invite using the *Create and Invite New User Option*. This option appears only if the user is at least a User Manager.

Alternatively, users can also generate a shared link, for which, type the full e-mail address, and a link icon appears with the e-mail address. Click on it and a light red box with the e-mail address are added to the list of approvers.

User can repeat the process for more approvers. All approvers get their respective request at the same time (parallel approval) and they must individually approve before the document is fully approved.

When selecting a group for approving a document, only one of the group members need to approve.

When there are users already invited to the approval role, the list pre-populates with these approvers. This is handy when multiple documents in the same folder or branch must be approved by the same set of users, then invite these users on the folder level.

9.1.2. Notification Scheme

A notification scheme allows you to specify which User or Groups or Roles receives the E-mail notifications.

User can select a notification scheme to be used in an approval cycle from within the Approval Setup. Share & Approve uses this notification scheme for all its notifications related to the Document or Folder. Refer *Folder/ Document Notification Scheme*.

Notification Scheme drop-down shows:

- The active Site Notification schemes.
- The Folder Notification Schemes of any of the folders in the current document or folder's hierarchy (if one was created).
- The Document Notification Scheme if one was created.

The default selection is either the notification scheme of a parent folder or the default site notification scheme.

The Approval Master can edit the Folder or Document Notification Scheme by clicking on the Edit Notifications button. This opens the Notification Scheme Edit dialog. This new updated scheme will be remembered as the Document or Folder Notification scheme (depending on whether this is a Document or Folder Approval Setup). The updated scheme will not impact the inherited scheme, instead it will create or update the local scheme for the current document or folder.

Message

The approvers receive an e-mail notification when they are expected to approve a document. The e-mail can be customized at the site level by an Administrator. However, a user can add a more personal or a document specific message.

Due Dates

User can set the due date for the approval. The due date is mentioned in the e-mail and the approver receives an overdue notification, if it is not approved or rejected by the due date. The due date defaults to 'tomorrow end of business day' in the respective time zone. Refer *Due Dates* on page 32

9.2. Advanced Approval

A multi-stage approval is known as an advanced approval. It is also called as Complex Approval. A user can set up advanced approval by

1. Clicking on Set up approval within the document.
2. Select Advanced approval set up from the drop-down.

Request Approval to **cmyk.pdf** ℹ️

Approval Setup

Single Stage Approval (Default) ⌄

| Single Stage Approval (Default) |
| Advanced Approval Setup |
| Folder Approval |

Start typing to search for a user or a group ▾

Notification Scheme

System Default Scheme ⌄ 🔍

Message

Please enter an Approval Message

☑ **Add Due Date**

Date 01/06/2021 📅 Time 17:00 ⌄

Forward Approvals

Allow Approval Forwarding to registered and unregistered users ⌄

3. Users can set many approval settings including staged approval, Restart Approvals on upload of new versions and other options.
4. Click Save. Click Start Approval Button.

An Advanced approval setup or a staged approval can be set up by a user, by opening Document details page.

If one of the approvers has rejected the stage, an approval cycle can be continued or stopped by the choice of the person who has set up the cycle.

When one User rejects

| Stop Approval cycle after every approver decided | ⌄ |

Stop Approval Cycle Immediately
Stop Approval cycle after every approver decided
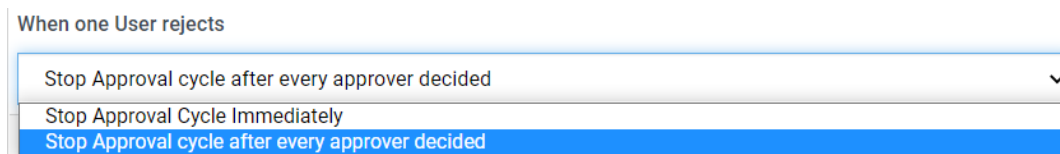
But the whole cycle will be rejected in one of the users rejects any stage. Every stage has to be approved by each user to make a document approved.

9.3. Folder Approval Setup

Folders cannot be approved, only documents can be approved. Document's approval cycle can be quickly set up by copying the folder approval setup, which acts as a template for the documents inside it.

When selecting Folder Approval in the Approval Setup of a document, user can add a due date and change the message and before starting the approval cycle.

The approval setup inherited is the parent having an approval setup. So it is possible to define the approval setup several levels up, if the setup is shared between all these (sub)folders and documents. e.g. user can create a folder for a product line and apply an approval setup to it (e.g. the product manager or graphic director of the product line). Then create subfolders for each project and put the PDF files in these subfolders. If the subfolders do not have a folder approval, the approval setup can be chosen from the product line folder.

9.4. Forward Approval

Forward Approval is the function where an approver can ask another person to approve instead of himself, or in addition to himself. The typical use case for forward approval is an approval by a 3rd party where the uploader only knows an intermediate person and not the final approver(s). The forwarded user may or may not be a user with Share and Approve. The typical use case for forward approval is an approval by a third party where the user who uploads only knows an intermediate person and not the final approver(s). One example is the case where a printer needs approval from a product company or local shop, but the printing order is coming from an intermediate company, e.g. a service provider or wholesaler.

Forwarding approvals is enabled by the Administrator. It is disabled by default due to security reasons. Administrator decides to enable the forwarding to either registered users or both registered and un-registered users.

1. People with approval right can decide whether approval forwarding is allowed. While creating or editing an approval set up

The user can choose from Forward approvals.

1. The choice is remembered for the current set up.
2. The choice is inherited from the folder approval setup to the document approval setup.
2. An additional button to Forward Approval is displayed when approval set up allows forwarding.

> 📄 **Note:** A user cannot forward it to an equipment or a group.

When forwarding the approval, the current approver can choose to remain as an approver or not.

- **Request Approval and take me out as an approver**: The approval cycle will be adapted such that the original approver is replaced by the new approver in the current stage.
  - The added person can add annotations and comments and can approve/reject.
  - The added person can further forward.
  - The forwarded approver keeps view access to the document even after the approval cycle terminated.

- **Request Approval but keep me as an approver**: The new approver is added to the approval cycle in addition to the current approver. Both the approvers are required to approve the document for the approval cycle to be completed.

> 📄 **Note:** If the original approver of the document is 'One of the Group' then any members of the group can forward.

> 📄 **Note:** If the original approver of the document is 'One of Role' then each.

> 📄 **Note:** If forward approval is changed in between an approval cycle, the change will not be reflected in the current cycle, but the future approvals will be affected.

9.4.1. Removing Forward Approvals

The forwarder can delete the forwarding.

1. A cross button will appear when user places the cursor next to the name of the forwarded approver. Click the cross button.
2. A dialog box will appear asking confirmation to withdraw.
3. Select Withdraw.

> 📄 **Note:** If the original approver was taken out before, this action causes the original approver to be the approver again.

> 📄 **Note:** If the approval was forwarded to many by the forwarded approver (multiple forwards), then all the actions becomes invalid.

10. Approving a Document

An approver can approve a document by clicking the Approve Button. ✓ Approve

Once the document is rejected, the user cannot change anything to the approval anymore for this version of the document. The user needs to upload a new version if the approval needs to be re-started. An approval cycle is straight forward if all the approvers approve the document.

11. Rejecting a Document

An approver can reject a document by clicking the Rejection Button. ✕ Reject

This happens when an approver rejects and the setting "when one user rejects" is not set to "Continue Approval Cycle Anyway".

Once the document is rejected, the user cannot change anything to the approval anymore for this version of the document. The user needs to upload a new version if the approval needs to be re-started.

If all approvers approve the document, then the approval cycle is straightforward. But when an approver rejects, some approvers still continue the workflow while others restart the approval cycle.

Following are the options that can be set by a user regarding the rejection of an Approval Cycle:

Stop Approval Cycle Immediately

The entire approval cycle is stopped when an approver rejects, and the following happens:

- The document version gets the final approval status as "Rejected".
- The approval request gets removed from the to-do list of the pending approvers.

Stop Approval Cycle at The End

This option is only available for a simple approval.

- When one user rejects, the approval cycle continues until all the approvers have completed the approval, after which the approval cycle stops with the status as "Rejected".
- The advantage in this option is that, all approvers give comments on the document before a new version is created. This ensures that the next version is approved.

Stop Approval Cycle After the Stage

This option is only available for a staged approval.

- When one user rejects, the approval cycle continues until the end of the current stage.
- When all approvers in the current stage have completed the approval stage, the cycle stops with the status as "Rejected"
- The advantage of this approach is that the opinion of all the approvers of the stage is collected before a new version is created. This ensures that the next version is approved for this stage.

Continue Approval Cycle Anyway

This option is only available for a staged approval and is not available for the last stage in a final approval.

- With this option, the results of prior stages can be overruled by later stages.
- For example, in a two-stage approval cycle, the first stage can be a review with many approvers and the second stage could be a final approval stage with one approver.

When all the approvers reviewed and completed the approval of the document in the first stage, the approval cycle progresses to the next stage. In the final approval stage, the only approver decides to

either approve or reject the document based on the annotations and approval decisions taken in the previous cycle.

12. My Approvals
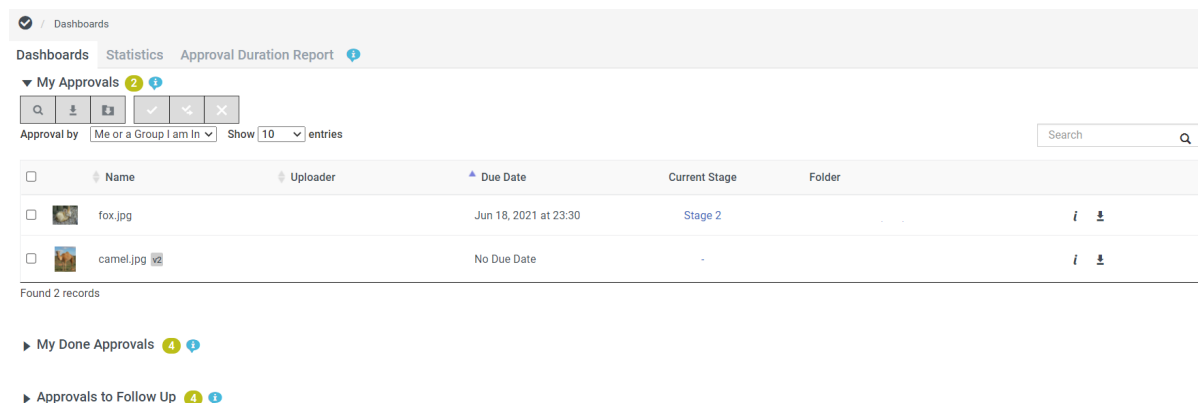
Approval dashboard is visible to all users with site access. To open the page, Click Approvals from the main menu. By default, the page opens with My Approvals and My Done Approvals. To an internal user, the statistics page is displayed.

My Approvals

My Approvals is a list of documents queued for approval either in the individual capacity or for groups where the user is a group member. This list is always kept current and contains only the documents that requires the approval. In case of staged approval, the document appears in this list only when it is due for the approval. The user can open the viewer to Approve or Reject along with annotations for viewable documents or redirected to document details for non-viewable documents.

Details of the approval cycle can be viewed in the document details by clicking on the current approval stage name. A user can Approve, Reject, Forward, Download, View in viewer by options listed above My approvals table. The total number of approvals pending on a user is shown along with My Approvals section.

Records with same Due Date, Folder and Stage comes as faded entry.

Approval by' Filter

Share & Approve allows users to invite groups to approve. The user can either choose the approval to be done by one of the members of the group or all the members of the group. The document is shown in the list if the approval is needed in either individual or in group's capacity. To make the distinction between these situations, My Approvals has a filter 'Approval by' with following options.

- Me: Only documents the user need to approve in individual capacity.
- Me or a Group I am in: Shows both the documents the user needs to approve in individual capacity and the documents for which an approval is pending for a group the user is the member of.
- A group I am in: Shows only documents for which an approval is pending for a group the user is the member of.

The number aside from My Approvals shows how many documents with pending approvals before further filtering after considering the Approval by

filter.   Found 3 records

Search filter

The Search filter can be used to filter approvals based on the document name.

Sorting

The table is sorted by default on the Due Date. Users can change the sorting to any of the columns with arrows (Name, Uploader, Due Date). Sorting decisions are remembered within the session but return to default after logout.

- Selection checkbox: Use the checkboxes to make a selection. This enables the Document action buttons above the table, allowing to download, view or approve/reject. To Force approve or Force Reject action, navigate to the document details or viewer and it is allowed only if the permissions are requisite.
- Document icon: A small icon of the document is shown.
- Document Name: Along with the document icon, the document name is given and can be sorted with the arrows.
- Version: Displays the version of the document.
- Uploader: The name of the uploader as Lastname, Firstname (username)
- Due Date: Displays the due date with the date and time.
- Current Stage: The current stage of the document in the approval cycle.
- Folder: Folder name is displayed clicking on folder name navigates user inside folder. For document present inside root, Sitename(root) is displayed.

Actions

Next to the displayed folder name, two icons for different actions are present.

- **Info:** Opens the document in Document Details view.

- **Download:** Downloads The document as a zip folder.

My Done Approvals

My Done Approvals is a list of documents (force) approved or (force) rejected and the list shows approval documents from when a user was added to the Share & Approve site. The list is ordered to submission date with the latest first and by default shows ten documents per page. Users can change sorting by clicking on the triangle arrows in the column's headers, but this rarely makes senses for My Done Approvals. If the user is looking for a specific document, it is best to search using the text search box which searches on Document Name.

Users can access the Document details page for non-viewable documents or the viewer for viewable documents by clicking on the thumbnail or the document name.

Users can click on the current approval stage name to go to the document details page which shows more approval details.

When each approval is done as part of a group, the document still appears in the list while it does not appear, when somebody else has approved on behalf of the group.

Effect of staged approvals and document versions

The same document appears multiple times if user approved or rejected it multiple times. Each of the approval actions appears in My Done Approvals. This may occur when:

- A user is an approver in more than a stage.
- A user was an approver for more than one version. E.g. when the user rejects the first version, which then got corrected to a second version, which was later approved.

Status of the document may be different from the My Done approval status.

Approvals to Follow-up

Approvals to Follow Up is a list of documents for which a user is the Approval Master. The section appears automatically in the page 'Approvals' as soon as the user is the approval master of at least one document. Approval master can be changed in the advanced approval user interface.

Approvals to Follow Up makes it easier to follow-up documents that are pending for approval and to track documents are approved or rejected recently. Approval Masters have a number of approvals pending and the Approvals to Follow-Up panel is designed to help prioritize approvals to chase with reminder e-mails or which documents to move forward or backward in workflows based on the approval decisions.

Filters

Approvals to Follow Up has filters on

- **General approval status:** Pending, Stopped, Rejected, Approved, Approved with a condition. The force versions are filtered together with their non-force versions. Select multiple checkboxes to show documents of any of these conditions.

- **Approval finish date:** An approval is finished when the approval cycle stops, either because it was stopped manually or because it got a final approval status: any of (Force) Rejected, (Force) Approved, (Force) Approved with a Condition). This indicates the approval master which documents to pay attention to.

- **Search box:** that searches on the Document Name.

When using multiple filters, the documents fitting the intersection of filters are shown.

Sorting: The table is sorted by default on the Due Date. The user can change the sorting of the columns with arrows (Name, Due Date and Finished Date). Clicking once more on the arrows of the column

already sorted, reverses the sort order. Sorting decisions are remembered within the session but return to default after logout.

My Forward Approvals

Forward Approval enables an approver to forward the approval request of a document to another user and has an option to remain as Approver or can forward the document and not remain as Approver. Forwarding the approvals may occur when the approver might need to seek the opinion about the document or may want an approval by a third party where the uploader only knows an intermediate person and not the final approver(s).

Users can keep a tab on the approval even after forwarding the approval in My Forwarded Approvals option. Users can also choose to withdraw the forward in the same widget.

My Forwarded Approvals widget appears if the user has forwarded at least one approval.

In this table the documents the user has forwarded, sorted to due date is shown by default. Users can change the sorting to Finished Date or Name. The table shows both the documents that are already approved as documents which are not yet approved. The status is the overall status of the document, not the decision of the person to which the user has forwarded. Current stage is the current stage of the document, and not the stage in which the user has forwarded. Users can see details of the approval cycle by clicking on the Current Stage.

Withdraw: Approvals once forwarded can be withdrawn provided, the forwarded approver has meanwhile not taken a decision. After successful withdrawal, the approval returns to the user who forwarded.

> **Note:** When the user hovers over each status thumbnail, it shows the status of each state of
>
> ✓
>
> the document. For example, if the user puts the cursor over   the document status shows as approved.
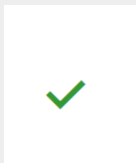
> **Note:** If the version number of a document is displayed in grey then it is the latest version.

12.1. Approval Statistics

Approval statistics is visible only to the internal users of the site. The page shows a combination of graphics and tabular form (based on faceted search) and filters to find approvals of interest.

The following widgets are present in the page

Pending Approvals

Pending Approvals shows a graph and a list of the currently pending approvals. The graph shows a distribution of the listed approvals over one of the key features of approval cycles. Pending Approvals is only visible to Internal Users.

The list largely works like the other approval lists (e.g. Approvals to Follow Up) with:

- A set of sortable columns. Users can change sorting by clicking on the arrows/triangles in the header of the table. The table is sorted on Due Date by default.
- Thumbnail and name hyperlinking to the viewer.
- Due dates are shown in red when the due date is passed.
- Current stage hyperlinks to the approval details page (also when there is no stage name, click on -)
- Folder hyperlinks to the parent folder of the document.
- Approver icons are shown. Hover over them to see the e-mail of the approver.
- Ability to show more items in the list by changing the value in 'Show x entries'.
- A search filter which filters on the name. Searching on folder or stage can be done with the advanced filter.

Which approvals are seen in the 'Pending Approvers' list?

A document appears in the list when:

- It has an overall approval status 'Pending'
- Users can view the document
- It is not filtered away by one of the filters

Graph and Group By

The graph helps the user to visualize data in the list. The graph shows the total number fitting to the filter, but across the pages. Changing the filter changes the graph but changing 'Show x entries' has no impact on the graph.

A drop-down 'Group by' has following values:

- **Approvers:** The graph shows how many documents are yet to be approved by each approver. When there are many different approvers, only the top 20 is shown. When a document is yet to be approved by multiple approvers, the document is counted for each of them (so with only 1 pending document, users can still see a graph with 2x 1 approvals. Only currently pending approvals are counted. When an approver has already approved or rejected in the current stage, it is not counted anymore. Also, approvals in the stages yet to begin are not counted.
- **Due Date:** shows the distribution between overdue approvals, approvals due today, approvals due in the coming seven days and the rest (including approvals without a due date)
- **Uploader:** shows the distribution over the uploaders.
- **Stage**: shows the distribution over the stages. This can show which stages are the bottlenecks. One side-usage can help showing different types of approval, even when having only one stage. Better insights can be received by naming the stages of even single-stage approval cycles.
- **Advanced Filter:** Click on the filter icon to show the Advanced Filters dialog. When the filter is active, the filter icon is red.

Advanced filters allow a user to create more complex filters. The graph and list only shows documents matching the filter. The advanced filter combines with the name filter in the search box (using AND logic). Start the Advanced filter by clicking on the filter icon. When the advanced filter is active, the filter icon is red.

Due

Only shows documents where the due date of the current stage fits:

- All: No filtering on due date (default)
- Overdue Now: Matches every document which is pending and has a due date for the current stage in the past.
- Overdue for Days: As Overdue Now but the due date must be at least a number of days in the past (fill in a value in Due Days). 2 days in the past means 48 hours (so checking is done on the time too).
- Due in Days: Matches documents with a due date for the current stage in the coming x days (again also matching on the time). Overdue documents are not shown.

Folder

Only shows documents in the folder fitting the input. Note that the user can enter a path e.g. customer 1/pdf. Folder search is case sensitive.

Approvers

User can select any registered user.

Stage

User can type a stage name or a fraction. When e.g. searching for "1", it would find "Stage 1" or "1st Stage".

Approval Master

Users can select:

- Any: does not filter on approval master.
- Me: Only shows documents on which the user is the approval master.
- Other: Shows an additional drop-down with all the registered users. Start typing to filter the list to a smaller list.

Done Approvals History

Done Approvals History shows a donut chart and a list of all the approvals operations performed like approval or rejection. The graph shows a distribution of the approvals either by approvers or decision or by approval stage. Done Approvals History is only visible to Internal Users. The list and the graph correspond to the documents for the current site only.

A document appears in this list when:

- A set of sortable columns. Users can change sorting by clicking on the arrows/triangles in the header of the table. The table is sorted on Submission Date, in ascending order, by default.
- Status denotes the current approval status of the document. The final state of the document.
- Thumbnail and name hyperlinking to the viewer.
- Uploader, as the name suggests is the person who uploaded the document.
- Submission Date denotes the date and time the document was approved by the approver.
- Decision hyperlinks to the approval details page and displays the stage name and the decision taken by the approver for that stage (as an icon).
- Folder hyperlinks to the parent folder of the document.
- Approver displays the e-mail of the approver for that stage.
- Ability to show more items in the list by changing the value in 'Show x entries'.
- A search filter which filters on the name. Searching on folder, approver or stage can be done with the advanced filter.

Done Approvals History list shows documents along with its folder location, status, uploader, submission date, approver and the decision. List can be sorted on some of the columns like Name, Submission Date and Uploader. User can click on the document name or thumbnail to view the document in viewer. To know more on the approval stage, click on the decision icon. To search on the name of the document, use the search box or the user can search on folder, approver or stage with the advanced filter.

Graph and Group By

The graph is the visual representation of the list shown. User can hover over the segments of the graph to view more details. The graph shows the total number fitting to the filter, but across the pages. Changing the filter, changes the graph, but changing 'Show x entries' does not impact the graph. Hovering on the item in the legend of the chart highlights the segment corresponding to the item. Clicking on the items in the legend removes that segment in the chart, but the list is not affected.

A drop-down 'Group by' has following values:

- Approvers: Shows how many approval operations were done by each approver. When there are many different approvers, only the top 20 is shown.
- Decision: Shows the distribution between approved, approved with condition, force approved, force approved with condition, rejected, rejected with comment, force rejected, and force rejected with comment.
- Stage: Shows the distribution over the stages. Users can view different types of approval, even when having only one stage. By naming the stages of even single-stage approval cycles, user can get better insights.

Advanced Filter

Click on the filter icon to show the 'Advanced Filters' dialog where the user can set up more complex filters. Each of the filter items works together with AND logic. For example, the user can create a filter searching for documents in 'Folder' AND by stage name. When the filter is active, it is red and black when inactive.

Export to CSV

Click on the export to CSV icon to download the current results of the table into a CSV format.

12.2. Approval Duration Report

The Approval Duration report summarizes the time taken for approvals to be completed. The user can use this report to infer the approval cycle efficiency and make decisions on their approval management process.

The report consists of 4 sections:

- Graphics
- Aggregated approval statistics
- Filters
- Approval duration report table

Graphics

The graphic section consists of two options. Each option displays different donut charts.

- **Stage KPI:** This option displays the average time taken for the completion of each state in the approval cycle.

- **First Time Right KPI:** This option displays the number of approval iterations a document had, before the approval cycle was completed.

Aggregated approval statistics

The Aggregated Approval Statistics are displayed next to the graphics. This consists of two different statistics based on the graphics selected:

For Stage KPI

- **Average Approval Duration:** The average time taken for a complete approval. An approval cycle is considered to be completed, when the document is approved.

- **Average Approval Cycle:** The average number of cycles the document has gone through before its completion.

- **Average Stages Duration:** The average stage duration of each stage will be shown under this section.
- **Average Approval Status:** The status comprises two efficiency parameters "On Time" & "Late". Approval documents that are completed before due are considered "On Time" & the rest as "Late"

For First Time Right KPI

- **First time right:** The total number of documents which were approved on first time.
- **2 versions:** The total number of documents which were approved within two iterations.
- **3 versions:** The total number of documents which were approved within three iterations.
- **4 or more versions:** The total number of documents which were approved within or more than 4 iterations.

Filter

Approval Duration report consists of the following filters:

- **Version Filter:** The filtering can be done on each version. You can apply this filter to multiple versions using comma separated input. For example, 1,2.
- **Status Filter:** The filtering can be done on Approval Status. You can select multiple status from the drop-down.
- **Date Filter:** The filtering can be done by date:
    - **Date Period:** By default, the date filter is set to one month. You can select the approvals using Quick date or Absolute date filters. The Quick date filters can be used to select quick date range. To select an absolute custom date range, you can select Absolute.
    - **Filter Date By:** You can choose a date period filtering also with its Due date or Start date or End date. For example, if your date period is one month (30 days) and the selected Filter date by is the Start date, then all the approvals started in the 30 days period is retrieved.
- **Overdue Duration:** The filtering can be done on the overdue duration of the documents. When you click on this filter a drop-down list appears:
    - **Both on time and late:** When you select Both on time and late, all the approvals which were completed before and after the due dates are retrieved.
    - **Late:** When you select Late, all the approvals which crossed the due dates are retrieved.
    - **On Time:** When you select On Time, all the approvals which did not cross the due dates are retrieved.
    - By default, this filter is set to "All", that is all the approvals with the current Overdue Duration is displayed. You can set the Overdue duration with the combination of this filter in which the time frame of the approval can be selected. This filter offers three input boxes, where you can select the months, days and hours by which the approvals were either early or late.

        For example, if you select Overdue Duration as "On Time" and in the input box the time is set 6 hours, then all the approval cycles which was completed before 6 hours of due date is displayed (difference between approval cycle due date and approval cycle end date is equals or greater than 6 hours).

Approval duration report table

The Approval Duration Report table is displayed with the records on the information of the filter mentioned above. The table comprises following columns.

- **Name:** The name of the document.

- **Version:** The version of the approved document.

- **Approval Status:** The final status of the approval cycle.

- **Start Date Time:** Starting time of the approval cycle.

- **Approval Date Time:** Time when the approval cycle was completed.

- **Approval Due Date:** The due date of the approval cycle.

- **Approval Duration:** Total time taken for the completion of the approval cycle.

- **Stages:** On clicking Stages, a mini row will be opened containing a table with the information on each stage. Columns of the tables consists of:

    - **Name:** Name of the stage.

    - **Duration:** Time take to complete the stage.

    - **Due Date:** Due date for the stage.

    - **Status:** Based on due date status will be either "On Time" or "Late".

12.3. Overview of Approval Statuses

Following are the different types of Approval Statuses:

No Approval Setup Defined

No approval cycle was defined yet (or it was cleared). This is the normal situation for a fresh document.

Use the setup buttons to create an approval setup of each choice or load the folder approval setup if it is defined for any of the parent folders.

Not Started

The approval setup is defined (approvers have been assigned, stages are created) but is not yet started or has been stopped.

Any user with Editor role (or higher) to this document can start the approval cycle by clicking on "Start Approval Cycle". People who can start the approval cycle can also stop it by clicking on Stop Approval Cycle.

Pending

The approval cycle is running for the moment. In a running cycle, the user cannot change the setup. If they want to change the setup, first stop the approval cycle.

Approved

The document (this document version) is approved. Once the document is approved, users cannot change anything to the approval anymore for this version of the document. User need to upload a new version if the user wants to re-start the approval.

Approved with a Condition

The document (this document version) is approved but one of the approvers entered a condition. Whether approvers can set a condition is depending on the setting "Allow Conditional Approval" in each of the stages.

Once the document is approved, user cannot change anything to the approval anymore for this version of the document. The user needs to upload a new version to re-start the approval.

Force Approved

The document (this document version) is approved but this has been forced by a user with "force approval" rights on the document (people with Manager Role or Administrators or the Approval Master of this document).

Force Approved with a Condition

This is the combination of the previous 2. The user with force approval rights has approved but has entered a condition.

Rejected

The document is rejected. This happens when one approver rejects and the setting "when one user rejects" is not set to "Continue Approval Cycle Anyway".

Once the document is rejected, the user cannot change anything to the approval anymore for this version of the document. The user needs to upload a new version to re-start the approval.

Force Rejected

The document is rejected but this has been forced by a user with "force approval" rights on the document (see the Force Approved status for understanding who can do this).

13. Annotation and Approval Report

The user can get a report containing information about the annotations and the approval states of a certain file. The annotation and approval report consists of

- **Main Page** (always generated)
- **Annotation Report**
- **Approval Report**

The main page is always generated while the user can choose either to generate an Approval report or Annotation report or both. Thumbnails are created wherever possible based on the file type or else a placeholder image is shown.

Both the report pages contain page numbers and a site logo if it is available. Reports are generated in A4 size standard.

The Main Page

The main page contains a thumbnail of the first page of the file and the details regarding the file. This page can be either portrait or landscape, depending on the format of the provided file.

The following are the details that are contained inside a report:

- Name of the file.
- Full path of folders it is in.
- Site it belongs to (based on the option chosen in Setup > General Site Settings > Annotation and Approval reports).
- Unique ID of the file.
- Version of the document.
- General approval status (with the date).
- Number of annotations for the file.
- Creation date and time.
- Modification date and time.
- The date and time of the report download.
- Approval Status along with the date and time if approved/rejected.
- The number of annotations made.
- Size of the file.
- Version of the file.
- Name of the user who downloaded the file.
- Click-able link to theShare & Approve#Document Details page.

The Approval Status Report

The second page of the report contains the Approval Report and has the title "Approval status". The report comprises of a table with a header that describes the three columns:

- **Status:**#The status of the approval action for that approver (e.g., Pending if he didn't do an action yet).
- **Approver:**#The name of the approver who is the part of the approval cycle and the time and date of the approval.
- **Comment:**#The comment that approver gave when the approval action was committed.

The Annotation Report

For each page of the file containing annotations, a page which contains the annotation thumbnail page is added together accompanying an annotation table.

The annotation thumbnail page contains the thumbnail of the certain page with the annotations drawn over the thumbnail.

Each annotation has a line with the annotation's color that is headed away from the center of the image. This line connects with the number of the annotation.

For each annotation thumbnail page, an accompanying table is drawn. It has the title "Annotations on page <x>" where <x> denotes the page of the original file.

The table has the following columns:

- (unnamed): Contains the numbers referencing the annotations in the thumbnail.
- **User:**#The user that created the annotation.
- **Date:**#Date and time the annotation was made on. It is written in the date format of the language of the user or defaulted to a fixed format, as specified in the General Site Settings.
- **Comment:**#This column contains the comments accompanying the annotations.
    - The text in these cells can contain simple markdown. This is bold, italic, underlined, strike-through, sub- and super-text. Left and right alignment is also possible.
    - It is possible that italic doesn't show in certain languages because the italic version of the font is not available.

This report can only be generated for viewable files. If the file is not viewable, the main page will list that there are no annotations possible for the file.

> ⚠️ **Attention:** If the report generation takes longer than 50 seconds, it may fail to generate the report. It is recommended to try again after five minutes.

13.1. Downloading Annotation & Approval Report

User can choose between Annotation or Approval report or both. A user with read only access can download the report. There are different ways to download the report:

- Click on the More Action button.
- Click on the More Action icon (three dots) on the document.
- Click on the Annotation and Approval button (pdf) inside the viewer.
- To download reports on multiple documents, select the documents > click on more and then download.

    1. Click on More Action.
    2. Choose Report Settings from the dialog box opened.

        - **Language:** Select the language wanted from the drop-down list. The default language is the language of the user.

        - **Report Type:** User can select Annotation or Approval Report or both.

        - **Version:** Select the version wanted from the drop-down list. The user can select a range of versions with lower and upper bound or can select last or all. The default version set is the last version.

- **Zoom ins:** Selecting this option displays the clear (zoomed) image of the annotations made.

- **State Filters:** The user can choose the state of the annotation before downloading the report. Select the filter from the drop-down list. The list contains None, Must Contain and Must Not Contain. If the user chooses either Must Contain or Must Not Contain, a new drop-down list will be displayed where the user can choose the different states of annotation such as None,Accepted, Rejected, Cancelled, and Completed.

- **Users Filter:** Selecting Users Filter from the drop-down list will display a new drop-down list where the user can filter the annotation with regard to the users who have made annotations.

> **Note:** When multiple reports are downloaded the version options are limited to last and all.

3. Click Download Report, a progress notification is shown. The reports will be downloaded by the browser.

14. My Network

My network is the place where the respective users, groups, partners, (customers, suppliers, other partners) etc. are maintained.

It is specific to each Esko Cloud Account but is shared between the sites of Esko Cloud Account (if there are more than one).

The Users and Groups within the site is shown under My Network. A user with higher privileges like a Manager can add or delete new users and groups. The Administrators has the power to create new partner network and to add equipment. When a user clicks on My network from the menu, it displays a table with Users and Groups as icons. If the Administrator has configured partner and equipment, then the table shows as below.
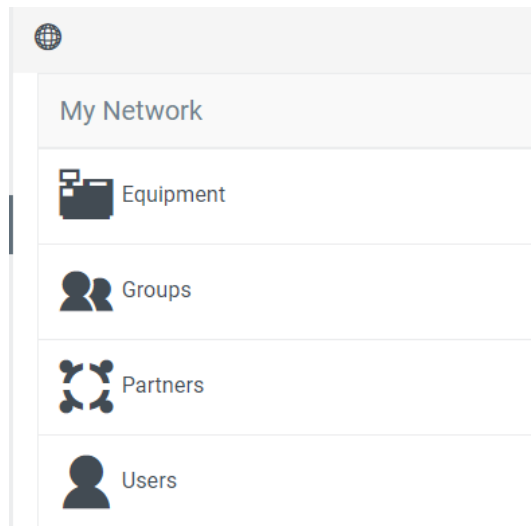
> 📄 **Note:** External users cannot access My Network. The menu they view consists of Recent, Documents, My Approvals and My Contacts. My Contacts show the partner manager details or else the tab shows **"No contact information available, contact Site Administrator"**. If External User is created without a partner, this item will not be present.

14.1. Users

A user is a person who uses Esko Cloud Account. A user normally has a single EskoID but can be invited to multiple Esko Cloud Accounts. That is, the user can work for multiple organizations, either as employee or as employee of a partner or in any another relationship.

When the user opens the Users list, the list shows the details of ten users. The user can use the page numbers at the bottom of the list to see more users or the number of visible users can be changed at the top of the table (Sort by).

A user can search another user using their first name, last name or e-mail address at the search box.

Refer *Registered and Unregistered Users* and *Internal and External users* to know about different types of users in Share & Approve.

Click on Users to shows the list of users. The list contains:

- Last Name
- First Name
- Esko ID
- Company/Location
- Owner: Last name, First name of the person who created this user
- Actions:

  - **Show User details**: Click the 🛈 button this will display the details of the user or else the details can be viewed by clicking on the first name or the last name of the user. The user with higher privileges like a Manager can edit the details of another user by clicking Edit button.

  - **Edit User details**: Clicking the button ✏️ redirects to the page where the user is in. For example, the user can be a part of the User Managers, Group Managers or Administrators group. The details of the users can be edited. But the first name, last name and the EskoID cannot be edited. An option to resend activation mail is available. Users can be edited from external to internal users and their group will automatically change from external users' group to internal users' group. User details can also be edited by choosing Edit button by clicking the name of the user.

  - Send e-mail: By clicking the email button, the user can send an email to the other users..
  - Delete: Delete option is available only when the user is in the User Managers, Group Managers or Administrators group.

> **Note:** Clicking a name shows details of the user.

14.1.1. Add Users

1. To Add new users:
1. Click on Add User to create a new user. Only members of the groups, User Managers, Group Managers and Administrators can create users.
2. Choose internal users for people of the company and external users for all others.
3. To create the user, enter their e-mail address. The system will now verify this user. There are 3 cases:

   - The user has no EskoID. Then enter First Name, Last Name and optionally function, initials and telephone number. Clicking on Create will create an EskoID for this user and sends a notification.
   - The user has an EskoID but is not yet invited to the site. The site will display a green star next to the form and fills the name automatically. Clicking on create will give this user access and will send a notification.
   - The user already in the Users list. There will be a notification and the user already created cannot be created again.

4. In case you choose 'External' for the User type, there is also an option to set a partner optionally. If the partner list is empty or the partner who need to be assigned is not appearing, first create it through My Network/Network > Partners.

Note:

- Newly added users may not be able to access or view any document until they are invited to a folder (or the root) of the site(s).
- It is always recommended to add External users to the Partner Network. So that if the Partner Network is deleted the user will also get automatically deleted.

14.1.2. Registered and Unregistered Users

Registered users are users who access Share & Approve/Job Onboarding using their EskoID. This is a username/password combination where the username is normally the e-mail address while the password is chosen by the user. An EskoID enables access to multiple systems powered by Esko Software including the Share & Approve/Job Onboarding application.

Unregistered users are users who enter the system using a hyperlink sent to them via an e-mail. Emails are usually sent with a link valid for a defined time for viewing or for approval of the document. These users are not visible in the list of users of Share & Approve/ Job Onboarding.

14.1.3. Internal and External Users

Internal users are users from the company. External users are all other users. For example, for a packaging converter, the designers, customer service reps, salespeople, project managers, etc. are internal users while the customers are external users.

Internal and External users are both registered users. Internal users are normally users of the company who owns the site and can view all the users available in the site. Internal users can navigate to My Network showing Users, Groups, Equipment and Partners. External users are assigned as a partner typically by the name of their company and can view only the users of the same partner and their partner manager. External users get My Contact showing their partner manager if a partner and partner manager are assigned instead of My Networks. The main differences between these user types are the default access rights and the user interface.

The person who creates the user in the system will decide whether the user is internal or external. It can be changed later.

External users have less access than internal users on the site. They do not have the 'My Network' menu item. Consequently, they can't see other users who are defined in each network and they cannot see the names of other partners and their users. External users under same partner can see each other.

Internal people can see all partners and their users.

> **Note:** Be careful to not assign external users as internal users.

14.1.4. Invite and Share

Users can Invite Users and Share the link of the document to unregistered users using the share option in Share & Approve.

In most cases there will be an option either to Invite user or to Share the link of the document. But when the user creates a folder, the user is asked for different options. Refer *Creating Folder* on page 22

In that scenario, creator of the folder can Create a new user (external or internal) or can select from the existing list of users, groups or equipment.

The users invited via Invite Users has the access allowed by their role.

1. Select Invite Users from the option.
2. Following dialog box appears

Select the User, Group or Equipment from the list. If the User is not added already click Create and Invite New User.

3.

If the user added a new user click Create else, select from the drop-down list.

4. Select the role for the User from the drop-down.

5. Write a message (optional) for the Email notification for that user.

6. Click Create.

Users can be given access via Sharing a link. If that is been selected, then an E-mail is sent with an encrypted link behind the view button. Whoever clicks the button in the e-mail is given access to the data. Currently, Share & Approve only allow read-only access via Share a Link. Refer the section below about Share a Link.

Share a Link

Share a Link is used to give access to unregistered users to review or approve a document.

When Share a Link is selected, an e-mail is sent with an encrypted link. Whoever clicks the View button in the e-mail is given access to the file.

> **Note:** Share & Approve allows read and download access via Share a Link. If Request Approval is selected, the user can also approve the document.

> **Note:** Approvals by Share a Link cannot be initiated on folders and documents that already have an approval cycle on going or completed.

Users can access Share a Link via the Share icon in a folder or a document.

• Share a Link in Folder Share icon displays the following dialog box:

• Share a Link in Document Share icon displays the following dialog box:

Share a Link for VIEW_LUMI_PLUS_CARTON_GREEN.zae ⓘ

* E-mail Address

| Enter E-mail | ▼ |

Copy To Clipboard

Role

Reviewer

Expiration Date

| 01/28/2022 | 🗓 |

☑ Request Approval

Starts a single-stage approval cycle with the chosen people

☑ Add Due Date

Date | 10/29/2021 | 🗓 | Time | 17:00 ⌄ |

Forward Approvals

| Don't allow | ⌄ |

Message(optional)

| Write your Message |

Cancel | **Share Link & Start Approval**

Note: When the approval of a document is already started, the Share a Link dialog box of the document will be as same as the folder.

1. Enter the e-mail address of the user you want to share the link with. The user with a shared link usually has the role of a Reviewer.
2. If the user is new to the site, an Unregistered User E-mail Language box appears. You can select a localized language for your user from the language drop-down. Click Ok. The default language is English.
3. Select an Expiration date to your invite from the calendar. By default, a link expires 90 days from the day of creation.
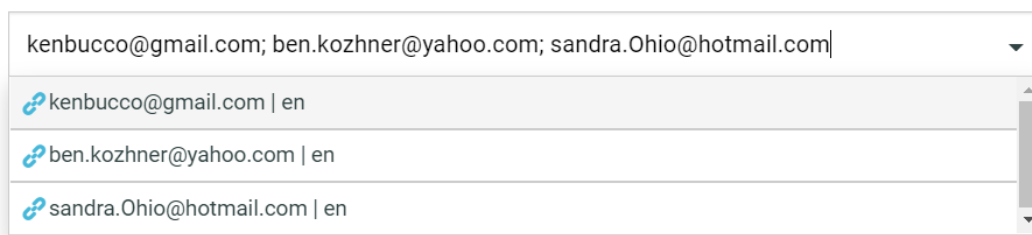
Click Share Link for sharing the link without approval cycle

4. If you need the user to approve the document, select Request Approval. This enables you to add a due date and choose whether the user can forward the approval. Refer *Due Dates* on page 32 and *Forward Approval* on page 49.

5. Click Share & Start Approval to share the document for approval.

Selecting Multiple E-mails

- To share the link with multiple users, use ";" and space after each e-mail address. The e-mail addresses can be either entered manually or copied and pasted into the E-mail Address box. For example, when the e-mail addresses **kenbucco@gmail.com; ben.kozhner@yahoo.com; sandraOhio.125@hotmail.com** are copied and pasted,
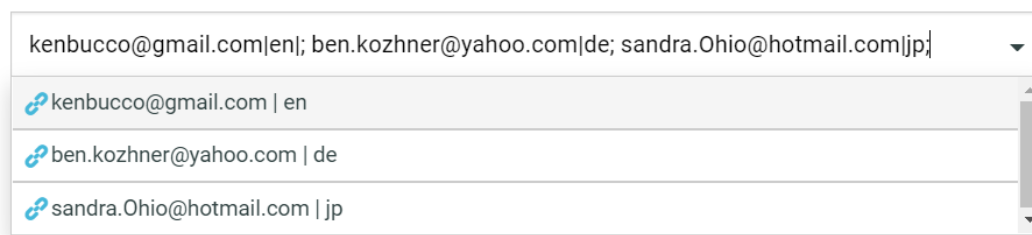
* E-mail Address

| kenbucco@gmail.com; ben.kozhner@yahoo.com; sandra.Ohio@hotmail.com | ▼ |

🔗 kenbucco@gmail.com | en

🔗 ben.kozhner@yahoo.com | en

🔗 sandra.Ohio@hotmail.com | en

By default, the language will be English.

- To share the link with users of a diverse language group, add a pipe "|" and the respective language acronyms followed by ";" and space. For example, when the e-mail addresses along with different language acronyms kenbucco@gmail.com|en|; ben.kozhner@yahoo.com|de; sandraOhio.125@hotmail.com|jp; are copied and pasted,

* E-mail Address

| kenbucco@gmail.com|en|; ben.kozhner@yahoo.com|de; sandra.Ohio@hotmail.com|jp| | ▼ |

🔗 kenbucco@gmail.com | en

🔗 ben.kozhner@yahoo.com | de

🔗 sandra.Ohio@hotmail.com | jp

Note: To re-use the e-mail addresses, click Copy To Clipboard.

Refer *Manage Permissions* on page 22 for more details.

14.2. Groups

A group is a set of users or equipment (or a mix of both users and equipment) used to invite to folders or documents or approvals.

A user can create a group with a unique name using the Add Group option.

1. Navigate to My Network > Groups> Add New Group.

2. Add a Group Name (mandatory), Group Description and Group E-mail.
3. Click Create.

   Group interface consists of a table including:

   • Group Name: Name of the group is displayed. Clicking on it shows the group details.
   • Group Description: A short description of each group is given.
   • Group e-mail: When the user set a group e-mail, invitation mails and follow-up mails are sent to this e-mail address. When group e-mail is not setup, e-mails are sent to all group members.
   • Group Manager: Shows the name of each group managers.

The table has check boxes for multi selection. Filtering option is available for Group Name, Group Email and Group Manager. A user can also filter search using keywords.

14.2.1. Default Groups and their Permissions

A number of built-in groups are created when the Esko Cloud Account is created for convenience. Some of the built-in groups are added when enabling certain features. For example, adding a Partner Network, creates a group called Customer Managers to determine the people who can manage customers. Built-in groups cannot be deleted.

Following are the built-in groups that exist:

Administrators	Have a wide access to the system. The administrator has the complete access to all data in the system such as Users, Groups, files, and configuration. It is a good practice to limit the number of members of the Administrators group to two.
Application Managers	Can manage an application like Share & Approve sites. Can change the customization and e-mail setup of the site.
Group Managers	Can view all users, can create, edit, delete users as well as groups. Can add or remove users to all groups except Administrators.

	Group Managers cannot see folders or documents unless the group Group Managers is explicitly invited to them.
User Managers	Can view all users. Can create, edit, delete users. Cannot add or remove users to groups. User Managers cannot see folders or documents unless the group User Managers is explicitly invited to them.
Internal Users	Users marked as Internal when creating or editing the user are part of the Internal Users group and usually has all the users working for the company and using the site. The Internal Users group is used by the system to determine the visibility of My Network/Network. Internal Users can view the details of all users in the Esko Cloud Account, including the external users.
	The user can use the Internal Users group also to invite all the (registered) internal people to certain or large parts or even all the Documents/Folders.
External Users	Users marked as External while creating or editing the user. This group is assumed to contain all the users who do not work for the company and are using the site. External Users will typically not be able to view My Network/Network and External users may see their own colleagues (users of the same partner network or their partner manager). (
Users	A group with all the registered users (anybody created with Add User and appearing in the list My Network/Network > Users). Can be used e.g. to be invited to a top-level folder with public information (contact information, how to use, marketing information. Also used internally by the system to give read access to e.g. the site customization.
Customer Service Representatives	The CSRs added to the site are displayed in this group. CSR is a person from the converter company who is the contact person for the Print Buyer. The users in this group are assigned to one or multiple partners.
Customer Managers	Customer Managers are internal users invited into the site to manage the Print Buyers. They do not have full access to the site, but they oversee the partners set for them. The members of the group "Customer Managers" can create/edit/delete Partners of the type "Customer".

14.2.2. User and Group

Registered users can only be added to a group. Add members to group dialog shows a list of registered users. Users who are already member of the group are indicated with a tick mark. If there are many users, only the first 10 will be shown. Use the Search box to enter a part of the name or e-mail address and find the users to be added.

1. Navigate to Groups. The list of basic groups created by the system are displayed.
2. Click the group name. The following page opens
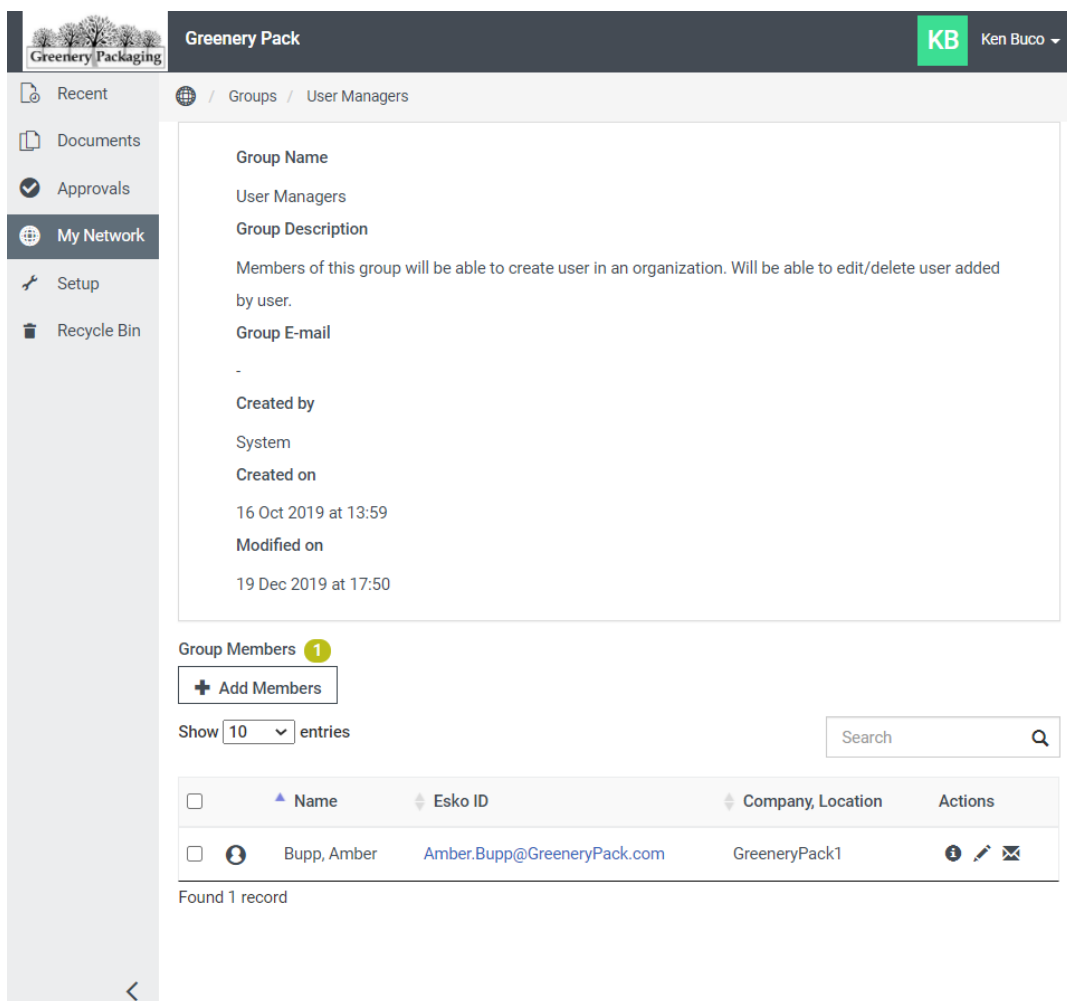
3. Click Add Members. Select the users from the list.
4. Click Add.

To remove a member from the group,

1. Select the user from the group.
2. This enables the Remove from Group button instead of Add Members button.

3. Click Remove from Group.

14.2.3. Access Rights for Groups

Groups can be used in the same way as users like

- Groups can be invited to share a folder or document and make the folder or document visible to any user of that group. The sharing role (same roles as for users) determines which other actions the group members can execute.
- Groups can be invited to an approval setup. The document then needs to be approved by any member of the group or all members of the group depending of a setting done at the approval setup.

When users are member of multiple groups, they will get the 'union' of the rights of each group. Users rights as an individual user and as a group member only add up which means that an action can be done both as a user or as a member of any of the groups the particular user is in.

Note: If a new member is added to the group where the approval process is already in process, to add the new member to the process, approval cycle needs to be stopped and restarted. Else the new member cannot be a part of the approval process.

15. Recycle Bin

Recycle Bin is the location where all the deleted folders and documents are temporarily stored and can be restored later if necessary. When a folder with documents is deleted, the folder, its documents and sub folders are listed separately in the Recycle Bin.

Note: Only Administrators and Internal users have access to Recycle Bin.

Note: The deleted folders and documents will be available for 30 days.

Select Recycle Bin from the left menu option. Clicking Recycle bin option opens the recycle bin view. The table contains the details of the deleted folders and documents sorted on the basis of recently deleted. The table comprises of the following columns:

	Name	Deleted By	Deleted On	Folder	Size(KB)	Actions
☐	GET SET_WRAPPER_BLUE1.pdf		Nov 15, 2021 at 16:33	Vanish Collection/The fall collection	4,182	↩ ✗
☐	GetSet.pdf		Nov 15, 2021 at 16:32	The New collection	4,754	↩ ✗

Found 2 records

- **Checkbox:** The user can select the documents or folders.

- Icon/Thumbnail: The thumbnail of the deleted. When you hover over the thumbnail of a document, you can see its enlarged view.

- **Name:** Name of the document or folder.

- **Deleted by:** The full E-mail address of the user who deleted the item is shown.

- **Deleted on:** The time and date in which it was deleted.

- **Folder:** The name and path of the folder.

- **Size(KB):** The size of document or folder in KB. The size of folders are shown as 0 KB.

- **Actions:** The actions column consists of

  - **Restore:** Option to restore the document or folder.

  - **Delete:** Deletes the document or folder leaving the statistical events for later reference. The events that have been recorded on the deleted files are displayed on My Approvals. When you

select Delete, a confirmation notification will be shown "*Are you sure you want to delete? You cannot restore deleted file(s)/folder(s), but its usage will still reflect in statistics*". My Approvals

displays the deleted file status as icon.

The table displays deleted folders followed by deleted documents.

Restore

Folders as well as documents can be restored individually or in bulk.

1. To restore a document or folder, click on the restore icon in the Actions column.
2. To restore multiple documents or folders select multiple items by clicking the check box. Click the 'Restore' button.

Restore Folder

- When the folder is restored, any subfolder and documents in that folder get restored automatically.
- When a document within a folder is restored, the parent folder(s) also gets restored along with that document. Other documents must be restored separately if required. For example, A document exists in the path Folder A/Folder B/Folder C. When Folder A is deleted and only the one document in Folder C is restored, then the document along with Folder A, Folder B and Folder C are restored. Other document in Folder C or other folders are not restored.
- If a folder and its documents are deleted separately, each delete event will be stored separately. For example, if a document is deleted from a folder and later the folder is deleted restoring the folder will not restore the deleted document. The deleted documents should be restored separately if required.