Fiery JobFlow

How-To:
Create a Workflow with Approval

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Feature Overview

The flexible and open “Approve Anywhere” module allows reviewers to see and approve jobs from any mobile device that runs Web browsers. It offers a way to have jobs securely reviewed and approved by internal and external reviewers to guarantee minimal print errors and waste.

Customer Benefits

- Fiery JobFlow provides all the necessary services to host and manage the “Approve Anywhere” process
- Reviewers inspect and approve jobs remotely before printing to ensure the output is correct

Objectives of the Exercise

- Create an internal and an external reviewer
- Create a new Fiery JobFlow workflow with Approve modules to add internal and external reviewers
- Submit a job to the workflow
- Approve the job as a reviewer

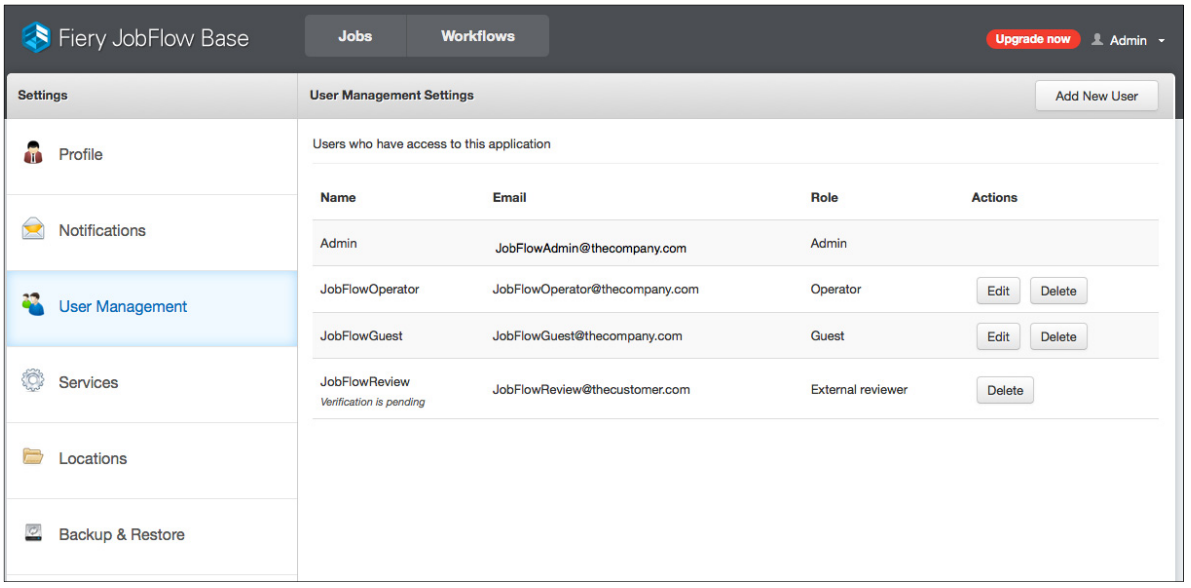
Additional Resources

If you would like to learn more about Fiery product features, EFI has created interactive online courses designed to enhance Fiery product knowledge and help increase performance. For complete list of the online courses we offer, go to the Fiery eLearning web page.

Before you begin

- Have Fiery Command WorkStation 5.7 or above installed on the Fiery JobFlow server with the Fiery Impose license activated on the Command WorkStation.
- Have Fiery JobFlow version 2.0 or above installed.
- Connect the Fiery JobFlow server to a Dropbox account.
- Have the contact names and email address information for the internal and/or external reviewers.
- Place the following file in a location accessible to the Fiery JobFlow server.
    - **FGS_spread_booklet_LTR.pdf** or **FGS_spread_booklet_A4.pdf**

Note: The external reviewer does not get direct access to JobFlow but is able to approve or decline jobs.

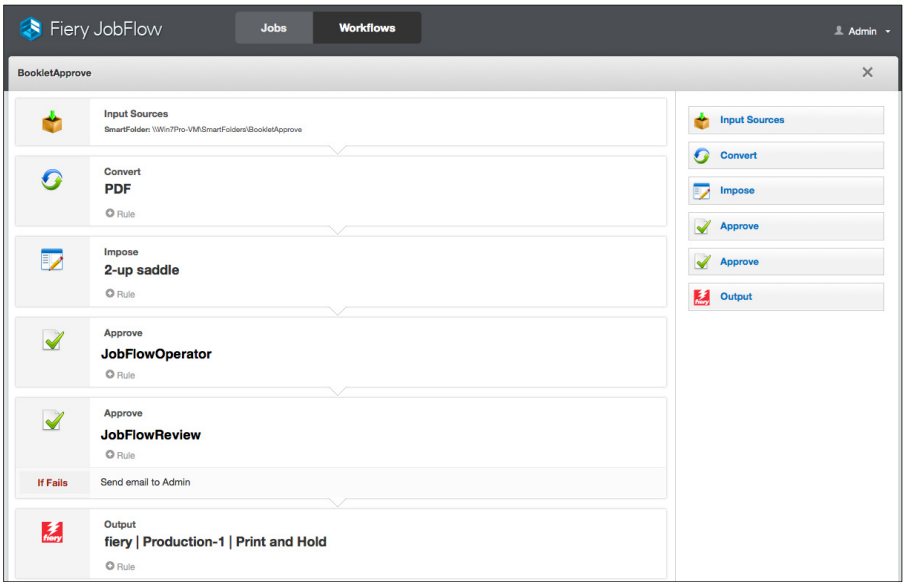


Fiery JobFlow server preparation for the Approve module

1. To set up Approve Anywhere and external reviewers, connect the Fiery JobFlow server to a Dropbox account. Reference the How-To Configure Fiery JobFlow Locations for information on how to do that.
    a. Create the JobFlow user(s) and/or external user(s) who will be the reviewers. For information on how to create Users, reference the How To Configure Global Notifications Guide. There are four levels of access available for Fiery JobFlow: Administrator, Operator, Guest, and External reviewer. The first three levels can be assigned to internal users only.
2. To set up a new external approval user, select the role of **External reviewer**.
    a. JobFlow will send an email with approval invitation to the external reviewer. The reviewer needs to accept it to be able to review and approve jobs. On the JobFlow admin side there will be a “Verification is pending” message displayed for each reviewer until the invitation is accepted.
    b. Each external reviewer must open the email containing the subject**: Invite to approve print jobs – Fiery JobFlow** and click on the **Accept Invitation** to start receiving approval requests from the JobFlow admin. If the invitation is not accepted, the approver will not receive any approval email requests.
    c. Each reviewer will see a confirmation message that their invitation was accepted and that they will receive job approval request notifications from the email address of the JobFlow Administrator.
    d. After the external reviewer accepts the invitation to approve jobs, the “Verification is pending” message will disappear.

Note: Reviewers can then view the job and Preflight and Correct reports and choose to approve or decline. If they decline the job, they can provide a reason.

Any users with direct access to JobFlow can be named as internal reviewers.



Create a JobFlow Workflow with Approval requirements

1. Log in as a user with administrator rights to your Fiery JobFlow server from your browser.
2. Select **Workflows** and select the **+ Create New Workflow** icon.
3. Enter a name for your workflow. For this example, enter **Approve.** Select **Create**.
4. Select the **Input Sources** module and click on the **pencil** icon to edit the module and change the input source location.
   a. Select the Input Source from the dropdown menu listing all available locations grouped by location type.
   b. For this example, select the Dropbox location.

Note: Each workflow is assigned an input source for job submission. Input location options include SMB, FTP, sFTP, one or multiple Dropbox accounts or will use the default JobFlow SmartFolder.
SmartFolder is a folder acting as an input queue for job submission to a specific workflow. Each SmartFolder is created under the root folder called “SmartFolders” on the JobFlow server.

5. Select the **+Add** icon sign below the Convert module. Fiery JobFlow will display a list of the available modules.
6. Select the **Approve** module.
7. In the **Approve Settings,** select **Internal reviewers** and select a user from the available list. For this example, select **Admin** and **Save**.
8. Select the **+Add** icon sign below the Approve module and a second **Approve** module.

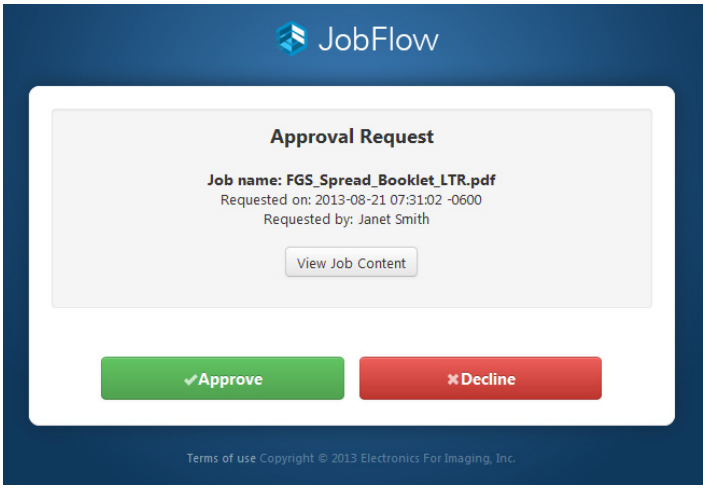
9. Select **External Reviewers**. Select an external approver from the available list. For this example, select the external reviewer created earlier.

Note:

The list of available reviewers displayed in the drop down menu is populated from the list of users created in Fiery JobFlow User Management.
Approve sends jobs to reviewers for approval. The reviewers can be JobFlow users, or external reviewers. Request to approve is sent by email.

Each Approve module can have up to two approvers and both must be internal or both must be external. Only one of the approvers is required to approve the job. If you need additional approvers, you can add multiple Approve modules. The Approve module cannot have both an internal and external reviewer.

10. In the **Approve Settings,** Select the **+ Rule** icon to define the rules for the Approve module and select **Add**.
11. For this example, select **If Approval Fails** then **Send email** to selected users and select the **Admin** user and **Save**.
12. Select the **+ Rule** icon to add and define another rule. For this rule, select **If Approval Fails** Then **Archive Job** and select a **Location** and **Save**.
13. Submit the **FGS_spread_booklet_LTR.pdf** or **FGS_spread_booklet_A4.pdf** job to the new workflow.



Approving the job

If a workflow contains multiple Approve modules, one reviewer from each module must approve the job, for the job to continue. JobFlow only sends the approval request email to the reviewer(s) in the active Approve module. After a reviewer in the first module approves the job, then JobFlow sends an approval email request to the reviewer(s) in the second module. Here are the steps to approve a job:

1. JobFlow sends a job approval request email to the reviewer(s) in the first Approve module.
2. For this example first is the internal reviewer who needs to open the email and click on **View and Approve** to view the job and select to Approve or Decline it.
    a. For this example select **Approve**.
    b. A message will be displayed to the reviewer the job has been approved.

Note:

View Job Content opens a browser window for the reviewer to download and view the secure PDF file.

Approve will advance the job to the next module in the workflow.

Decline will not advance the job to the next module in the workflow. If a print job is to be declined, the reviewer can add comments to provide the reason for declining.

3. Next JobFlow sends a job approval request email to the reviewer(s) in the second Approve module. Second is the external reviewer who needs to open the email and click on **View and Approve**.
    a. For this example select **Approve**.
    b. A message will be displayed to the reviewer the job has been approved.
4. The print job will advance to the next module in the workflow. For this example, the job will be submitted to the connected output device.
5. To see a list of the jobs pending approval in JobFlow, select **Jobs** to view the **Jobs waiting for approval** section.

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