Perceptive eAuthorize

Installation and Setup Guide

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Lexmark™ Enterprise Software
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About Perceptive eAuthorize

The Perceptive eAuthorize solution enables you to send documents for electronic signature to any authorized signatory, including non-ImageNow users. You can send documents, residing within or outside of ImageNow, to a single or multiple authorized signatories whose signatures are required. The signed documents upload automatically and are stored in the ImageNow repository. If the signatory declines the document, you receive an email notification. A signatory can also forward the email with the link to the documents to any person inside or outside your organization.

This solution offers the following advantages.

- The electronic process of signing saves you time.
- Anyone inside or outside your organization can sign documents.
- Signatories do not need access to ImageNow.
- Signatories receive email notifications of documents to sign. The email contains a link to the document and instructions. Alternatively, documents can be immediately presented on the user's screen. You can send a single document or an envelope containing multiple related documents.

Three different levels of eAuthorize are available.

- **Standalone**. AssureSign is sold as a standalone solution, with no integration with ImageNow.
- **Post-signature integration**. A non-ImageNow document is provided to AssureSign for signature, is signed, and then the signed document is uploaded into ImageNow.
- **Full integration**. An ImageNow document is submitted to AssureSign for signature, is signed, and then the signed document is uploaded to ImageNow (for ImageNow, version 6.7 or Perceptive Content, version 7.1.5).

This document provides the configuration and setup guidelines for ImageNow connector for AssureSign.

Important After you finish installing and configuring eAuthorize, complete the steps in the *Perceptive eAuthorize Getting Started Guide* to test your configuration and confirm that the installation and setup is successful.

For information about using Perceptive eAuthorize, see the *Perceptive eAuthorize Getting Started Guide*.

Requirements

Software prerequisites

For ImageNow, version 6.6 or lower, before you run the eAuthorize solution, ensure that your system meets the following prerequisites.

- ImageNow Client and ImageNow Server are installed and running properly.
- You can log into an ImageNow user account with managerial privileges.
- Message Agent is installed and running properly.
- Download Microsoft .NET Framework 4.0 from http://www.microsoft.com/en-us/download/details.aspx?id=17851.

- You have administrator access to the AssureSign environment to create and edit AssureSign templates.
  - Sandbox environment: https://sb.assuresign.net/documents/Default.aspx
  - Production environment: https://na1.assuresign.net/Login.aspx or the URL for the local instance of AssureSign

For ImageNow, version 6.7 or higher up to Perceptive Content 7.1.5, before you run the eAuthorize solution, ensure that your system meets the following prerequisites.

- ImageNow or Perceptive Content Client and ImageNow or Perceptive Content Server are installed and running properly.
- You can log into an ImageNow user account with manager privileges.
- Tomcat, version 7.0 or higher, is installed with host manager and apps manager.

  Note Tomcat must be installed on an HTTP server, not an HTTPS server.
- Perceptive Integration Server is installed and running properly.
- You have administrator access to the AssureSign environment to create and edit AssureSign templates.
  - Sandbox environment: https://sb.assuresign.net/documents/Default.aspx
  - Production environment: https://na1.assuresign.net/Login.aspx or the URL for the local instance of AssureSign

License

The following licenses are required to run eAuthorize.

- Perceptive eAuthorize
- Integration Framework version 6.7 or higher
- ImageNow Server, version 6.7 or higher up to Perceptive Content Server, version 7.1.5
- ImageNow Client, version 6.7 or higher up to Perceptive Content Client, version 7.1.5
- Message Agent Server, any version between 6.5.1 to 6.6, and Transaction Pack
- Integration Server version 6.7 or higher, and Transaction Pack
- Envoy for Apps version 6.7 or higher
- iScript
- Optional. eForms and Doc Control Suite

Configure eAuthorize

If you are using ImageNow, version 6.5.1 or 6.6, complete the steps in this section to configure eAuthorize for post-signature integration. Note that this functionality provides a subset of the eAuthorize features and functionality that are available with ImageNow, version 6.7 or higher up to Perceptive Content 7.1.5.

Set up DocumentTRAK for document transmission

Use the following built-in web notifications in AssureSign to set up DocumentTRAK for document submission using third-party applications. If you are using a local instance of the AssureSign environment, see the Appendix C: Copy web notification templates for information on copying AssureSign web notification templates from the sandbox environment.

Perform the procedures in this section to set up the following items.

- **ImageNow access**. Authenticate with Message Agent to establish a session.
- **ImageNow upload**. Upload a signed document to ImageNow.
- **ImageNow workflow**. Route the stored document to an ImageNow workflow queue.

Set up ImageNow access

1. In AssureSign, on the **Administration** tab, open **Notifications** and click **DocumentTRAK**.
2. On **Web Notifications**, click **Copy** in front of **ImageNow Access** in the **Name** column.
    1. In the **Design Summary** page, in the **General Information** section, click **Edit**.
    2. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP of the server on which Message Agent is running, and click **Next** until the **Finish** button displays.

        Note The port provided is 6070, which is the default port for Message Agent. If you change your Message Agent port, change 6070 accordingly.
    3. Click **Finish**.

Set up ImageNow upload

1. On **Web Notifications**, click **Copy** in front of **ImageNow Upload** in the **Name** column.
    4. In the **Design Summary** page, in the **General Information** section, click **Edit**.
    5. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP of the server on which Message Agent is running.

       Note The port provided is 6070, which is the default port for Message Agent. If you change your Message Agent port, change 6070 accordingly.
    6. In the **Design Used for Authentication** list, select **ImageNow Access** and click **Next**.
    7. Select **Edit Raw XML** and click **Next**.
    8. Edit the values for the parameters in the XML to set the index values for the signed documents as required and click **Next** until the **Finish** button displays.
    9. Click **Finish**.

Set up ImageNow workflow

1. On **Web Notifications**, click **Copy** in front of **ImageNow Workflow** in the **Name** column.
    1. On the **Design Summary** page, in the click **General Information** section, click **Edit**.
    2. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server on which Message Agent is running.

Note The port provided is 6070, which is the default port for Message Agent. If you change your Message Agent port, change 6070 accordingly.

3. In the **Design Used for Authentication** list, select **ImageNow Upload** and click **Next**.
4. Select **Edit Raw XML** and click **Next**.
5. Edit the values for the parameters in the XML as required and click **Next** until the **Finish** button displays.

   Note The index values for this notification must be the same as those defined in the **ImageNow Upload** web notification in order for the same document to be routed to a workflow queue. You define the workflow queue name within the WORKFLOW_Q_NAME text tags for the signed document to route to this queue.
6. Click **Finish**.

2. In **AssureSign**, on the **Administration** tab, click **Settings**.
   1. On **Notification Preferences**, click **Edit** in front of **DocumentTRAK Credential**.
   2. Enter the username and password of an ImageNow account to communicate with ImageNow Server using Message Agent.
3. In **AssureSign**, on the **Templates** tab, click **New** and create a template for document submission using third-party applications. For details, see the AssureSign Quick Reference Guide for instructions to create a template.

   Note Consider the following points when creating the template.

   - In **Workflow Template**, on **Web Notifications**, for **Document Completed** stage, select either **ImageNow Upload** or **ImageNow Workflow**.
   - Use this template to submit a document for signature using a third-party application or when manually uploading them directly to AssureSign.

Install and configure eAuthorize for ImageNow 6.7 or higher

If you are using ImageNow, version 6.7 or higher, install Perceptive Platform Integration Engine and then install eAuthorize using the installation wizard. To download and complete the installation process, perform the following procedures.

1. Download the eAuthorize files
2. Install Platform Integration Engine
3. Install eAuthorize
4. Set up ImageNow for signing
5. Set up the AssureSign environment
6. Set up the ability to download signed documents from a third party
7. Set up the AssureSign environment for envelopes
8. Set up an eForm for Signature

Download the eAuthorize files

1. Navigate to the Lexmark Enterprise Software Customer Portal.

2. In the **Product Downloads** page, search for all downloadable items for the specific product and version you want to use, including 32-bit or 64-bit.
3. Download the relevant files to a temporary directory on your computer and then unzip the files as needed.

Install Platform Integration Engine

Platform Integration Engine (PIE) is required to install eAuthorize. PIE must be installed and running on a system that has public Internet Protocol address when you configure eAuthorize to use AssureSign Sandbox or production environment. To install Platform Integration Engine, complete the following steps.

Before you start, verify that Apache Tomcat is already installed and running on the target machine. You can change the server configuration to match your environment.

1. Extract the **PIE + Imagenow Services.zip file in a new directory.**
2. Open a browser, go to `http://<tomcatservername>:<tomcatserverport>/`, and click **Manager App**.
3. Log in with your credentials.
4. In the **Tomcat Web Application Manager** page, scroll to the **Deploy** section.
5. Under the **WAR file to deploy**, click **Browse** to select the **Engine.war** file from the extracted directory, and then click **Deploy**.
6. Under the **Applications** section, verify that the Engine service is running, and in the **[*drive*:]\IntegrationEngine** directory, the **etc**, **lib**, **log**, and **Modules** subdirectories exist.
7. Navigate to the extracted directory.
8. Copy the **imagenow-common-0.jar** file from the extracted directory to the **[*drive*:]\IntegrationEngine\lib** and **[*drive*:]\{path}\Apache Software Foundation\Tomcat 7.0\webapps\Engine\WEB-INF\lib** directories.

Install eAuthorize

After you install the Platform Integration Engine, download eAuthorize files and run the eAuthorize installation wizard. You can also install eAuthorize manually. To install eAuthorize manually,see the Install eAuthorize manually section.

Run the eAuthorize installer

When you run the eAuthorize installation wizard, you can choose from two installation options: complete and custom. For a complete installation, the wizard installs all of the required components on the same computer. For a custom installation, ensure that you have already installed the required software for each installation option according to the following table. Regardless of the option, all components are required for eAuthorize to function correctly.

Typically, you select the custom installation to set up this installation on two machines:

- On the machine running Tomcat and Platform Integration Engine, you can install the Framework Configuration option.
- On a separate machine running ImageNow Server, you can install the other options (Perceptive Configuration and Workflow Configuration).

Note Install the Framework Configuration option first, and then the Perceptive Configuration and Workflow Configuration options. You must specify the IP address of your web application server during the installation steps of the Perceptive Configuration and Workflow Configuration options.

Custom Installation Option	Description	Software Prerequisites
Perceptive Configuration	Creates a customized Perceptive environment. Install Perceptive Configuration on the same machine as ImageNow Server.	• ImageNow Server
Workflow Configuration	Creates a sample workflow and document types. Install Workflow Configuration on the same machine as ImageNow Server.	• ImageNow Server
Framework Configuration	Installs all files required for Perceptive eAuthorize. Install Perceptive Framework on the same machine as Perceptive Integration Engine.	• Tomcat • Platform Integration Engine

To install eAuthorize using the installer, complete the following steps.

1. Stop the Apache Tomcat web service.
2. Run the eAuthorize setup executable.
3. In the **Welcome** page, click **Next**.
4. In the **License Agreement** page, read the License Agreement, scroll to the bottom of the agreement, select **I accept the terms in the license agreement**, and then click **Next**.
5. In the **Setup Type** page, select one of the following installation options.
    - **Complete**. Select **Complete** if Tomcat with Platform Integration Engine and ImageNow Server are installed on the same machine. Click **Next** and continue to the next step.
    - **Custom**. Select **Custom** if Tomcat with Platform Integration Engine and ImageNow Server are installed on different machines. This allows you to define the location. For further details, see the Install eAuthorize section. Click **Next** and perform the following substeps.

        1. Select from the following features to make the corresponding configuration changes. Note that you can install Perceptive Configuration independently, but Workflow Configuration requires that Perceptive Configuration should already be installed or be installed at the same time.
            - **Perceptive Configuration** creates a customized Perceptive environment on ImageNow Server, including an Envoy service, custom properties, a reason list, reasons, task templates, audit history form, and ImmediatePresentment form. All are required for eAuthorize.
            - **Workflow Configuration** creates the signature workflow and document types on ImageNow Server to get you started.

- **Framework Configuration** deploys the required JAR files and connector in the Platform Integration Engine to run eAuthorize.

2. Click **Next**.

6. The **Destination Folder** page displays the default Tomcat Root directory. If the default directory does not point to Tomcat root directory, click **Change** to select a Tomcat root directory and click **Next.**
7. In the **AssureSign Information** page, provide the following information.

- In the **Assure Sign WSDL URL** box, enter the location of the sandbox or production instance in the AssureSign cloud or a URL to the local AssureSign web application you are using, as shown in the following examples.
  - If you are using sandbox instance or production instance in the AssureSign cloud, enter the following location.

    `[Site Root]/Services/DocumentNow/v2/DocumentNow.svc?wsdl`

  - If you are using locally installed AssureSign application, enter the following location.

    `[Site Root]/services/documentnow/v2/documentnow.svc?wsdl`

    Note The `[Site Root]` is one of the following values.

    - AssureSign sandbox: `https://sb.assuresign.net`
    - AssureSign production: `https://na1.assuresign.net`
    - AssureSign local: The machine name and port number where the local instance of AssureSign is installed.
- In the **Local instance domain** box, enter the machine name where the local instance of AssureSign is installed. Leave this box blank if you are using an AssureSign cloud environment (sandbox or production).
- In the **User Name** box, provide the user name for the account in AssureSign with which you submit documents for signature.
- In the **Context ID** box, provide the AssureSign DocumentNOW Account Context Identifier, which is a unique identifier needed in order to validate the request. If you have administrative access, you can find this identifier on the **Settings** page in AssureSign.
- In the **Template tag** box, you can provide any value (string). Use this value as the template tag when you create a template in AssureSign. For details, see the AssureSign Quick Reference Guide for instructions to create a template and the template tag.

  Important The installer assigns the value you enter to the AS_TEMPLATE_TAG parameter in the configuration.xml file located in the [*drive*:]\IntegrationEngine\etc directory. If the template tag value in the configuration.xml file does not match the template tag value in the AssureSign template, documents fail when they are submitted for signature.

8. Click **Next**.
9. In the **SMTP Information** page, provide the following information if you want to notify an email address if a document fails. Otherwise, you can leave the information on this page blank.

- In the **Server Name/IP** box, type the name or IP address of the SMTP server that sends email notifications.

- In the **Port** box, type the port of the SMTP server that sends email notifications.
- In the **Sender Email ID** box, type the email ID configured on the SMTP server that sends email notifications.
- Select the **Authentication required** check box if your SMTP email server requires authentication; otherwise, leave it unchecked.
  - If your SMTP email server requires authentication, in the **User ID** box, provide a user name for the email server.
  - If your SMTP email server requires authentication, in the **Password** box, provide the password corresponding to the user name you entered for the email server.

10. Click **Next**.
11. In the **Integration Server Information** palge, provide the following information to properly configure ImageNow Server.
    - In the **Integration Server URL** box, type the URL of Perceptive Integration Server. For example:

      `http://<tomcatservername>:<tomcatportnumber>/integrationserver`
    - In the **Integration Server User ID** box, type the ImageNow user name that Integration Server uses to allow communication between the AssureSign service and ImageNow Server.
    - In the **Integration Server Password** box, type the password for the machine on which Perceptive Integration Server is installed.
12. Click **Next**.
13. In the **Tomcat Information** page, provide the information for your Tomcat web server.
    - In the **Tomcat IP** box, type the IP address or DNS name of the machine where Tomcat and Platform Integration Engine are located.
    - In the **Port** box, type the Tomcat port of the machine where Tomcat and Perceptive Platform Integration Engine are located.
14. In the **Ready to Install** page, click **Install**.

    Important When the installer displays a message to ensure that your web application server is started, start your Apache Tomcat web service and then click **OK**.

    Important When the installer displays a message to stop and start your web application server, stop and then restart your Apache Tomcat web service and then click **OK**.

    Note The installation wizard may display a message that the engine service could not initialize. If this error message is displayed, you need to complete the `<AssureSignConnector>` section of the Configuration.xml file. For details, see the Appendix B: Configuration.xml file table for more information.

    If you do not receive this message after completing the installation wizard, continue to the Set up ImageNow for signing section.
15. In the **Installation Wizard Completed** page, you can optionally select the **Show the Windows Installer log** check box and then click **Finish**.

    Note If the installer fails to install certain components of eAuthorize, you need to install the components manually. To view the components that failed to install, check the Installer log. For additional information on how to install the components manually,see the Install eAuthorize manually section.

Install eAuthorize manually

Manual installation may be helpful when there is a problem installing eAuthorize with the installer. Before you install eAuthorize manually, the following configurations must be installed and running. You can change the server configuration according to your environment.

- Tomcat is listening to the server port. The default port is 8080.
- ImageNow Server and Integration Server are running.

To set up the AssureSign connector, complete the following actions.

1. From the from **eAuthorize_Lib** directory, copy all JAR files from **eAuthorize_Lib** folder to the **[*drive*:]\IntegrationEngine\lib** directory.

   Note While copying, if there are any conflicts, select **Copy and replace**.

2. From the directory where **PIE + Imagenow Services.zip file is extracted, copy the ImageNow67IntegrationServerConnection.jar and ImageNowService.jar files to the [*drive*:]\IntegrationEngine\lib directory.**
3. Copy **AssureSignConnector.jar** and **AssureSignHandler.jar**, and paste them to **[*drive*:]\IntegrationEngine\Modules**.
4. To reload the **Engine** services on the **Tomcat Web Application Manager** page, under **Applications**, for the **Engine** service, click **Reload**.
5. Navigate to the **[*drive*:]\IntegrationEngine\log** directory and open the **engine.log** file. If you find errors in the log file, such as line items starting with “Errors occurred” or “failed to start,” when you open it for the first time, restart from step 1. Ensure there are no errors in the **engine.log** file and then proceed. For details, see the Troubleshooting section for more information.
   - Stop the **Engine** service, navigate to the **[*drive*:]\IntegrationEngine\etc** directory, open the **Configuration.xml** in a text editor, and then reload **Engine**.
6. Edit the parameters to configure the values for this connector. For details, see the Guidelines for editing the parameters for the connector section for more information. Ensure that the connector has login credentials and save the file.

   Notes

   - Do not copy the XML code listed below. It generates automatically.
   - For more information on the values for the parameters, see the table in the Guidelines for editing the parameters for the connector section.

```
<?xml version="1.0" encoding="ISO-8859-1" standalone="no"?>
<configuration>
    <section name="connectors">
        <section name="AssureSignConnector">
            <parameter name="AS_USERNAME" value=""/>
            <parameter name="AS_URL"
value="https://sb.assuresign.net/Documents/Services/DocumentNOW/v2/DocumentNOW.svc?wsdl"/>
            <parameter name="AS_LOCAL_INSTANCE_DOMAIN_NAME" value=" "/>
            <parameter name="AS_CONTEXT_ID" value=""/>
            <parameter name="AS_TEMPLATE_TAG" value=""/>
                 <section name="EMAIL">
                <parameter name="SMTP_SERVER_NAME" value=""/>
                <parameter name="SMTP_SERVER_PORT" value=""/>
                <parameter name="SMTP_SENDER_EMAIL_ID" value=""/>
                <parameter name="SMTP_AUTH_REQUIRED" value=""/>
```

```
                <parameter name="SMTP_AUTH_USERNAME" value=""/>
                <parameter name="SMTP_AUTH_PASSWORD" value=""/>
            </section>
        </section>
    </section>
   <section name="IntegrationServer">
        <parameter name="IntegrationServerURL" value=""/>
        <parameter name="Username" value=""/>
        <parameter name="Password" value=""/>
    </section>
    <section name="operations"/>
</configuration>
```

7. Reload the **Engine** service, navigate to the **[*drive*:]\IntegrationEngine\log** directory, and open the **engine.log** file to verify that the **Engine** service successfully starts.
8. After successfully starting the **Engine**, you must configure the **operations** of the connector.
    1. Navigate to the **[*drive*:]\IntegrationEngine\etc** directory and open the **Configuration.xml** file.
    2. Verify that all the operations loaded successfully, as shown in the following code.

```
<section name="operations">
        <section name="SubmitForSignature">
            <section name="SubmitForSignature"/>
        </section>
        <section name="UpdateStatusDocument">
            <section name="UpdateStatusDocument"/>
        </section>
        <section name="UpdateStatusStepStarted">
            <section name="UpdateStatusStepStarted"/>
        </section>
        <section name="UpdateStatusStepLandingPageVisited">
            <section name="UpdateStatusStepLandingPageVisited"/>
        </section>
        <section name="UpdateStatusStepCompleted">
            <section name="UpdateStatusStepCompleted"/>
        </section>
        <section name="UpdateStatusEnvelope">
            <section name="UpdateStatusEnvelope"/>
        </section>
        <section name="DownloadSignedDocument">
            <section name="DownloadSignedDocument"/>
        </section>
        <section name="UploadSignedDocument">
            <section name="UploadSignedDocument"/>
        </section>
        <section name="UpdateStatusDocumentCompleted">
            <section name="UpdateStatusDocumentCompleted"/>
        </section>
        <section name="SendToAssureSign">
            <section name="SendToAssureSign"/>
        </section>
    </section>
</configuration>
```

To display the XML Web service WSDL file, open your web browser and go to http://<tomcatservername>:<tomcatserverport>/Engine/SignatureEndpoint. If the file does not display, repeat the preceding steps. For details, see the Troubleshooting section for more information.

Guidelines for editing the parameters for the connector

After the Configuration.xml file is generated, open the file in a text editor and edit the values assigned for the parameters as shown in the following table.

Section	Parameter	Guideline
AssureSign Connector	AS_URL	A URL that defines the service location of the sandbox or production instance in the AssureSign cloud, or a URL to the local AssureSign web service you are using.
	AS_LOCAL_INSTANCE_DOMAIN_NAME	Set the value to null if you are using an instance of the AssureSign cloud, for example: <parameter name= "AS_LOCAL_INSTANCE_DOMAIN_NAME"value=""/> If you are using a local AssureSign web application, provide the machine name as the value. You will also find the machine name in self-signed certificate issued during AssureSign installation.
	AS_USERNAME	An AssureSign administrative account that is used to authenticate AssureSign and submit documents for signature.
	AS_CONTEXT_ID	AssureSign's DocumentNOW Account Context Identifier specifies a unique identifier needed in order to validate the request. You can find this identifier in the **Settings** section of the Administrative tab within your AssureSign environment, if you have administrative access.
	AS_TEMPLATE_TAG	You can provide any value here (string). Take this value as template tag while creating template in AssureSign. For details, see the the AssureSign Quick Reference Guide for instructions to create a template. To specify template tag, complete the following steps. 1. In **AssureSign** under the **Templates** tab, click **New**. 2. Select **Start from Scratch** and click **Next**. 3. Expand **Show Advanced Options** and type the template tag in **Template Tag** (optional). 4. Enter this template tag value for the parameter in the **Configuration.xml** file and restart Platform Integration Engine.
Email	SMTP_SERVER_NAME	The name of the SMTP server that sends email notifications.
	SMTP_SERVER_PORT	The port of the SMTP server that sends email notifications.

Section	Parameter	Guideline
	SMTP_SERVER_EMAIL_ID	The email ID configured on the SMTP server that sends email notifications.
	SMTP_AUTH_REQUIRED	If your SMTP email server requires authentication, then provide the value as ‘true’; otherwise, use ‘false’.
	SMTP_AUTH_USERNAME	If your SMTP email server requires authentication, then provide a username for the email server.

Set up ImageNow Server

Configure ImageNow Server to submit documents for signature, to download the signed document, and to create a task to send notifications in the case of document failure.

Complete the following steps to configure ImageNow Server.

1. Copy all script files from the **eAuthorize_inserver6 _script** folder. The folder contains the following iScript files.
    - **IntegrationServer_WorkflowQueue_GetByName.js** – for document transmission.
    - **IntegrationServer_Page_Delete.js** – for replacing original document upon downloading signed version.
    - **CreateTask.js** – for creating a task in ImageNow if a document fails in workflow.
    - **IntegrationServer_User_Get.js** – for fetching the user information from ImageNow.
    - **DocumentStoreAndForward.js** – for storing and forwarding a document in workflow queue.
    - **RefreshAuditHistory.js** – for refreshing Audit History.
    - **eAuthorize** folder containing **IN_WorksheetManager.jsh**, **IN_XML.jsh**, **INBasePath.jsh**, and **Util_Misc.jsh**.
    - **IntegrationServer_VersionControl_Chekin.js** – for version control.
    - **IntegrationServer_VersionControl_Chekout.js** – for version control.
    - **IntegrationServer_VersionControl_UndoCheckout.js** – for version control.
2. Paste these files to the **[*drive*:]\inserver6\script** directory.

Set up eForm for AssureSign Audit History

You can complete this procedure only if you are an owner or manager, or are assigned the Manage Forms privilege. A Forms license is required to use forms in eAuthorize. Without this license, the audit trail history will not be available in ImageNow but will be available from AssureSign. If you need a Forms license, contact your Perceptive Software representative.

Consider the following points when creating the Audit History eForm.

- Download and extract the **form** folder from **eAuthorize_inserver6** folder in eAuthorize Installation Package. This folder contains the XSL files, supporting files, and the XML Data Definition file in **Audit_History** and **data_definition** folder, respectively.

- The name of the form must contain the words “AssureSign,” “Audit,” and “History.” This requirement is not case-sensitive.
- It is recommended that you create only one Audit History form, because data is populated in the form which appears first in the list of forms, alphabetically. If you erroneously create more forms, delete them.

Manually load form components into ImageNow Server

To upload the XML Data Definition file, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **Management Console**, in the left pane, click **Forms**.
3. In the right pane, click **Manage Form Components**.
4. On the **Manage Form Components** dialog box, in the **Data Definitions** pane, click **Add**.
5. In the **Select XML File** dialog box, navigate to the folder where your local form files are stored, select the XML file you created for this form, and then click **Open**.
6. Optional. Upload files to share more than one presentation.
    1. In the **Shared Files** pane, click **Add**.
    2. In the **Shared Files** dialog box, select the optional files you created that you want to share with more than one presentation, and then click **Open**.

To upload XSL files, supporting files, and organize your files into presentations, perform the following actions.

1. On the **Presentations** pane, click **Create**, type a name for your presentation, and then press ENTER.
2. Select the presentation you just created and click **Modify**.
3. Optional. In the **Presentation** dialog box, in the **General** pane, type a description for your presentation.
4. In the **Files** pane, click **Add**, then select the XSL file and any optional files you created for this presentation, and click **Open**.
5. If you previously added shared files that you want to use in this presentation, click **Select Shared Files** in the **Select Shared Files** dialog box, select the files you want, and then click **OK**.
6. If you created more than one XSL file to use with your XML file, repeat substeps 7 to 11 for each XSL file.
7. Click **OK**.

Create a form from your data definition file and presentations

To create a form, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **Management Console**, in the left pane, click **Forms**.
3. In the right pane, on the **Forms** tab, click **New**.
4. Type a unique name for your form and press ENTER.
5. Select the form you just created and click **Modify**.

6. Optional. In the **Form** dialog box, in the **General** pane, in the **Description** box, type a description for your form.
7. In the **Components** pane, under **Data Definition**, in the **Data definition** list box, select the XML file you created for this form.
8. Click **Select** to choose presentations you want to be available for use with this form, and in the **Select Presentations** dialog box, select the presentations and then click **OK**.
9. Click **OK**.

Refresh time out for Audit History

To modify the refresh time for Audit History form, complete the following steps.

1. Copy the content of the **eAuthorize** folder from **eAuthorize_inserver6_etc** folder and paste it to the **[*drive*:]\inserver6\etc** directory.
2. Open eAuthorize from the **[*drive*:]\inserver6\etc** directory, then open the **eAuthorize_config.xml** file, and edit the following configuration parameters.
    1. Provide the Envoy service name for eAuthorize within the **<envoyName>** tag.
    2. Provide the time out in seconds within the **<refreshTimeout>** tag.

Set up eForm for AssureSign ImmediatePresentment

You can complete this procedure only if you are an owner or manager, or are assigned the Manage Forms privilege. A Forms license is required to use forms in eAuthorize. If you need a Forms license, contact your Perceptive Software representative. If the form license is not activated, the AssureSign ImmediatePresentment form is not available in ImageNow.

Consider the following points when creating the AssureSign ImmediatePresentment eForm.

- Download and extract the eAuthorize_ImmediatePresentmentForm.zip from eAuthorize Installation Package. This archive contains the XSL files, supporting files, and the XML Data Definition file in **presentation** and **data_definition** folder, respectively.
- The name of the form must contain the words “AssureSign,” “Immediate,” and “Presentment.” This requirement is not case-sensitive.
- It is recommended that you create only one AssureSign ImmediatePresentment form, because data will be populated in the form which appears first in the list of forms, alphabetically. If you have erroneously created more forms, delete them.

To set up AssureSign ImmediatePresentment form, you must manually load form components into ImageNow

Server and create a form from your data definition file and presentations. For additional information, see the following sections.

- Manually load form components into ImageNow Server
- Create a form from your data definition file and presentations

Design workflow for sending documents for signature

If you install eAuthorize manually, you must create a workflow process to send documents to AssureSign for signature and download the signed documents in ImageNow. These instructions may also be helpful if you install eAuthorize using the installer, but want to modify the workflow that is automatically created by the installer.

You can only complete this procedure if you are a user with the global privilege to manage workflow processes, a manager, or the owner. This procedure creates automated system queues (ASQs).

You can create your own workflow process or use the following process.

1. On the **ImageNow** toolbar, click **Manage**, and then click **Workflow**.
2. On the **Workflow** tab, click **New**.
3. Enter a name for the workflow process.
4. Optional. Enter a description for your workflow process.
5. Click **OK**.
6. Double-click the process to open it in the **Workflow Designer**.
7. Create your workflow process by performing the following substeps.
    1. In the **Workflow Designer** window, in the left pane, under **Queues**, select the **Integration ASQ**  icon and drag it to the right in your workflow diagram. Repeat this step to create two more ASQs.

       Note In this example, the ASQs are SubmitForSignature, DownloadSignedDocuments, and SendToAssureSign. You can supply other names for the ASQs.
    2. In the left pane, under **Queues**, select the **Work** queue and then drag it to the right in your workflow diagram.
    3. Double-click the queue to modify its properties.
    4. In the **Queue Properties** dialog box, in the left pane, select **Properties**.
    5. In the right pane, enter **SignatureRequested** in the **Name** box.
    6. Click **OK**.
    7. Repeat the substeps 2 to 6 to create **DocumentStore**, **DocumentInProgress**, **SignatureComplete**, and **SignatureFailure** work queues.
        1. Double-click **DocumentStore**.
            1. In the left pane, click **Actions**.
                1. Under **Inbound**, for the **iScript** list, select **Edit iScripts** and click **Add**.
                2. Select **DocumentStoreAndForward.js** and click **OK**.
            2. Click **OK**.
        2. Double-click **SignatureFailure**.
            1. In the left pane, click **Actions**.
                1. Under **Inbound**, for the **iScript** list, select **Edit iScripts**, and click **Add**.
                2. Select **CreateTask.js** and click **OK**.
            2. Click **OK**.
    8. Perform the following steps to configure **SubmitForSignature**, **DownloadSignedDocuments**, and **SendToAssureSign** ASQ.

Note You must have an Envoy license to use Integration ASQs. Perform this procedure to create a queue that sends web service notifications to any business application. Before performing this procedure, you must create two queues: one queue for successfully processed items and another queue for processing unsuccessful items. In addition, you must define an Envoy service name and the number of days an item can remain in the Integration ASQ after your business application receives a successful call for that item. You have to create two ASQs, one for submitting document for signature and another for downloading signed documents.

1. Double-click the queue to modify its properties.
2. Under **Automated Action**, perform the following substeps.
    1. To designate the process and queue for items processed in this queue, in the **Success Action** list, select the workflow process in the **Process** list, and select **SignatureRequested** queue in the **Queue** list.
    2. To designate the process and queue for items that do not successfully process in this queue, in the **Failure Action** list, select the workflow process created in the **Process** list, and select **SignatureFailure** queue in the **Queue** list.
    3. To set the number of days that items remain in this queue after the business application receives a successful call for those items, in the **Route After (Days)** box, type a number. The maximum number of days is 365. By default, ImageNow routes items to the failure queue after one day.

       Note If your business application does not place a web service call for an item, that item remains in the Integration ASQ for the number of days you specify in the **Route After (Days)** box.
    4. To designate the endpoint that receives web service notifications from this queue, under **Envoy Service**, in the **Service Operation Name** list, select the **eAuthorize::SubmitForSignature** Envoy service. Only service operations that are available to use in workflow appear in the Service Operation Name list.
3. Repeat the steps above to create **DownloadSignedDocuments** Integration ASQ with the following configurations.
    1. For **Success Action**, select **SignatureComplete** from **Queue** list, and for **Failure Action**, select **SignatureFailure** from the **Queue** list.
    2. For **Envoy Service**, in the **Service Operation Name** list, select the **eAuthorize::DownloadSignedDocument** Envoy service.

       Note Envoy Service Parameters are not required.
4. Repeat the steps above to create **SendToAssureSign** Integration ASQ with the following configurations.
    1. For **Success Action**, select **SignatureRequested** from **Queue** list, and for **Failure Action**, select **SignatureFailure** from the **Queue** list.
    2. For **Envoy Service**, in the **Service Operation Name** list, select the **eAuthorize::SendToAssureSign** Envoy service.

       Note Envoy Service Parameters are not required.

8. Join the queues as shown in the figure below to create a complete workflow process. To create routes between the queues, perform the following actions.
    1. In the left pane, click **Routes**.

    2. On the **Workflow Designer** toolbar, verify that the **Normal Routes** button is selected.
    3. Under **Routes**, click **Sequential** route.
    4. To create a route from one queue to another queue, point to the first queue until the pointer becomes a cross-hair, click the queue, and then drag the pointer to the second queue to create the route.

       Note Ensure the route from **DocumentStore** to **SendToAssureSign** is a **Seq-Auto route.**

9. When you complete creating your workflow process, close **Workflow Designer**.
10. On the **Workflow** tab, click **Close**.

Note If the flow of documents is interrupted anywhere in this workflow it redirects to the **Failed** queue. However, you can open the document in **Workflow** and click **Route Back** to route it manually to the queue from where it was interrupted.

Set up the Envoy services

1. Log into ImageNow, and on the **ImageNow** toolbar, click **Manage**, and then click **Envoy Services**.
    1. Click **New** in the right pane.
    2. In the **Envoy Services** page, complete the following steps.
        1. In the **Name** box, type **eAuthorize**.
        2. In the **Description** box, type a description.
        3. In the **URI** box, type `http://<tomcatservername>:<port>/Engine/SignatureEndpoint`, replacing `tomcatservername` and `port` with your specific information.
        4. In the **Authentication** list, select **None** and verify that the **Enable interceptor logging** check box is cleared.
        5. Click **Next**.
        6. Ensure that all of the items under **ESignatureService** are selected.
        7. Click **Finish**.
2. **In Management Console, in the left pane, click Workflow**.
    1. On the **Workflow** tab, click **eAuthorize**, click **Modify**, and then complete the following steps.
        1. In **Workflow Designer**, double-click **DocumentStore**.
            1. In the **Queue Properties** dialog box, in the left pane, click **Actions**.
            2. On the **Inbound** tab, in the **iScript** list, select **DocumentStoreAndForward.js** and click **OK**.
        2. In **Workflow Designer**, double-click **SignatureFailure**.
            1. In the **Queue Properties** dialog box, in the left pane, click **Actions**.
            2. On the **Inbound** tab, in the **iScript** list, select **CreateTask.js** and click **OK**.
        3. Complete the following substeps to configure the **SubmitForSignature** Integration ASQ.
            1. In **Workflow Designer**, double-click **SubmitForSignature**.
            2. For **Success Action**, select **DocumentStore** from the **Queue** list and for **Failure Action**, select **SignatureFailure** from the **Queue** list.

3. For **Envoy Service**, in the **Service Operation Name** list, select the **eAuthorize:: SubmitForSignature** Envoy service.

   Note You do not need to map Envoy Service Parameters.

4. Click **OK**.

4. Complete the following substeps to configure the **SendToAssureSign** Integration ASQ.
   1. In **Workflow Designer**, double-click **SendToAssureSign**.
   2. For **Success Action**, select **SignatureRequested** from the **Queue** list, and for **Failure Action**, select **SignatureFailure** from the **Queue** list.
   3. For **Envoy Service**, in the **Service Operation Name** list, select the **eAuthorize::SendToAssureSign** Envoy service.

      Note You do not need to map Envoy Service Parameters.

   4. Click **OK.**
5. Complete the following substeps to configure the **DownloadSignedDocuments** Integration ASQ.
   1. In **Workflow Designer**, double-click **DownloadSignedDocuments**.
   2. For **Success Action**, select **SignatureComplete** from the **Queue** list and for **Failure Action**, select **SignatureFailure** from the **Queue** list.
   3. For **Envoy Service**, in the **Service Operation Name** list, select the **eAuthorize::DownloadSignedDocument** Envoy service.

      Note You do not need to map Envoy Service Parameters.

   4. Click **OK**.

Create new custom properties

To create new custom properties, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. To create a custom property for **Signatory 1 Full Name**, perform the following substeps.
   1. In **Management Console**, in the left pane, click **Custom Properties**. In the right pane, point to **New** and click **String**.
   2. In the **Name** box, type **Signatory 1 Full Name.**
   3. Click **OK**.
3. Repeat the previous step to create each of the following custom properties: Signatory 1 Email Address, AS_ID, AS_SIGNATURE_STATUS, and AS_AUTH_TOKEN.
4. To create a flag that enables you to keep the original unsigned document, perform the following substeps.
   1. Click **New** and select **Flag**.
   2. In the **Name** box, type **AS_KEEP_ORIGINAL_DOCUMENT**
   3. Click **OK.** For more information about using this flag, see the *Perceptive eAuthorize Getting Started Guide*.
5. To create a list of failure notifications, perform the following substeps.

1. Click **New** and select **List**.
2. In the **Name** box, type **AS_FAILURE_NOTIFICATION_TYPE**.
3. Click **Add**, type **Email**, and press ENTER. Repeat this step to add **Task** and **Both**.
4. In the **Default value** list, select **Email** as the default**.**
5. Click **OK**.

Notes

- Signatory 1 Full Name and Signatory 1 Email Address are the input parameters for AssureSign Connector that you must provide. AS_ ID, AS_AUTH_TOKEN, and AS_SIGNATURE_STATUS are the output parameters for AssureSign Connector that automatically populate.
- Various actions occur depending on the value you set for **AS_FAILURE_NOTIFICATION_TYPE**.
  - **Email** If the document fails in the workflow, an email is sent to the email ID that you configured in ImageNow while creating user profiles. You must provide the SMTP server name, port, email ID in the Configuration.xml file, and the authentication if needed.
  - **Task** You receive a task in **My Assigned** view in ImageNow that shows that the document failed in workflow.
  - **Both** You receive an email in your email account and a task in ImageNow.

Set up ImageNow for signing

You can complete the procedures in the following sections if you are a user with global privileges, a manager, or the owner.

The eAuthorize installation wizard sets up several aspects of ImageNow to get you started. These automatic configurations are detailed in Appendix A: About the eAuthorize ImageNow configuration. However, before you can send a document to AssureSign for signing, there are some ImageNow configurations you need to complete using Management Console. The following list is an overview of these procedures.

1. Create document types and assign custom properties
2. Configure task templates for document notification
3. Create a folder type to send multiple documents for signing
4. Design workflow for sending documents for signature

Create document types and assign custom properties

To create document types and assign custom properties, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **Management Console**, in the left pane, click **Document Types**.
3. In the right pane, click **New**, and then type a name for the document type that matches the name of the corresponding template in AssureSign. For details, see the AssureSign Quick Reference Guide for instructions on creating a template.
4. To assign custom properties to the document type, complete the following substeps.
   1. Select the document type from the previous step and click **Modify**.

2. In the **Custom Properties** tab, in the **By Type** list, select **All**.
3. Select the appropriate custom properties in the list and then click **Add**. The following properties are required.
   - AS_AUTH_TOKEN
   - AS_FAILURE_NOTIFICATION_TYPE
   - AS_ID
   - AS_KEEP_ORIGINAL_DOCUMENT
   - AS_SIGNATURE_STATUS
   - Signatory 1 Email Address
   - Signatory 1 Full Name

   Note To add more custom properties, see the About custom properties for multiple signatures section.
4. To mark these properties as required, click the column in front of the custom property until the **Required** icon displays.
5. Click **OK**.

Configure task templates for document notification

You receive a task in the My Assigned view in ImageNow when a submitted document fails in workflow. You can also opt to receive email notifications when submitting the document for signature.

The eAuthorize installation wizard automatically creates task templates, reasons, and a reasons list. The installation wizard also populates the reason lists with the corresponding reason list member and associates the appropriate action reasons and return reasons with each task template. For a table showing these correlations, see the Task templates section.

To configure the task templates, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **Management Console**, in the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Pointer**.
4. On the **Templates** tab, select **FailureNotification_Cancelled** and click **Modify**.

5. In the **Pointer Task** dialog box, complete the following steps.
    1. In the left pane, select **Properties**.
        1. In the **Description** box, type a template description.
        2. Under **Options**, check the **Is active** check box to make the task template available to task creators assigning tasks from the **Tasks** toolbar.
    2. In the left pane, click **Components**.
        1. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see. These instructions are the content for the email notifications that the system sends to the task assignee. You can base your instructions on the **Action Reason List** column in the table in the Task templates section.
        2. If you want to allow a task creator to modify the instructions on the **Options** tab in the **New Task** dialog box, ensure that the **Modifiable during task creation** check box is selected.
        3. In the **Task location** section, select the following locations to determine where tasks created with this template are assigned.
            - **Folder.** Create a task for a folder.
            - **Document.** Create a task for a document.
            - **Page without a visual representation.** Create a task for a page in a document with no visual representation.
            - **Page with a visual representation.** Create a task, along with a visual representation, for a page in a document.
        4. In the **Completion** box, select **Manual**.
        5. Optional. On **Workflow Assignment**, in the **Send to queue** list, select **(None)**.
    3. In the left pane, click **Assignment**.
        1. In the right pane, click **Add**.
        2. In the **Select Users and Groups** dialog box, assign the users and groups you want to have access to this task.
    4. Optional. In the left pane, click **Reasons** and then select the **Assignee must specify a reason during task completion** check box to require task assignees to select a reason after completing a task.
6. Repeat this procedure four more times to configure the remaining eAuthorize pointer task templates.
    - FailureNotification_Declined
    - FailureNotification_DownloadFailed
    - FailureNotification_Expired
    - FailureNotification_SubmissionFailed

4. In the **Pointer Task** dialog box, complete the following steps.
    1. In the left pane, select **Properties**.
        1. In the **Description** box, type a template description.
        2. Under **Options**, check the **Is active** check box to make the task template available to task creators assigning tasks from the **Tasks** toolbar.
    2. In the left pane, click **Components**.
        1. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see. These instructions are the content for the email notifications that the system sends to the task assignee. You can base your instructions on the **Action Reason List** column in the table in the Task templates section.
        2. If you want to allow a task creator to modify the instructions on the **Options** tab in the **New Task** dialog box, ensure that the **Modifiable during task creation** check box is selected.
        3. In the **Task location** section, select the following locations to determine where tasks created with this template are assigned.
            - **Folder.** Create a task for a folder.
            - **Document.** Create a task for a document.
            - **Page without a visual representation.** Create a task for a page in a document with no visual representation.
            - **Page with a visual representation.** Create a task, along with a visual representation, for a page in a document.
        4. In the **Completion** box, select **Manual**.
        5. Optional. On **Workflow Assignment**, in the **Send to queue** list, select **(None)**.
    3. In the left pane, click **Assignment**.
        1. In the right pane, click **Add**.
        2. In the **Select Users and Groups** dialog box, assign the users and groups you want to have access to this task.
    4. Optional. In the left pane, click **Reasons** and then select the **Assignee must specify a reason during task completion** check box to require task assignees to select a reason after completing a task.
5. Repeat this procedure four more times to configure the remaining eAuthorize pointer task templates.
    - FailureNotification_Declined
    - FailureNotification_DownloadFailed
    - FailureNotification_Expired
    - FailureNotification_SubmissionFailed

Create a folder type to send multiple documents for signing

You can send multiple documents for signature at the same time by sending a folder of documents to be signed through an AssureSign envelope. To create a folder type to send multiple documents for signing, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **Management Console**, in the left pane, click **Folder Types**.
3. In the right pane, under **Folder Types**, click **New** and specify a name that matches the name of the corresponding envelope type name in AssureSign. For details, see the AssureSign Quick Reference Guide for instructions on creating an envelope.
4. Select the new folder type and click **Modify**.
    1. On the **Document Types** tab, select the document type you created in the Create document types and assign custom properties section of this document and click **Add**.
    2. On the **Custom Properties** tab, in the **By Type** list, select **(All)**.
    3. Select **AS_ID, AS_AUTH_TOKEN**, **AS_SIGNATURE_STATUS**, and **AS_FAILURE_NOTIFICATION_TYPE** and then click **Add**.

       Note AS_ID, AS_AUTH_TOKEN and AS_SIGNATURE_STATUS represent corresponding values of an AssureSign envelope.
    4. Click **OK**.

Set up the AssureSign environment

Set up AssureSign DocumentTRAK for status notifications

Log into AssureSign to configure the following DocumentTRAK web notifications. If you are using a local instance of the AssureSign environment, see the Appendix C: Copy web notification templates for information on copying AssureSign web notification templates from the sandbox environment.

eAuthorizeDocumentStatus

1. On the **Administration** tab, on the left, click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeDocumentStatus** web notification template.
    1. Select **Edit** for the **General Information** section.
    2. In the **Design Name** box, enter a name for the web notification.
    3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
    4. Select **Edit Raw XML** and click **Next**.
    5. Verify that the content of the XML file is similar to the following example and click **Next**.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UpdateStatusDocument xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
```

```
      <DOC_STATUS>[Document Status]</DOC_STATUS>
    </UpdateStatusDocument>
  </s:Body>
</s:Envelope>
```

6. Select **Compare response to expected XML string** and click **Next**.
7. Select **Edit Raw XML** and click **Next**.
8. Verify that the XML is similar to the following example, click **Next**, and then click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeStepStart

1. On the **Administration** tab, open **Notifications,** and click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeStepStart** web notification template.
    1. Select **Edit** for the **General Information** section.
    2. In the **Design Name** box, enter a name for the web notification.
    3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
    4. Select **Edit Raw XML** and click **Next**.
    5. Verify that the XML is similar to the following example and click **Next**.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UpdateStatusStepStarted xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
      <DOC_SIGNING_STEP>[Signing Step]</DOC_SIGNING_STEP>
    </UpdateStatusStepStarted>
  </s:Body>
</s:Envelope>
```

    6. Select **Compare response to expected XML string** and click **Next**.
    7. Select **Edit Raw XML** and click **Next**.
    8. Verify that the XML is similar to the following example, click **Next**, and then click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
```

```
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeStepComplete

1. On the **Administration** tab, open **Notifications** and click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeStepStart** web notification template.
    1. Select **Edit** for the **General Information** section.
    2. In the **Design Name** box, enter a name for the web notification.
    3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
    4. Select **Edit Raw XML** and click **Next**.
    5. Verify that the XML is similar to the following example and then click **Next**.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UpdateStatusStepCompleted xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
      <DOC_SIGNING_STEP>[Signing Step]</DOC_SIGNING_STEP>
    </UpdateStatusStepCompleted>
  </s:Body>
</s:Envelope>
```

    6. Select **Compare response to expected XML string** and click **Next**.
    7. Select **Edit Raw XML** and click **Next**.
    8. Verify that the XML is similar to the following example, click **Next**, and then click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeStepUserVisit

1. On the **Administration** tab, open **Notifications** and click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeStepStart** web notification template.
    1. Select **Edit** for the **General Information** section.
    2. In the **Design Name** box, enter a name for the web notification.
    3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
    4. Select **Edit Raw XML** and click **Next**.

5. Verify the XML looks like the following example and then click **Next**.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UpdateStatusStepLandingPageVisited xmlns:xsi="http://www.w3.org/2001/XMLSc
hema-instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
      <DOC_SIGNING_STEP>[Signing Step]</DOC_SIGNING_STEP>
    </UpdateStatusStepLandingPageVisited>
  </s:Body>
</s:Envelope>
```

6. Select **Compare response to expected XML string** and click **Next**.
7. Select **Edit Raw XML** and click **Next**.
8. Verify that the XML is similar to the following example, click **Next**, and then click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeDocumentCompleted

1. On the **Administration** tab, open **Notifications** and click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeDocumentCompleted** web notification template and complete the following substeps to edit the XML data.
   1. Select **Edit** for the **General Information** section.
   2. In the **Design Name** box, enter a descriptive name for the web notification**.**
   3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
   4. Select **Edit** in the **Request XML** section.
   5. Select **Edit Raw XML** and click **Next**.
   6. Replace the original text in the XML with the following highlighted text. Note that this is for indexing a signed document within ImageNow. If the document originated within ImageNow and you want to maintain the original document index values, leave the field values blank.

      To do this, complete the following substep.

      - Select the existing text in the code in place of the highlighted text and click the exact parameter name enclosed in brackets in the **Request XML Editing** box.

      Note The values for `<field1>` through `<field5>` can be static text (no brackets) or can contain the name of an AssureSign jotblock within brackets ([JotblockName]) so the jotblock value can be populated as the index field. For any empty field in AssureSign, the corresponding field in ImageNow remains unchanged.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UpdateStatusDocumentCompleted xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
      <DOC_ID>[Document ID]</DOC_ID>
      <DOC_AUTH_TOKEN>[Document AuthToken]</DOC_AUTH_TOKEN>
      <field1>(Field 1 value)</field1>
      <field2>(Field 2 value)</field2>
      <field3>(Field 3 value)</field3>
      <field4>(Field 4 value)</field4>
      <field5>(Field 5 value)</field5>
    </UpdateStatusDocumentCompleted>
  </s:Body>
</s:Envelope>
```

7. Select **Compare response to expected XML string** and click **Next**.
8. Select **Paste Raw XML** and click **Next**.
9. Type the following code in the **Expected Response XML Editing** box and click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeDocumentStatusKBA

1. On the **Administration** tab, on the left, click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeDocumentStatusKBA** web notification template and complete the following substeps.
   1. Select **Edit** for the **General Information** section.
   2. In the **Design Name** box, enter a name for the web notification.
   3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
   4. Select **Edit Raw XML** and click **Next**.
   5. Verify that the XML is similar to the following example and click **Next**.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
 <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
   <UpdateStatusDocumentKBA xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://www.perceptivesoftware.com/asq/esignature">
     <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
     <DOC_STATUS>[Document Status]</DOC_STATUS>
     <SIGNER_AUTH_FAIL_DET>[Signatory Authentication Failure
Details]</SIGNER_AUTH_FAIL_DET>
```

```
     <SIGNER_KBA_RES>[Signatory KBA Result]</SIGNER_KBA_RES>
     <SIGNER_KBA_DET>[Signatory KBA Result Details]</SIGNER_KBA_DET>
     <DOC_SIGNING_STEP>[Signing Step]</DOC_SIGNING_STEP>
   </UpdateStatusDocumentKBA>
 </s:Body>
</s:Envelope>
```

6. Select **Compare response to expected XML string** and click **Next**.
7. Select **Edit Raw XML** and click **Next**.
8. Verify that the XML is similar to the following example, click **Next**, and then click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Set up an AssureSign template for signature

For details, see the AssureSign Quick Reference Guide for instructions to create a template. However, consider the following points when creating a template.

- Make sure the template name matches the name of the corresponding document type in ImageNow.
- Make sure the Template Tag in AssureSign matches the value you provide in the Configuration.xml file. For details, see the Appendix B: Configuration.xml file table for more information on the Configuration.xml file.

```
<section name="connectors">
        <section name="AssureSignConnector">
            <parameter name="AS_USERNAME" value=""/>
            <parameter name="AS_CONTEXT_ID" value=""/>
            <parameter name="AS_TEMPLATE_TAG" value=""/>
        </section>
    </section>
```

Add web notifications

In the **Workflow Template**, for **Web Notifications**, add the notifications as shown in the following table.

Note If there are multiple steps (signatories) defined in the template, then each step (Step 1, Step 2, and so on) should have the following assigned design names.

Stage	Timing	Design Name
Document Started	Before Document Started	eAuthorize Document Status
Step 1	Before Step	eAuthorize Step Start
	After Step	eAuthorize Step Complete
	Landing Page Visited	eAuthorize Step User Visit

Stage	Timing	Design Name
Document Completed	After Document Completed	eAuthorize Document Completed
Expiration Warning	No notification selected	
Document Expired	After Document Expiration	eAuthorize Document Status
Document Cancelled	Document Cancelled	eAuthorize Document Status
Document Declined	Document Declined	eAuthorize Document Status
Feedback Submitted	No notification selected	
Authentication Failed	Authentication Failed	eAuthorize Document StatusKBA
KBA Started	KBA Started	eAuthorize Document StatusKBA
KBA Completed	KBA Completed	eAuthorize Document StatusKBA

For details, see the Set up AssureSign DocumentTRAK for status notifications section for instructions on creating these web notifications.

Add dynamic JotBlock in PDF documents

To add dynamic JotBlocks in a PDF document, you have to change the following setting in the AssureSign environment.

1. In **AssureSign**, on the **Administration** tab, on the left pane, click **Settings**.
2. In **Document Preferences**, point to **Flatten PDF Documents Prior to Processing** and click **Edit**.

   Note If you cannot find this setting in **Document Preferences**, contact your administrator to set this preference to **No**.
3. Select the **No** button and click **Save**.

Set up the ability to download signed documents from a third party

Signed documents submitted by a third party automatically upload into ImageNow after the signatory signs them. These documents do not originate in ImageNow. A third party sends them for signature manually or from another application. The system then uploads the documents directly into ImageNow after signing.

You have to create document types and configure templates within the AssureSign environment for document transmission. To complete the following steps, you must have administrative rights to your AssureSign environment.

Create document types to download signed documents submitted by third party applications

To download signed documents in ImageNow, submitted by third-party applications, you have to create a document type that contains AS_AUTH_TOKEN and AS_ID as custom properties. These custom properties are automatically populated when a signed document is downloaded in ImageNow.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **Management Console**, in the left pane, click **Document Types**.
3. In the right pane, click **New** and specify a name for the document type.

   Note The name of the document type must contain the words "AssureSign" and "External". This is the default document type for document transmission.
4. Select the added document type and click **Modify**.
   1. Under **Custom Properties**, in the **By Type** list, select **String**.
   2. In the **Available** box, select **AS_AUTH_TOKEN** and **AS_ID**, and then click **Add**.
   3. Click **OK**.

Set up AssureSign for document transmission

The steps given below are for the transmission of third-party documents in ImageNow 6.7 or higher up to Perceptive Content 7.1.5. For details, see the Configure eAuthorize section for transmitting third-party documents in ImageNow 6.5.1 and 6.6.

Complete the following steps to set up the AssureSign environment for document transmission.

1. In **AssureSign**, on the **Administration** tab, open **Notifications** and click **DocumentTRAK**.
2. In **Completed Document Transmission** section, copy the **eAuthorizeExternalDocUpload** document transmission template.
   1. Select **Edit** for the **General Information** section.
   2. In the **Design Name** box, enter a name for the web notification.
   3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
   4. Select **Edit Raw XML** and click **Next**.
   5. Replace the original text in the XML with the following highlighted text by performing the following substeps.
      1. Select the existing text in the code in place of the highlighted text and click the exact parameter name enclosed in brackets in the **Request XML Editing** box.
      2. In the `<field1>`, `<field2>`, `<field3>`, `<field4>`**,** and `<field5>` tags, enter the appropriate index values for the signed document when it comes into ImageNow.

         Note Value for `<field1>` through `<field5>` can be static text (no brackets) or could contain the name of an AssureSign jotblock within brackets ([JotBlockName]). If any field value is empty, the corresponding field in ImageNow appears empty.
      3. In the `<documentType>` tag, enter the document type value that you want the signed document to contain.

```
 <?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UploadSignedDocument xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <DOC_ID>[Document ID]</DOC_ID>
      <DOC_AUTH_TOKEN>[Document AuthToken]</DOC_AUTH_TOKEN>
```

```
      <DOC_ORDER_ID>[Order ID]</DOC_ORDER_ID>
      <drawer>default</drawer>
      <name>[Document Name]</name>
      <field1>field1 value</field1>
      <field2>field2 value</field2>
      <field3>field3 value</field3>
      <field4>field4 value</field4>
      <field5>field5 value</field5>
      <documentType>doctype value</documentType>
      <DOCUMENT>[Completed Document]</DOCUMENT>
      <EXTERNAL_DOCUMENT_QUEUE>SignatureComplete</EXTERNAL_DOCUMENT_QUEUE>
    </UploadSignedDocument>
  </s:Body>
</s:Envelope>
```

Notes

- Ensure that the document keys contain unique values for signed documents. This restricts ImageNow from appending a signed third-party document.
- Provide the queue name for the **EXTERNAL_DOCUMENT_QUEUE** parameter to download the signed document in that queue in ImageNow. The previous example shows the **SignatureComplete** queue.
- If you do not provide a document name for the name parameter, ImageNow uses the document ID as the default document name.
- If you do not provide a type for the documentType parameter, the default document type for document transmission is used. For details, see the Create document types to download signed documents submitted by third party applications section of this document.
- When you use an eForm from ImageNow Forms Server, ensure that document type is not specified as "is a form" for document storage in ImageNow.
- If you provide a document type, ensure the document type contains **AS_AUTH_TOKEN** and **AS_ID** as the custom properties.

6. Select **Compare response to expected XML string** and click **Next**.
7. Select **Edit Raw XML** and click **Next**.
8. Verify the XML looks like the following example.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

3. Create a template for document transmission. For details, see the AssureSign Quick Reference Guide for instructions to create a template.

   Note Consider the following points when creating the template.

   - In **Workflow Template**, for **Web Notifications**, ensure that no notifications are selected for any of the stages.

- For **Document Transmission**, select the design name added in this section.

Set up the AssureSign environment for envelopes

This section outlines the steps to set up the AssureSign environment for sending multiple documents in a folder for signature. To see the steps to send multiple documents see the *Perceptive eAuthorize Getting Started Guide*.

Configure DocumentTRAK for the AssureSign envelope template

1. In **AssureSign**, on the **Administration** tab, open **Notifications** and click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **eAuthorizeEnvelopeAll** web notification template.
    1. Select **Edit** for the **General Information** section.
    2. In the **Design Name** box, enter a name for the web notification.
    3. In the **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP address of the server running Tomcat and click **Next**.
    4. Select **Edit Raw XML** and click **Next**.
    5. Verify that the XML is similar to the following example and click **Next**.

```
<?xml version="1.0" encoding="utf-8"?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <UpdateStatusEnvelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"xmlns="http://www.perceptivesoftware.com/asq/esignature">
      <ENVELOPE_ID>[Envelope ID]</ENVELOPE_ID>
      <ENVELOPE_AUTH_TOKEN>[Envelope AuthToken]</ENVELOPE_AUTH_TOKEN>
    </UpdateStatusEnvelope>
  </s:Body>
</s:Envelope>
```

    6. Select **Compare response to expected XML string** and click **Next**.
    7. Select **Edit Raw XML** and click **Next**.
    8. Verify that the XML is similar to the following example, click **Next**, and then click **Finish**.

```
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <impl:Response xmlns:impl="http://www.perceptivesoftware.com/asq/esignature
">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Create an envelope template

Email notifications should be assigned within the Envelope Template and disabled within the individual Document Templates that are included as part of the Envelope. Otherwise, instead of receiving one notification for all documents in the envelope, the signatories receive multiple email notifications for the same document.

1. In the **Envelope Templates** section, click **New**.

2. In the **Name** box, enter a name for the envelope template. Ensure that the template name matches the name of the corresponding folder type in ImageNow.
3. In the Tag box in AssureSign, enter a value that matches the value that you provided in the Configuration.xml file. For additional information on the Configuration.xml file, see the Appendix B: Configuration.xml file table.
4. Select an email design set from the **Email Design Set** list and an **Account** from the **Accessibility** list.
5. Click **Save**.

Edit notifications

1. Click **Edit** in front of the new envelope template.
2. Click **Edit Notifications** and add the notifications as shown in the following table.

Stage	Timing	Design Name
Envelope Started	Envelope Started	eAuthorizeEnvelopeAll
Envelope Completed	Envelope Completed	eAuthorizeEnvelopeAll
Envelope Expired	Envelope Expired	eAuthorizeEnvelopeAll
Envelope Cancelled	Envelope Cancelled	eAuthorizeEnvelopeAll
Envelope Declined	Envelope Declined	eAuthorizeEnvelopeAll

Set up an eForm for Signature

If you are using an eForm, you do not have to capture the document in ImageNow. The signatory receives the form with a Submit button. After the signatory completes the form and clicks the Submit button, a Begin signing link displays directly within the eForm. When the signatory clicks the Begin signing link within the eForm, the document appears for signing. The eForm data dynamically populates the data on the document. After signing, you can configure the document within the AssureSign template and then automatically upload it into ImageNow.

Before proceeding, ensure that eauthorize-eform-agent.war, the Tomcat server, and ImageNow Forms Server are deployed on the same machine.

1. Open an internet browser, and then go to `http://<tomcatservername>:<tomcatserverport>/` and click **Manager App**.
2. Log in with your credentials.
3. In the **Tomcat Web Application Manager** page, scroll to the **Deploy** section, and under **WAR file to deploy**, click **Choose File** to locate the **eauthorize-eform-agent.war** file.
4. Click **Deploy**.
5. Under the **Applications** section, verify that the **eauthorize-eform-agent** service is running.
6. Go to the **[*drive*:]\Program Files\Apache Software Foundation\Tomcat 7.0\webapps\eauthorize-eform-agent\WEB-INF\conf** directory and complete the following substeps.

1. Open **config.properties** and provide Platform Integration Engine IP, Platform Integration Engine port, AssureSign URL, AssureSign local domain (if a local AssureSign web application is in use), AssureSign username, and context ID.
2. Save the file.
3. Open the **log4j.properties** file and specify the path for downloading log file. The default path is **[*drive*:]\EAuthorizeEFormAgent**.

7. Log into ImageNow with managerial privileges and click **Manage**.
   1. In **Management Console**, in the left pane, click **Forms**.
   2. On the **Forms** tab, click **Open Form Designer** and create a form.

      Note For more information on creating forms using Form Designer, see the *Perceptive Software ImageNow Form Designer Help*.
   3. On the **Forms** tab, click **Manage Form Components**.
   4. On **Presentations**, select the newly created presentation and click **Modify**.
      1. In the left pane, click **Files**.
      2. In the right pane, click **Add**, browse to select **CallAssureSign.js**, and click **OK**.
8. Open the XSL file from the newly created form folder in the **[*drive*:]:\inserver6\form** directory and complete the following substeps.
   1. Add `<script language="JavaScript" src="CallAssureSign.js"></script>` within the head tag to call AssureSign, as shown in the following example.

```
<?xml version="1.0" encoding="windows-1252"?>
<xsl:stylesheet version="1.0"
xmlns:xhtml="http://www.w3.org/1999/xhtml"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:template match="/form">
    <html>
      <head xmlns="http://www.w3.org/1999/xhtml">
         <script language="JavaScript" src="CallAssureSign.js"></script>
        <meta name="generator"
        content="HTML Tidy for Windows (vers 14 February 2006), see
www.w3.org">
        </meta>
        <title>ImageNow Forms</title>
        <meta name="GENERATOR" content="MSHTML 9.00.8112.16455">
        </meta>
        <meta name="GENERATOR" content="MSHTML 9.00.8112.16455">
        </meta>
        <meta name="GENERATOR" content="MSHTML 9.00.8112.16455">
        </meta>
        <meta content="text/html; charset=us-ascii"
        http-equiv="Content-Type"></meta>
        <meta name="GENERATOR" content="MSHTML 9.00.8112.16455">
        </meta>
      </head>
```

   2. Add `<input type="button" value="Submit" onclick="getImmediatePresentmentLink()" />` and `<p id="SigningLink"></p>` within a body tag to place the **Submit** button and the **Begin signing** link in the form body, as shown in the following example.

```
              <input type="button" value="Submit"
onclick="getImmediatePresentmentLink()" />
        <p id="SigningLink"></p>
      </body>
    </html>
  </xsl:template>
</xsl:stylesheet>
```

Configure CallAssureSign.js to work with manually designed eForms

Manually designed eForms are eForms that are created using utilities other than the eForm designer utility of ImageNow. If you design the eForm manually, you need to make some changes in the CallAssureSign.js script so that it can recognize the inputs and associated value to construct the URL encoded request parameters. The following example displays the Java script template that you must modify to work with a manually created eForm.

```
function getImmediatePresentmentLink() {
    var allElements = document.all;
    for (var i = 0; i < allElements.length; i++) {
        allElements[i].setAttribute("disabled", true);
    }
    var winLoc = window.location.href;
    var tempStr = winLoc.substring(winLoc.lastIndexOf("/"), winLoc.lastIndexOf("."));
    var formName = tempStr.substring(tempStr.indexOf("_") + 1);

    document.getElementById("SigningLink").innerHTML = 'Please wait....The document is
being submitted....Your signing link will appear here shortly';
    var strRequest = "ImageNowFormName=" + formName;
    var row = document.getElementsByTagName("tr");
    for (i = 0; i < row.length; i++) {
        var currentItem = row.item(i);
        if (currentItem.childNodes.length < 2) {
            continue;
        }
        var field = currentItem.childNodes.item(0).innerText;
        var dataItem = currentItem.childNodes.item(1).childNodes.item(0);
        var value;
        if (dataItem.nodeName.toUpperCase() == "INPUT") {
            value = dataItem.value;
        }
        if (dataItem.nodeName.toUpperCase() == "SELECT") {
            var selectedIndex = dataItem.selectedIndex;
            value = dataItem.getElementsByTagName("option")[selectedIndex].innerText;
        }
        strRequest = strRequest + "&" + field + "=" + value;
    }

    var xmlHTTP;
    if (window.XMLHttpRequest) {
        xmlHTTP = new window.XMLHttpRequest;
    }
    else {
        try {
            xmlHTTP = new ActiveXObject("MSXML2.XMLHTTP.3.0");
        }
        catch (ex) {

        }
    }
```

```
    xmlHTTP.open("POST", "/eauthorize-eform-agent/SubmitToAssureSign", true);
    xmlHTTP.setRequestHeader("Content-Type", "application/x-www-form-
urlencoded;charset=utf-8");
    xmlHTTP.onreadystatechange = function () {
        if (xmlHTTP.readyState == 4 && xmlHTTP.status == 200) {
            document.getElementById("SigningLink").innerHTML = '<a href="' +
xmlHTTP.responseText + '" target="_blank">' + 'Begin Signing' + '</a>';
            /* window.open(xmlHTTP.responseText);*/
        }
    }
    xmlHTTP.send(strRequest);
}
```

You can make the following changes in the CallAssureSign.js script to make it work with your manually designed eform.

- In the line `for (i = 0; i < row.length; i++)`, establish the iteration mechanism to implement proper traversal for your eForm.
- In the `var field = currentItem.childNodes.item(0).innerText;` line, under the `field` variable, assign the variable name of AssureSign parameter.
- In `the var dataItem = currentItem.childNodes.item(1).childNodes.item(0);` line, under the `dataItem` variable, assign the value of the AssureSign parameter that is identified in the `field` variable.

The strRequest = strRequest + "&" + field + "=" + value; line is eForm specific. This line denotes the relationship between AssureSign parameter names and associated values. The strRequest variable must be of the format ImageNowFormName=<Name of the ImageNow form>&parameter1=value1&parameter2 =value2 and so on, where parameter1 and parameter2 are AssureSign parameters and value1 and value2 are associated values.

Disable the Begin signing link

To disable the immediate presentment link, complete the following steps.

1. In the XSL file, delete `<p id="SigningLink"></p>` in the body tag.
2. In the **CallAssureSign.js**, delete the following lines.

```
document.getElementById("SigningLink").innerHTML = 'Please wait....The document is
being submitted....Your signing link will appear here shortly';
and
   xmlHTTP.onreadystatechange = function () {
        if (xmlHTTP.readyState == 4 && xmlHTTP.status == 200) {
            document.getElementById("SigningLink").innerHTML = '<a href="' +
xmlHTTP.responseText + '" target="_blank">' + 'Begin Signing' + '</a>';
            /* window.open(xmlHTTP.responseText);*/
        }
    }
```

3. Restart **Tomcat**.

Disable buttons on eForms

ImageNow Forms Server provides the option to disable the save, print, reset, and attachments buttons.

1. Access the **[*drive*:]\inserver6\etc** directory and open the imagenowforms.xml file.
2. Go to the section where the `<FormName>` tag value is the name of the form you are using to sign.

3. Within `<ConfigParams>`, add the configuration parameters and set the values as FALSE for the buttons which you want to disable, as shown in the following example.

```
<DocumentForm>
    <FormName>eAuthorize_eForm</FormName>
    <QueueName></QueueName>
    <Drawer>Accounts Payable</Drawer>
    <Field1 isUnique="true"/>
    <Field2 isTimeStamp="true"/>
    <Field3/>
    <Field4/>
    <Field5/>
<ConfigParams>
<ConfigParam name=”saveVisible” value=”FALSE”/>
<ConfigParam name=”printVisible” value=”FALSE”/>
<ConfigParam name=”resetVisible” value=”FALSE”/>
   <ConfigParam name=”attachmetnsVisible” value=”FALSE”/>
</ConfigParams>
</DocumentForm>
```

4. Stop the **Engine** service and then restart **Tomcat**. Now all the buttons are invisible.

   Note If you save the attachments in ImageNow, you cannot submit them along with the signed document. As in this case, where you are not saving the form to ImageNow and are only collecting values from the eForm, you cannot submit attachments.

Map eForm fields to JotBlocks in AssureSign

To map the fields in forms with the parameters in JotBlock, consider the following points while creating eForms for submitting documents for signature.

- Create a document template in AssureSign matching the name of the form used for signature.
- JotBlocks should have **Type** as **Text**, **Input** as **Parameter** and the parameter name should match the field names in the form.
- **Workflow** template in AssureSign should contain the **Signatory Name** and **Email Address** matching those in the form.
- AssureSign treats the documents submitted for signature though eForm as third party documents. Hence, while creating **Workflow** template, on **Document Transmission**, select **eAuthorizeExternalDocUpload** as the **Design Name**.

Troubleshooting

Situation: Cannot restart Tomcat after installing Platform Integration Engine.

Solution: It is possible that Integration Server and Platform Integration Engine are on the same physical server and port, and since Platform Integration Engine attempts to start before Integration Server is running, it halts. To check this, comment the XML element in the configuration.xml file containing the Integration Server URL, save the configuration.xml file, and start Tomcat. Then, remove the comment and restore the original file.

Situation: The WSDL at `http://<server>:<port>/Engine/SignatureEndpoint` does not show the operations. Messages, such as "ImageNow endpoint cannot be created," might display.

Solution: This situation can occur if you restart the Engine service multiple times within a short period of time. Each time the Engine service restarts, it creates a new connection with Integration Server. To close these open connections, complete the following steps.

1. Go to **ImageNow Management Console**.
2. Click **Diagnostics** in the left pane and log off all of the Integration Server connections. The status changes from **Connected** to **Disconnected**.
3. Restart the **Engine** service. Restart only the Engine service and not Tomcat, if both Integration Server and the Engine service are on the same server and port.
4. Access the WSDL and verify that it shows all operations.

Situation: If Integration Server and ImageNow Forms Server are installed on the same Tomcat server, one of the servers may not start, which can result in a Platform Integration Engine startup failure. A message such as "Cannot connect with ImageNow" might display.

Solution:

1. Cut **encryption.jar** from the **Tomcat\webapps\integrationserver\WEB-INF\lib** directory and paste to the **tomcat\webapps\shared** folder. Create the directory if it does not exist.
2. Open the **Tomcat\conf\catalina.properties** file and edit the shared.loader setting to **catalina_home\webapps\shared**.

Situation: The eAuthorize document submission fails and error logs display the message "The required attribute 'TemplateId' is missing…"

Solution: This error occurs if the AssureSign template is not properly set up. When you submit a document in ImageNow, the Document Type name in ImageNow must match with an AssureSign template name. The name match is case-sensitive. To know how to set up an AssureSign template, see the Set up an AssureSign template for signature section.

Appendix A: About the eAuthorize ImageNow configuration

The eAuthorize solution uses various products for the signing and storage of documents. This section of the installation guide describes the ImageNow configuration provided with the installer. After you run the installation wizard using the Complete setup type or the Workflow Configuration option in the Custom setup type, the installer creates the storage and workflow needed by eAuthorize on your ImageNow system.

This appendix provides details about the ImageNow configuration that is automatically set up by the installation wizard.

Custom properties

The following table provides the list of custom properties that the installation wizard creates during installation.

Custom Property Name	Description	Parameter Type	Data Type
AS_AUTH_TOKEN	Unique security token from AssureSign	Output parameter	String
AS_FAILURE_NOTIFICATION_TYPE	Type of notification sent to the user when a document fails in workflow	Input parameter	List
AS_ID	Unique ID from AssureSign	Output parameter	String
AS_KEEP_ORIGINAL_DOCUMENT	If this is set as TRUE, the original document remains as is in the DocumentStore work queue in ImageNow workflow and a copy of it is created.	Input parameter	Flag
AS_SIGNATURE_STATUS	Status of the signature in workflow	Output parameter	String
Signatory 1 Full Name	Name of the person who needs to sign the document	Input parameter	String
Signatory 1 Email Address	Email address of the person who needs to sign the document	Input parameter	String
Signatory 2 Full Name	Name of the person who needs to sign the document	Input parameter	String
Signatory 2 Email Address	Email address of the person who needs to sign the document	Input parameter	String
Signatory 3 Full Name	Name of the person who needs to sign the document	Input parameter	String

Custom Property Name	Description	Parameter Type	Data Type
Signatory 3 Email Address	Email address of the person who needs to sign the document	Input parameter	String

It is important to understand how these custom properties function.

- Signatory 1 Full Name and Signatory 1 Email Address are the input parameters for AssureSign Connector that you must provide.
- AS_ ID, AS_AUTH_TOKEN, and AS_SIGNATURE_STATUS are the output parameters for AssureSign Connector that populate automatically.
- Various actions occur, depending on the value you set for AS_FAILURE_NOTIFICATION_TYPE:
  - **Email**. If the document fails in the workflow, an email is sent to the email ID that you configured in ImageNow while creating user profiles. You must provide the SMTP server name, port, email ID in the Configuration.xml file, and the authentication if needed.
  - **Task**. You receive a task in the My Assigned view in ImageNow that shows that the document failed in workflow.
  - **Both**. You receive an email in your email account and a task in ImageNow.

About custom properties for extended features

To send a document to multiple signatories, you need the signatory full name and signatory email address custom properties corresponding to each signatory. During installation, the following custom properties are automatically created for sending a document to additional signatories.

- Signatory 2 Full Name
- Signatory 2 Email Address
- Signatory 3 Full Name
- Signatory 3 Email Address

When you create the multiple signatories, you must understand how the information correlates to the AssureSign template and ImageNow custom properties.

- You specify the signatory names and email addresses while creating a template in AssureSign.
- You must make sure that the custom properties for signatory full name and signatory email address in ImageNow match the AssureSign template. For example, if you use Signatory 1 Full Name and Signatory 1 Email Address in a particular template, make sure that ImageNow uses the same Signatory 1 Full Name and Signatory 1 Email Address custom properties.

Note Additional custom properties can be used to prefill information on an AssureSign document if the name of AssureSign template parameter and the names of custom property are same.

For details, see the AssureSign Quick Reference Guide for instructions on creating a template. Ensure that each name and email address corresponds to custom properties in ImageNow.

Task templates

The eAuthorize installation wizard automatically creates pointer task templates, reasons, and reason lists. The installation wizard also populates the reason lists with the corresponding reason member and associates the appropriate action reasons and return reasons with each task template. The following table shows these correlations.

Task Name	Action Reason List	Action Reason List Members	Return Reason List	Return Reason List Members
FailureNotification_Cancelled	Cancelled	Document/Envelope is cancelled by signatory.	Task Return List	Additional information requested. Not my document. Not my folder. Not completed as required. See comments for more information.
FailureNotification_Declined	Declined	Document/Envelope is declined by signatory.	Task Return List	Additional information requested. Not my document. Not my folder. Not completed as required. See comments for more information.
FailureNotification_DownloadFailed	DownloadFailed	Document/Envelope download failed.	Task Return List	Additional information requested. Not my document. Not my folder. Not completed as required. See comments for more information.
FailureNotification_Expired	Expired	Document/Envelope is expired.	Task Return List	Additional information requested. Not my document. Not my folder. Not completed as required. See comments for more information.
FailureNotification_SubmissionFailed	Submission Failed	Document/Envelope submission failed.	Task Return List	Additional information requested. Not my document. Not my folder. Not completed as required. See comments for more information.

eAuthorize iScripts

The installation wizard places the following iScripts in the [*drive*:]\inserver6\script directory during installation.

Script	Function
CreateTask.js	For creating a task in ImageNow if a document fails in workflow.
DocumentStoreAndForward.js	For storing and forwarding a document in a workflow queue.
IntegrationServer_Page_Delete.js	For replacing the original document upon downloading the signed version.
IntegrationServer_User_Get.js	For fetching the user information from ImageNow.
IntegrationServer_VersionControl_Checkin.js	For version control.
IntegrationServer_VersionControl_Checkout.js	For version control.
IntegrationServer_VersionControl_UndoCheckout.js	For version control.
IntegrationServer_WorkflowQueue_GetByName.js	For document transmission.
RefreshAuditHistory.js	For refreshing Audit History.

The installation wizard places the following files in the [*drive*:]\inserver6\script\eAuthorize directory during installation.

- IN_WorksheetManager.jsh
- IN_XML.jsh
- INBasePath.jsh
- Util_Misc.jsh

AssureSign form

A Forms license is required to use forms in eAuthorize. If you need a Forms license, contact your Perceptive Software representative.

AssureSign Audit History form

This form displays the audit trail of each document processed in eAuthorize. If the form license is not activated, the audit trail history will not be available in ImageNow but will be available in AssureSign.

About the AssureSign Audit History form files and components

The eAuthorize installation wizard automatically creates the AssureSign Audit History form for you. You create a form by first uploading the data definition file and then the XSL style sheet and supporting files. The eAuthorize installation wizard automatically loads these files to the [*drive*:]\inserver6\forms directory and configures the corresponding ImageNow components. To create it manually, see the Set up eForm for AssureSign Audit History section.

File name	Purpose
AssureSign_AuditHistory.xml	The data definition XML file contains the schema used to save data instances in data content record files.
AssureSign_Audit_History_Presentation.xsl	The presentation XSL file describes how to present the XML data in the form.
Supporting files	The supporting files for the presentation. • AssureSign_AuditHistory.xls • Asynch.js • Forms.css • Refresh_16.png • Section_header_bg.gif

AssureSign ImmediatePresentment form

This form provides you the link to sign the associated documents from within ImageNow client. If the form license is not activated, the AssureSign ImmediatePresentment form is not available in ImageNow.

About AssureSign ImmediatePresentment form files and components

The eAuthorize installation wizard automatically creates the AssureSign ImmediatePresentment form for you. You create a form by first uploading the data definition file and then the XSL style sheet and supporting files. The eAuthorize installation wizard automatically loads these files to the [*drive:*]\inserver6\forms directory and configures the corresponding ImageNow components. To create this manually, see the Set up eForm for AssureSign ImmediatePresentment.

File name	Purpose
AssureSign_ImmediatePresentment.xml	The data definition XML file contains the schema used to save data instances in data content record files.
AssureSign_ImmediatePresentment.xsl	The presentation XSL file describes how to present the XML data in the form.
Supporting files	The supporting files for the presentation. • Forms.css • Forms.js • section_header_bg.gif

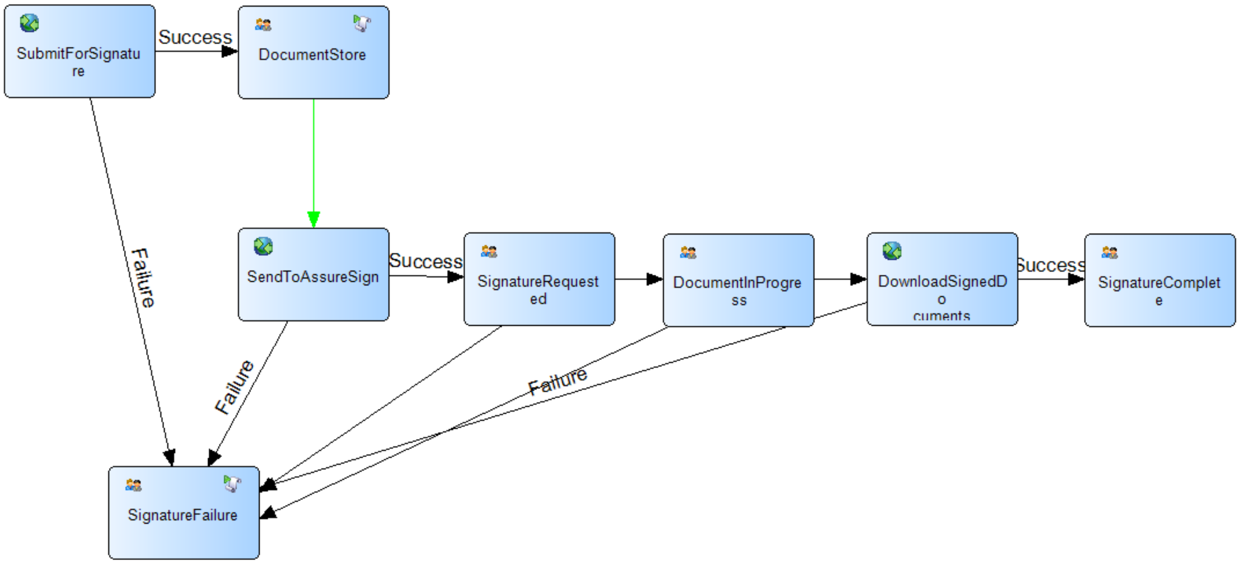
About the workflow for sending documents for signature

A workflow process is required to send documents to AssureSign for signature and download the signed documents in ImageNow. The installer automatically configures workflow configurations.

The eAuthorize installation wizard creates a workflow process and the queues described in the following table.

Queue Name	Description
SubmitForSignature	ASQ for submitting a document for signature. This is the first queue in the workflow process.
DocumentStore	When AS_KEEP_ORIGINAL_DOCUMENT is TRUE, the original document remains as is in this work queue, a copy of it is created in ImageNow, and through sequential auto-routing it is forwarded to the SendToAssureSign ASQ.
SendToAssureSign	When the document is submitted to AssureSign for signature.
SignatureRequested	When the email notification from AssureSign is sent to signatory.
DocumentProgress	When the signing process is in progress.
DownloadSignedDocuments	ASQ where the signed document is routed for downloading in ImageNow.
SignatureComplete	Work queue where the document is routed when the required signature is obtained.
SignatureFailure	Cancelled, expired, declined, or format mismatched documents are routed to this queue.

You can verify the workflow setup in Workflow Designer, as shown in the workflow diagram below. You can use Workflow Designer if you are a user with the global privilege to manage workflow processes, a manager, or the owner.



When you use this process, if the flow of documents is interrupted anywhere in this workflow it redirects to the **SignatureFailed** queue. If that occurs, you can open the document in Workflow and click **Route Back** to return it.

Appendix B: Configuration.xml file table

The following table provides definitions and instructions for setting the parameter values in the configuration.xml file, located in the [*drive*:]\IntegrationEngine\etc directory. This table displays the settings under group headings, for example, `<AssureSignConnector>`, in the order the groups appear in the file. Use this table as a guide if you need to customize the file.

Section	Parameter	Guideline
AssureSignConnector	AS_WSDL_URL	A URL that defines the location of the sandbox or production instance in the AssureSign cloud, or a URL to the local AssureSign web application you are using.
	AS_LOCAL_INSTANCE_DOMAIN_NAME	Set the value to null if you are using an instance of the AssureSign cloud, for example: <parameter name= "AS_LOCAL_INSTANCE_DOMAIN_NAME"value=""/ > If you are using a local AssureSign web application, provide the machine name as the value. You can also find the machine name in self-signed certificate issued during AssureSign installation.
	AS_USERNAME	An AssureSign administrative account that is used to authenticate into AssureSign and submit documents for signature.
	AS_CONTEXT_ID	AssureSign's DocumentNOW Account Context Identifier specifies a unique identifier needed in order to validate the request. You can find this identifier in the **Settings** section of the Administrative tab within your AssureSign environment, if you have administrative access.
	AS_TEMPLATE_TAG	This value needs to match the Template tag value in the AssureSign template. Use the value that you have already entered in AssureSign, or note this value so that you can enter it in AssureSign as the Template Tag. For details, see the AssureSign Quick Reference Guide for instructions to create a template. To specify template tag, complete the following steps. 3. In **AssureSign** on the **Templates** tab, click **New**. 4. Select **Start from Scratch** and click **Next**. 5. Optional. Open **Show Advanced Options** and type the template tag in **Template Tag**. 6. Enter this template tag value for the parameter in the **Configuration.xml** file and restart Platform Integration Engine.

Section	Parameter	Guideline
EMAIL **Note** This section is required for sending email notifications if a document fails, such as the user sends a document to AssureSign and there is an error.	SMTP_SERVER_NAME	The name of the SMTP server that sends email notifications.
	SMTP_SERVER_PORT	The port of the SMTP server that sends email notifications.
	SMTP_SERVER_EMAIL_ID	The email ID configured on the SMTP server that sends email notifications.
	SMTP_AUTH_REQUIRED	If your SMTP email server requires authentication, provide the value as ‘true’; otherwise, use "false".
	SMTP_AUTH_USERNAME	If your SMTP email server requires authentication, provide a username for the email server.
	SMTP_AUTH_PASSWORD	If your SMTP email server requires authentication, provide the password corresponding to above-mentioned username for the email server.
IntegrationServer	IntegrationServerURL	The URL of Perceptive Integration Server. http://<tomcatservername>:<tomcatportnumber>/integrationserver/
	Username	A valid Perceptive Integration Server username.
	Password	The password for the above mentioned Perceptive Integration Server username.

Appendix C: Copy web notification templates

If you are using a local instance of the AssureSign environment, complete the following steps to copy the web notification templates from the sandbox environment.

1. In a browser window, sign into the **AssureSign sandbox environment**.
2. In another browser window, sign into your **AssureSign local environment**.
3. In the **sandbox** environment, on the **Administration** tab, click **DocumentTRAK**.
4. In your **local** environment, on the **Administration** tab, click **DocumentTRAK.**
5. In the **sandbox** environment, in the **Web Notifications** table, locate the design you want to copy and click **Copy**.
6. In your **local** environment, in the heading row of the **Web Notifications** table, click **New**.
7. In the **sandbox** environment, copy the values from the **Design Summary** page to the **General Information** window in your local environment.
8. In your **local** environment, in the **General Information** page, click **Next**.
9. Copy the request XML from the sandbox environment.
    1. In the **sandbox** environment, in the **Design Summary** page, in the **Request XML** section, click **Edit**.
    2. In the **Request Message XML** page, ensure **Edit Raw XML** is selected and click **Next**.
    3. In the **Request XML Editing** page, copy the XML.
    4. Click **Next**.
    5. In your **local** environment, in the **Request Message XML** page, ensure **Paste Raw XML** is selected and click **Next**.
    6. In the **Request XML Editing** page, paste the XML.
    7. Click **Next**.
10. Copy the response validation method from the sandbox environment.
    1. In the **sandbox** environment, in the **Design Summary** page, in the **Response Validation** section, click **Edit**, and note the response validation method.
    2. In your **local** environment, in the **Response Validation Method** page, select the same value from the sandbox environment.
    3. Click **Next** and then click **Finish**.
11. Repeat the above steps for each required template.

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