

# Share and Approve 2403

## Administrator Guide

02 - 2024

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# 1. Copyright Notice

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## 2. Introduction and Quick setup

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Welcome to Share & Approve's guide for Administration level users. This guide explains as how to set up Share & Approve and make it ready for use.

Other Share & Approve documentations:

- [Getting Started Guide](#): Details the functional flow of Share & Approve.
- [E-learning modules](#): Contains online videos on introduction and quick set up of Share & Approve.
- Online Help: The functions are described within the site. The info icon next to each feature opens an inline document detailing its function.

### 2.1. 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 approve or reject it.

Share & Approve can be integrated with Artpro+ and Deskpack. For more information on the Share and Approve connection, refer to the **Share & Approve connection** section in the User Guide of:

- [ArtPro+](#)
- [DeskPack Advanced](#)

## 2.2. Concepts

---

### Esko Cloud

Esko Cloud is a cloud environment that deploy applications like Share & Approve. 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 sites. All data can be stored under one Esko Cloud Account for all Share & Approve 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 (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. 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.

## 2.3. User Rights

If the user is a member of more than one group or assigned multiple roles then the union of rights is assigned.

Functionality	Feature	Administrator	Application Manager	User Manager	Group Manager	Internal User	External User	Site Administrator	Manager
<b>New Site in Existing Organization</b>	Create Site								
	Delete Site		** 						
	Assign/ Unassign Subscription		** 						
<b>Account Setup</b>	General Account Settings								

	Subscribed Sites	✓	✓	✗	✗	✗	✗	✗	✗
	My Storage	✓	✗	✗	✗	✗	✗	✗	✗
	My Transactions	✓	✗	✗	✗	✗	✗	✗	✗
	Automation Engine	✓	✗	✗	✗	✗	✗	✗	✗
	Calibration Setup	✓	✗	✗	✗	✗	✗	✗	✗
	Archiving Setup	✓	✗	✗	✗	✗	✗	✗	✗
	Service Access	✓	✗	✗	✗	✗	✗	✗	✗
<b>Site Setup</b>	General Site Settings	✓	✗	✗	✗	✗	✗	✓	✗
	Site Customization	✓	✗	✗	✗	✗	✗	✓	✗
	Email Notifications	✓	✗	✗	✗	✗	✗	✓	✗
	Approval Preferences	✓	✗	✗	✗	✗	✗	✓	✗

<b>Others</b>	Viewer Preferences	✓	✗	✗	✗	✗	✗	✗	✗
	Getting Started	✓	✗	✗	✗	✗	✗	✗	✗
	System Information	✓	✗	✗	✗	✗	✗	✗	✗
<b>My Network</b> <b>Manage Users</b>	Add Users	✓	✗	✓	✓	✗	✗	✗	✗
	View Users	✓	✓	✓	✓	✓	✗	✓	✓
	Edit Users created by self	✓	✗	✓	✓	✗	✗	✗	✗
	Edit Users created by others	✓	✗	✗	✓	✗	✗	✗	✗
	Delete Users created by self	✓	✗	✓	✓	✗	✗	✗	✗
	Delete Users created by others	✓	✗	✗	✗	✗	✗	✗	✗
	Add user to a group created by self	✓	✗	✗	✓	✗	✗	✗	✗
	Add user to a custom group	✓	✗	✗	✓	✗	✗	✗	✗

<b>Manage Groups</b>	created by other								
	Create	✓	✗	✗	✓	✗	✗	✗	
	Edit group created by self	✓	✗	✗	✓	✗	✗	✗	
	Edit group created by others	✓	✗	✗	✗	✗	✗	✗	
	View	✓	✓	✓	✓	✓	✗	✓	
	Add/Remove Users (Default Groups)	✓	✗	✗	✗	✗	✗	✗	
	Delete custom group created by self	✓	✗	✗	✓	✗	✗	✗	
	Delete custom group created by others	✓	✗	✗	✗	✗	✗	✗	
	<b>Manage Network</b>	Add Partner Network	✓	✗	✗	✗	✗	✗	✗
		Edit Partner Network	✓	✗	✗	✗	✗	✗	✗
Delete Partner Network		✓	✗	✗	✗	✗	✗	✗	
Add Equipment Network									

		✓	✗	✗	✗	✗	✗	✗	✗
Share the Space	Invite Users	✓	✗	✗	✗	✗	✗	✓	✓
	Manage Permissions	✓	✗	✗	✗	✗	✗	✓	✓

\*\* Can operate only on sites created by the Application Manager.

## 2.4. Pre-requisites

Make sure that the following are acquired in order to start with Share & Approve:

- An EskoID to create a new Esko Cloud account.
- Ensure an Esko Cloud Account to Create a site.

Register for a new EskoID, if you don't have one yet. Refer [What is an EskoID and why should I get one?](#)

## 2.5. An Overview of Setup Process

Share & Approve is a SaaS based application, which you can purchase, create and maintain by yourself.

The users can either purchase Share & Approve as a subscription, or it is possible to try it for few days and then subscribe.

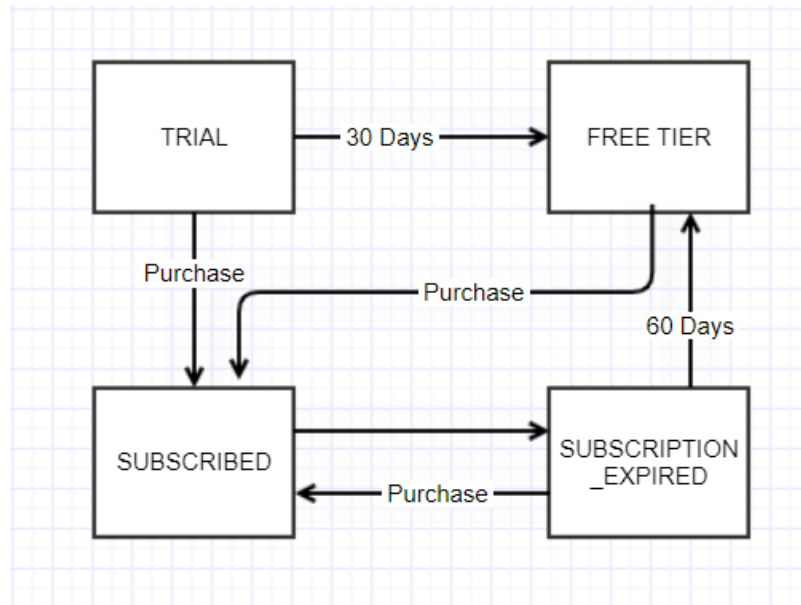
Trial account of Share & Approve is available for 30 days from the date of purchase. The time and date of expiry of the Trial site is displayed along with the name of the site and user.



Users can purchase a subscribed site within the 90 days of expiry, else the site will be changed to Free Tier.

If the last paying period of the subscribed account has expired then the account status changes Subscribed Expired. 60 days later it will change into Free Tier. At any moment after expiration of the Subscription the customer can renew the Subscription after which the status changes again to Subscribed.

The following flow chart shows the subscription flow of Share & Approve site:



**Note:** Subscribed accounts can have Trial and Subscribed sites. However, Trial accounts can have Trial sites but no Subscribed sites.

## 2.6. Creating a Share & Approve Account and EskoID

An Esko Cloud Account is necessary to create a Share & Approve site or to enable trial access.

## SIGN IN WITH ESKO ID TO DOWNLOAD YOUR SOFTWARE

Esko ID gives you access to all Esko services. Confused? Find out more in this [article](#). Don't have an Esko ID yet? [Get it here!](#)

**Email**

**Password** [Forgot your password?](#)

Keep me logged in

**SIGN IN**      **REGISTER NEW ESKO ID**


---

Don't have an Esko ID yet? [Get it here!](#)

For creating an Esko Cloud Account, an Esko ID is needed.

### Creating an Esko ID

To create an Esko ID, click the Register New Esko ID button.

1. The user is redirected to the customer registration page where new Esko ID can be generated. The page consists of three parts.
  - a. Enter the name, e-mail address and a password.
  - b. Choose your company information from the two options given.
    - a. If the organization is an existing Esko customer, enter the Company Code and proceed.
    - b.  **Note:** If you don't know the Company Code, refer [What is my Company Code and how can I find it?](#)
    - c. If your organization is purchasing Esko product for the first time, give the necessary details regarding your organization.
  - c. Read and agree with the privacy policy. Confirm the Captcha.
2. The page asks the user to check the given e-mail.
3. Click the link in the e-mail to activate the Esko ID. The user is redirected to the Sign in page.
4. Sign in with the Esko ID.
5. User will be redirected to the Share & Approve Sign in page. Sign in using the credentials.



6. Click **Visit your space**.

### Registering to an Existing Account

1. When a user logs in with an existing Esko ID, the **Start your access to Share & Approve** dialog box is displayed.
2. The drop-down list contains all the Share & Approve accounts that belongs to your company. Select an account.
3. Click Next. This either adds the user to the account or displays the message: **Please contact your administrator**.

### Creating a New Esko Cloud Account

When a user logs in with an Esko ID whose company does not yet have an account, a new account is created automatically, and a page with the account details is displayed.

## 2.7. Trial and Free Tier Limitations

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When the Share & Approve site (or Esko Cloud Account) is in TRIAL status, the Maximum storage provided in the trial period is 5 GB. The current usage status can be checked in **Setup > My Storage**.

The status of the account is also displayed in My Storage. When your trial period expires (30 days after the creation of the trial), the site is converted to a Free Tier account.



**Note:** For Trial accounts there is no limit on Transactions.

### Free Tier Limitations

When an account expires its trial and subscription, it is replaced as a Free Tier account till the subscription is renewed.

- Maximum 5GB of storage. When you go over 5GB, you can no longer upload new files.
- Maximum number of transactions is 50 per month.



**Note:** Subscription Expired accounts have the same limitations as a Free Tier account.

## 3. Subscription Types

### 3.1. Trial/Subscribed/Free Tier Accounts: An Overview

The following table shows a comparison between Trial, Subscribed and Free Tier Accounts:

Feature	Trial Account	Subscribed Account	Free Tier / Subscription Expired
Number of Sites	No limit	No limit	No limit
Number of Administrators	Unlimited	Unlimited	Unlimited
Subscription period	30 days	As per subscription	No limit
Storage	5 GB	As per subscription	5 GB
Transaction	Unlimited	As per subscription	50
AE Equipment	Unlimited	Unlimited	Unlimited
User Management (Add, Update, Delete)	yes	yes	yes
Group Management	yes	yes	yes
Esko Cloud Account status	Trial	Subscribed/ Subscription Stopped	Free Tier/Subscription Expired

Refer [An Overview of Setup Process](#) to learn more about the subscription process.



**Note:** Users can update the Trial/Free Tier account to a Subscribed account by clicking Upgrade Transactions icon from **Setup (Account Setup) > My Transactions**. This will redirect users to [Subscription Orders Overview](#) where users can purchase the desired package.

### 3.2. Creating a Share & Approve Account

To create a Trial Account, follow these steps:

1. Navigate to <https://www.esko.com/en/products/share-approve>.
2. Click on **Try now** button.
3. Users will be redirected to the page [Start a Share & Approve Trial](#) where users can read about the basic concepts of Share & Approve. Click **GETTING STARTED FOR FREE**.
4. This action redirect users to the Share & Approve login page. Login using the Esko ID. Refer [Creating an Esko ID](#) to read more information on Esko ID.
5. In case the user works for a company which

1. Does not yet have an account for Share & Approve the account is created.
2. Already has one account for Share & Approve then the current account will be reused.
3. Already has multiple account for Share & Approve then the user must select one of the accounts from the list and the selected account will be reused.



**Note:** Depending on the configuration of your account, the user can be automatically registered to the account or not. If the automatic registration is not possible the following message will be displayed **Contact your administrator**.

6. A page is displayed with the account details and a button **Visit your space**. Click on Visit your space to start working with Share & Approve.

### 3.3. Creating a Subscribed Account and a Site

---

To create a Subscribed account, follow these steps:

1. Open your browser, go to [www.esko.com](http://www.esko.com)
2. Click on **Store > Start Shopping** under Software Subscriptions
3. Click **Share & Approve > Click here for pricing**.
4. Select an option from Share & Approve Starter Pack or Build your own Pack according to your choice. If you want to Try Share & Approve for free, click Try for free link. Refer [Creating a Trial Account and a Site](#).
5. Click Buy now button, this action will redirect you to your cart along with the summary of the items purchased and the bill.
6. After you have purchased the package, the link to Create New account appears. If you already have an existing account, link it to that account by selecting it from the list.
7. If this is your new account, enter a desired name for your account and proceed accordingly. Refer [Create an Esko Cloud Account](#) and [Creating Share and Approve Site](#) for more details.

### 3.4. Converting Trial to Subscribed Account

---

Subscribed accounts provide more privileges over Trial Accounts. Refer [Trial vs Subscribed](#) and [An Overview of Setup Process](#) for more details.

A Trial Account is valid only for 30 days from the date of creation. However, users can extend the experience by subscribing to it.

To convert your account into a Subscribed Account:

1. Navigate to **Setup (Account Setup) > My Transactions**. Refer [My Transactions](#) for more details.
2. Click the button **Upgrade Transactions**. This redirects you to <https://www.esko.com/en/myaccount/subscription-orders-overview>.
3. Select the Esko Cloud Account and complete the transaction.

Or you can

1. Click the attached link in the expiry notification e-mail.
2. This redirects you to <https://www.esko.com/en/myaccount/subscription-orders-overview>.

3. Select the Esko Cloud Account and complete the transaction.



**Note:** Free Tier/Subscription Expired accounts can be changed to Subscribed using the same steps.

## 3.5. Expired Accounts

---

Share & Approve experience is moved to Free Tier when the purchased validity period is over. To extend the services, users should renew their accounts by either subscribing or extending the subscription.

### Notification: Trial Account

Users receive a notification to the linked e-mail account five days prior to the expiry. The notification contains a link that can be used to buy the subscription and the basic information about your account.

For Trial Accounts, the expiry date is displayed on the Share & Approve header, if the date is within less than 5 days, the expiry date will blink.

When the Trial Account expires, the account changes to a Free Tier account.

Refer [Converting Trial to Subscribed Account](#) and [Creating a Subscribed Account and a Site](#).

### Notification: Subscribed Account

Each user from the Administrator group receives a notification to the linked e-mail account 30 days before the expiration informing them about the subscription expiration. The notification contains a link that can be used to renew the subscription and the basic information about your account.

When the Subscribed Account expires, the account is changed into a Subscription Expired account. The monthly transactions are limited to 50 transactions per month. If the subscription is not renewed within 60 days, then the account is converted into Free Tier.

Refer [Converting Trial to Subscribed Account](#)

## 4. Share & Approve Administration Basics

---

The following sections detail various administration basics of Share & Approve.

### 4.1. Supported Web browsers

---

Most of the popular browsers support Share & Approve.

#### Supported Web Browsers

- Edge
- Chrome
- Firefox
- Safari
- Opera

#### Web Browsers: Not Supported

- Internet Explorer

### 4.2. Understanding Share & Approve Page Layout


---

#### Headers




The top left corner of Share and Approve shows the logo and the site title. You can update those using Site Customization.






The top right corner has the name of the logged in User and the user initials (first letter of first name and last name), if you have configured the Avatar, it shows an image. You can update Avatar in the User Preferences.



The path of your current page is displayed  in this panel. Users can toggle between the pages using this path hierarchy.

Top left menu consists of:

- Recent Documents 
- Documents 
- Approvals 


- My Network 
- Setup 
- Calibration 
- Archival Connections 
- Recycle Bin 

This guide contains the detailed overview on Setup, Archiving and Calibration. Other menu options are documented on the User Guide.

### Overview of basic parts

- Search bar: Users can search documents or folders by typing a search cue on the bar and clicking the search icon.





- Deep Search/ Normal Search:  If deep search is enabled by clicking this icon the search will be carried out down the hierarchy of folders and documents. Normal search is enabled by default. Users can check whether deep search has been enabled by the color of this icon, if the icon is in red, then the deep search is enabled.
- Sort By: Users can sort the page or the function using the Sort By drop-down. The arrow next to this can be used to sort the items ascending and descending.



- Show entries: Users can select the number of items to be displayed on a page from this drop-down.



- The left menu options can be collapsed for more space using  and retrieved using  these icons.

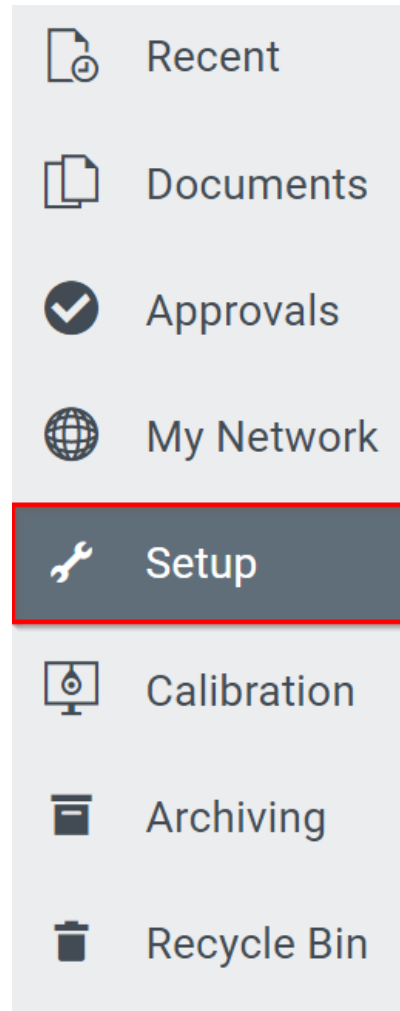
## 4.3. The Administrator Menu

---

The Site Administrator role is automatically designated to the person who has created the site. This role has full control over Share & Approve.

One of the major tasks for the administrator apart from creating and setting up the site is to add a user as a Manager, or an Administrator. The Administrator is automatically added to the Administrators Group. Refer [Users and Groups](#).

The settings of the account and site are controlled by the administrator.

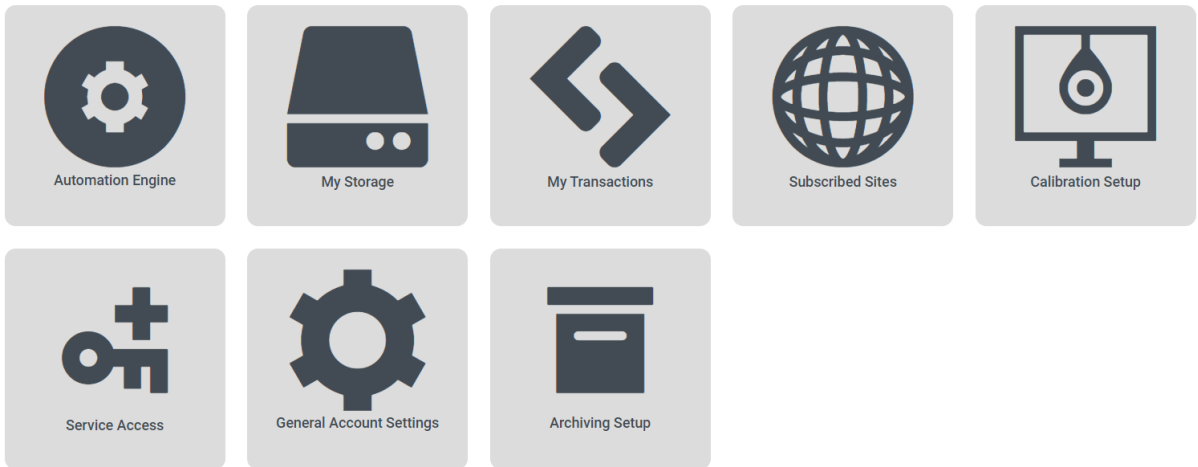


Navigate to Setup on left navigation menu of the site to set up various options regarding your Esko Cloud Account.

The Setup in Share & Approve is categorized broadly into three sections:

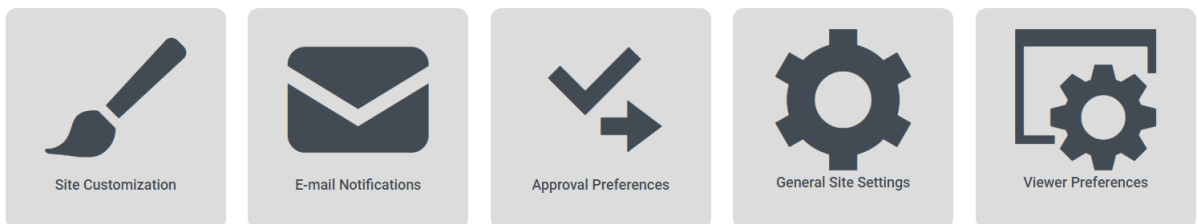
- **Account Setup:** The Administrator can view the details and change the setup regarding the Esko Account, Storage, Transactions, Service Access, Archiving Set up, General Account Settings, and the equipment settings of Automation Engine and Calibration. Refer [Manage Account Settings](#).

Account Setup



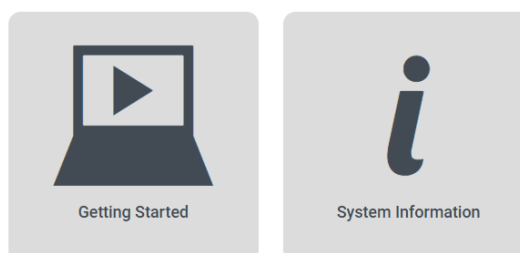
- **Site Setup:** The Administrator can use these settings to customize the site, set up Approvals and Viewer Preferences, change the default site settings, and manage the E-mail Notifications set up. Refer [Manage Site Settings](#).

Site Setup



- **Others:** Shows the System Information and the help menu which redirects to the User help for Share & Approve. Refer [Other Settings](#).

Other





## 5. Manage Sites

---

Site is the User interface created within an Esko Cloud Account. The administrators can create multiple sites in the same Esko Cloud Account.

Each sites should be configured separately. It is recommended to have multiple sites to organize your company needs.

Managing Sites involve:

- Creating a new site
- Creating multiple sites
- Site Customization
- Deleting a site

### 5.1. Create a Site in New Organization

---

A user with an Esko ID can create a site in the new organization.

[Creating a Share & Approve Account and EskoID](#) on page 15 details how to create and EskoID and create a new Esko Cloud Account.



**Note:** An Esko Cloud Account can be created only with an EskoID.

Refer [What is an EskoID and why should I get one?](#) to read more.

### 5.2. Create a Site in Existing Organization

---

An administrator can create a new site in the existing organization via two methods.

1. By selecting **Create new site** from the Subscribed Sites option in Account Set up. Refer [Sites](#) on page 28
2. By navigating to the **createNewSite** page using any of the following ways
  - a. <http://www.esko.com> > Products > Share & Approve > Try Now > START TRIAL. Users will be asked to log in with their Esko ID.
  - b. Esko Store after having subscribed to the service.

### 5.3. Create Multiple Sites

---

An administrator can create multiple sites in an Esko Cloud Account. All the site users can have different customization and user rights.

Creation of multiple sites enables:

- Customization: Each site can be customized for User Interface looks and e-mail customization. An Administrator can tailor a site in need of a specific business unit or process or for large customers.
- Distribution of access rights: Each site is a separate structure where the Administrator can grants different rights to different users. This is also the case with folders, but the site level allows an additional management level.

To create multiple sites, refer [Create a Site in Existing Organization](#) on page 25.

The number of sites subscribed to and the number of sites deployed is displayed on Subscribed sites on the Account Set-up and My Sites on the right menu options.

Refer [Sites](#) on page 28 and [My Sites](#).


## 5.4. Deleting Sites

---

Administrators can delete the sites which are no longer required. By deleting, all the information of the site is removed permanently, and it cannot be recovered. This option should be used judiciously as all the information of the site is wiped off permanently and cannot be recovered.

The Subscribed Accounts do not have a direct link to delete the site. To delete a Subscribed site:

1. Navigate to Setup > Subscribed Sites
2. Click unassign in the Actions

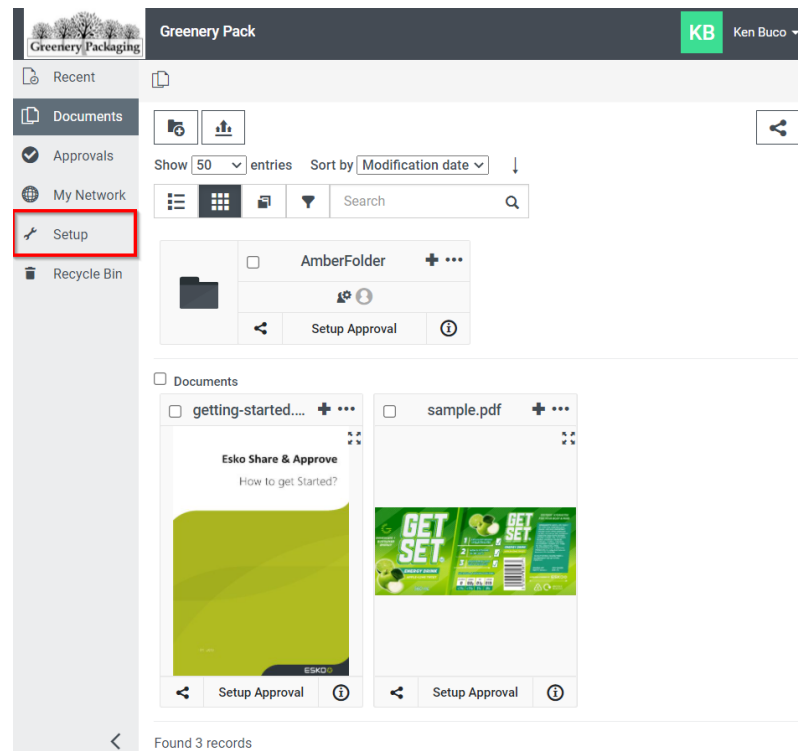
Site Name	Site Title	Created by	Created on	Site Status	Actions
 First Site & First Site	First Site & First Site	ESKO	Jan 19, 2021	SUBSCRIBED	<a href="#">Unassign</a>

3. A link is generated to delete.
4. Click delete.

## 6. Manage Account Settings

Share & Approve allows the administrator to customize the account catering to the organization's need. The administrator sets up the account for its users.

Click Set Up from the left menu options to customize your Esko Cloud Account.



In Account Setup, the Administrator can view the details and change the setup regarding the Esko Account, Storage, Transactions, Service Access, Archiving Set up, General Account Settings, and the equipment settings of Automation Engine and Calibration



**Note:** An Administrator has full rights over the Account and the Site.

### 6.1. General Account Settings

General Account Settings display the information regarding the entire Account. The details regarding the account cannot be edited except the Account Readable Name.

The information includes:

- **Esko Cloud Account Number:** The unique number of the Esko Cloud Account. The account number comprises of numbers, alphabets and unique characters.

- **Esko Cloud Account Name:** Name given to the account. This can be edited using below option Account Readable Name.
- **Total Allowed Storage:** The total storage of the current site. If the account is Trial/Free Tier, then the total storage will be 5GB. If your account is Subscribed then the purchased amount of storage will be displayed.
- **Current Storage in Use:** Used storage of the current site.
- **Esko Cloud Account Status:** The status of the account whether it is Trial, Subscribed, Free Tier, or Subscription Expired.
- **Account Readable Name:** The Account readable name is the name given to the Account. It serves as an identification to refer to an account. This name can be seen displayed in many of the other settings pages and on **My Sites** page. Click the Save icon before you leave the page.
- **Automatic User Registration:** Administrators can switch on this to enable operators of pre press editors to automatically register as users to the account. This feature is enabled by default for accounts created with 2319 release or later. For accounts created earlier it is disabled by default. But it can be manually enabled. Note that the functionality will be available on Pre Press editors after the 23.07 release.

## 6.2. Sites

---

Sites give an overview of the number of sites deployed. Administrators can create additional sites using **Create New Site**.

The page displays one site listed because a Share & Approve contract usually has only one site. However, you can create additional sites.



**Note:** It is recommended to create separate environments so that each of the sites has its own look or e-mail customization. One use case is to create a site specifically for a large customer.



**Note:** Administrators can create any number of sites from 2313.

- **Esko Cloud Account Number:** The unique account number of the Share & Approve site.
- **Esko Cloud Account Name:** The name of you Esko Cloud account.
- **Esko Cloud Account Status:** The subscription status of the Share & Approve account. This can be Subscribed, Subscription Expired, Trial or Free Tier.
- **Create New Site:** This link redirects to the Create New Site page, where you can create a new site to your account.

Sites table consists of the following:

- **Site Name:** The name given while you created the site.
- **Site Title:** The title displayed on your site. Site title can be edited using the [Site Customization](#) option.

- **Created By:** The name of the user who created each site.
- **Created on:** Date on which each site was created.
- **Actions:**
  - **Delete:** Accounts have the delete option in Actions column. Refer [Deleting Sites](#) on page 26.

## 6.3. My Storage

Storage is the amount of data that can be stored in the Esko Cloud account. The amount of storage equals to the difference between the uploaded data and the data that was deleted.

Storage also shows Esko Cloud Account Number, Esko Cloud Account Name, Esko Cloud Account Status, Total Allowed Storage, and the Current Storage in Use.

### Storage per Site

When there are multiple sites, the Administrator can view the storage utilization in each of the sites. When there are upload rights for external users, this table helps the Administrator to view the utilization separately and identify if a specific site is utilizing excess storage.

**My Storage** 🔗

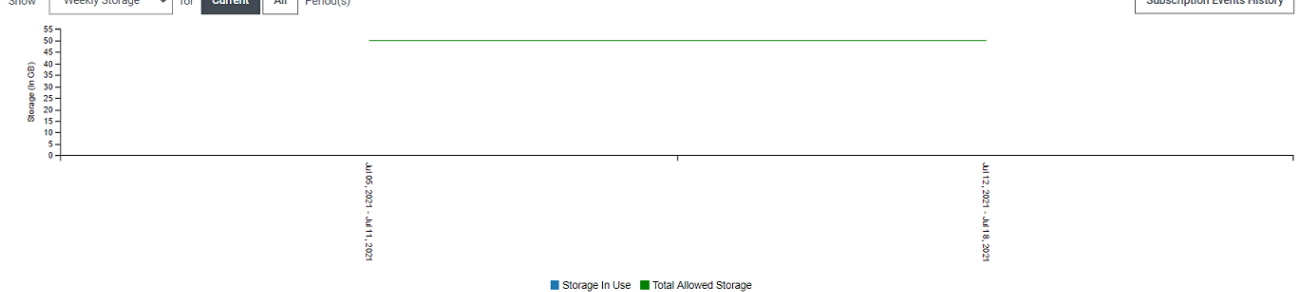
Esko Cloud Account Number	a-t-1040-0030-1005-3519
Esko Cloud Account Name	The Label
Esko Cloud Account Status	SUBSCRIBED
Expiration Date	Jul 01, 2022
Total Allowed Storage	50 GB
Current Storage in Use	0.039 GB
Current Period	Jul 01, 2021 to Jul 01, 2022

Upgrade Storage

Storage per Site
Storage History

Show Weekly Storage for Current All Period(s)

Subscription Events History



The graph shows 'Storage In Use' (blue bars) and 'Total Allowed Storage' (green line). The y-axis is 'Storage (In GB)' from 0 to 55. The x-axis shows dates: Jul 05, 2021 - Jul 11, 2021; Jul 11, 2021 - Jul 18, 2021; Jul 18, 2021 - Jul 25, 2021. The 'Total Allowed Storage' line is constant at 50 GB. The 'Storage In Use' bars are very low, around 0.039 GB.

Date	Uploaded (In GB)	Deleted (In GB)	Total Storage (In GB)
Jul 05, 2021 - Jul 11, 2021	0.000	0.000	0.034

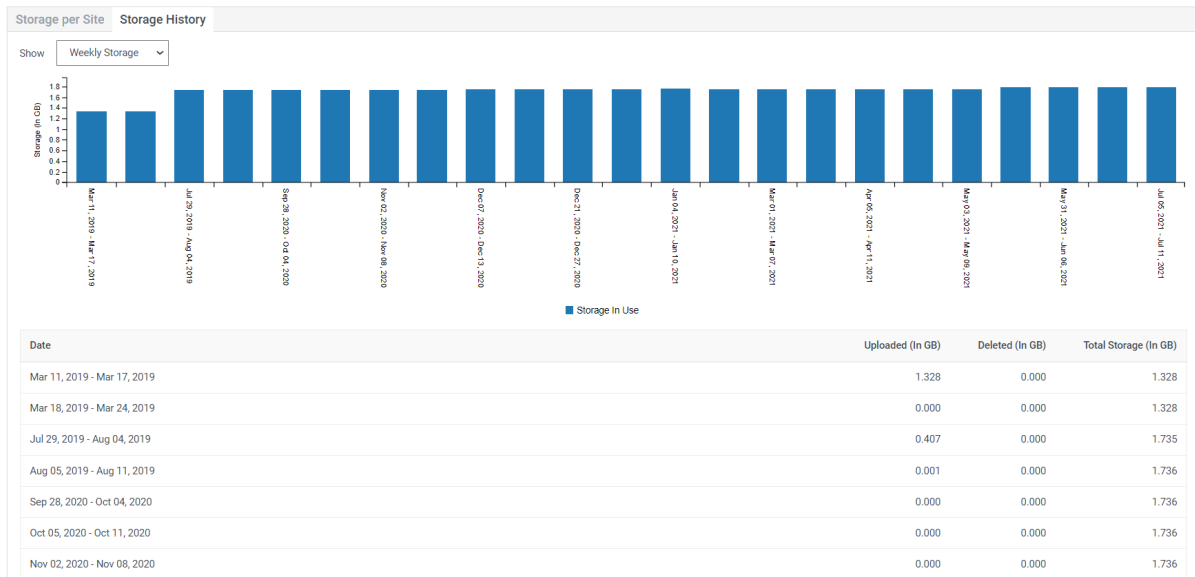
The site names can be filtered according to its alphabets.

**Upgrade Storage:** Esko Cloud Account manages the storage and can be updated anytime via the Esko Store (Upgrade Storage). The Administrator can extend the storage on the renewal of the subscription contract. Clicking this button redirects you to the support page.

### Storage History

Storage History shows the amount of storage utilized in the past. The Administrator can set the frequency to Daily/Weekly/Monthly. A line with the currently allowed storage is shown and only one storage sample per day is taken at midnight UTC. The Bar Graph shows the Storage used, where the

Line Graph (relevant only for Subscribed/previously Subscribed Accounts) resembles the upper limit of the Storage permitted.



### Current/All Storage

This feature is relevant only for Subscribed/previously Subscribed Accounts with Storage Subscription.

- **Current:** Shows the Storage data only for the current/last active Storage Subscription cycle. This includes the Storage usage data from the start date of the current or the last active Storage Subscription cycle.
- **All:** Shows the Storage usage data for all the Storage Subscription cycles till date. This includes the Storage usage data from the start date of the first Storage Subscription cycle.

### Subscription Events History

Subscription Events History refers to the information regarding the purchase, renewal, upgrade, or cancellation of the selected Subscription, and the history of the Subscription Cycles is shown in this section.

Clicking on the Subscription Event History button opens a dialog with:

- **Date:** Date when the subscription event is logged.
- **Event:** Subscription Event type logged- Add/Update/Renew/Cancel.
- **Amount:** The amount purchased along with the subscription. For transactions, the column header is Amount (Nos.) and for Storage it is Amount (GB).
- **Start Date:** The Start date of the subscription event.
- **End Date:** The End date of the subscription event.



**Note:** Only days/ weeks/ months when transaction occurred are shown in the table.

## Subscription Events History ×

Subscription ID [REDACTED]

Subscription Period : **Current**

Date	Subscription Event	Quantity (GB)	Start Date	End Date
19 Jan 2021	New	250	19 Jan 2021	19 Jan 2022

## 6.4. My Transactions

My Transactions displays the transactions of the account only for the current period or cumulatively since the start of the subscription. By default, current period is shown and shows whether the purchased transactions are overrun in the current period (typically 1 year).

Usage of an Esko Cloud Application is charged per transaction. Most of the common usage like login, upload, navigating the site, downloading a document, search, and view are all free. However, Esko Cloud is a 'pay as you go' environment where the transactions are charged.

For example, in a Share & Approve site, the below are charged as a transaction:

- Starting a single stage approval: counts as 1 transaction.
- Starting a multi stage approval: counts as 2 transactions.

For accounts which do not have a transaction subscription, there is a limit on 50 transactions per month,

### Transaction History

The Transaction History is the record of every transaction that happened during a subscription period.

The transaction history displays

- A graph with cumulative number of transactions.
- A table with the actual transactions.

Transaction History is visible only when the Account has gone through a subscription cycle at least once. (i.e. Subscribed, Subscription expired, and Subscription stopped accounts). Only days/weeks/months where transactions occurred are shown in the table. The Bar Graph resembles the transactions used. Whereas the Line Graph (relevant only for Subscribed/previously Subscribed Accounts) resembles the upper bound of the transactions permitted to be used.



**Attention:** The Free Tier or Subscription Expired accounts shows the transactions in a period of 1 month (the transactions will be reset to zero at the start of each month).

## Subscription Events History

Subscription Events History refers to the information regarding the purchase, renewal, upgrade, or cancellation of the selected Subscription, and the history of the Subscription Cycles is shown in this section.

Clicking on the Subscription Event History button opens a dialog with:

- **Date:** Date when the subscription event is logged.
- **Event:** Subscription Event type logged- Add/Update/Renew/Cancel.
- **Amount:** The amount purchased along with the subscription. For transactions, the column header is Amount (Nos.) and for Storage it is Amount (GB).
- **Start Date:** The Start date of the subscription event.
- **End Date:** The End date of the subscription event.



**Note:** Only days/ weeks/ months when transaction occurred are shown in the table.

### Subscription Events History ×

Subscription ID                     

Subscription Period : **Current**

Date	Subscription Event	Quantity (GB)	Start Date	End Date
19 Jan 2021	New	250	19 Jan 2021	19 Jan 2022

### Current/All Filter

Relevant only for Subscribed/previously Subscribed Accounts. Refers to the Subscription type selected.

- **Current:** Shows data only for the transactions logged against the current/last active Subscription cycle. Shows all transactions logged from the start date of the current/last Active Subscription cycle.
- **All:** Shows data for the transactions logged against all the Subscription cycles till date and includes all transactions logged from the start date of the first Subscription cycle.

### Transaction Limit and Overuse Calculation

Trial accounts have no transaction limit although they are monitored for usage and security reasons. Subscribed Esko Cloud Accounts can use more transactions than purchased and excess usage is added to the invoice sent at the renewal of the contract.

Overuse is calculated per transaction. An occasional overuse is not expensive, as the overuse cost is comparable to the cost within the tier you are using. However, a systematic overuse might not be cost-efficient, and it is better to subscribe to the next transaction bundle.



**Note:** For Free Tier and Subscription Expired accounts, the Limit is 50 transactions and overuse is not possible.



Before a Transactions subscription expires (during the last month of subscription), an administrator sees a banner at the top of the Share & Approve user interface. The banner states that the Transaction subscription must be renewed to prevent transactions being limited to a maximum of 50 transactions.

#### Operations counted as transactions

Operation	Transactions
Upload PDF file	0
Start of Single Stage Approval Cycle	1
Start of Multi Stage Approval Cycle	2
Internal users view the file	0
Invite a user to approve and send out e-mail	0
Approver rejects.	0
Approver approves	0
Approval cycle is stopped	0
A new version is uploaded	0
File is downloaded	0



**Note:** Trial accounts are monitored for usage, but they have no transaction limit. Subscribed Esko Cloud Accounts can use more transactions than purchased and excess usage is added to the next invoice.

## 6.5. Automation Engine Setup

---

Automation Engine is an Esko software application to automate pre-press workflows. Automation Engine is integrated with Esko Cloud to connect to the workflows and utilize other Automation Engine functions like upload and download, start approval cycles, listen to approval events, and so on.

For further information about Automation Engine visit [Automation Engine Documentation](#): the chapter '[Integrating with Share & Approve](#)').

Also refer [Automation Engine- Troubleshoot Esko Cloud Connection](#)



**Note:** Automation Engine 20.0 and later versions are supported.

## Licensing

Automation Engine connectivity is a licensed feature. However, during the trial period, the Automation Engine can be connected to the respective site. The connection is ended when the trial expires.

### 6.5.1. Setting up of Automation Engine

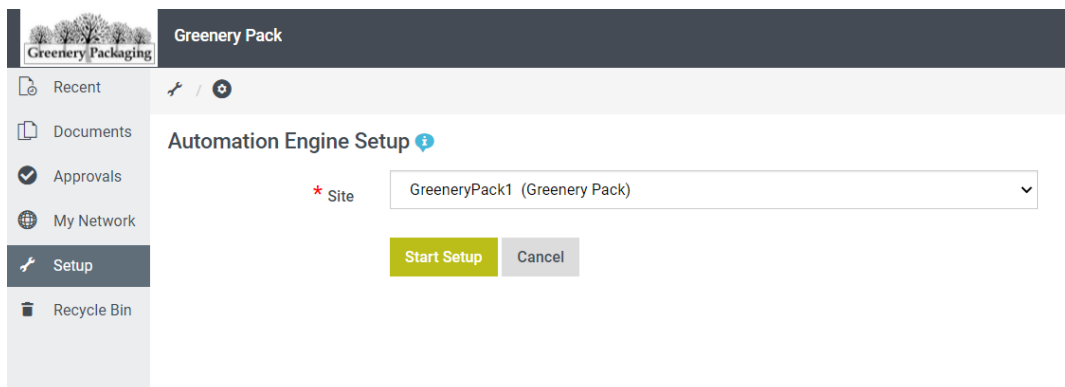


**Note:**


- The Automation Engine must be at least version 18.1.1. Share & Approve recommends the version 20.x.
- Multiple Automation Engines can be connected to the same Share & Approve site. Connecting to Automation Engine is a payable subscription option. The Administrator can however connect an Automation Engine to a Share & Approve site during the trial period.

To set up the connection, execute following steps:

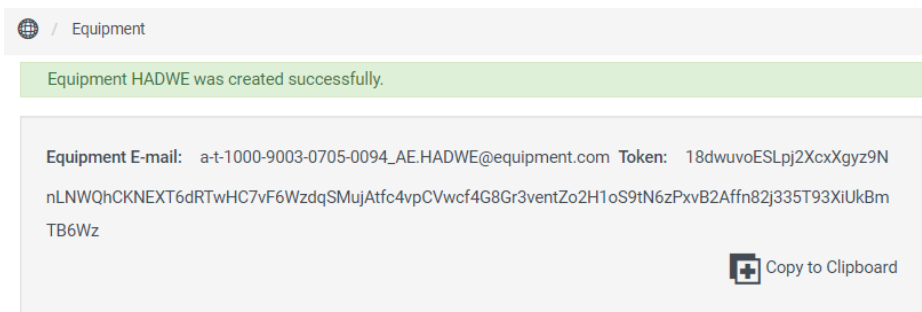
1. Navigate to **Setup > Automation Engine**. In case there are multiple sites, choose the site to which the Automation Engine will connect from the drop-down list. (There is also an option to add the site later.)



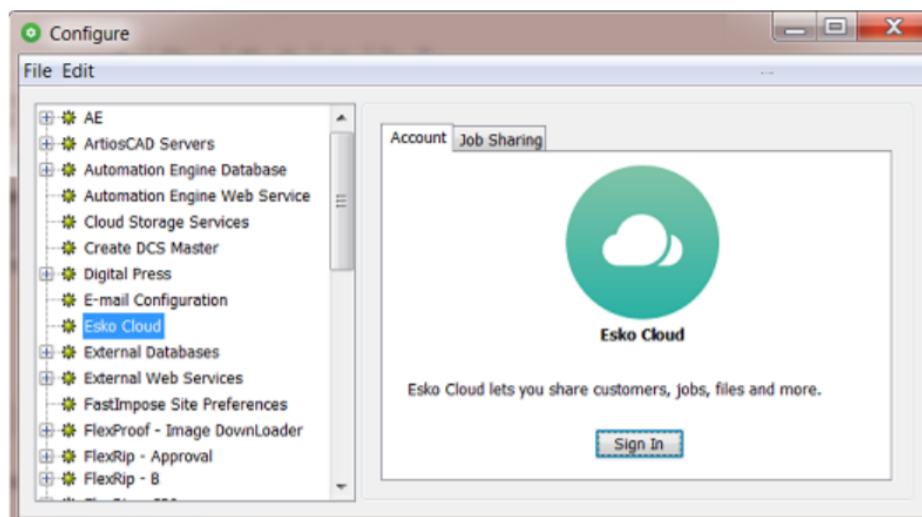
2. Click **Start Setup**. This will confirm that the Automation Engine Setup is successful.

Automation Engine is enabled 

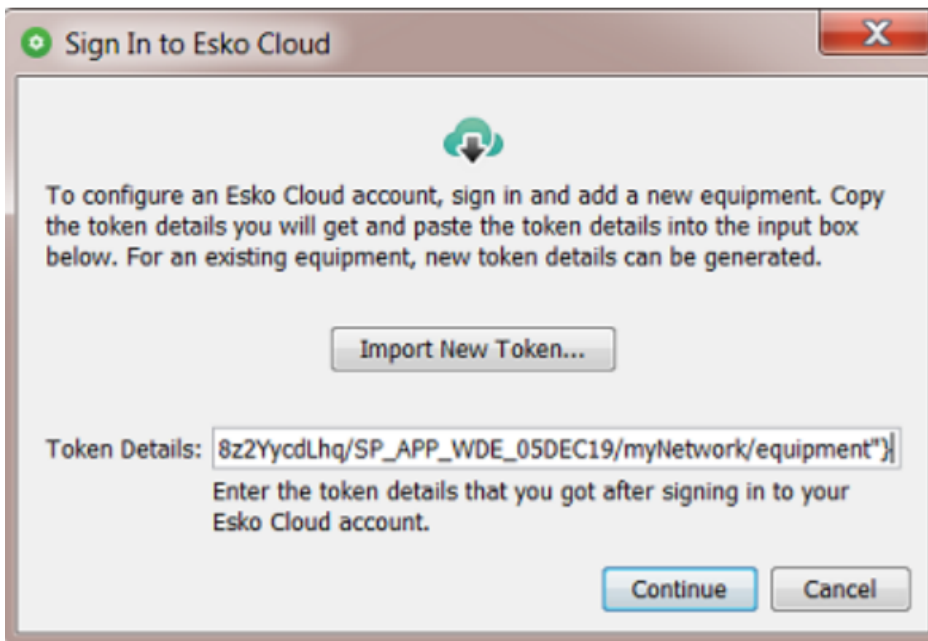
3. Go to **My Network/Network**, click on **Equipment > Add Equipment**.
4. On the option Equipment **Type**, select Automation Engine. Enter the equipment **Name**. This is the name of the location of this Automation Engine server that all users will get to see, including Automation Engine users. The name of an equipment is limited to 7 characters. Avoid special characters in the name like */, space, \*, ?, #* and similar.
5. Click **Create**. A cryptographic token is generated which is required for Automation Engine connection. Once identified through that token, the permissions that correspond to the supplied token are enabled.



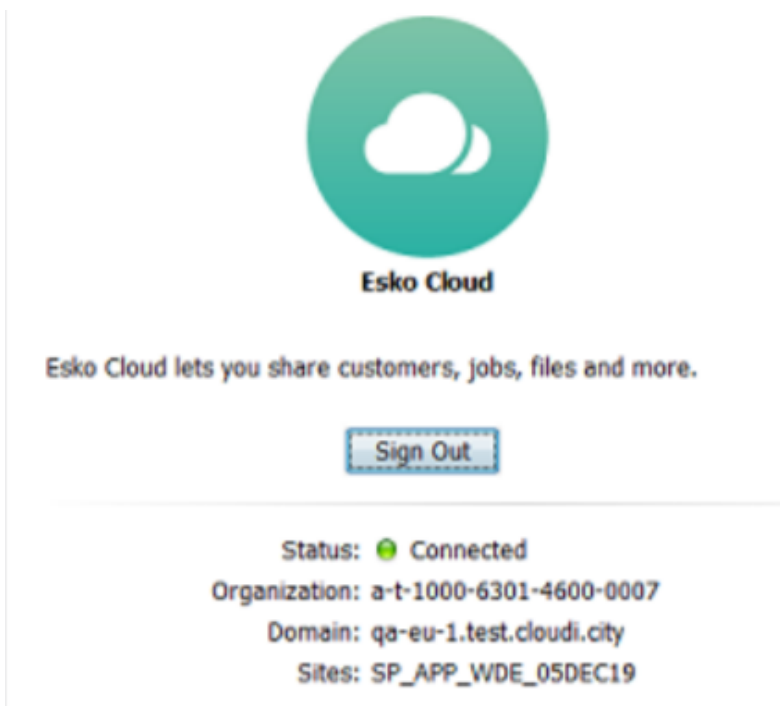
6. Click **Copy to Clipboard**. This will copy the token and important additional information to the clipboard.
7. On Automation Engine, in the Pilot, open the **Configure** tool and select **Esko Cloud**. Following dialog opens:



8. Click on **Sign In**.



9. Give the **Token Details** and click **Continue**.



**Note:** Once the Esko Cloud Account for Automation Engine connectivity is enabled, there is no option to undo this operation. Deleting the respective equipment results in the disconnection of the Automation Engine.



**Note:** When the Automation Engine setup is completed for one of the sites of an organization, to enable the same for another site, the Administrator or the Manager should

1. Login to the site which requires Automation engine setup
2. Be on Documents page (root)
3. Click the Share Site icon and share the site to Automation Engine group with the permissions as a Manager.

## 6.6. Calibration

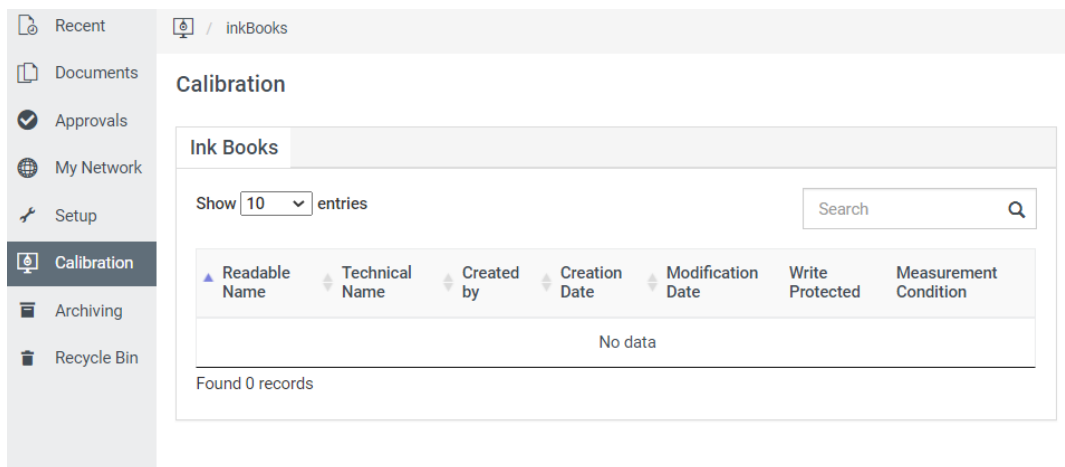


**Note:** This feature of Share & Approve is meant for ColorTrace customers.

Esko Cloud acts as a repository of ink books which also allow sharing of ink books with different parties. When the calibration setup is enabled by the Administrator, an additional tab “Calibration” appears in the Esko Cloud Account. After enabling the Calibration setup, connect to one or more Color Engine Pilots to the Esko Cloud Account and synchronize the ink books.

To enable Calibration set up refer to [Calibration Setup](#) on page 37 page.

The calibration page has an initial single tab called Ink books. This tab shows the list of Ink books available to the current user.



The screenshot shows the Esko Cloud interface with a sidebar on the left containing navigation options: Recent, Documents, Approvals, My Network, Setup, Calibration (selected), Archiving, and Recycle Bin. The main content area is titled 'inkBooks' and 'Calibration'. Below this is a section for 'Ink Books' with a 'Show 10 entries' dropdown and a search box. A table with the following columns is displayed: Readable Name, Technical Name, Created by, Creation Date, Modification Date, Write Protected, and Measurement Condition. The table body is empty, showing 'No data' and 'Found 0 records' at the bottom.

- Search: The page can be searched on Readable Name, Technical Name and Creator.
- Sort: The page can be sorted on Readable name, Technical name, Created by, Creation date and Modification Date.
- Write Protected: Displays whether the Ink book is Write protected or not. The field uses yes/no.

When a user clicks on the Ink book, it redirects to a page with details of the ink book.

### 6.6.1. Calibration Setup

Esko Cloud connection can be established to centralize Esko Color Engine ink books.



**Note:** Read the Color Engine Pilot documentation to know more about Color Ink books.

## Calibration Setup ?

Esko Cloud allows managing inks, colors, and other Calibration resources. Click 'Enable Esko Cloud Account for Calibration' to enable this functionality.

Enable Esko Cloud Account for Calibration

### PantoneLIVE

PantoneLIVE Setup

\*PantoneLIVE Domain

\*User Name

\*Password

### Enabling Calibration Setup

1. Navigate to Set up > Account Set up.
2. Select Calibration Set up tile.
3. Click 'Enable Esko Cloud Account for Calibration'.
4. Confirm. Once confirmed you cannot go back disabling it.
5. Connect one or more Color Engine Pilots to the Esko Cloud Account and synchronize the ink books.

When the Administrator enables the calibration setup, the following updates occur:

- A storage structure for ink books is created in the back-end.
- Color Engine Pilot Equipment type is added to the list of possible equipment types.
- Calibration Users, Calibration SuperUsers, and Calibration ReadOnly are added to the list of groups.
- The Calibration Setup page gets an additional item called Setup PantoneLIVE.

## 6.6.2. Setup PantoneLIVE

PantoneLIVE is a cloud-based architecture, that enables digital specification and communication of Pantone color standards to all stakeholders. Esko Cloud Accounts can be connected to a PantoneLIVE account. This enables other applications in Esko Cloud Account like Esko Cloud Pilot and WebCenter to access PantoneLIVE inks.

1. The Administrator requires a server name (xxx.pantone.live.com), a username, and a password which is generally available with any PantoneLIVE user.
2. Enter the credentials to the PantoneLive server and save them. The password is saved only if the credentials are valid and once saved, the password is not masked and displayed but will remain empty.
  - PantoneLIVE domain
  - User Name: accepts a user name
  - Password: accepts a password

3. Check the connection by clicking on the Check Stored Credentials button. If this fails, first try the same username and password on PantoneLIVE's direct user interface. Once the PantoneLIVE connection is set up, a new group PantoneLIVE Users is created. Only the users added to this group can communicate with PantoneLIVE.
4. Click the Save Button. The PantoneLIVE credentials are saved securely.


**Note:**

- PantoneLIVE setup can be disabled again by unchecking the PantoneLIVE checkbox. Esko Cloud will not allow the PantoneLIVE calls until the connection is re-enabled with the credentials.
- Check the legal agreements regarding the usage of PantoneLIVE. Through Esko Cloud, you can expose PantoneLIVE inks to other users and Esko takes no responsibility over the digital rights to share this information. Esko Cloud also does not store PantoneLIVE information, it only passes on information to callers of the color service.
- Save button is disabled until a password is entered.

## 6.7. Archiving Setup

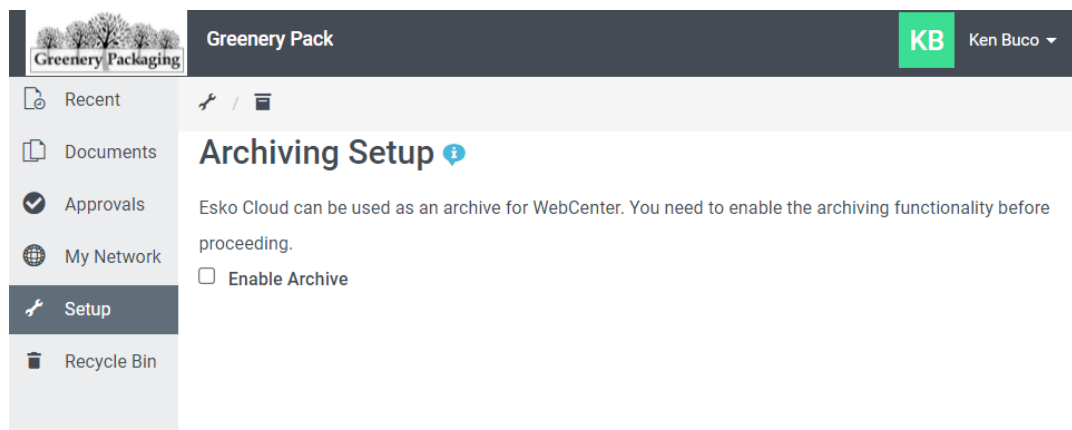


**Note:** This feature of Share & Approve is an extension of WebCenter.

WebCenter 20 and later versions of WebCenter can archive files in Esko Cloud. Multiple WebCenter files can be archived in the same account.

To enable archiving, the administrator should

1. Navigate to Setup > Archiving Setup > enable the check-box.



2. The Administrator needs to make a connection between the Esko Cloud and WebCenter. WebCenter archiving uses Esko Cloud base storage (the same storage subscription as Share & Approve). It can be monitored in My Storage.

Follow the steps to enable archiving:

1. Create an equipment for WebCenter.

2. Navigate to **Network > Add Equipment**.
3. Select Equipment type as WebCenter to establish a connection with WebCenter. Right now, Equipment is enabled to make connection with:
  - WebCenter
  - Automation Engine
  - Color Pilot (option shows when calibration is enabled)
  - Others.

On selecting the Equipment type as WebCenter, an additional option **Use this Equipment for Archiving** is shown. Select this option to use the created Equipment for archiving documents from WebCenter.

**\* Equipment Type** WebCenter ▼

Create WebCenter External Equipment

**\* Equipment**

Name

Location

Code

Description

Use this equipment for Archiving

Status Not Connected

Provide an Equipment name (mandatory), Location, Code, and Description.



**Note:** The check-box option is selected by default when archiving is enabled. The Administrator can deselect the check-box during equipment creation if necessary.

4. Click Create.

## 6.7.1. Archiving Connections

When the Administrator successfully adds a connection to Archiving, an additional menu item 'Archive' appears on the site with the connection lists. An overview of the archives will be displayed when you



click on it. The user can sort the table in the basis of Name and Creation Date. The Search widget helps the users to do the search by Name.

### Archival Connections

Total Archived - Documents

Total Content - MB

Uploaded

Show  entries

▲ Connection Name	↕ Creation Date
A_test	Dec 22, 2020 at 15:21



**Note:** The details in the table is uneditable.

The Administrator can enable Archiving by:

1. Navigate to the account Set up.
  2. Select Archiving Set up.
  3. Enable Archiving.
  4. Confirm by selecting 'yes' from the confirmation box.
- Enabling the archiving option establishes the requisite framework for archiving documents in Esko Cloud. WebCenter then can start archiving the documents to the current Cloud Account.

Read more details on how archiving works in WebCenter from: [WebCenter: Documents in Esko Cloud](#)

- The Disable Archiving option is allowed only if no active equipment exists in the cloud account for archiving. On disabling the archiving option, any WebCenter type of Equipment cannot be flagged to be used for Archiving. Archiving is then restricted until the archiving is enabled again.



**Note:** User should delete all the data archived before disabling the archive.

When the Administrator tries to delete the equipment, a check is done (back-end) whether there is an archive connected to the equipment. If so, the system refuses to delete the equipment with the message:

You cannot Delete the Archival Setup unless all active Archives are cleared. You can remove existing Archives through WebCenter connection.



**Note:** The tile **Setup> Archiving** only appears when the Esko Cloud Account has a storage subscription.

## 6.8. Service Access

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To provide better service to our customers, Esko Cloud allows the administrator to grant access for service to a service engineer. The access can be denied using [Service Access Policy](#).

When the Administrator contacts the Customer Services, a service engineer attempts to access the cloud account. The service engineer can perform all the Administrator functions, just like any member of the Administrator group and is visible as **okta://service.engineer@esko.com**.

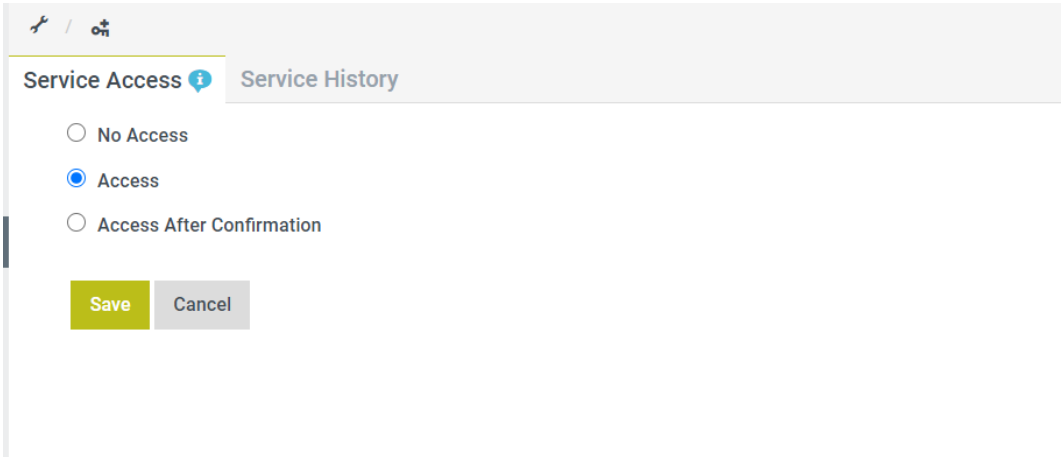
A service engineer is (typically) an Esko employee who helps Esko customers who encounter problems in the Esko Cloud. Esko Service Engineer can access the Esko Cloud account with administrative rights without being invited explicitly if the Service Access is provided. Esko ensures that trained Service Engineers access the Esko Cloud account with utmost care to secure the data and the site.

Service Engineer can also perform actions like a normal user such as upload documents, start approval cycles, and so on but cannot approve on behalf of an actual user nor can force approve or force reject like an Administrator or a Manager. Refer [Overview of Approvals](#) for more information.

### 6.8.1. Service Access Policy

The Administrator determines how to grant service access to a service engineer or block this access.

This is executed via following options:



- **Allow Access:** This is the default access. This enables direct access without any approval until the policy is changed.
- **No Access:** Cannot access until the policy is changed or until an explicit user is created.

- **Access After Confirmation:** Here, an Administrator needs to provide approval for each request separately. This is the most secure option to allow access as the permission is given only on need basis and the access is locked automatically after 24hours.

## 6.8.2. Access After Confirmation

When your policy is Access After Confirmation, the following actions happen in the sequence:

1. Service engineer gets a message '**Wait for Confirmation**'.
2. The Site gets a request to confirm the access to the specified service engineer on the service access page. (mostly while you are on a telephone call or in a chat session with the service engineer).
3. The service engineer is provided access and execute the Administrator functionality for the next 24 hours. Service engineer's login to any site is only on a need basis and on reporting an issue by a customer which requires intervention. Strict security measures are taken to ensure no impersonation can be made.

## 6.8.3. Service History

The Service History tab logs the request and approval of the confirmed Service Access. It logs every access by service engineers, along with the confirmation details if made.

A table is shown with following columns in the Service History:

- **Date/time:** Displays the date and time of the service logged.
- **Service engineer:** Displays the name with the EskoID of the Service engineer.
- **Access type:** Displays whether the access given is auto or confirmed access.
- **Expiry:** A session expires in 24 hours. After logout or time out, the service engineer loses the session and needs to restart the procedure.

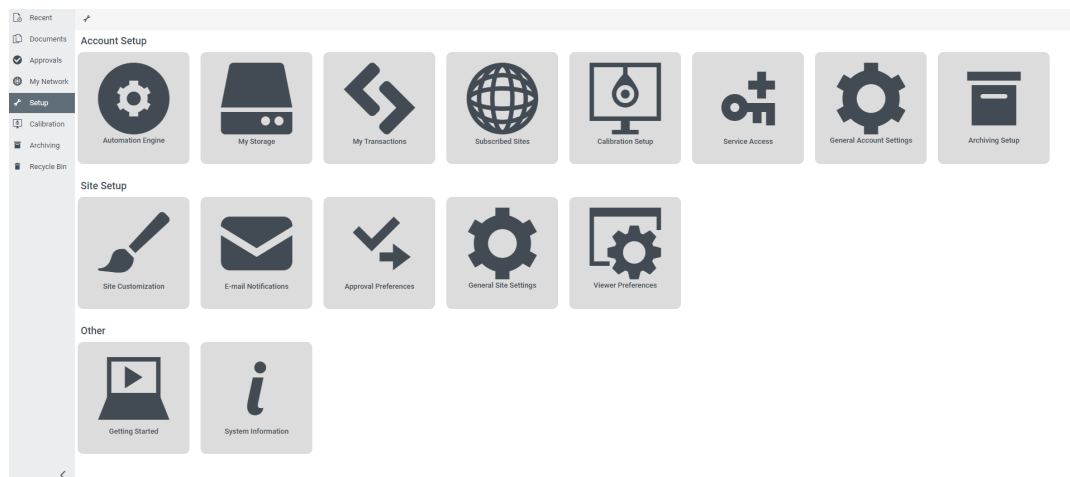


**Note:** Transactional operations of the service engineer are still counted as transactions.

## 7. Manage Site Settings

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The Administrator can use the Site Setup options to customize the site, set up Approval and Viewer Preferences, change the default site settings or the Notifications set up.

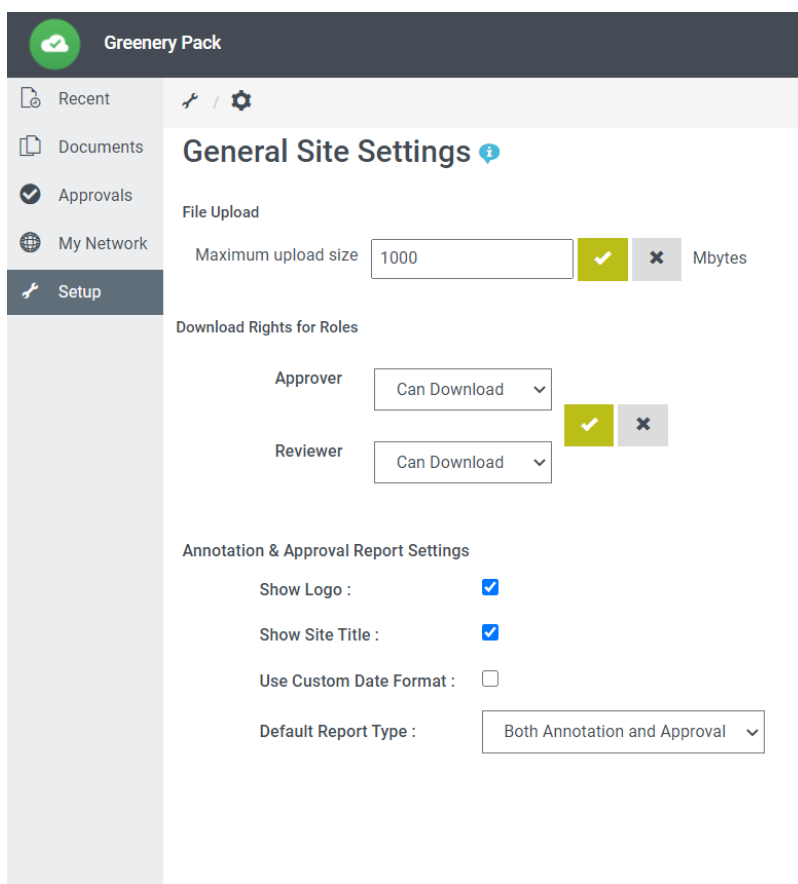


Click Set Up from the left menu options to customize your site.

### 7.1. General Site Settings

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General Site Settings are settings that change the behavior of an entire site. When there is more than one site, each site can have different site settings.



**Maximum Upload Size:** An Administrator can set the maximum size of files that the users of the site can upload. This ensures that external users do not upload large files (which cost the storage). Enter the MBs. The absolute maximum is 5120 MB or 5 GB/ file.

### Download Rights for Roles

Many prepress providers want to protect the documents from unsolicited downloads or sharing of documents that are meant for review or for approval by their customers. To prevent the files from unnecessary downloads and the spread to the wrong people or used to print the same artwork at a different converter without prior agreement, rights can be restricted within the Roles.

For the Reviewer and Approver roles, download permissions can be restricted by the Administrators. In that case, they can only download files or folders for which they are in the Reviewer or Approver roles.

When the download is disabled, the following happens:

- Download of documents for which the user is only a Reviewer or Approver without download rights will fail. In some places, the download button is removed or disabled, but in overview lists, the download action may still appear because it is too time consuming to determine the rights on all documents before even an attempt to download is started.
- Download as ZIP will fail when the download permission is not available for even one of the documents in the ZIP.
- The Download folder will fail even if one of the documents in the folder is not downloadable.

Usually, Editors and higher roles are permitted to download. When a user is on a certain document or folder with multiple roles like Editor, Approver, and a Reviewer without download rights, download is still possible.

When a document is not viewable in the viewer, Reviewers and Approvers can review these documents by downloading them.

### 7.1.1. Annotation and Approval Report Settings

The Annotation and Approval Report contains information about the annotations and the approval states of a document. The Annotation and Approval report contains three main parts. Namely, the Main page, Approval report, and Annotation report.

**Show logo:** If "Show Logo" is enabled, the site logo is shown at the lower right corner in the annotation and approval report. If there is no site logo, no logo is shown, even if the button is enabled.

**Show title:** When "Show Site Title" is enabled, the custom site title are added to the report.

**Date Format:** The default date format for all languages is shown in the table below. If another fixed format is desired for all languages, the check box must be enabled. A drop-down list appears, where you can choose the format.

Language	Example
Italian	15 ottobre 2020 10:32 GMT
Portuguese	15 de Outubro de 2020 10:32 GMT
English	October 15, 2020 10:32 AM GMT
Spanish	15 de octubre de 2020 10:32 GMT
Dutch	15 oktober 2020 10:32 GMT
German	15. Oktober 2020 10:32 GMT
French	15 octobre 2020 10:32 GMT

If another fixed format is desired for all languages, the **"Use Custom Date Format"** option and choose the date format from the drop-down list shown.

The report can also only be an annotation or only an approval report. If only one of these or both are desired can be chosen in the "Report Type" drop-down.

### 7.1.2. PDF Annotation Notes

A PDF file contains embedded annotations along the replies of it. These annotations can be imported into Share & Approve.

Administrators can enable this import via

1. Navigate to General Site Settings.
2. Activate PDF Annotations.

If this import is enabled, and you upload a PDF file that contains embedded PDF annotations, then these annotations are converted to cloud annotations of the PDF asset.

Note that if there are no embedded annotations in the uploaded PDF, no Cloud Annotations are created.

### 7.1.3. Internal Annotations

Internal annotations are annotations that can be created and seen by the members of the Internal Users group and Internal Annotation Users' group.

Internal annotations can be created in the viewer/ArtPro+/DeskPack by indicating the annotations to be internal; if not, the annotations will be considered as external annotations.

Only administrators can enable/disable Internal Annotations.

To activate Internal Annotations,

1. Navigate to Setup > General Site Settings > Internal Annotations.
2. Enable **Allow to create annotations which are only visible to a limited set of users**.

Enabling Internal annotations grants access to Internal Annotations for the members of

- Internal Users group
- Internal Annotations Users (if the group is activated).
- To create a group of Internal Annotation users refer below.
- Automation Engines group (if this group exists)



**Note:** If Automation Engine setup is activated after enabling the Internal Annotations, there won't be access to Internal Annotations for the Automation Engine Users. To fix this disable Internal Annotations and re-enable them.

To deactivate,

1. Navigate to Setup > General Site Settings > Internal Annotations.
2. Disable **Allow to create annotations which are only visible to a limited set of users**.

This prevents any user from creating new Internal Annotations.

Note that the users will still be able to see the internal annotations that were created in the past.

#### Internal Annotation Users Group

The administrator can create an additional group "Internal Annotation Users". Also, the members of this group can create and view internal annotations. By adding external users to this group, they also get access to internal annotations. For example, the employees of an external prepress agency.

To create an Internal Annotation Users Group,

1. Navigate to Setup > General Site Settings > Internal Annotations.
2. Enable **Allow to create annotations which are only visible to a limited set of users**. A checkbox appears.
3. Selecting the checkbox creates the group Internal Annotation Users.

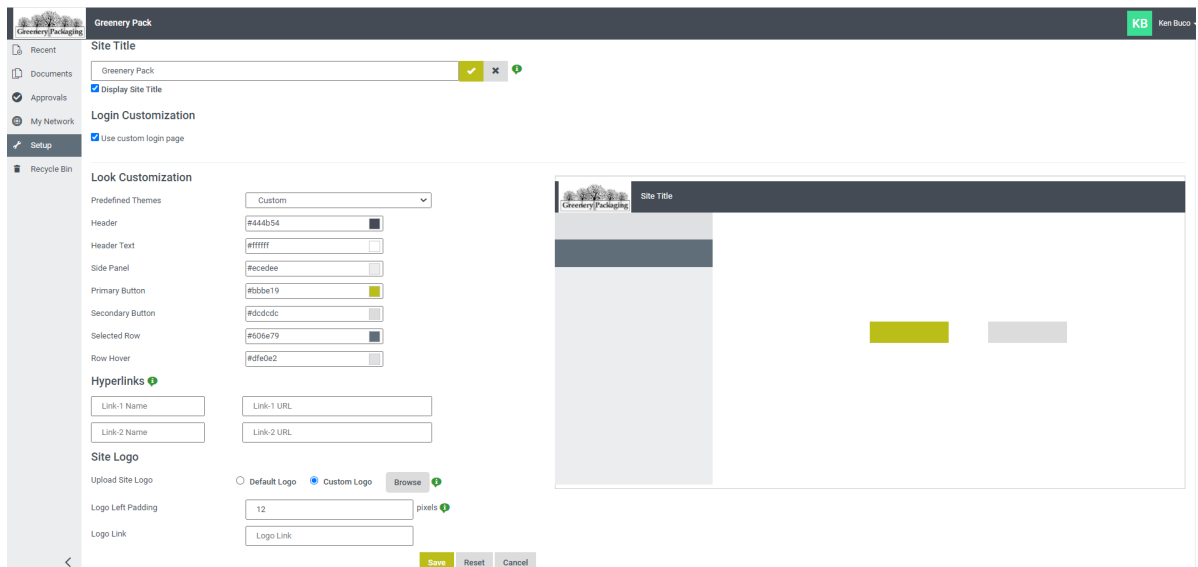
To disable the Internal Annotation Users group, de-select the checkbox. This pops up the following warning message **Members of this group will no longer have access to internal annotations**. Click OK to continue.

After disabling, members of the groups Internal Annotations Users and Internal Users can still access the existing Internal Annotations but are not able to create new Internal Annotations.

## 7.2. Site Customization

The Administrator can customize the look of the Share & Approve site. If there are multiple sites in the Esko Cloud Account, the Administrator can customize each of them to have a different look. Having multiple sites enables the user to manage the data better amongst different business verticals or among different customers.

The site customization also influences the e-mails sent from that site. E-mails can be further customized using e-mail customization.




**Note:** The site customization page has customization options and the preview. Make some changes, then when the preview is OK, commit the changes by clicking the Save button. The page is then refreshed to show the site with the updated choices. This can have a delay of up to 20 seconds and in some cases, reload the page. The site customization page only influences the look of the site

- **Site Title:** The site title is the text appearing at the top of the site. Changing the title leads to the change of the website title and the top banner in the e-mails. Already sent out e-mails are not impacted by the change.
  - Site title has an inline save button. Ensure to click on the save button for immediate effect on the title.
  - The maximum number of characters is 100. If the logo has the company name and there is no need to add a separate title name, then deselect the box (Display Site Title) below the page.
- **Color Customization:** Most of the colors of a Share & Approve site can be changed. But it is not possible to change the text color or font or text size.
- **Color Scheme:** The Administrator can choose between the following color schemes: Esko (default); uses Esko green and grey, Blue, Green, Red, and Custom.



By giving the value as Custom, the site accepts the current color as the beginning of further editing therefore it does not change the color like other themes.

Color Scheme can be picked for:

- **Header:** The header of the site in which the site title and logo are shown.
- **Side Panel:** The background of the left menu.
- **Primary Button:** The color of the primary buttons.
- **Secondary Button:** The color of secondary buttons. The colors of tertiary buttons or 'normal' buttons cannot be customized (they are always white).
- **Selected Row:** The color for a selected row in the menu.

**Row Hover:** The color of a row in a table when you hover over it.

### Recommendations for Color Scheme

- Before changing the color of the banner, first, customize your logo. Often the banner color needs to either follow or contrast the color of the logo.
- Header text and Header-footer color should contrast. Choose either a darker banner and white text or a lighter banner and black or dark gray text. Colored text mostly works on a white banner.
- The gray panels are best kept gray or another soft color (e.g. a light shade of the banner color).
- Share & Approve has primary, secondary and tertiary buttons. Primary buttons are typically the main action that can be performed (e.g. Save when filling out a form). Secondary buttons are often additional actions or the first alternative (Cancel, power functions, Delete, ...). Tertiary actions are supporting actions, advanced functions, the administrator only functions. They are white and cannot be customized.
- The primary button color works best as a darker version of the top banner color or as a close family in e.g. your company's color scheme. E.g. for the Esko theme, we used Esko gray for the banner and Esko green for the primary button.
- The primary button color is also used for the progress bar of upload which appears below the top banner. For this reason, it is best to not take it the same color as the banner and to take a color that goes well together with it.
- The Selected row is the row in the menu representing your current navigation location. Take a dark color because the text of the selected row will be white.

### Site Logo

- The site logo is the logo which appears to the left of the Site Title. Share and approve has a very neutral default logo. The Administrator can add the respective company logo here. For example, some create a dedicated site for a large client and put the client's logo there. In yet other cases, the site is separately branded with a logo specially designed for this site.
- The site logo can also be used in e-mails. After changing the site logo, there is an option to test it on e-mails.
- To change the logo, select Custom Logo. A Browse button will appear. Click it and select an image from your local file system. Any web-compatible image in .PNG, .JPG, or .GIF formats work. After uploading, the preview gets updated. The actual site changes after saving the changes at the bottom of the page.
- An Administrator can change the logo's left padding. This is the space between the left end of the page and the logo's left end. The same size is also applied to smaller screens like mobile devices. Mostly the default of 12 pixels works for transparent images. For images with e.g. a white background, padding of 0 is better.

The logo can be a hyperlink. When the Administrator enters an address like <https://www.esko.com>, this link is applied to the logo. Users clicking on the logo are then forwarded to this configured URL.

Add the entire address including `http://` or `https://`. Leaving the logo link empty will make the logo non-clickable.

### Recommendation for a Good Logo

- PNG logos with a transparent background render better than JPG's with a flat background.
- Best size of the logo is 50 pixels high. Square or landscape logo's work better than portrait logos. Logo's larger than 500 pixels high or wide are not accepted.
- Logo's higher than 50 pixels are scaled proportionally to 50 pixels. This however does not happen on e-mail banners, so make sure to test e-mails to see whether they remain aesthetic.
- Logo's wider than 50 pixels are just left how they are if their height is not larger than 50 pixels
- Animated GIF's work well, but they do not render mostly in e-mails, depending on the e-mail client.
- **Hyperlinks:** The top right header drop-down where the current user's name appears, can get two additional configured links to provide a connection to the main site. The Administrator can add a name to the link and then the url. On saving the site is visible under the drop-down where the name of the user is displayed.
- These allow to add e.g. a link to specific help the Administrator creates for the end users. It can also be used to point to the marketing information. The link name is the name as it will appear in the menu. The same name will be used regardless of the end user's language preference. The hyperlink is the internet URL. It must be complete e.g. <https://www.esko.com> should not omit `http://` or `https://`.
- **Login Customization:** The check box for login customization enables the customer to view a customized login screen. Here the logo which is displayed to the left of the site title along with the site title itself is displayed to the customers when they attempt to login.
- For the customized logo and the site title to appear, the link must include the path up to the site name E.g. : `https://approve.eu.esko.cloud/sites/rU8zRpxfEpmC/FlexoLabels`. If the bookmarked link does not contain the path up to at least the site name, then the login screen displays the Esko logo underneath which the text "Sign in with Esko ID" is displayed.
- The behavior of the login screen is the same if the "Use custom login page" check box is unchecked. It is possible to customize only the logo. To disable the custom logo, remove the custom logo from the Site Logo section below. The default behavior is that login customization is enabled. An Administrator can always disable it by unchecking the check box.
- Reset and Cancel

**Reset:** The entire customization except the site title (goes to default).

**Cancel:** Undoes the previous changes since latest Save. It has the same effect as navigating away from the page or closing the browser (tab) without clicking Save.

## 7.3. E-mail Notifications

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Notification scheme is a saved configuration of different notifications to be sent to various recipients. This feature allows you to customize the notifications. Notifications are sent via e-mail and the Administrators can choose the recipients and the type of e-mails for each event. E-mails can be configured through **E-mail Customization** under Setup > E-mail notifications.

There are three types of the notification scheme:

1. Site Notification Scheme
2. Folder Notification Scheme
3. Document Notification Scheme

### 7.3.1. E-mail Notifications

Esko Cloud Share & Approve can send customized e-mail notifications for events that occur. E-mail Notifications Settings made, are applicable for the specific site and the Administrator can have different E-mail Notification Settings for different sites. Esko Share & Approve has a simple yet powerful way of customizing the e-mails that are sent to the users (internal or external).

E-mails are sent mostly as an invitation.

- for users to the system
- to a new folder
- for approval

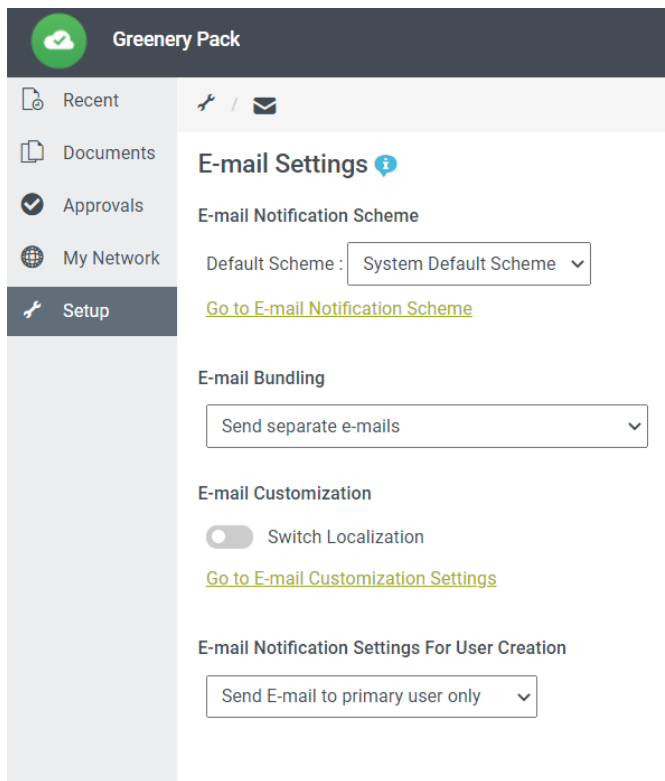
The Administrator can take decisions about:

- Whether to have e-mails in local languages or only in English.
- Content of the e-mails (which information appears, color schemes, thumbnails).
- Recipients of the e-mails.
- When the e-mails are sent (immediately or bundled per time period).

E-mail Notification can be configured via **Setup > E-mail Notifications**.

To go to E-mail Settings:

1. Navigate to Settings.
2. Select E-mail Settings under Site Customization.



### Switch on E-mail Localization

E-mail notifications can be sent using the language of the users. Based on the recipients language preference, E-mail localization makes the notifications more personalized.

The Administrator takes the decision whether to have all the e-mail sent in English or localized to the language of the users. Move the 'Switch Localization' slider to the right to have e-mails sent in the language preference of the users.

#### E-mail Customization

Switch Localization

[Go to E-mail Customization Settings](#)

### E-mail Customization

E-mail customization enables you to customize the content of the e-mails. To ensure personalized and valued communication with your customers, the e-mail templates can be altered according to the need of your organization. The preview option allows you to see the consequences of your changes and make changes before sending.

Click on **'Go to E-mail Customization Settings'**.

A page opens allowing to set options, get a preview, send a test e-mail. The customization is per site, so if there are different sites, the Administrator can customize the e-mails with different look and content. The customization allows to change the terminology, the look of the e-mail and to add

information. The customization user interface is influenced by whether the Administrator enabled localization in **Setup > E-mail notifications**. When localization is enabled, the customization shows language keys instead of the current values.

**E-mail Master:** Many different notification messages are sent and instead of customizing them each separately, mail customization master can be used. When the Administrator changes a setting in the master configuration, the settings are inherited by each of the applicable notifications, unless this setting is locally set differently.

Example: When setting the header text in the master, the header text for all notifications is changed. After this when a user sets a different header text in a specific notification for 'Link Sharing', the header text is adapted for that notification only. Further changes to the master are applied to all notification except this one.

**Type selector:** Using the Type selector, Administrator can switch between the E-mail Master and the specific e-mail types. We recommend starting with the E-mail Master and do as many changes needed there, so that repetition is reduced.

**E-mail Preview:** The E-mail Preview to the right side of the screen gives a preview of how the e-mail looks. In case of the E-mail Master, it can look complex, but no actual e-mail with that complexity will ever be sent. The preview is better suited for the individual e-mail types.

**E-mail Localization:** When localization is switched on in Setup > E-mail notifications, the customization values will show codes like `#{documentName:Document Name}`. Click on the customization values to view the current values for each of the languages. For built-in fields (e.g. Document Name), this is pre-populated with the system's default localization. For custom fields (e.g. Text After Title Bar), it will start empty. The Administrator can type a different text for each language. If a language box is empty, the default will be English.

Localizations added to the E-mail Master is inherited by the specific types, but it can be changed to something else as preferred. The entire field inherits or doesn't inherit for all languages.

### Customizable Sections

Each of the sections can be switched on or off with the check box after 'Show xxx'. If the check box is off, the system disregards the inputs coming after. When the Administrator set the values and previews, then it can be switched on/off by the appearance of the section per individual mail type.

**Title Bar Section:** The title bar text defaults to the site's title, represented by the smartname `#{siteTitle}`. It can be replaced with a fixed text, or could be combined this with the smartname, e.g. Approval Request on `#{siteTitle}`. Title Bar's Text can be aligned to left, center or right, and the text size can be given in pt. size or in px size. Show Site Logo will add the same logo as in the site. The site logo in the e-mail is not scaled, hence use site logo of the size between 50 and 100 pixels.



**Note:** Only an image can be put in the title bar, give it a white background and no text. Make your image approx. 650 pixels wide for the best experience.

**Text After Title Bar, Text Before Link Button, Text After Link Button:** The Administrator can type a static text or a text with smartnames or with a hyperlink. These could be instructions, or a custom welcome message.

The Administrator can add a hyperlink by clicking on the hyperlink icon. The link must be a valid HTTP URL including the `http://` part, e.g. `https://www.esko.com`.

**Document Thumbnail:** For all e-mails regarding a document (sharing of documents and approval e-mails) a thumbnail of the document can be added to the e-mail.

Thumbnails can only be shown if they exist. Thumbnails do not exist for non-viewable documents (e.g. JPG, MS Office files, ...). Thumbnails are shown with 500 pixels width or height depending on whether they are portrait or landscape

**Label configurations:** Most of the e-mail content are label/text pairs where the label is the topic and the value are derived (for example, approval state). The Administrator can switch on/off each of these sections and change the label. Not all sections appear in all e-mail types. It can also be set to their labels all on the Master level though. It will automatically take the non-applicable ones out, and it can be further filtered in the individual e-mail types.

**Link Button:** The link button is where it is expected from the users to click to navigate to the document.

**Show Link in Text:** The link text in the link button which appears as a text in the mail, to allow users to navigate to the location if the mail forwarding client blocks the link in the button.

## E-mail Bundling

E-mail bundling is the feature that collects e-mails during a time period (e.g. 1 hour), then constructs an e-mail with the information from the events during that time frame and sends that to the recipient(s). E-mail bundling is off by default. This means that for every event the notification scheme determines that a certain person needs to get an e-mail, that e-mail is sent immediately.

Choose 'E-mails can be bundled ...' from the drop-down. This opens a dialog asking for bundling frequency and criteria. The Administrator specifies the E-mail Bundling settings for the site.

E-mail Bundling

Send separate e-mails ▾

Send separate e-mails

E-mails can be bundled together and sent as one

Bundling happens per e-mail recipient. E-mails for a user is obviously never bundled with e-mails for another user. But also, the timer works per user, and starts with the first e-mail that needs to be sent to that user. The system collects the e-mails during the set period for the criteria and sends as an e-mail when the period expires.

E-mail Bundling Settings ⓘ
×

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When multiple e-mails need to be sent to the same e-mail recipient within the same e-mail bundling time frame, only 1 e-mail will be sent.

Bundling Frequency :

Bundling Criteria :

- Message
- Due Date
- Your Role
- Folder
- Approval Master
- Approval Status
- Final Status

**Bundling Frequency:** The e-mail bundling frequency determines the time frame the system consolidates the information to send an e-mail. The default bundling frequency is 30 minutes.

**Bundling Criteria:** Bundling criteria comprises of different fields which are present in the e-mails.

Based on the fields selected to be part of the bundling criteria, e-mails have the same value for all fields in that set are bundled together for the same recipient.

**Following table shows all the bundling criteria**

Bundling Criteria	E-mails which have the
Message	Same messages are bundled together.
Due Date	Same due dates are bundled together.
Your Role	User invited with the same role.
Folder	Documents/folder in a specific folder are bundled together based on e-mail types
Approval Master	Same approval masters are bundled together.
Approval Status	Same approval statuses are bundled together.
Final Status	Same final status of an approval cycles are bundled together.

Bundling Criteria considers fields that are relevant to that specific e-mail types. For example, Due date is only applicable for approval related and not for E-mails sent for Invite/Sharing and hence due date criteria are ignored for the latter.



**Note:** Share & Approve offers capabilities which avoids the e-mails which do not belong together from bundled.

- It will never bundle e-mails for different event types. This also ensures that the look customization is still straightforward.
- Languages are never combined (this only matters when users change their language during the time period or when shared link users get e-mails from different setups where a different language was chosen for them). This makes sure that no e-mails with mixed languages need to be constructed.
- E-mails from different Share & Approve sites are never combined.

The dialog allows creating more restrictions. If for e.g. check 'Folder', then e-mails for documents in the different folders are not combined. When folders reflect e.g. a business project, this can be used to bundle e-mails per project.

More e-mails will be sent when more criteria are checked. It will however mostly not matter too much as e-mails during a time frame tend to be for the same reasons. However, these criteria avoid that info for a business action gets 'lost' in a lengthy e-mail for another project



**Note:** Automation Engine will often start a set of approval cycles for multiple files (multiple SKUs/variations,...). These will be started shortly after one another, so typically within the bundling period. The approver will only get an e-mail.

### E-mail Bundle View

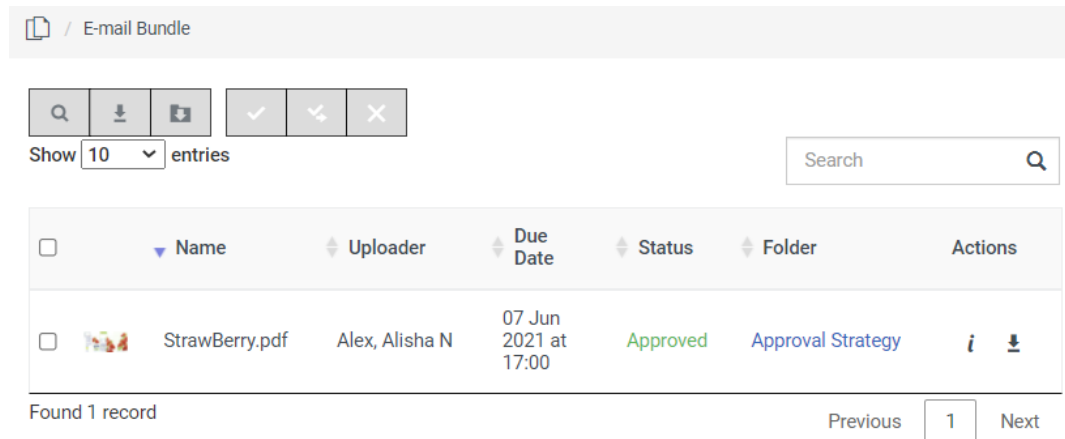
E-mail is bundled on criteria basis like type of email notification. For example, approval requests and rejected approvals will be bundled separately.

If the administrator has enabled bundling, you will receive an e-mail with a link and when clicked upon, the E-mail Bundle page will be opened in your browser.

If you are the approver, then the document will be opened in the viewer.



**Note:** Multiple files can be selected together and can opened in viewer.



The screenshot shows a web interface for an 'E-mail Bundle'. At the top, there is a breadcrumb 'E-mail Bundle' and a toolbar with search, download, and refresh icons, along with status filters (check, close, delete). Below the toolbar, it says 'Show 10 entries' and a search box. The main part is a table with columns: Name, Uploader, Due Date, Status, Folder, and Actions. One row is visible for 'StrawBerry.pdf' uploaded by 'Alex, Alisha N' on '07 Jun 2021 at 17:00' with a status of 'Approved' and folder 'Approval Strategy'. The Actions column contains an info icon and a download icon. At the bottom, it says 'Found 1 record' and has 'Previous', '1', and 'Next' navigation buttons.

	Name	Uploader	Due Date	Status	Folder	Actions
<input type="checkbox"/>	StrawBerry.pdf	Alex, Alisha N	07 Jun 2021 at 17:00	Approved	Approval Strategy	

The E-mail Bundle table comprises of the following tables:

- **Name:** The Name of the document.
- **Uploader:** The name of the user who uploaded the document.
- **Due Date:** The due date for the stage.
- **Status:** The approval status of the document.
- **Folder:** The name of the folder in which the document is.
- **Actions:** Action column comprises of two icons.
  - **Info:** Opens the document in Document Details view.
  - **Download:** Downloads the document as a zip folder.

When you select a document, the following icons will be activated:

- **View Selection:** Opens the document in the viewer, if it is viewer supported.
- **Download Selection:** Downloads the document.
- **Download Selection as zip:** Downloads the document as a zip folder.

When you select a document with pending status from the table, the following icons will be activated:



**Note:** The user (registered or unregistered) should be an approver or a part of the approval process.

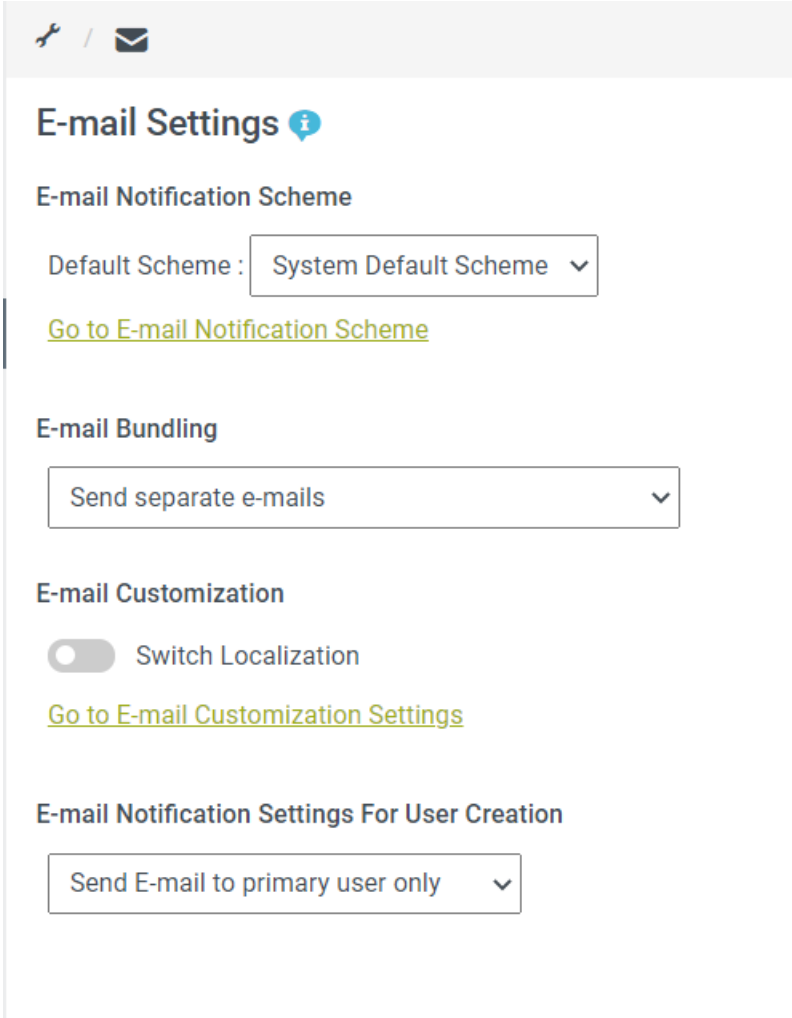
- **Approve Selection:** Approves the document without opening it in a viewer.
- **Reject Selection:** Rejects the document without opening it in a viewer.
- **Forward Approval:** Can assign the document to a third party for approval. Refer [Forward Approval](#).



### 7.3.2. Create Notification Scheme

Share & Approve allows the administrator to choose the recipient and the type of event which needs a notification. The Administrators can create notification schemes for the site. This will help to add the important notifications and reduce sharing of unwanted notification.

Share & Approve allows the Administrator to preview the changes by sending sample e-mails before publishing the customization.



The screenshot displays the 'E-mail Settings' configuration page. At the top, there are icons for a wrench and an envelope. The main heading is 'E-mail Settings' with an information icon. Below this, the settings are organized into sections:

- E-mail Notification Scheme:** A dropdown menu is set to 'System Default Scheme'. Below it is a link: [Go to E-mail Notification Scheme](#).
- E-mail Bundling:** A dropdown menu is set to 'Send separate e-mails'.
- E-mail Customization:** A toggle switch for 'Switch Localization' is currently turned off. Below it is a link: [Go to E-mail Customization Settings](#).
- E-mail Notification Settings For User Creation:** A dropdown menu is set to 'Send E-mail to primary user only'.

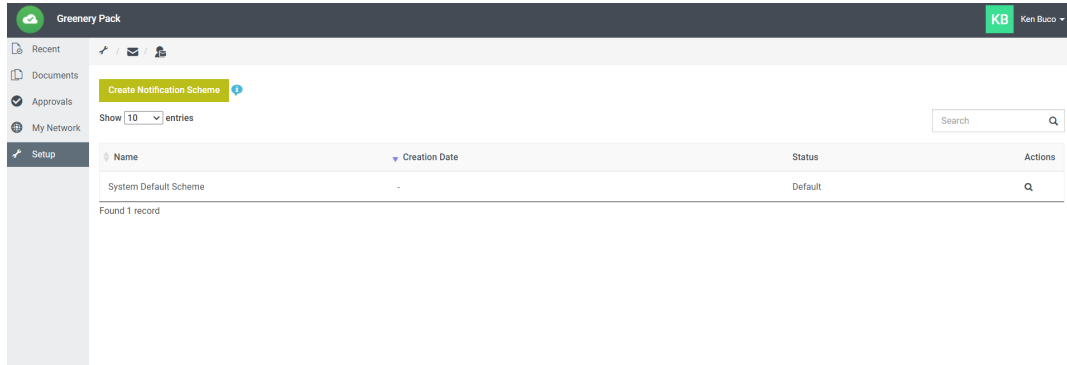
To Create a Notification Scheme follow these steps:

1. Navigate to Setup.
2. Click on E-mail Customization under Site Setup.
3. Click on the link > Go to E-mail Notification Scheme.

E-mail Notification Scheme

Default Scheme :  ▾

[Go to E-mail Notification Scheme](#)



4. Click on the Create Notification Button.
5. The Administrator will get a dialog box with various options:

### Notification Scheme ✕

Name \*

Notifications

Type(s) ✕

Approval Stage Start ✕
Approval Request ✕

Document Rejected ✕
Approval Overdue ✕

Recipient(s) ✕

Approvers ✕

Type(s) ✕

Approval Stage Start ✕
Approval Cycle Finished ✕

Document Rejected ✕

Recipient(s) ✕

Approval Master ✕

Type(s) ✕

Approval Forward ✕

Recipient(s) ✕

Forwarded Approvers ✕

Type(s) ✕

Invite User On Folder ✕
Invite User On Document ✕

Invite User On Site ✕
Share Link On Folder ✕

Share Link On Document ✕

Recipient(s) ✕

Shared With ✕

+ Add

Cancel
Create

Type in the Name for the notification scheme and choose the type of events that needs notification. Add the recipients (registered and un-registered users) who need to receive the notification.



**Note:** Add the un-registered users using their e-mail address.

There are various Notifications Types and the events which trigger them:

	Type	Event triggering it
1.	Approval Setup Changed	The Approval Setup's details got changed. Not seen as changes are any of the other events.
2.	Approval Cycle Stopped	The Approval Cycle was stopped manually (without a final result).

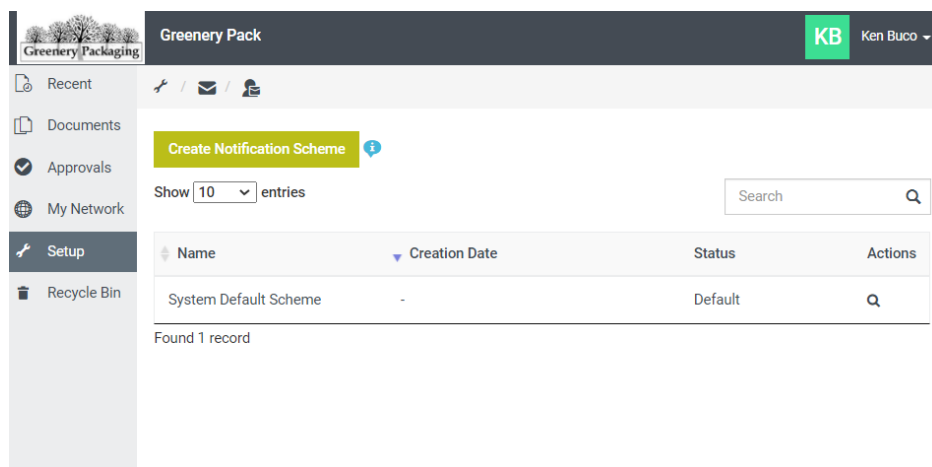
3.	Approval Cycle Finished	The approval cycle came to its final conclusion and reached a final status.
4.	Approval Comment Added	An approver has added a comment in the approval cycle. Remark that comments are different from annotations in the viewer.
5	Approval Stage Start	An approval stage is started. 1 event per stage. Is also sent for the single stage of a simple approval.
6	Approval Request	An approval stage is started and needs an Approver to approve. 1 event is generated per approver
7	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.
8	Approval Overdue	An approval request was not answered by the due date. 1 event per approver who is overdue.
9	Approval Forward	An approval is forwarded from one user (possibly representing a group) to another user. 1 event per forward.
10	Invite User on Site	A registered user was invited to the site root (and everything under it)
11	Invite User on Document	A registered user was invited to a single document (not using 'Share a Link').
12	Invite User on Folder	A registered user was invited to a folder (not using 'Share a Link').
13	Share Link on Folder	A folder was shared with an e-mail address (not a registered user)
14	Share Link on Document	A document was shared with an e-mail address (not a registered user)
15	Document Rejected	A document is approved or conditionally approved by a single approver. 1 event per approval operation

16	Document Approved	A document is approved or conditionally approved by a single approver. 1 event per approval operation
----	-------------------	---

6. Click Create.

### 7.3.3. Notification Scheme Table

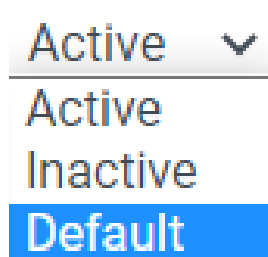
Notification Scheme Table is the table which displays when a user clicks on 'Go to E-mail Notification Scheme'. This contains all the notification scheme created for the site. This table does not display notification scheme created for individual folder or document.



First row shows "**System Default Scheme**". A System Default Scheme is the already existing saved configuration for the site. The System Default Scheme can be viewed but you cannot edit, it works like a factory setting to which you can always return.

According to the preferences, status of the Notification Scheme can be active, inactive or default. Freshly created Site Notification Schemes are active (default), they can be used anywhere on the site.

Use the drop-down to make a notification scheme inactive.



When the Notification Scheme is set to inactive, then it can no longer be selected for a document or a folder. However, documents or folders which are already using a Notification Scheme continues with the same scheme. When editing these document or folder's notification scheme, there will be warning that the scheme is inactivated.

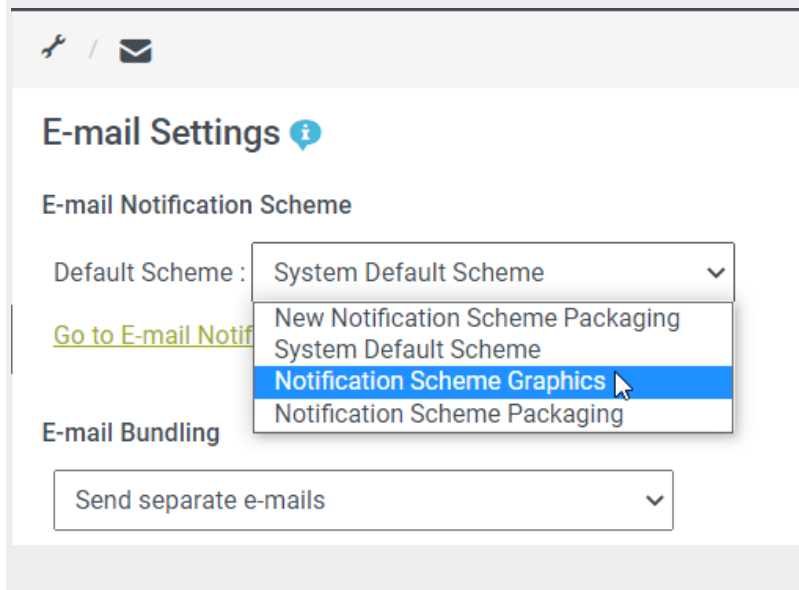
Already running approval cycles using the inactivated Notification Scheme will however not be affected until a user selects another notification scheme.

The Action Column consists of following icons:

- Edit: By clicking on edit user can update the selected scheme. But you cannot edit the name of a Notification Scheme that is already created.
- View: Clicking on view will open the scheme in read only mode.



**Note:** The user can also select a notification scheme from the active schemes in the E-mail Notification page.



### Scope

Notification schemes have 'scope'. Scope means that different notifications can be sent based on where the user is in the folder hierarchy. Site Notification Scheme can be inherited by Folder Notification scheme and Document Notification Scheme.

### 7.3.4. Rules on E-mail Type and Recipients

- If any approval related e-mail type is selected then the next selection must be of approval mail type only, so in mail type drop-down only approval related mail types will come for next selection.
- If invite/share e-mail type is selected, then during the next selection only invite/share mail type will come in the drop-down.
- If Approval related mail types are selected, then "Shared with" smart name will not appear in recipient selection.

- If invite & share mail types are selected, then "Approvers" smart name will not appear in recipient selection.

### 7.3.5. Smart Name E-mail Recipients

E-mails can be sent to 'smartnamed' e-mail recipients. This means that the list of recipients is determined by the details of the event linked to the notification.

Following smartnames exist:

1. Approvers: adapts to the event:
  - For Approval Request: each of the approvers to which a request is sent (typically the approvers of 1 stage).
  - For Approval Stage Started or Stopped: the approvers of the stage.
  - For Document Approved or Rejected, approval comment added: approvers of current stage.
  - For Approval Overdue: the approver who is overdue.
  - For Approval Cycle Finished: all approvers in the cycle.
  - For Approval Stopped or Approval Setup Changed: approvers of current stage.
  - For Invite and share: nobody.
2. Shared With: adapts to the event:
  - For Approval events: nobody
  - For Invite Users and Share Link events: the person with who the folder or document is shared in the current event
3. Forwarded Approvers adapts to the event:
  - For Approval Forwarded: the approver to which the approval was forwarded.
  - For any other event: nobody.

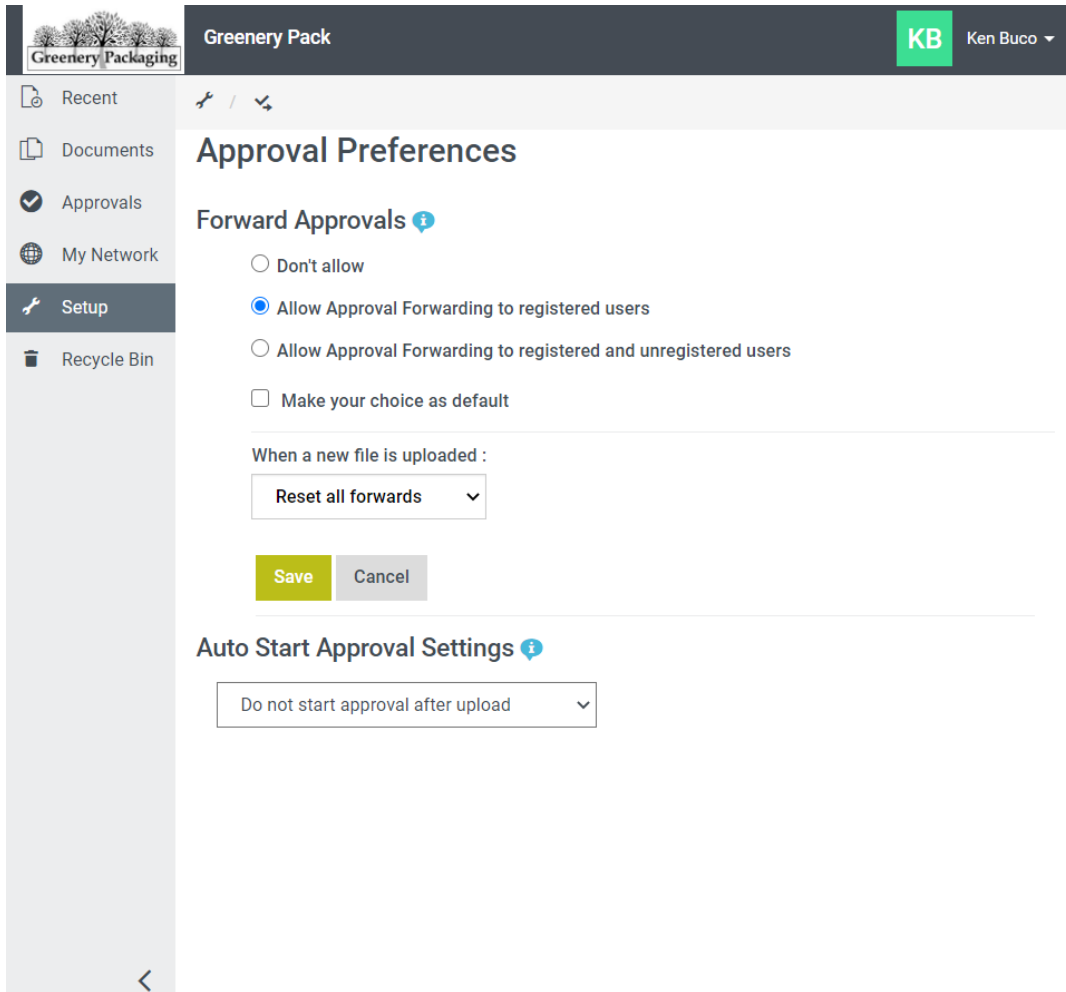


**Note:** Smartnames are shown in green in the Notification Scheme details

## 7.4. Approval Preferences/Forward Approvals

---

Forward Approval is the function where an approver can ask another person to approve instead of himself, or in addition to the approver. The typical use case for forward approval is approval by a 3rd party where the person who uploads 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.



Greenery Pack KB Ken Buco

Recent Documents Approvals My Network Setup Recycle Bin

## Approval Preferences

### Forward Approvals ?

Don't allow  
 Allow Approval Forwarding to registered users  
 Allow Approval Forwarding to registered and unregistered users  
 Make your choice as default

When a new file is uploaded :

Reset all forwards ▼

Save Cancel

### Auto Start Approval Settings ?

Do not start approval after upload ▼

Forwarding happens between a registered user and an unregistered user. To allow this, select **Allow Forwarding to registered and unregistered users**. An Administrator can restrict the approvers from forwarding the invite only to registered users using, select **Allow Approval Forwarding to registered users**. Approvers are then limited to forward to users who are already given access to the system.

### Forward Approval System Settings

Forward Approval is disabled by default. To enable forward approval, select another option than 'Don't Allow'. Check 'Make your choice as default' and then click Save.

When now starting new approval cycles, the approvers will be able to forward their approvals. Anywhere there is an approval button, there will be an additional 'Forward' button. Clicking this, they can enter an e-mail address or select a registered user from the drop-down.

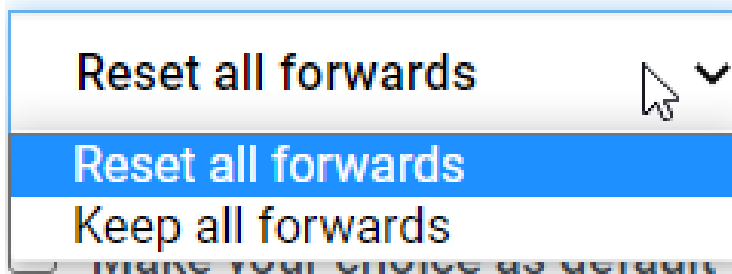
Save the changes and now you can forward the approvals.

When any of the above options is selected, the approvers can forward their approvals using the Forward button. To forward an approval, enter an e-mail address or select a registered user from the drop-down.

- **When New Version is Uploaded:** When the approval cycle is restarted for the new version, it continues from where it was left. When a new version of a document is uploaded in an approval cycle, the Administrator can choose one of the two options given below:



## When a new version is uploaded :



- **Make the Choice as Default:**

When approval forwarding is allowed, the Administrator can still restrict at the level of the approval cycle or even in the approval stage level.

Approval forwarding has its own notification. The forwarded person gets a notification when the forward is happening. The original approver gets a notification when the forwarded approver has taken the decision.

These e-mail notifications can also be customized. Refer [E-mail Notification](#).

### 7.4.1. Auto Start Approval Settings

Auto start approval feature enables the administrator to start an approval immediately after the upload of a document based on the approval settings made on the folder level. This feature helps to trigger approvals immediately or prompts a confirmation after the upload#has been made.

To automatically start Approval Settings,

Navigate to **Setup> Approval Preferences > Auto Start Approval Settings** . Choose one of the three options available and click the tick next to the option to save the setting.

1. **Do not Start Approval After Upload:** This is the default setting. This option allows the user to set up approvals like#earlier. No approval is started automatically after upload of a document.
2. **Auto Start Approval After File Upload:** In this case, an additional option with a checkbox 'Start Cycle on Upload' is available in the 'Settings' in the advanced folder approval setup. This option is visible to any person who has permission to setup an approval cycle such as Manager, Editor or Approval Master. By checking this option, the approval setup is automatically started whenever#the upload of the document(s) is completed in that folder.

This is helpful when working with Adobe® Illustrator Plug-in or Automation Engine. An approval cycle can be started automatically when an document is uploaded from Adobe® Illustrator or as a part of a workflow from Automation Engine.

3. **Ask to Set up Approval Cycle on File Upload:** In this case when a file upload to the folder is initiated, the user is prompted with a dialog box to configure approval setup. There are two options:
  - a. **Do not Start Approval After Upload :** Approvals are not started automatically, and the only file upload commences when the user clicks on "Upload Files". The user must set up approvals for each document.
  - b. **Start Approval After Upload:** When the user selects Start Approval After Upload, a dialog box appears where the user needs to configure the Approval setup.

After Configuring the approval setup, the user needs to click “Upload Files and Start Approval”. Once an upload#has been#done, the user receives a notification pop-up stating that the approval cycle#has been started.



**Note:** While uploading documents with Auto start approval, there are chances of displaying a document without an approval cycle. This is normal. After a few seconds or after refreshing, the user can see the approval cycle has started.

## 7.5. Viewer Preferences

---

A Viewer Workspace has a set of tools and widgets available for a user in the viewer. By enabling Viewer Workspaces functionality, an Administrator can modify the default settings based on the different roles and requirements.

The Administrator should save or cancel the enabled options before exiting the pages for changes.

### 7.5.1. Viewer Workspaces

Viewer Workspaces allows customizing tools and widgets based on the user’s role. Users can also further customize their own personal experiences. When any viewable document is opened in the viewer, a Viewer Workspace comprises of tools and widgets that are available. When the settings are changed in any of the tabs, ‘Save’ to take effect immediately for the users, or else ‘Cancel’ to exit the page.

**An Administrator can determine what is visible/available to the end users based on their role.**

In Viewer Preferences, Administrators can set tools and widgets which are visible or available for all the users according to each role.

## Viewer Workspaces

Reviewer	Editor	Approver	Manager	Site Administrator
<b>Tools</b>		<b>Widgets</b>		
> <input checked="" type="checkbox"/> Navigation	<input type="checkbox"/> Approval Details			
> <input checked="" type="checkbox"/> Orientation	<input checked="" type="checkbox"/> Annotation List			
> <input checked="" type="checkbox"/> Measure	<input checked="" type="checkbox"/> CAD			
> <input type="checkbox"/> Text	<input checked="" type="checkbox"/> Document Select			
> <input checked="" type="checkbox"/> Compare	<input checked="" type="checkbox"/> Info			
> <input checked="" type="checkbox"/> Annotation	<input type="checkbox"/> Channels			
<input checked="" type="checkbox"/> Toggle 2D/3D	<input checked="" type="checkbox"/> Layers			
<input checked="" type="checkbox"/> Page List	<input checked="" type="checkbox"/> Navigator			
	<input checked="" type="checkbox"/> 3D View			
	<input type="checkbox"/> 3D Setup			
	<input type="checkbox"/> View			
	<input checked="" type="checkbox"/> Page List			
	<input type="checkbox"/> Quality Control			
	<input type="checkbox"/> Color Management			
<input checked="" type="checkbox"/> Visible by default				
<input type="checkbox"/> Available, can be set to visible in viewer				
<input type="checkbox"/> Hidden, not available in viewer				
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>		

When viewing a document, based on the user's role workspace is loaded accordingly. The ones under 'available' can be re-enabled by the individual user though.

Note: If there are multiple sites in the Esko Cloud Account, this setup is done separately for each site (this is a possible reason for having multiple sites).

**Typical use cases:**

- Reduce the number of:
  - measurement tools (e.g take out Braille, caliper, ...).
  - annotation tools (e.g. don't allow point note annotations).
  - zoom tools (e.g. take out zoom to 1:1 pixel).
  - compare tools for less advanced users.
- Remove:
  - Channels for Reviewer and Approver (if they are not supposed to check this).
  - Text tools (certainly if you know text is always contoured).
  - 3D tooling. E.g. if you know you will never upload 3D files or use on-the-fly 3D.

- You should not:
  - Switch off CAD: auto-adapts to the file type so the tools only appear when they are relevant and then they are always needed.

Switch off page list: auto-adapts to be a multi-page file.

For example, if the Administrator wants to restrict certain privileges of the Viewer Workspace for a Reviewer, say to restrict the liberty over measuring tools, the Administrator can un-check the box beside it.

If the Administrator wants to restrict the specific tools within measuring tools, say Barcode, the Administrator can click the arrow beside measuring tools and then un-check Barcode. This prevents the Reviewer from having Barcode tool on his Viewer Workspace.

## 7.6. Navigating through Multiple Sites

---

To switch between multiple sites,

1. Navigate to My Preferences.
2. Select My Sites.
3. Click on the site name to navigate to the site. You can return to My Sites via the top-right menu.

All the sites in your Esko Cloud account will be listed based on the Organization. Refer **My Sites** in User Preferences for more information.

## 8. Other Settings

---

The Other setup displays the System Information and the help menu which redirects to the User help of Share & Approve.



### 8.1. Getting Started

---

The Getting Started icon will redirect you to the support page of Share & Approve.

### 8.2. System Info

---

System info page gives the details on Share & Approve Version and Cloud Version.

## 9. Managing 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 a maximum 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 display 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:** Refer [Edit Users](#) on page 71.
- **Send e-mail:** By clicking the email button, the user can send an email to the other users.
- **Delete:** Delete button can be used to delete a user from the site. Refer [Delete Users](#) on page 71.



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

### 9.1. 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.

## 9.2. Edit Users

---

Clicking the button  takes to the page where you can edit user details.

For example, the user can be a part of the User Managers, Group Managers or Administrators group. These 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 changed 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.

Refer [Internal and External Users](#) on page 71.

## 9.3. Delete Users

---

Delete option is available for the user who is a member of User Managers, Group Managers, or Administrators group.

To delete a user:

1. Select the user's name from the User list table. This enables the Delete button instead of Add User button.
2. Click Delete.
3. A confirmation box appears. Select Yes.

## 9.4. 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.

## 9.5. 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.



## 10. Managing 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.

Refer [Default Groups and their Permissions](#) on page 74.

Refer [Access Rights for Groups](#) on page 74.

### 10.1. Add Group

---

You can create a group with a unique name with the **Add Group** option.

1. Navigate to Groups page in My Network.
2. Click Add Group button.
3. The Add New Group page will be opened. Enter the Group Name (mandatory), Group Description and Group E-mail.
4. Click Create.

#### Group E-mail

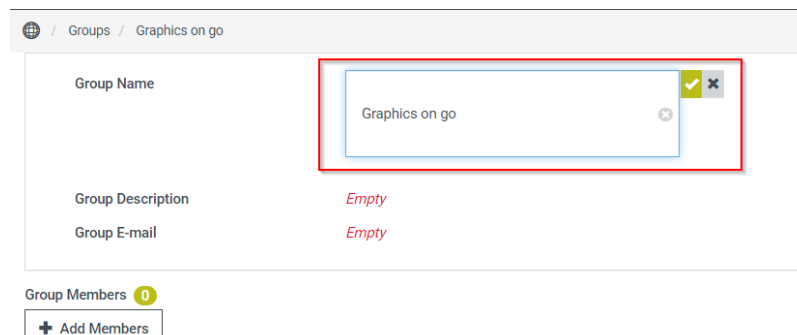
When you set a group e-mail, invitation mails and follow-up mails are sent to this e-mail address. When group e-mail is not setup, e-mails are sent to all group members.

### 10.2. Edit Groups

---

Built-in groups (refer [Default Groups and their Permissions](#) on page 74) are created automatically by the system so the users cannot edit the details of those. However, it is possible to add and remove members from the groups. In the Group details view, built-in groups are displayed as System under Group Manager.

To edit the details of a non built-in group, click on the fields in the Group details view and add the information. For example, if you want to change the Group name, click the name of the group which will open an editable box. Type the new name and click the save button next to it. To cancel the action select the X button next to the save button.



The screenshot shows the 'Groups / Graphics on go' page. The 'Group Name' field is highlighted with a red box and contains an editable text box with the text 'Graphics on go'. The text box has a green checkmark and an 'X' button next to it. Below the 'Group Name' field, the 'Group Description' and 'Group E-mail' fields are both labeled 'Empty'. At the bottom, there is a 'Group Members' section with a count of 0 and an '+ Add Members' button.



**Note:** You can only edit the following fields:

- Group Name
- Group Description
- Group E-mail

## 10.3. Delete Groups

---

Users who are Administrators or Group Managers can perform the delete function.

To delete a group:

1. Select the group's name from the Groups list table. This enables the Delete button instead of Add Group button.
2. Click Delete.
3. A confirmation box appears. Select Yes.



**Attention:** System created groups (default groups) cannot be deleted. If you have clicked on the Delete button the following message appears "Bad Request: cannot delete default group(s)".

## 10.4. 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.

## 10.5. 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	<p>Can view all users, can create, edit, delete users as well as groups. Can add or remove users to all groups except Administrators.</p> <p>Group Managers cannot see folders or documents unless the group Group Managers is explicitly invited to them.</p>
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	<p>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.</p> <p>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.</p>
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

Customer Managers

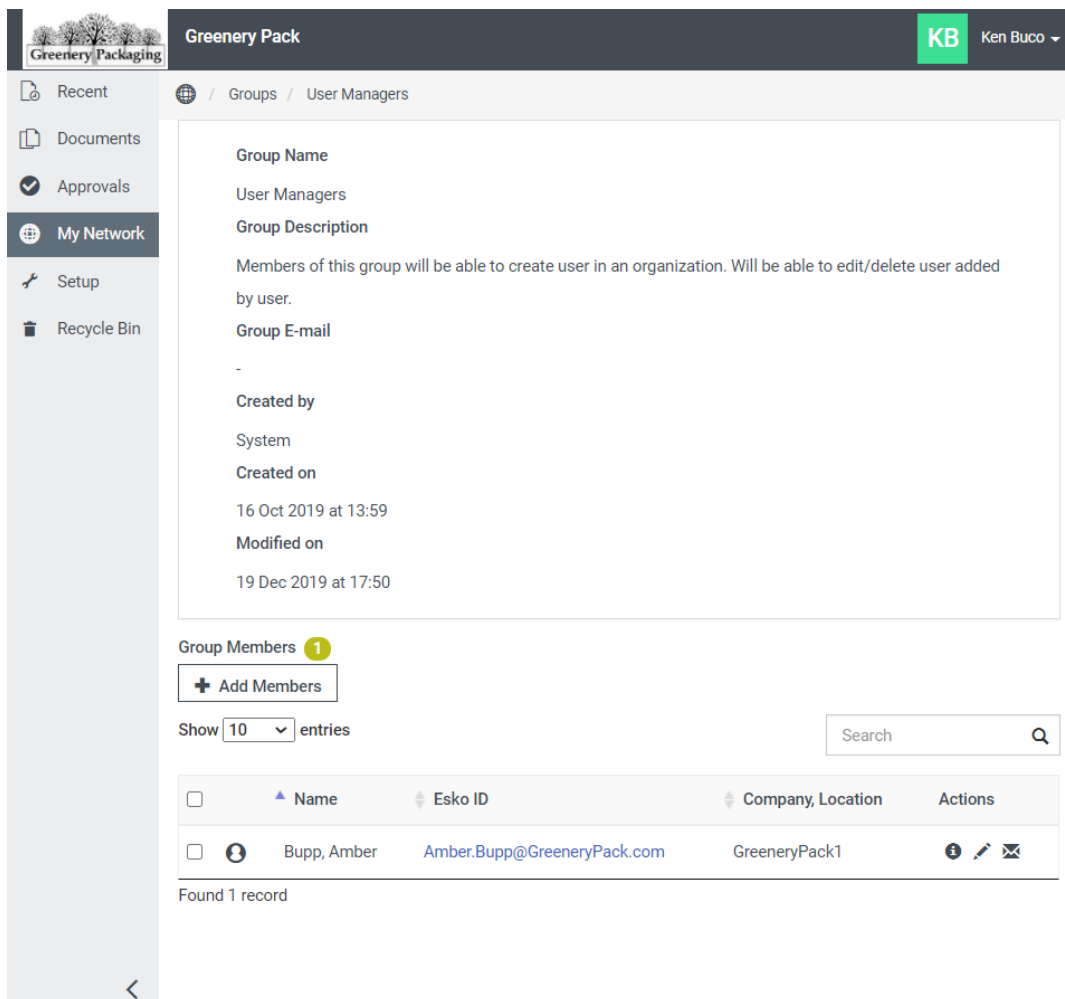
company who is the contact person for the Print Buyer. The users in this group are assigned to one or multiple partners.

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".

# 11. 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



The screenshot shows the 'User Managers' group details in the Esko software. The interface includes a sidebar with navigation options like 'Recent', 'Documents', 'Approvals', 'My Network', 'Setup', and 'Recycle Bin'. The main content area displays the group name 'User Managers', a description, and creation/modification dates. Below this, there is a 'Group Members' section with an 'Add Members' button, a search box, and a table listing one member: Amber Bupp.

Name	Esko ID	Company, Location	Actions
Bupp, Amber	Amber.Bupp@GreeneryPack.com	GreeneryPack1	Info Edit Delete

Found 1 record

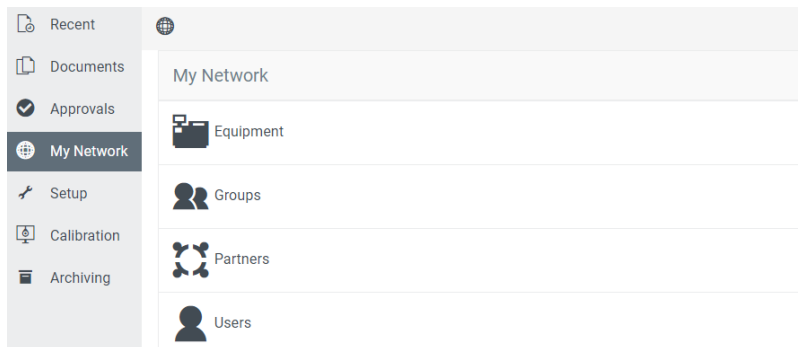
3. Click Add Members. Select the users from the list.
4. Click Add.

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.

## 12. My Network/Network

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My Network/Network is the place where you maintain your users, groups, partners, customers, suppliers, other partners etc.

The network is specific to each Esko Cloud Account, but it is shared between the sites of the respective Esko Cloud Account (if there is more than one).

External users do not have a 'My Network/Network' menu item and hence they cannot view which other users are defined in each network and they cannot see the names of other partners and their users.

(External users have 'My Contacts' menu item)

Internal users can see all partners and their users. The Administrator can make a connection with an equipment or a partner network.

### 12.1. Adding Users to the Account

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The Administrators not only sets up the site, as soon as the site is created, they add Managers to the site. When you add any user, the user is added to organization/Esko Cloud Account and the user will be present for all the sites under the account.

Only Administrators can edit the Users Managers and Group Managers. The Administrator also can add other users as administrators to the site. Refer [Add Users](#) on page 70 and [User and Group](#) on page 77.

### 12.2. Partner Network

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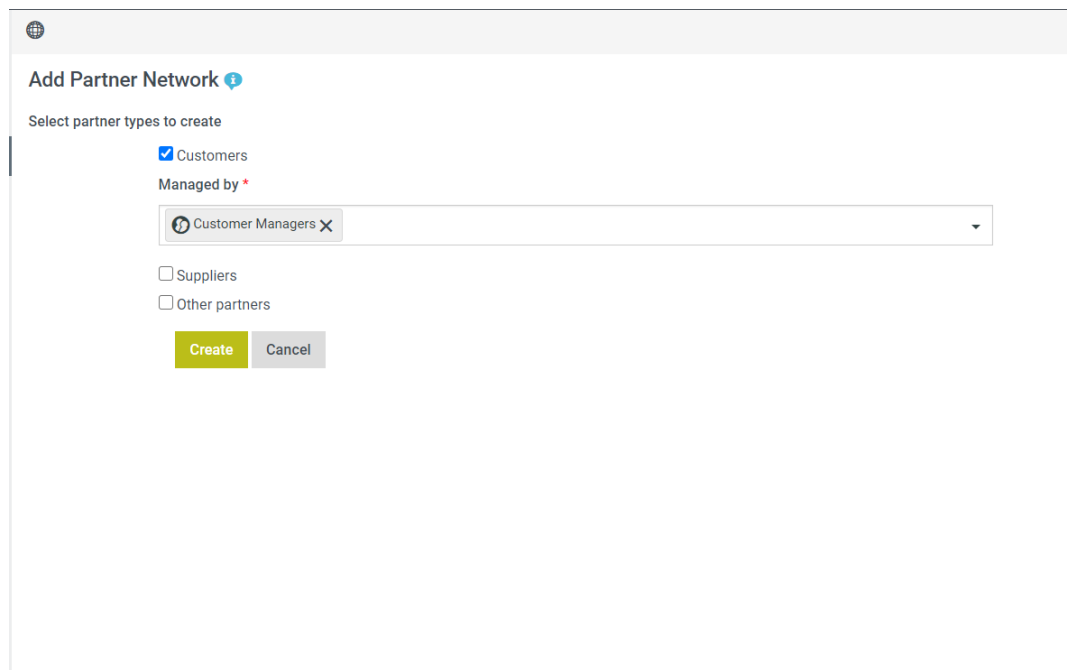
Share & Approve site can be used outside the company by creating a partner network. Partner Networks is a way to manage the customers, suppliers and other business partners, including managing which of their users can access the site. The Administrator can share and manage the partner networks. The Administrator can assign users to the Partners, who are usually the employees

of that partner (or at least those you have contact with e.g. to approve PDF files). Assigning a partner is only possible for external users.

## 12.2.1. Add Partner Network



1. Click Add Partner Network.
2. Select which partner network you want. Always select customers.

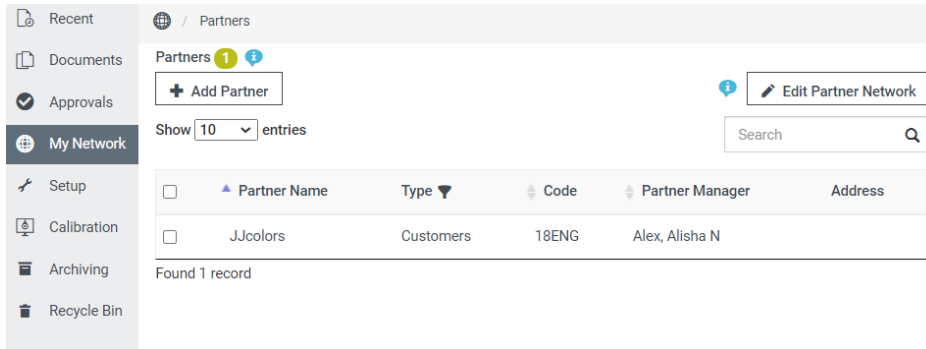


3. Click Create, to create a new Partner Network. To update the existing Partner Network, click Update.
4. Confirmation form appears. Go to partners network list.

You can see that the Partner Network and the default group (groups) listed while partner creation are created.

## 12.2.2. Edit Partner Network

The Administrator can modify an existing Partner Network using this option. Click on the **Edit Partner Network** button inside the Partners page. A dialog box opens:



**Managed by:** Partner Networks are managed by different groups. Groups selected for each Partner type are listed under their respective Partner types. This list of Groups can be modified by adding more Groups to the Managed by a list of Partners of a specific type.

By default, only Administrators can manage partners. To avoid too many users in the Administrators group, your site allows setting one or more groups as management groups per partner type.

There is a built-in Customer Managers group for managing your customers. The Administrator can change this by selecting another group. Managed by can be left empty and in that case, the Administrators will be able to manage this partner type. At any point, **Managed by** group can be changed and already created partners will still be manageable by their original creators.

Existing Groups can also be removed. Groups removed from here will not delete the Group from the organization. It will only revoke the rights to manage the respective Partner type.

For example, users from a Group removed can no longer create customers.



**Important:** It is important to note that the **Managed by** field can never be empty for any given Partner type.

### Add/Remove Partner Types

Adding new Partner types will allow the creation of partners of the newly added type.

Existing Partner types can be removed if no Partner exists in that type. If there exist no Partners, Editing the Partner Network by removing all the Partner types will lead to deletion of the Partner Network.

## 12.3. Equipment

Equipment is a connection (computerized) created to Esko Cloud without human assistance. Equipment enables connection to your Esko Cloud site by any computer system or software program without human intervention. It is primarily used for Esko Automation Engine and when connected, Automation Engine can upload files, wait for approval, listen to events and so on. Other Esko components will be connected too.

Before connecting an equipment to your Esko Cloud Account, it must be 'registered' so it can determine its access rights. Add Equipment registers the equipment. Once registered, it can be used like normal users in the invitations.

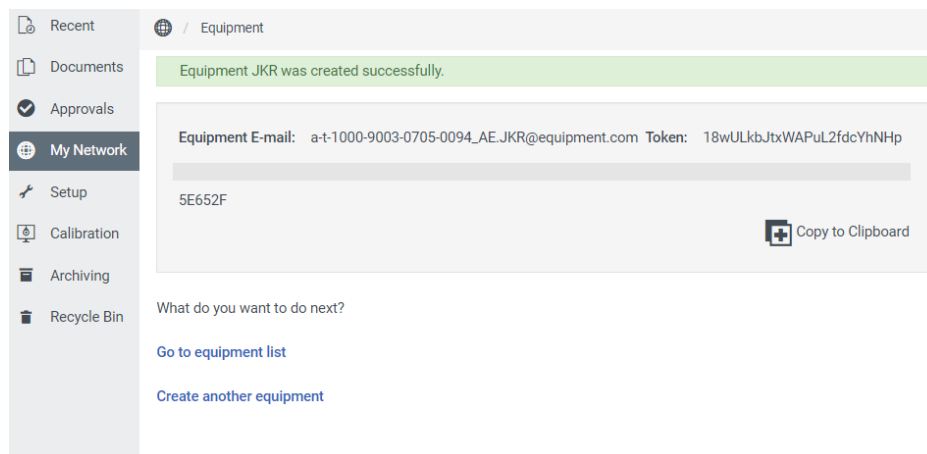
Following equipment types are supported



- Automation Engine
- WebCenter
- Color Pilot
- Others

### Adding an Equipment

1. Navigate to **My Networks/Network > Click Equipment**.
2. Click the button **Add Equipment**. An Administrator can create an equipment by adding a Name that is unique and has maximum 7 characters as this name is used as prefix for certain automatically generated names. Location, Code and Description fields are optional. It is good practice to set the Location to the geographical place (city) where the equipment is installed. Status is initially always **'Not Connected'**.
3. A confirmation message is received when the Administrator Create the equipment. You can click on Copy to Clipboard to copy the code and this information is necessary (as copied to the clipboard) to connect e.g. Automation Engine.



Further information on how to connect to equipment of each of the types is found in their respective manuals. An equipment can be deleted using the check box given next to the equipment list.

## 12.3.1. Access Rights for Equipment

Equipment acts in almost the same way as users. Like:

- The equipment can be invited when sharing a folder or document. This makes the folder or document readable or changeable by that equipment depending on the sharing role (same roles as for users).
- The equipment can be added to a group.

Equipment of the type Automation Engine is automatically added to a group named Automation Engines. This group provides all your Automation Engines access to the Share & Approve site(s).

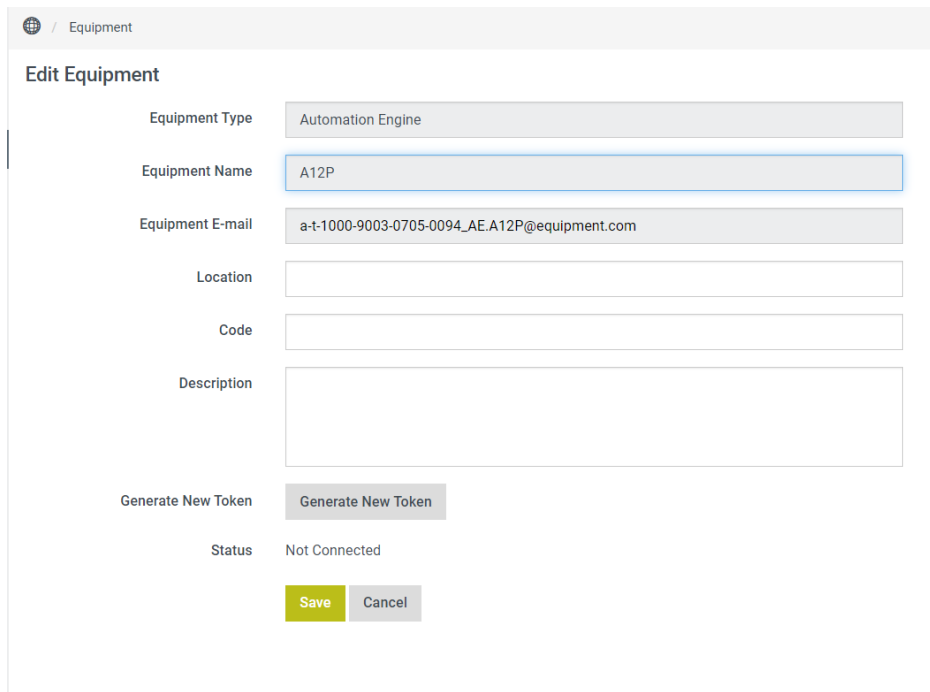
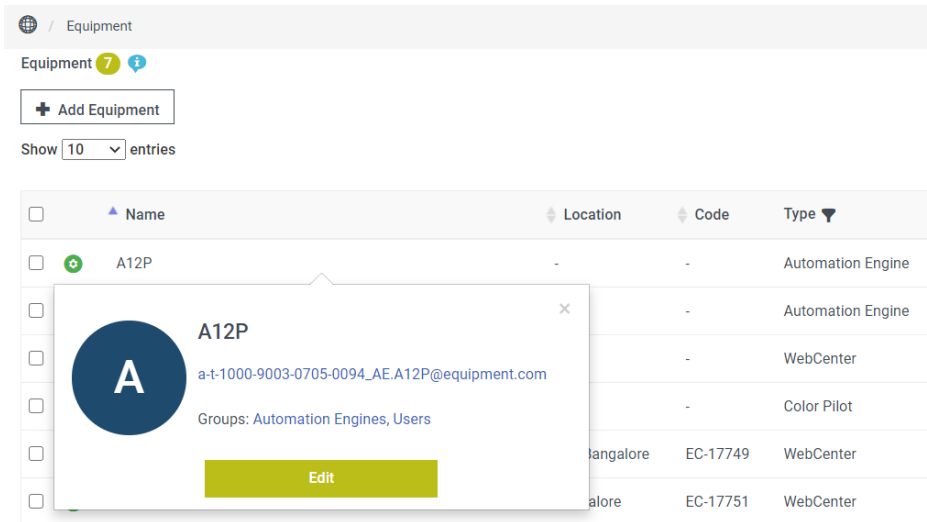
### Connection Status

Once the equipment is registered, it can connect and interact with all Esko Cloud applications (e.g. Share & Approve). Automation Engine retains a permanent connection (unless you manually

disconnect) which allows it to listen to approval events and other changes to the documents and the status is shown as connected.

### 12.3.2. Edit Equipment

In the Equipment overview table, click on the equipment name. This shows a pop-up with an edit button, click on the edit button. A form appears:



For all equipment types:

- Type, name and e-mail are shown read-only.
- Location, code and description are editable and are changed after clicking the Save button.

For:

- Automation Engine and WebCenter: Status shows whether the Automation Engine is connected to the event bus.
- Other: No Status field.

A new token can be generated for the added equipment later.



**Note:** The old token will be automatically inactivated when a new token is generated.

## 13. Share the Space

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Share this Place icon enables the user to Invite users and to Manage Permissions for the site.

### 13.1. Invite and Share

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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](#)

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

Invite to **Colors for Code** i
×

---

**Name or E-mail Address**

Start typing to search for a user or a group or an equipment ▼

**Role**

Reviewer ▼

**Message(optional)**

Write your Message

Cancel

Invite

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

3.

 Add New User ×

 Type  Internal  External

\* E-mail Address

\* First Name

\* Last Name

Function

Initials

Telephone Number




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.

## 13.2. 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](#) 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.