Perceptive eAuthorize

Getting Started Guide

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Documentation Notice

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About Perceptive eAuthorize

Perceptive eAuthorize is a solution that enables you to send documents for electronic signature to any authorized signatory, including non-Perceptive Content users. You can send documents, residing within or outside of Perceptive Content, to single or multiple authorized signatories who sign the documents after receiving email alerts. The signed documents are automatically uploaded and stored in the Perceptive Content 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 the documents.
- Signatories do not need access to Perceptive Content.
- Signatories can sign the document by clicking on a link initiated from an eForm or from the link received in an email notification.
- You can send a single document or an **Envelope** containing multiple related documents.

This document illustrates the instructions to send documents to AssureSign for signature.

Important You can use this document to test your Perceptive eAuthorize installation.

Requirements

Software prerequisites

Before you run the eAuthorize solution, ensure that your system meets the following prerequisites.

- Perceptive Content Client is installed and running properly.
- You can log in to an Perceptive Content user account.
- eAuthorize is installed and configured.
- AssureSign templates are created for the document types used for signature. For more information on creating AssureSign templates, see the AssureSign Knowledge base under https://support.assuresign.net.

Submit documents in AssureSign for signature

This section contains the steps to submit documents to AssureSign to obtain a signature. You can submit a single document for signing as well as an envelope containing multiple documents.

Create an Perceptive Content capture profile to submit a document for signature

To create a capture profile to submit a document for signature, complete the following steps.

1. On **Perceptive Content** toolbar, click **Capture**>**Manage Capture Profiles**.
1. In **Capture Profiles** dialog box, click **Create**.
    1. In **New Capture Profile** dialog, on the **General** tab, perform the following substeps.
        1. Under **General**, in the **Name** box, type a name for the capture profile.
        2. Under **Type**, in the **Source** list, select **File**, and in the **Mode** list, select **Single**.
        3. Under **Workflow**, in the **Send To** list, verify that **None** is selected.
    2. On the **Document Keys** tab, double-click each **Document Key** and change the type using the following settings.
        - For **Drawer,** in the **Type** list, verify that **SystemDrawer** is selected and in the **Value** list, **Default** is selected.
        - For **Doc Type**, in the **Type** list, select **Document Type**, and in the **Value** list, select the document type created earlier for sending a single document for signing.
        - For **Name**, in **Type** list, select **User Entry**.
        - For all other document keys in **Type** list, select **Unique ID**.
2. Click **OK**. The new capture profile appears under **Capture** in the **Perceptive Content** toolbar.

Submit a document for signature

To submit a document for signature, you must first capture it in Perceptive Content with the new capture profile and route the document to the **SubmitForSignature** Connect Queue in workflow.

Capture a document using the new capture profile

To capture a document, complete the following steps.

1. On **Perceptive Content** toolbar, point to **Capture** and click your new capture profile.
2. In the **Proposed Keys** dialog box, in the **Name** box, type a name for the document, verify or edit the **Document Keys** as required, and click **Capture**.
3. In the **Import files** window, select the file you want to capture and click **Open**.
4. The captured document opens in **Perceptive Content Viewer**. Change the **Custom Properties** of the document as follows.
    - Under **Document Keys**, for **Document Type**, select the document type created for sending a document for signature.
    - Type the signatory’s full name and email ID in the respective boxes.

- For **AS_FAILURE_NOTIFICATION_TYPE**, select the type of notification from list. The default is **Email**.
- For **AS_KEEP_ORIGINAL_DOCUMENT**, select **True** or **False**. Refer to the “Add a signed document as a new document” section for more information.

5. Click the **Save** button.
6. In **Perceptive Content Explorer**, right-click a document and click **Add to Workflow**.
7. In the **Add to Workflow** dialog box, in the **Select a list**, select the **SubmitForSignature** queue and click **Add**.

Submit multiple documents for signature

You can submit multiple documents to single or multiple signatories for signing in an envelope. You can create folders in an envelope and submit documents in it. However, if any document is declined in a folder or in the sublevel folders, the entire envelope is declined. While submitting multiple documents to a single signatory, the full name corresponding to the email ID should remain the same.

To submit multiple documents, the following items are required.

- A folder in Perceptive Content that contains the documents required for signature, which is explained in the Create a folder and move the documents to the folder section.
- A folder type in Perceptive Content. Contact your administrator in case of any difficulty.
- A document type has only the **custom properties**, **AS _ID**, **AS_AUTH_TOKEN**,and **AS_SIGNATURE_STATUS. Other custom properties like Signatory Name and Email are provided at the AssureSign end**.

Capture documents using the capture profile you created

To capture a document, complete the following steps.

1. On **Perceptive Content** toolbar, select **Capture**, and click the capture profile that is created to capture multiple documents for signing, and capturing the documents.
2. In **Import files** window, select a document you want to capture and click **Open**.
3. The captured document opens in **Perceptive Content Viewer**. To modify the custom properties of the document, perform the following substeps.
   - Type the signatory’s full name and email ID in their respective boxes.
   - Under **AS_FAILURE_NOTIFICATION_TYPE**, select the type of notification from list. The default is **Email**.
   - Under **AS_KEEP_ORIGINAL_DOCUMENT**, select **True** or **False**. Refer to the “Add a signed document as a new document” section for more information.
4. Click the **Save** button.

Create a folder and move the documents to the folder

To create a folder, complete the following steps.

1. On the **Perceptive Content Explorer** toolbar, click **File**, select **New**, and then click **Folder**.
2. In the **Name** box, type a name for the new folder.

3. Under **Properties**, for the **Type** list, select the document type created for sending a single document.
4. In **Custom Properties** table, type the signatory's full name and email ID in the respective boxes. Ensure that under **Advance**, **Sendtoworkflowqueue** is not selected.

   Note Values for **AS_AUTH_TOKEN**, **AS_ID**, and **AS_SIGNATURE_STATUS** are automatically populated on submitting the document for signing.
5. Click **OK**.
6. In **Perceptive Content Explorer**, in the left pane, select **All Documents**.
7. Right-click the document that you want to send for signing and click **Move**.
8. In **SetLocation** window, search for the folder name, select it, and click **OK**.
9. Repeat steps 6 through 8 for the documents that you want to send for signing.

Add the folder to workflow

To add a folder to a workflow, complete the following steps.

1. In **Perceptive Content Explorer**, in the left pane, select **All Folders**.
2. Right-click the folder that you created for sending multiple documents and click **Add to Workflow**.
3. In the **Add to Workflow** dialog box, in the **Select a list**, select the **SubmitForSignature** queue and click **Add**.

Check the status of a submitted document

After a document is submitted for signature, it passes through various queues, and on reaching each queue a notification is sent to **Perceptive Content**, which informs the sender of the status of the document in the signing process. The queues through which the document passes are shown in the following table.

Queue Name	Description
Signature requested	Document is submitted for signature. A link is generated in the AssureSign ImmediatePresentment form and an email is sent to the signatory.
Signature started	Signatory begins the signing process.
Signature progress	Signatory clicks on the email link to start signing.
Signature completed	Document is signed.
Signature failed	If the process fails in any of the above queues or if the document expires before all required signatures are obtained, the document is sent to this queue.

View the submitted document

You can sign the document that is submitted for signature using the link available in the AssureSign ImmediatePresentment form from within the Perceptive Content client. You can also sign the document by clicking the link sent in an auto-generated email. The process for signing the document depends on how you configure the AssureSign template.

To sign the documents from within Perceptive Content, the AssureSign ImmediatePresentment form files and components must be installed. In the eAuthorize workflow setup, any workflow queue after the “SendToAssureSign” ASQ can be used for signing, but we recommend the use of “DocumentInProgress” queue. For all queues from where you want to access this eForm, the eForm's visibility must be set.

View status of a document submitted for signing

To view the status of a submitted document, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Document**>**AllDocuments**.
2. Right-click a document and click **Properties**.
3. In the **Document Properties** window, in the left pane, click **Document**, and in the right pane, on the **Custom Properties** tab, verify the status for **AS_SIGNATURE_STATUS**.
4. In the left pane, expand **Workflow** and select the workflow item.
5. To view the status of the document, in the right pane, click **History**.

Note AS_SIGNATURE_STATUS and workflow history together show the status of the document.

View the audit history

Audit History is a non-editable form containing notifications sent from AssureSign about a document submitted for signature in AssureSign. To view and refresh the audit history, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Documents**.
2. Open a document from the document list **Perceptive Content Explorer**.
3. In the **Perceptive Content Viewer**, select **View** and click **Forms**.
4. In the **Forms** pane, in **Select a form** list, select **AuditHistory**.
5. Click the **Refresh** button to refresh the audit history form.

Submit a document from a third-party application

You can submit documents in AssureSign from third-party applications. After signing, these documents are downloaded in Perceptive Content and you can check their status. For more information, refer to *Perceptive eAuthorize Installation Guide*.

- To submit a document for signature using third-party tools, use the template specifically created in AssureSign for this purpose. Contact your administrator for more information or refer to the *Perceptive eAuthorize Installation Guide*.

Submit a document with dynamic JotBlocks for signature

You can submit a document containing dynamic JotBlocks for signature. Consider important points listed below when creating dynamic JotBlocks for signature.

- You can add dynamic JotBlocks to PDF, DOC, and DOCX files. In the case of PDFs, irrespective of the content of the file, dynamic JotBlocks are text fields only.

- You can add dynamic JotBlocks only through Text Tags. Refer to https://support assuresign.net/ for instructions to create dynamic JotBlocks.
    - If the dynamic JotBlock contains the SignatoryEmail property, the email address should match the value given for AS_SIGNATORY_MAIL.
    - If the dynamic JotBlock contains the SignatoryEmailParameterName property, it should match the parameter name of a valid parameter for this document.

Add a signed document as a new document

If you set the value as **TRUE** for the **AS_KEEP_ORIGINAL_DOCUMENT** custom property, the original document remains unchanged in the **DocumentStore** work queue in Perceptive Content workflow and a copy of it is created with the document name_<PerceptiveContent document ID> for a single document and document name_<unique ID> for a folder. This document or folder is routed to the next queue in workflow process, and the signed document is added as a new document in Perceptive Content.

If you set the value as **FALSE** for **AS_KEEP_ORIGINAL_DOCUMENT**, the original document is assigned to the workflow and the signed version replaces it.

Sign a document through an eForm

To sign a document via eForm, complete the following steps.

1. Open the eForm and fill in the information requested.
2. Click **Submit** and wait for the **Begin signing** link to appear. This may take some time.

- Click **Begin signing** and sign the document.s to be in line with AssureSign.