

# Share Approval Workflows

**!** To create a Share Approval workflow that applies to users other than yourself, you must be a promoted Admin with all User Share privileges. In addition, required share approvals must be enabled in the FileCloud Admin portal, and your share approval workflow must be selected to make it active. To ensure that your Share Approval workflow performs correctly, please work with your FileCloud Admin when creating it.

If you are an Admin, see [Automated Workflow Management](#) for information on share approval workflow configuration.

Share approval workflows are a special type of workflow that run when a user creates a share. Instead of automatically making the share available to other users, the share approval workflow sends it to one or more approvers first. If the required number of approvers approve the share, it becomes available; when one user rejects the share it is considered rejected, and it is deleted.

Share approval workflows use the **Automatically on Share activity** trigger and include steps that are specific to share approval.

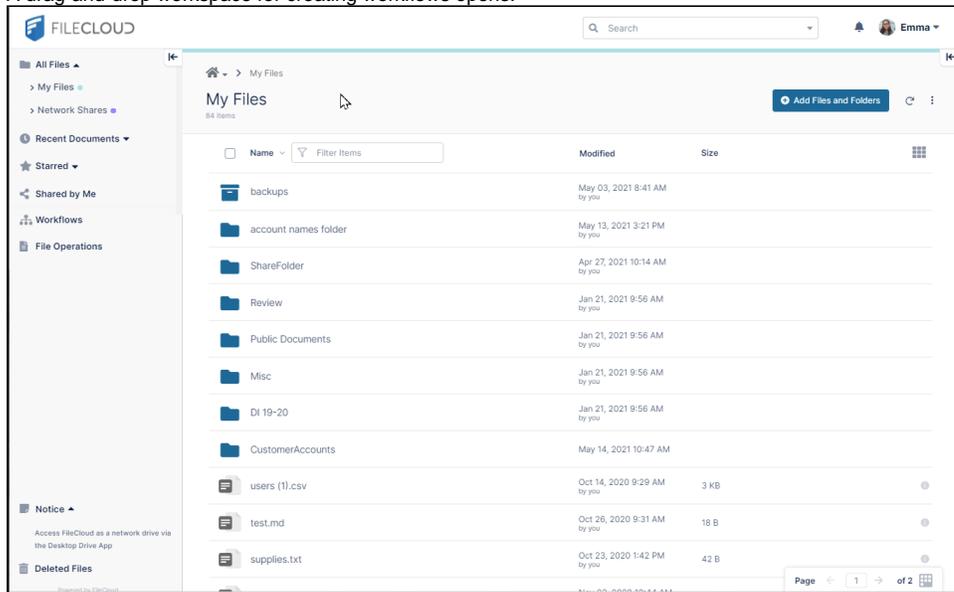
The following example shows you how to create a basic share approval workflow that requires one approval.

**i** You can create more detailed share approval workflows by including multiple approvers, approval and rejection notifications, and other steps and details.

## 1. Go to the drag-and-drop workspace.

- a. In the navigation panel, click **Workflows**, then, click **Create New Workflow**.

A drag-and-drop workspace for creating workflows opens:



## 2. Choose the Automatically on a share activity trigger.

- a. Click **Click here to start**.  
This opens a box of triggers to choose from.
- b. Choose **Automatically on a share activity**, the trigger required for a Share Approval workflow, and then click **Next**.  
The **Automatically on a share activity** trigger prompts you to choose a share activity and, optionally, a file path.
- c. Choose the only share activity available, **If a share is created or updated**.
- d. Click **Add**.  
Start and end nodes appear on the workspace.

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## 3. Drag and drop share approval steps onto the workflow.

The steps you can add to the workflow appear in the right panel.

- a. Drag and drop the **Wait for Share Approval** step onto the workflow.  
The step has parameters, which appear in the right panel.
- b. In **Approver Emails**, enter an email address of a share approver.



Users that you enter into **Approver Emails** must be promoted Admin Users with full User Share privileges or they will not be able to approve shares. Confirm with your FileCloud Admin that your approvers have these permissions before finalizing your workflow.

You may change **Custom Message** and **Approval Count Number** or leave their default values.

By default, 1 approval is required; if you increase the number of required approvals, you must increase the number of **Approver Emails**. Approvers are notified at the top of their user portal screen that they have pending actions.

- c. Click the + icon where you want to drag the step, and then drag and drop the **Share Approve** and **Share Rejection** steps under **Yes** and **No**.

If the approver approves the share, **Share Approve** automatically creates the share. If the approver rejects the share, **Share Rejection** automatically deletes it.

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#### 4. Name and save the workflow.

If you return to the previous page, the new workflow is listed.

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#### 5. Test the Share Approval workflow.

- a. Share a file.

You should see the message **This share will only be available after an automation workflow approval** at the top of the share dialog box.

To make it easier to check that share has been made available after it is approved, share it privately with a user.

Share link for file FCInactiveUsers.png

This share will only be available after an automation workflow approval.

Share Link:  [Modify Link](#)

Shared File: //jenniferp/CustomAccounts/FCInactiveUsers.png

**Share Options** | Share History

Share Name: FCInactiveUsers.png [Change](#)

Expires: [Never Expires](#)

Send Email Notifications: [Yes](#)

Allow anyone with link  
 Allow anyone with link and a password  
 Allow selected users or groups

**Users (1)** | Groups

Sharing Permissions: [Invite Users](#)

User	View	Download	Upload	Share	Sync	Delete	Manage
jaredtaylor978@g...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

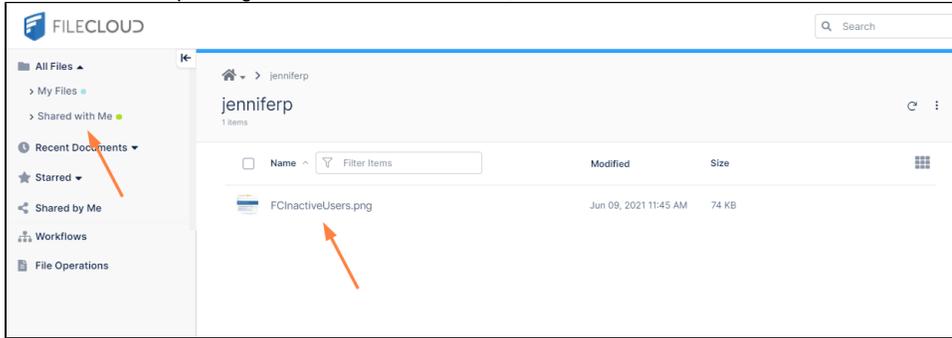
[Remove Share](#) [OK](#)

- b. Have the share approver log in to the FileCloud user portal and find and click the **pending action** message at the top of the screen.

- c. In the pending actions screen, the approver should click the thumbs up icon to approve the share.

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d. Have the share recipient log in and click **Shared with Me**, then confirm that the file has been shared.



- e. Repeat this procedure, but have the approver reject the share, and confirm that the share recipient does not see it.
6. Notify your FileCloud Admin of the name of the Share Approval workflow, and request that it be enabled.  
The workflow will not be active unless your Admin enables Share Approval workflows and specifies this workflow name.