

Checkpoint via mail



Checkpoint via mail is a default Switch app that allows implementing a simple Checkpoint via e-mail, performing the following main functions:

- For each arriving job, send out an e-mail message that includes the unique name prefix of the job and a list of possible "Checkpoint actions" (the names of the outgoing connections, or, if no name is specified, the name of the target folders) – in addition to instructions on how to operate the Checkpoint by return e-mail.
- Monitor e-mail messages coming back from users and parse those messages for the original information about the job and for the Checkpoint action selected by the sender.
- When a matching response comes in, move the corresponding job along the specified outgoing connection or (if no name is specified for the connection) to the specified target folder.

Keywords

If you enter one of the following keywords in the Search field at the top of the Flow elements pane, the **Checkpoint via mail** element will be shown in the list:

- Internet
- web
- email
- e-mail
- network
- communication
- transfer
- interaction
- client
- user




Connections


Checkpoint allows any number of outgoing move connections. Each connection defines a "Checkpoint action".


Properties

Property	Description
Element type	The flow element type: Checkpoint via mail.

Property	Description
	This property is useful to identify renamed flow elements. It cannot be changed.
Name	The name of the flow element displayed in the canvas.
Description	A description of the flow element displayed in the canvas. This description is also shown in the tooltip that appears when moving your cursor over the flow element.
Subject	The subject line for the message that will be sent as soon as a job arrives in the folder just before the Checkpoint via mail tool in the flow.
To addresses	The list of destination e-mail addresses for the message. E-mail addresses are separated by a semicolon or by a newline. The to address typically contains the email address of the customer who has to take a decision (e.g. accept or refuse the file).
Include attached addresses	If set to Yes , the email addresses from the job's internal job ticket are added to the To addresses. For more information about attached email info, refer to <i>Using email info in Switch</i> in the Switch Reference Guide .
SMTP server authentication	Authentication parameters for the SMTP server. Remember that the SMTP server address must be defined in the Switch preferences (Mail send category). If you want to use the sender specified in the Switch preferences (Mail send category), choose Default . If you want to use a different sender (as specified in the Sender address and Sender name field), make sure to choose Custom and enter the user name and password linked to this sender. <ul style="list-style-type: none"> • <i>User name</i>: The login name for the SMTP server, for example: user@gmail.com. Leave empty if none is required. • <i>Password</i>: The password for the SMTP server. Leave empty if none is required.
Sender name	The sender's name for outgoing email messages. If the value is empty or set to Default , the sender name specified in the Switch preferences (Mail send category) will be used. If you want to use a different sender, enter the name of your choice and do not forget to specify the custom SMTP authentication parameters.
Sender address	The sender's email address for outgoing email messages.

Property	Description
	<p>If the value is empty or set to Default, the sender address specified in the Switch preferences (Mail send category) will be used.</p> <p>If you want to use a different sender, enter the email address of your choice and do not forget to specify the custom SMTP authentication parameters.</p>
Reply address	<p>The e-mail address to which a receiver of the message should send a reply.</p> <p>If the value is empty or Default, the sender address specified in the Sender address field is used (i.e. to the address that was used to send mails).</p> <hr/> <p> Note: The value of this property is used in the Reply-To SMTP header that is normally used by email client applications to send a reply. However, the From field of an email in the client application does not display this address, instead it shows the sender address specified in the Sender address field.</p> <hr/>
Message format	<p>The format of the message that will be sent, either Plain text or HTML.</p> <hr/> <p> Note: Make sure to choose the correct format for the selected body template (next field), e.g. if you upload an HTML template, you should select HTML.</p> <hr/>
Body template	<p>The location of the template of the e-mail body:</p> <ul style="list-style-type: none"> If set to Built-in, a built-in template is used and you can enter the text of your choice in the <i>Body text</i> property. <p><i>Include attached body text</i> allows you to insert the body text attached to the job as part of its e-mail info, after the body text.</p> <p><i>Display metadata</i> allows you to specify the <i>Metadata fields</i> that should appear in the e-mail.</p> If set to Fixed file, you can upload a <i>Template file</i> (HTML or text) that contains the template for the message body. Make sure to inform your customer in this message about the required reply syntax (see below). <hr/> <p> Tip: To make it easier for your customers, you could present the Checkpoint actions as buttons and add a Submit button that automatically generates the reply mail.</p> <hr/> <ul style="list-style-type: none"> If set to Associated with job, the <i>Template dataset</i> (which is the name of the metadata dataset associated with the job containing a plain text or HTML template for the email

Property	Description
	body) will be used. For more information about attached email info, refer to <i>Using email info in Switch</i> in the Switch Reference Guide .
Attach files	If set to Yes , the incoming job is attached to the e-mail message that is sent out. This is useful if the customer should review the job.
Enable report viewing	If set to Yes , the metadata dataset indicated with the subordinate property is attached to the e-mail message that is sent out.
<i>Report dataset name</i>	The name of the dataset to be attached to the e-mail message.
<i>Report name suffix</i>	The name of the attached report is formed by adding this suffix to the name of the job, before the file name extension.
<i>Report name extension</i>	The file name extension for the report. Select "Data Model" to automatically use XML, JDF, JSON or XMP depending on the data model of the exported data set. For the Opaque data model, the original backing file's extension is used.
Allow multiple outputs	If set to Yes , the user can send copies of a job along more than one outgoing connection; otherwise the job is sent along exactly one of the outgoing connections.
Server type	The type of server from which to retrieve email. Choices are POP3 and IMAP .
Server address	The URL or IP address of the server from which Switch retrieves e-mail (to check the customer's reply).  Tip: You can find the POP3 or IMAP settings of your mail provider (e.g. gmail) on the internet. Note that POP3/IMAP must be enabled on your mail account. For more information, refer to the documentation of your mail provider.
Port	Specify the port to be used for communication with the server (as specified in the POP3/IMAP settings of your mail provider)
Accounts	A list of accounts (names and corresponding passwords) from which to retrieve e-mail. This is usually your own account (as set in the Switch user preferences).
Use secure password verification	Defines whether to log in to the e-mail server using secure password verification. If set to Yes , the <i>Authentication method</i> (used to establish the connection to the mail server) should be specified. The following secure authentication methods are supported:

Property	Description
	<ul style="list-style-type: none"> • Automatic (The element will try the different methods one by one until the connection could be established) • SASL Plain • NTLM • SASL DIGEST-MD5 • CRAM-MD5 • APOP  Note: APOP can only be used with a POP3 mail server.
Server requires secure connection	Defines whether the e-mail server requires a secure connection using the TLS protocol.
Check every (minutes)	The frequency of checking the e-mail accounts for new messages.
Fail jobs after timeout	<p>If set to Yes, jobs are failed after residing in the Checkpoint for a certain period of time (specified in the subordinate properties).</p> <p>Failed jobs are moved to the outgoing connection specified in the subordinate properties or to the Problem jobs folder.</p>
<i>Unit</i>	Selects the unit for the subsequent property: Minutes, Hours, Days.
<i>Timeout delay</i>	<p>The timeout delay in the units indicated by the previous property.</p> <p>0 means that the jobs are failed immediately.</p>
<i>Fail connection</i>	<p>The name of the connection to which failed jobs must be moved. You can specify multiple names separated by commas. Note that connection names must not contain a comma.</p> <p>If this property value is empty or if the specified name does not match any of the outgoing connection names, failed jobs are moved to the Problem jobs folder.</p>

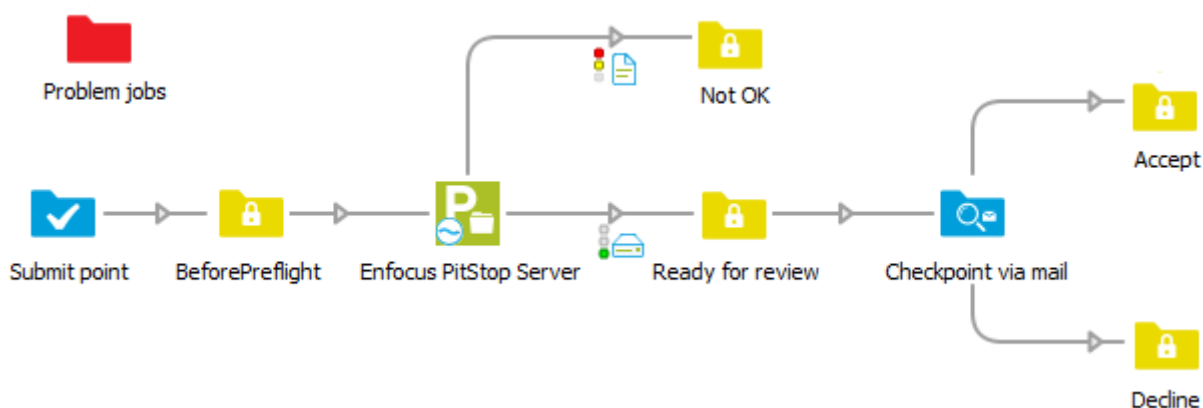
Reply syntax

The user's reply message must specify the job ID and the selected Checkpoint action(s) in a simple format. Specifically, Switch searches for the following character sequences:

- "Job identifier:" followed by the job ID (as specified in the original e-mail sent to the customer).
- "Action:" followed by one of the Checkpoint action names, or a list of comma-separated action names (in case multiple actions are allowed).

In both cases, the text is case insensitive. All other text in the message is ignored.

Example flow



In the above example, jobs are submitted via a Submit point. They are preflighted using Enfocus PitStop Server, and moved to two separate folders, depending on the outcome of the preflighting.

Files that are preflighted OK, are moved to the *Ready for review* folder element and will be presented to the customer for approval. This works as follows:

1. As soon as a job arrives in *Ready for review*, a message is sent to the customer (i.e. to the email address in the To addresses property of Checkpoint via mail) - see the example mail below.
2. The customer has the chance to review the job (optionally, the job files are attached to the email) and sends back a reply that contains the job ID and the Checkpoint action of his choice (*Accept* or *Decline*) in the specified format- see the example reply below.
3. As soon as Switch receives the reply, the job that was waiting in the *Ready for review* folder is moved to the corresponding folder.

Example Mail

Dear customer,

Job identifier: 000E2

Message text:

This is the body text.

Possible checkpoint actions (please choose one):

Declined

Accept

Email was triggered by this file :

ForReview.pdf

Attachments:

Job file: ForReview.pdf

--- Important information ---

Reply message should contain the following lines:

Job identifier: job identifier from the text above

Action: action from the list above or comma separated actions list

Example Reply

Job identifier: 000E2

Action: Accept