Perceptive eAuthorize

Installation Guide

Version 1.x
Compatible with ImageNow versions 6.5.x to 6.7.x

perceptivesoftware

Table of Contents

About Perceptive eAuthorize

Perceptive eAuthorize is a solution that 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 who sign the documents after receiving email alerts. The signed documents are automatically uploaded and 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.

- Electronic process of signing saves you time.

- Documents can be signed by anyone inside or outside your organization.

- Signatories do not need access to Perceptive content.

- Signatories receive email notifications of documents to sign. The email contains a link to the document and instructions.

- You can send a single document or an **Envelope** containing multiple related documents.

The following three different levels of eAuthorize integration are available.

Stand-alone - AssureSign is re-sold as a stand-alone solution, with no integration with ImageNow.

Post-signature integration – non-ImageNow document is sent out for signature and is uploaded into ImageNow after it has been signed (available in 6.5.1 and higher).

Full Integration – ImageNow document is sent out for signature and the signed document comes back into ImageNow and replaces the original (available in 6.7 and higher).

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

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

Requirements

Software Prerequisites

For ImageNow 6.6 and lower versions, 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 in to an ImageNow, user account with managerial rights.

- Message Agent is installed and running.

- You have administrator access to 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

For ImageNow 6.7 and higher versions, 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 in to an ImageNow user account with managerial rights.
- Tomcat 7.0 or higher version is installed with host manager and apps manager.
- Integration Server is installed and running.
- You have administrator access to 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
- Platform Integration Engine (PIE) is installed and running on a system that has public Internet Protocol address (IP).
- Unzip **eAuthorize.zip** to get all files necessary for eAuthorize and PIE installation.

License

If you are using ImageNow 6.7 or higher versions, then you are required to have the following license:

- ImageNow eAuthorize license.

Configure eAuthorize for ImageNow Version 6.5.1 and 6.6

If using ImageNow versions 6.5.1 or 6.6, complete the steps in this section to install and configure eAuthorize. Only the post-signature integration is allowed for ImageNow 6.5.1 and 6.6. Use the following built in web notifications in AssureSign to set up DocumentTRAK™ for document submission using third party applications.

- **ImageNow Access** – Authenticate into Message Agent to establish a session.
- **ImageNow Upload** – Upload a signed document into ImageNow.
- **ImageNow Workflow** – Route the stored ImageNow document to an ImageNow workflow queue.

Set up DocumentTRAK™ for document transmission

1. In **AssureSign**, under **Administration**, expand **Notifications** and click **DocumentTRAK™**.
   1. Under **Web Notifications** click copy in front of **ImageNow Access** in **Name** column.
      1. In **Design Summary**, click **Edit** for **General Information** section.
      2. In **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP of the server on which Message Agent is running and keep clicking **Next** until **Finish**.

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

      3. Click **Finish**.
   2. Under **Web Notifications** click copy in front of **ImageNow Upload** in **Name** column.
      1. In **Design Summary**, click **Edit** for **General Information** section.

2. In **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP of the server on which Message Agent is running.

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

3. For **Design Used for Authentication** list, select **ImageNow Access** and click **Next**.

4. Select **Edit Raw XML** and click **Next**.

5. Edit the values for the parameters in the XML in order to set the index values for the signed documents as required and keep clicking **Next** until **Finish**.

6. Click **Finish**.

3. Under **Web Notifications** click copy in front of **ImageNow Workflow** in **Name** column.

1. In **Design Summary**, click **Edit** for **General Information** section.

2. In **Service Endpoint (URL)** box, replace **[TODO: Server IP]** with the IP of the server on which Message Agent is running.

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

3. For **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 keep clicking **Next** until **Finish**.

Note The index values for this notification need to 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 have to define the workflow queue name within the WORKFLOW_Q_NAME text tags and the signed document will be routed to to this queue.

6. Click **Finish**.

2. In **AssureSign**, under **Administration**, click **Settings**

1. Under **Notification Preferences**, click **Edit** in front of DocumentTRAK Credential

2. Enter the username and password of an ImageNow account, in order to communicate to the ImageNow Server using Message Agent

3. In **AssureSign**, under **Templates**, click **New** and create a template for document submission using third party applications. Refer to _Quick Reference Guide_ for instructions to create a template.

Note Consider the following points when creating the template.

- In **Workflow Template**, under **Web Notifications**, for **Document Completed** stage, select either **ImageNow Upload** or **ImageNow Workflow**.

- Use this template to submit a document for signature using third party application or when manually uploading them directly to AssureSign.

Configure eAuthorizefor ImageNow 6.7 and higher versions

If using ImageNow 6.7 and higher versions, complete the steps in this section to install and configure eAuthorize.

Install the AssureSign connector

Assumption Following are the assumptions for the steps in this section. You can change the server configuration as per your environment.

- Tomcat is listening to server port. Default is 8080.
- ImageNow Server and Integration Server are running at IP locations.

To set up AssureSign connector, perform the following actions.

1. Open an internet browser and go to http://<tomcatservername>:<tomcatserverport>/ and click **Manager App**.
2. Login with your credentials.
3. In the **Tomcat Web Application Manager** page, scroll to the **Deploy** section, under **WAR file to deploy** click **Choose File** to locate the **Engine.war** file and then click **Deploy**.
4. Under the **Applications** section, verify that **Engine** service is running and in the **C:\IntegrationEngine** directory the **etc**, **lib**, **log**, and **Modules** sub-directories are created.
5. Copy all JAR files from **eAuthorize_Lib** and **ImageNowService** folder and paste them to **C:\IntegrationEngine\lib**.

   Note In case of any copy-conflicts, select **Don't copy**.
6. Copy **AssureSignConnector.jar** and **AssureSignHandler.jar** and paste them to **C:\IntegrationEngine\Modules**.
7. To reload the **Engine** services , on the **Tomcat Web Application Manager** page, under **Applications**, for **Engine** service, click **Reload**.
8. Navigate to **C:\IntegrationEngine\log** and open the **engine.log**. If you find errors in the log file the first time you open it, such as line items that start with "Errors occurred" or "failed to start", redo from step 1, ensure there are no errors in **engine.log** and then proceed further. Refer to "Troubleshooting" for more information.
9. Stop the **Engine** service, navigate to the directory **C:\IntegrationEngine\etc** and open **Configuration.xml** in a text editor and then reload **Engine**.
10. Edit the parameters to configure the values for Connector. Refer to "Guidelines for editing the parameters for the connector". Ensure that Connector has login credentials. Save the file.

    Note Do not copy the XML code listed below. It is auto generated.

```
<?xml version="1.0" encoding="ISO-8859-1" standalone="no"?>
<configuration>
    <section name="connectors">
        <section name="AssureSignConnector">
            <parameter name="AS_USERNAME" value="(see Table 1)"/>
            <parameter name="AS_CONTEXT_ID" value="(see Table 1)"/>
            <parameter name="AS_TEMPLATE_TAG" value="(see Table 1)"/>
            <section name="EMAIL">
                <parameter name="SMTP_SERVER_NAME" value="(see Table 1)"/>
```

```
            <parameter name="SMTP_SERVER_PORT" value="(see Table 1)"/>
            <parameter name="SMTP_SENDER_EMAIL_ID" value="(see Table
1)"/>
            <parameter name="SMTP_AUTH_REQUIRED" value="(see Table 1)"/>
            <parameter name="SMTP_AUTH_USERNAME" value="(see Table 1)"/>
            <parameter name="SMTP_AUTH_PASSWORD" value="(see Table 1)"/>
        </section>
    </section>
  </section>
  <section name="IntegrationServer">
      <parameter name="IntegrationServerURL" value="(see Table 1)"/>
      <parameter name="Username" value="(see Table 1)"/>
      <parameter name="Password" value="(see Table 1)"/>
  </section>
  <section name="operations"/>
</configuration>
```

11. Reload **Engine** service, navigate to **C:\IntegrationEngine\log** and open **engine.log** to verify that the **Engine** service successfully starts.

12. After successfully starting the **Engine**, you have to configure the operations of the **Connector**.

    1. Restart the **Engine** service.

    2. Navigate to **C:\IntegrationEngine\etc** and open **Configuration.xml**.

    3. Verify that all the operations are 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">
              <parameter name="REPLACE_ORIGINAL_DOCUMENT" value="(see Table
1)"/>
          </section>
      </section>
      <section name="UploadSignedDocument">
          <section name="UploadSignedDocument"/>
      </section>
```

```
        <section name="UpdateStatusDocumentCompleted">
            <section name="UpdateStatusDocumentCompleted"/>
        </section>
    </section>
</configuration>
```

4. To display the XML Web service WSDL file, type
   http://<tomcatservername>:<tomcatserverport>/Engine/SignatureEndpoint, on your browser
   and press **Enter**. If the file does not display, repeat the preceding steps. Refer to
   "Troubleshooting" for more information.

Guidelines for editing the parameters for the connector

Once the **Configuration.xml** is generated, open it in a text editor and edit the values within **value=""** for
the parameters as shown in the following table.

Table 1 Parameters in Configuration XML

Section	Parameter	Guideline
AssureSignConnector	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 that is 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. Refer to the *Quick Reference Guide* for instructions to create a template. To specify template tag do the following. 1. In **AssureSign** under **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)**. Enter this template tag value for the parameter in the **Configuration.xml** file and restart PIE.
Email	SMTP_SERVER_NAME	Name of the SMTP server from which the email notifications is sent.

Section	Parameter	Guideline
	SMTP_SERVER_PORT	Port of the SMTP server from which the email notifications is sent.
	SMTP_SERVER_EMAIL_ID	Email ID configured on the SMTP server from which the email notifications is sent.
	SMTP_AUTH_REQUIRED	If your SMTP email server requires authentication then provide the value as 'true' else 'false'.
	SMTP_AUTH_USERNAME	If your SMTP email server requires authentication then provide a username for the email server.
	SMTP_AUTH_PASSWORD	If your SMTP email server requires authentication then provide the password corresponding to above-mentioned username for the email server.
IntegrationServer	IntegrationServerURL	URL of the Integration Server. http://<tomcatservername>:<tomcatportnumber>/integrationserver
	Username	Username for the machine on which Integration Server is installed.
	Password	Password for the machine on which Integration Server is installed.
DownloadSignedDocument	REPLACE_ORIGINAL_DOCUMENT	This determines whether the downloaded document replaces the original document or is appended to the original. If you set the value as: **true** - the signed document replaces the original document. **false** - the signed document is appended to the original.

Set up ImageNow server

Configure ImageNow Server to submit documents for signature, download the signed document, and 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 **eAuthorize_inserver6** folder which 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.

2. Paste these files to **C:/inserver6/script** directory.

Set up ImageNow for signing process

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

Before you can send a document to AssureSign for signing you have to configure ImageNow through the Management Console. Perform the following configuration procedures.

1. Access **Management Console**.

2. Start new Envoy Services.

3. Create new custom properties.

4. Create document types and assign the custom properties.

5. Create eForm.

6. Create folder type

7. Design workflow for sending documents for signature.

Access Management Console

1. To start the **Management Console**, perform one of the following actions.

   - On the **ImageNow** toolbar, click **Manage**.

   - To start a separate instance of **Management Console**, click **Start**, select **All Programs**, select **ImageNow 6**, and then click **ImageNow Management Console**.

   - Right-click the **ImageNow** ⬤ icon in the **Windows System Tray**, and then click **Launch ImageNow Management Console**. This appears when you enable the **Windows System Tray** icon for ImageNow during setup.

2. If you are already logged in to ImageNow, the **Management Console** displays. If you are not logged in, complete the following substeps.

   1. In the **User name** box, confirm or enter the user name and in the **Password** box, enter your password.

   2. Click **Connect** to initiate the connection to the **ImageNow Server**. The **Management Console** displays if you successfully log in.

Note If you are unable to connect to the server, verify that you entered the user name and password correctly.

Start new Envoy Services

In the following URI field, change <*servername*> and <*serverport*> to match your Tomcat deployment server and port.

1. On the **ImageNow** toolbar, click **Manage**.

2. In the **Management Console**, in the left pane, click **Envoy Services**.

3. In the right pane, click **New** and specify a name for the web service.

4. In **URI** box type http://<tomcatservername>:<tomcatserverport>/Engine/SignatureEndpoint.

5. In Authentication list, select **None** and keep **Enable interceptor logging** deselected.

6. Click **Next**.

7. Ensure that only **SubmitForSignature** and **DownloadSignedDocument** are selected.

8. Click **Finish**.

Create new custom properties

To create new custom properties, complete the following steps.

1. On the **ImageNow** toolbar, click **Manage**.

2. In the **Management Console**, in the left pane, click **Custom Properties**.

3. In the right pane, point to **New** and click **String**.

4. In the **Name** box type **Signatory 1 Full Name** and click **OK**.

5. Repeat the previous steps to create the following custom properties. **Signatory 1 Email Address**, **AS_ID**, **AS_SIGNATURE_STATUS** and **AS_AUTH_TOKEN**.

6. Click **New** and click **List**. In the **Name** box type **AS_FAILURE_NOTIFICATION_TYPE**.

7. Click **Add**, type **Email** and press Enter. Repeat this step to enter **Task** and **Both**.

8. In the **Default value** list select **Email** as default and click **OK**.

Note

- Signatory 1 Full Name, Signatory 1 Email Address, are the input parameters for AssureSign Connector which you have to provide. AS_ ID, AS_AUTH_TOKEN and AS_SIGNATURE_STATUS are the output parameters for AssureSign Connector which it will auto-populate.

- If you set **AS_FAILURE_NOTIFICATION_TYPE** as:

  - Email – If the documents fails in the workflow, you will get an email in the email ID which you configured in **ImageNow** while creating user profiles. You have to provide the SMTP server name, port, and email ID in **Configuration.xml**, if authentication is required then provide authentication username and password also. Refer to "Install the AssureSign connector".

  - Task – you will have a task in **My Assigned** view in **ImageNow** notifying you about the document failed in workflow.

  - Both – you will get an email your email account and a task in **ImageNow**.

Given below is the list of custom properties.

Table 2 Custom Properties list

Custom Property Name	Parameter Type	Data Type
Signatory 1 Full Name	Input parameter	String
Signatory 1 Email Address	Input parameter	String

Custom Property Name	Parameter Type	Data Type
AS_ID	Output parameter	String
AS_SIGNATURE_STATUS	Output parameter	String
AS_AUTH_TOKEN	Output parameter	String
AS_FAILURE_NOTIFICATION_TYPE	Input parameter	List

Create custom properties to send document to multiple signatories

To send a document to multiple signatories, create custom properties for Signatory Full Name and Signatory Email Address corresponding to each signatory. For example, you can enter Signatory 2 Full Name and Signatory 2 Email Address and more such custom properties for sending a document to multiple signatories.

- Specify the signatory names and email addresses while creating a template in AssureSign.

- Ensure that the custom properties for signatory full name and signatory email address in ImageNow are the same as in an AssureSign template. For example, if there are parameters, Signatory 1 Full Name and Signatory 1 Email Address in a particular template, then ImageNow should have custom properties Signatory 1 Full Name and Signatory 1 Email Address.

Refer to the *Quick Reference Guide* for instructions to create a template. Ensure that for each name and email address there are corresponding custom properties in ImageNow.

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 the **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 Document Type name should match the name of the corresponding template in AssureSign. Refer to "template in AssureSign environment for signature".

4. Select the added document type and click **Modify**.

   1. Under **Custom Properties**, in the **By Type** list select **All**.

   2. Select all the custom properties added in the above section and click **Add**.

   3. Mark the custom properties as required, click the column in front of **Signatory 1 Full Name** and **Signatory 1 Email Address** until icon appears.

   4. Click **OK**.

Create task template for document notification

When a submitted document fails in the workflow you will receive a task in **My Assigned** view in **ImageNow** notifying you about the document failed in workflow. You can also opt for emails notifications while submitting the document for signature. Refer to *Perceptive eAuthorize Getting Started Guide 1.0*.

1. In the **Management Console**, in the left pane, click **Tasks**.

2. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Pointer**.

3. Under **Templates**, click **New**.

4. In the **Pointer Task** dialog box, complete the following steps.

    1. In the left pane, verify that **Properties** is selected.

        1. In the right pane, under **General**, in the **Name** box, type **FailureNotification_Cancelled**.

        2. In the **Description** box, type a template description.

        3. Under **Options**, verify that the **Is active** check box is selected 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.

        2. Deselect the **Modifiable during task creation** check box to allow a task creator to modify the instructions on the **Options** tab in the **New Task** dialog box.

        3. In the **Task location** section, select the following locations to determine where tasks created with this template can be 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**.

            - Optional. Under **Workflow Assignment**, select **(None)** for **Send to queue** list.

    3. In the left pane, click **Assignment**.

        1. In the right pane, click **Add**.

        2. In the **Select Users and Groups** dialog box, under **Groups** tab select **All Users** and click **OK**.

5. Under **Reasons**, click **New** and type a name for reason. Create reasons for declined, download failed, expired, submission failed notifications.

6. Under **Reason List** click **New**.

    1. Under **General**, in **Name** box type a name for the reason list.

    2. Under **List Members**, select the appropriate reason for the list.

7. Under **Templates**, select a template and click **Modify**.

    1. In the left pane, click **Reasons**.

        1. Optional. Under **Action Reasons,** in the **Action** list, select the action list you want.

2. Optional. Select the **Assignee must specify a reason during task completion** check box to require task assignees to select a reason after completing a task.

3. Under **Return Reasons**, in the **Return** list, select **Task Return List**.

8. Repeat the above steps to **FailureNotification_Declined**, **FailureNotification_DownloadFailed**, **FailureNotification_Expired**, **FailureNotification_SubmissionFailed**.

Create folder type to send multiple documents for signing

Multiple documents can be sent out 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. In **ImageNow Management Console**, in the left pane click **Folder Types**.

2. In the right pane, under **Folder Types** click **New** and specify a name.

   Note Folder type name should match with the corresponding envelope type name in AssureSign.

3. Select the new folder type and click **Modify**.

   1. Under **Document Types**, select new document type created in "Create document types and assign custom properties" section and click **Add**.

   2. Under **Custom Properties**, in **By Type** list, select **String**.

   3. Select the **AS_ID**, **AS_AUTH_TOKEN** and **AS_SIGNATURE_STATUS** and click **Add**.

      Note **AS_ID**, **AS_AUTH_TOKEN** and **AS_SIGNATURE_STATUS** represent corresponding values of AssureSign envelope.

   4. Click **OK**.

4. Click **New** and click **List**. In the **Name** box type **AS_FAILURE_NOTIFICATION_TYPE**.

5. Click **Add**, type **Email** and press Enter. Repeat this step to enter **Task** and **Both**.

6. In the **Default value** list select **Email** as default and click **OK**.

Note

- Signatory 1 Full Name, Signatory 1 Email Address, are the input parameters for AssureSign Connector which you have to provide. AS_ ID, AS_AUTH_TOKEN and AS_SIGNATURE_STATUS are the output parameters for AssureSign Connector which it will auto-populate.

- If you set **AS_FAILURE_NOTIFICATION_TYPE** as:

  - Email – If the documents fails in the workflow, you will get an email in the email ID which you configured in **ImageNow** while creating user profiles. Refer to *Perceptive Software ImageNow Administrator Help* to add a user.

  - Task – you will have a task in **My Assigned** view in **ImageNow** notifying you about the document failed in workflow.

  - Both – you will get an email in your email account and a task in **ImageNow**.

Set up eForms for 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. If you need a Forms license, contact your Perceptive Software representative. Without this license the audit trail history will not be available in ImageNow but will be available in AssureSign.

Consider the following important points when creating the Audit History eForm.

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

- The name of the form should contain the words "AssureSign", "audit" and "history".

- It is recommended that you create only one Audit History form, because data will be populated in the form which appears alphabetically first in the list of forms. If erroneously you have created more forms, delete them.

Manually load form components into ImageNow Server

To upload XML Data Definition file, perform the following actions.

1. On the **ImageNow** toolbar, click **Manage**.

2. In the **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 with more than one presentation:

   1. In the **Shared Files** pane and then 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 then 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**, select the XSL file and any optional files you created for this presentation and then 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 these sub-steps for each XSL file.

7. Click **OK**.

Create your 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 the **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 then 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, in the **Select Presentations** dialog box select the presentations and then click **OK**.

9. Click **OK**.

Design workflow for sending documents for signature

Create a workflow process to send documents to AssureSign for signature and download the signed documents in ImageNow. 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 process should contain two **Integration** automated system queues (ASQs) and make the remaining ones work queues.

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 an **Integration** ASQ icon and drag it to the right in your workflow diagram. Repeat this step to create another ASQ.

        Note For example, we are naming the ASQs as **SubmitForSignature** and **DownloadSignedDocuments**. You can name the ASQ's as desired.

    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.
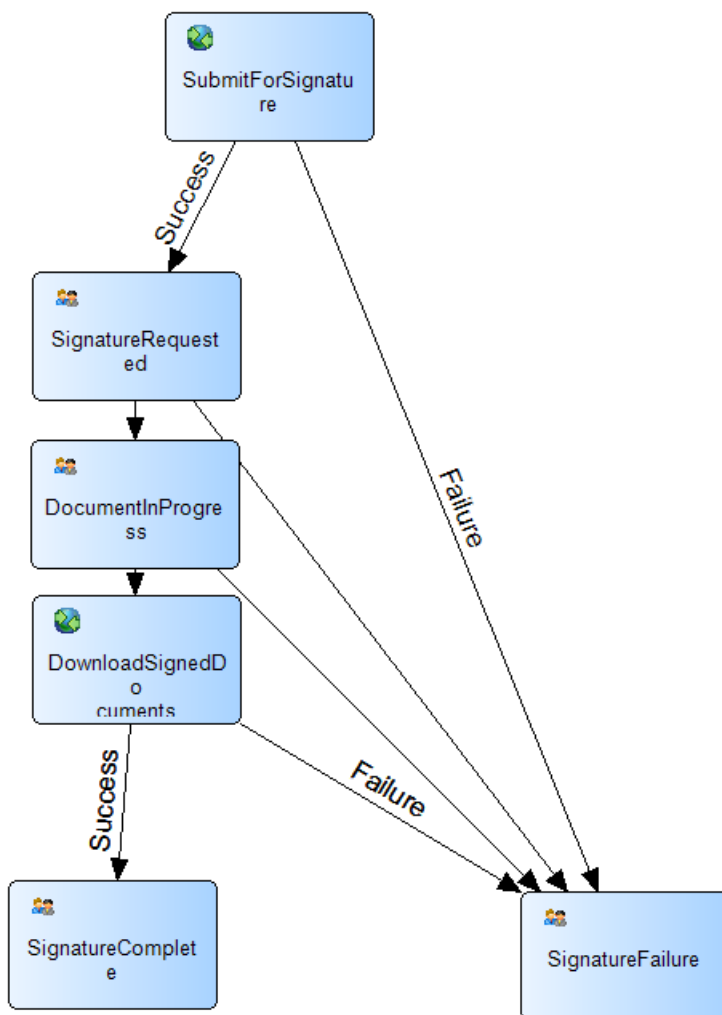
6. Click **OK**.

7. Repeat the previous steps to create **DocumentInProgress**, **SignatureComplete** and **SignatureFailure** work queues.

   1. Double click **SignatureFailure**.

   2. In the left pane, click **Actions**.

      1. Under Inbound, for **iScript** list select **Edit iScripts** and click **Add**.

      2. Select **CreateTask.js** and click **OK**.

   3. Click **OK**.

8. Perform the following steps to configure **SubmitForSignature** and **DownloadSignedDocuments** 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 ASQ's, 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 successfully 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 are not successfully processed in this queue, in the **Failure Action** list, select the workflow process, created in 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 **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 **Queue** list.

      2. For **Envoy Service**, in the **Service Operation Name** list, select **eAuthorize::DownloadSignedDocument** Envoy service.

3. Envoy Service Parameters are not required.

8. Join the queues as shown in the figure below to create a complete workflow process. To create route 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.

9. When you are finished creating your workflow process, close Workflow Designer.

10. On the **Workflow** tab, click **Close**.

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

Set up AssureSign DocumentTRAK™ for status notifications

Log into AssureSign to configure the following DocumentTRAK web notifications

eAuthorizeDocumentStatus

1. Under the **Administration tab**, click on **DocumentTRAK™**on the left-hand side.

2. In **Web Notifications** section, **Copy** the **eAuthorizeDocumentStatus** web notification template.

    1. Select **Edit** for the **General Information** section.

    2. In **Design Name** box, enter a name for the web notification.

3. In **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 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 the XML looks like the following and then 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/esignatu
re">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeStepStart

1. Under **Administration**, expand **Notifications** and click **DocumentTRAK™**.

2. In **Web Notifications** section, copy the **eAuthorizeStepStart** web notification template.

   1. Select **Edit** for the **General Information** section.

   2. In **Design Name** box, enter a name for the web notification.

   3. In **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 appears as follows 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">
    <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 the XML appears as follows then click **Next** and **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/esignatu
re">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeStepComplete

3. Under **Administration**, expand **Notifications** and click **DocumentTRAK™**.

4. In **Web Notifications** section, copy the **eAuthorizeStepStart** web notification template.

1. Select **Edit** for the **General Information** section.

2. In **Design Name** box, enter a name for the web notification.

3. In **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 appears as follows 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 the XML appears as follows then click Next and **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/esignatu
re">
       <impl:Return>true</impl:Return>
     </impl:Response>
   </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeStepUserVisit

1. Under **Administration**, expand **Notifications** and click **DocumentTRAK™**.

2. In **Web Notifications** copy the eAuthorizeStepStart web notification template.

   1. Select **Edit** for the **General Information** section.

   2. In **Design Name** box, enter a name for the web notification.

   3. In **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 appears as follows 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/XML
Schema-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 the XML appears as follows then click Next and **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/esignatu
re">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

eAuthorizeDocumentCompleted

1. Under **Administration**, expand **Notifications** and click **DocumentTRAK™**.

2. In the **Web Notifications** section, copy the **eAuthorizeDocumentCompleted** web notification template.

    1. Select **Edit** for the **General Information** section.

    2. In **Design Name** box, enter a descriptive name for the web notification.

    3. In **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 texts. To do this, do the following.

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

            Note The value for fields1 through fields 5 can be static text (no brackets) or could contain the name of an AssureSign jotblock within brackets ([JotblockName]) in order for the jotblock value to be populated as the index field If any field value is empty, the corresponding field in ImageNow will remain unchanged.

```xml
<?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/XMLSchem
a-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**.

```xml
<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/esignatu
re">
      <impl:Return>true</impl:Return>
```

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

Set up template in AssureSign environment for signature

Refer to *Quick Reference Guide* for instructions to create a template. However, consider the following points when creating the template.

- The template name should match the name of the corresponding document type in ImageNow.

- The template tag in AssureSign should match the value you provide in **Configuration.xml** highlighted in the following section. Refer to "Guidelines for editing the parameters for the connector".

```
<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>
```

Consider the following when creating the template.

Add Web Notifications

In **Workflow Template**, for **Web Notifications**, add the notifications as shown in the following table. Refer to "Set up AssureSign DocumentTRAK™ for status notifications" to create these web notifications.

Table 3 Template Web Notifications

Stage	Timing	Design Name
Document Started	Before Document Started	eAuthorizeDocumentStatus
Step 1	Before Step	eAuthorizeStepStart
	After Step	eAuthorizeStepComplete
	Landing Page Visited	eAuthorizeStepUserVisit
Document Completed	After Document Completed	eAuthorizeDocumentCompleted
Expiration Warning	No notification selected	
Document Expired	After Document Expiration	eAuthorizeDocumentStatus
Document Cancelled	Document Cancelled	eAuthorizeDocumentStatus
Document Declined	Document Declined	eAuthorizeDocumentStatus

Note If there are multiple steps (signatories) defined in the template then each step (Step 1, Step 2, etc.) should have the above design names assigned to it.

Set up AssureSign environment to add dynamic JotBlock in PDF documents

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

1. In **AssureSign Sandbox**, under **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** then contact your system administrator to set this preference to **No**.

3. Select the **No** button and click **Save**.

Download signed documents submitted by third party

Signed documents submitted by a third party are automatically uploaded into ImageNow after signing them. These documents do not originate in ImageNow, they are sent out for signature manually or from another application, and are able to be uploaded 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 should 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 will be auto populated when a signed document is downloaded in ImageNow.

1. On the **ImageNow** toolbar, click **Manage**.

2. In the **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 **Available** box, select **AS_AUTH_TOKEN** and **AS_ID** and click **Add**.

   3. Click **OK**.

Set up AssureSign for document transmission

The steps given below are for the transmission of 3rd party documents in ImageNow 6.7. Refer to the "Configure eAuthorize for ImageNow Version 6.5.1 and 6.6" section for transmitting 3rd party documents in ImageNow 6.5.1 and 6.6

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

1. In **AssureSign**, under **Administration**, expand **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 texts. To do this, complete the following substeps.

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

    2. In **field1**, **field2**, **field3**, **field4** and **field5** tag, 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 will be empty.

    3. In **documentType** tag, enter the doc 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>
```

Note

- Provide the queue name for **EXTERNAL_DOCUMENT_QUEUE** parameter to download the signed document in that queue in **ImageNow**. For example, here we are downloading it in **SignatureComplete** queue.

- If you do not provide **Document Name** for **name** parameter, then the document ID in **ImageNow** is taken as the default document name.

- If you do not provide **Document Type** then the default document type for document transmission is taken. Refer to "Create document types to download signed documents submitted by third party applications".

    - 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 appears as follows.

```
<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/esignatu
re">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

3. Create a template for document transmission. Refer to *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 AssureSign environment for envelopes

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

Configure DocumentTRAK™ for AssureSign envelope template

1. In **AssureSign Sandbox**, under **Administration**, expand **Notifications** and click **DocumentTRAK™**.

2. In **Web Notifications** section, copy the **eAuthorizeEnvelopeAll** web notification template.

    1. Select **Edit** for the **General Information** section.

    2. In **Design Name** box, enter a name for the web notification.

    3. In **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 appears as follows 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">
    <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 the XML appears as follows then click **Next** and **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/esignatu
re">
      <impl:Return>true</impl:Return>
    </impl:Response>
  </SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Create envelope template

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

2. In **Name** box, enter a name for the envelope template.

3. Select an email design set from **Email Design Set** list and **Account** from **Accessibilty** list.

4. Click **Save**.

Note 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 will receive multiple email notifications for the same document(s).

Edit notifications

1. Click **Edit** in front of new envelope template.

2. Click **Edit Notifications** and add the notifications as shown in the table given below.

Table 4 Notifications fr envelope

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

Stage	Timing	Design Name
Envelope Cancelled	Envelope Cancelled	eAuthorizeEnvelopeAll
Envelope Declined	Envelope Declined	eAuthorizeEnvelopeAll

Troubleshooting

Problem: Not able to restart Tomcat after installing PIE (need to identify a log error message unique to this).

Solution: It is possible that Integration Server (IS) and PIE are on same server and port and since PIE attempts to start before IS is running, it halts forever. Just comment the xml element in configuration.xml containing IS url and save it, and the tomcat starts. Then uncomment and restore the original file.

Problem: The WSDL at http://<server>:<port>/Engine/SignatureEndpoint is not showing the operations. Log shows error like **: ImageNow endpoint cannot be created or Failed to get ImageNow endpoint**.

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

1. Go to ImageNow Management console

2. Click Diagnostics on the left pane and logoff all the integration server connections. The status will change from **Connected** to **Disconnected**.

3. Then restart **Engine**(restart only Engine and not Tomcat if both integration server and Engine are on the same server and port).

4. Now try to access the WSDL, it should show all the operations now.

Index