

# Perceptive TransForm and Perceptive Content Integration

## Setup Guide

Version: 8.x

Written by: Product Knowledge, R&D  
Date: May 2018



## Table of Contents

<b>Perceptive Content connection setup .....</b>	<b>4</b>
Configure Perceptive Content handler .....	4
<b>E-Forms Manager settings .....</b>	<b>5</b>
Configure new form settings .....	5
Configure an ImageNow handler .....	7
Publish your form .....	12
Test the form URL .....	13
<b>Check the form submission status .....</b>	<b>14</b>

## Perceptive Content connection setup

This section contains the steps to set up a Perceptive Content connection. You only need to perform this setup one time for each Perceptive Content environment.

### Configure Perceptive Content handler

To configure a Perceptive Content handler, complete the following steps.

1. Log in to **Perceptive TransForm E-Forms Manager**. On the **Administration** tab, select **ECM Connectors**.
2. Select **New ImageNow Server**.
  1. In the **Server Name** box, enter a unique, descriptive name for the ImageNow Server. This name identifies the server in other areas of the application. Server names can only contain letters, digits, dashes, underscores, and spaces. It does NOT have to be a name already defined on the ImageNow Server or anywhere else.
  2. In the **Server URL** box, specify the URL that identifies the location of the ImageNow Message Agent service. The URL should include the protocol, host name, and the port number. For example, `http://imagenow.acme.com:6070/`
  3. In the **User Name** box, enter the user name of a valid ImageNow user who has privileges to store documents through the MessageAgent service.
  4. In the **Password** box, enter the password for this account.

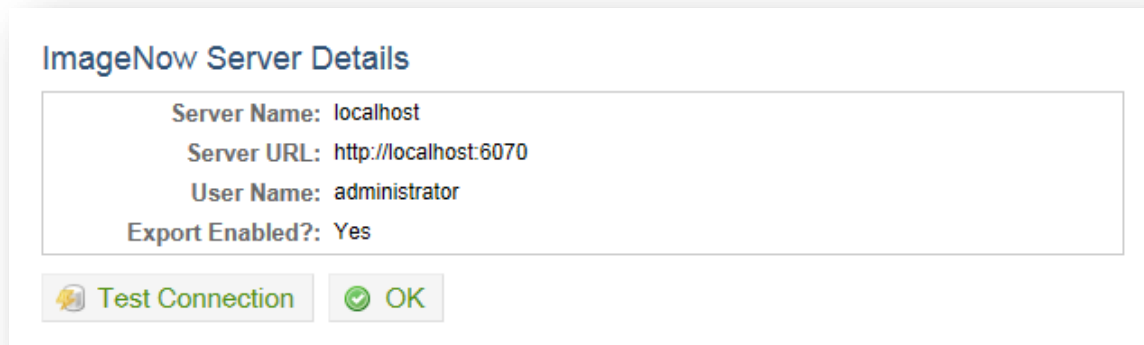
Select the **Export Enabled** check box. This option controls whether submissions are exported to the server. Disabling exports to a server causes submissions to fail, but you can retrieve the export of the submission after the exports to the server are enabled. Selecting this flag enables exports to the server, while deselecting this flag disables exports.
5. Click **Save Changes**.

The screenshot shows a 'ImageNow Server Setup' dialog box. It contains the following fields and values:

- \* Server Name:** localhost
- \* Server URL:** http://localhost:6070
- \* User Name:** administrator
- Password:** [masked with dots]
- Export Enabled?:** ☒

At the bottom of the dialog are two buttons: **Save Changes** (with a green checkmark icon) and **Cancel** (with a red X icon).

6. Select the newly created ImageNow Server setup.
7. Click the **Test Connection** button to the connection and verify the setup.



The dialog box titled "ImageNow Server Details" contains the following information:

- Server Name: localhost
- Server URL: http://localhost:6070
- User Name: administrator
- Export Enabled?: Yes

At the bottom, there are two buttons: "Test Connection" (with a lightning bolt icon) and "OK" (with a green checkmark icon).

## E-Forms Manager settings

This section contains the steps to set up a form to use the Perceptive Content connection.

### Configure new form settings

The following procedures define how to set up a form within E-Forms Manager for exporting to Perceptive Content. These instructions assume you have already designed a form with a submit button and locked the form within the TransForm Designer in preparation for uploading the form into the TransForm E-Forms Manager.

1. To upload the form to E-Forms Manager, complete the following substeps.
  1. Select the **Catalog** tab.
  2. Select **New Form**.
  3. Enter the required fields, denoted with an asterisk (\*).
  4. Click **Upload**.
2. Click **Form Details**.
3. In the **Form Management Properties** pane, ensure the properties you want are set in the **General** tab. The following list provides the minimum recommended settings.
  - Set a publish date.
  - Select the **Enable Processing** check box.
  - Select the **Enable Submission** check box.
  - Select the **Enable for iFiller** check box.

### Form Management Properties

Version Details

[General](#) | [Submission](#) | [Signing](#) | [Data](#) | [Imaging](#) | [Autofill](#) | [Autowrite](#) | [Perceptive eAuthorize](#) | [Workflow](#)

Version: .

Publish On:  (MM/DD/YYYY)

Publish End:  (MM/DD/YYYY)

Version Upgrade: ☐ If expired, provide current version on end user submission

Version Download: ☐ Require Client Authentication

Authentication Scheme:

FormID: *Not Configured*  
[Configure](#)

Enable Form Processing: ☒ Enable Processing  
☐ Enable Remote Signing  
☒ Enable Submission  
☐ Enable Data Export

iFiller: ☒ Enable for iFiller  
☒ Enable PFF Download toolbar button  
☒ Enable Print

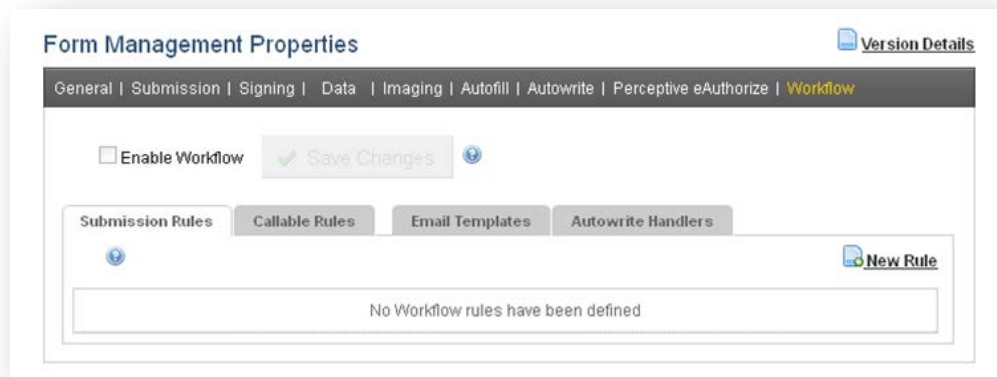
Settings Import / Export: [Export](#) [Import](#)

[Save Changes](#)

## Configure an ImageNow handler

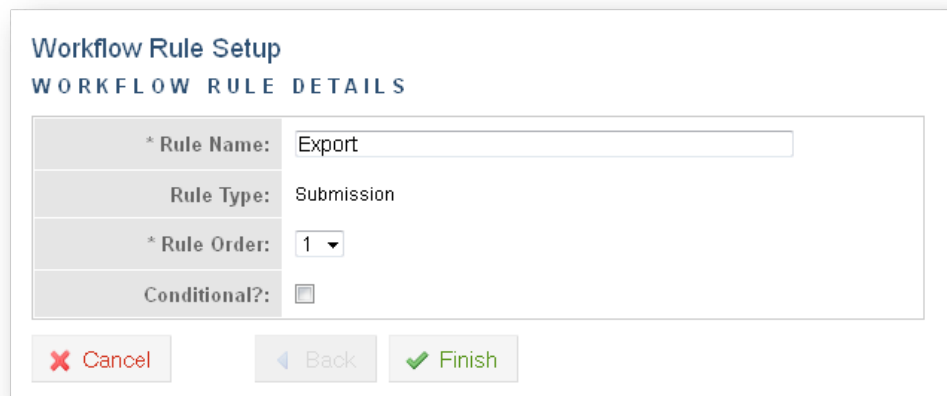
To set up an ImageNow handler for your form, complete the following steps.

1. In the **Form Management Properties** pane, select **Workflow**.



The screenshot shows the 'Form Management Properties' window. The 'Workflow' tab is selected in the top navigation bar. Below the tabs, there is a checkbox for 'Enable Workflow' which is currently unchecked. To the right of this checkbox is a 'Save Changes' button with a green checkmark icon. Below these elements are four sub-tabs: 'Submission Rules', 'Callable Rules', 'Email Templates', and 'Autowrite Handlers'. The 'Submission Rules' tab is active, showing a message that says 'No Workflow rules have been defined'. A 'New Rule' button with a plus icon is located in the top right corner of the Submission Rules section.

2. On the **Submission Rules** tab, click **New Rule**.
3. Enter a **Rule Name**.
4. In the **Rule Order** list, select the order.
5. Optional. Select conditional if you want to export a form based on form field conditions.



The screenshot shows the 'Workflow Rule Setup' dialog box. The title bar says 'Workflow Rule Setup' and the subtitle is 'WORKFLOW RULE DETAILS'. The dialog contains four fields: '\* Rule Name:' with the value 'Export', 'Rule Type:' with the value 'Submission', '\* Rule Order:' with a dropdown menu showing '1', and 'Conditional?:' with an unchecked checkbox. At the bottom of the dialog are three buttons: 'Cancel' (with a red X icon), 'Back' (with a left arrow icon), and 'Finish' (with a green checkmark icon).

6. Click **Finish**.

7. Click the **Export** rule to add an action to the form.

The screenshot shows the 'Form Management Properties' dialog box with the 'Workflow' tab selected. The 'Enable Workflow' checkbox is checked. Below the tabs, there is a table of rules. The 'Export' rule is highlighted in yellow.

Rule Name	Conditional?	# of Actions	Edit	Delete
Export	No	0		

8. Complete the following substeps to add a new action.

1. Click **New Action**.

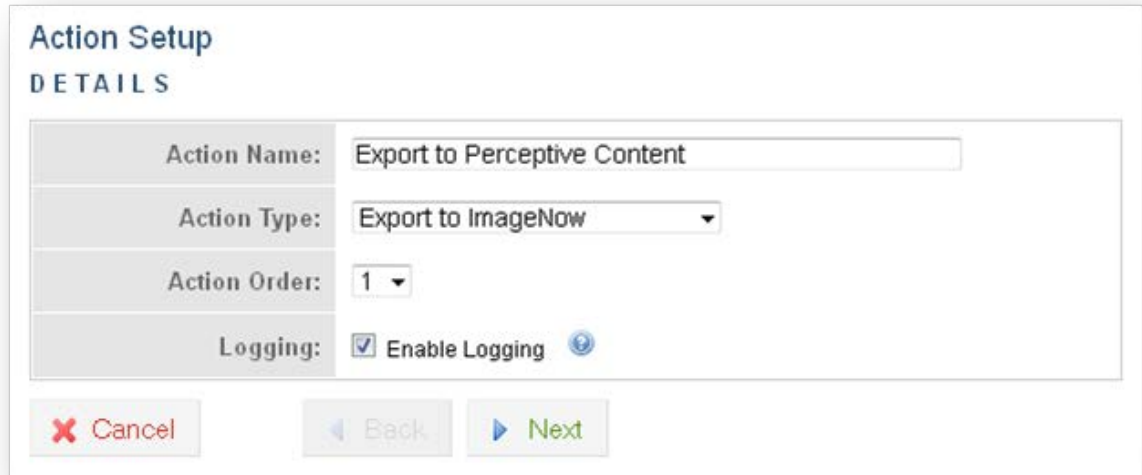
The screenshot shows the 'Workflow Rule Details' dialog box. The 'DETAILS' section shows the following information:

- Rule Name: Export
- Rule Type: Submission
- Rule Order: 1
- Conditional?: No
- # of Actions: 0

The 'ACTIONS' section shows a message: 'No actions have been defined for this Workflow rule'. There is a 'New Action' button in the top right corner of the ACTIONS section.

2. Enter a name for the action.
3. Select **Export to ImageNow** from the **Action Type** list.
4. If there are multiple actions, select the order in which you want this action to occur.
5. If you select **Enable Logging**, click **Next** and select both check boxes in the **Logging** dialog box.

6. Click **Next**.

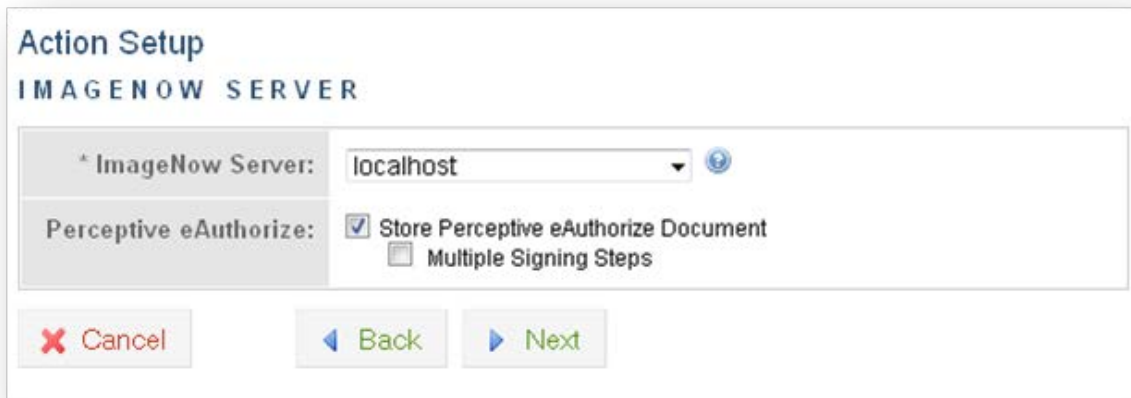


The 'Action Setup' dialog box, titled 'DETAILS', contains the following fields and controls:

- Action Name:** A text field containing 'Export to Perceptive Content'.
- Action Type:** A dropdown menu set to 'Export to ImageNow'.
- Action Order:** A dropdown menu set to '1'.
- Logging:** A checkbox labeled 'Enable Logging' which is checked, accompanied by a help icon.

At the bottom, there are three buttons: a red 'Cancel' button, a grey 'Back' button, and a green 'Next' button.

7. Select the ImageNow Server you previously set up.
  8. Optional. If you want to store the form, select **Store Perceptive eAuthorize Document**.
  9. Optional. Select **Multiple Signing Steps** if applicable.
- Note** If you select the **Multiple Signing Steps** option, ImageNow checks for the EFM eAuthorize web service.
10. Click **Next**.

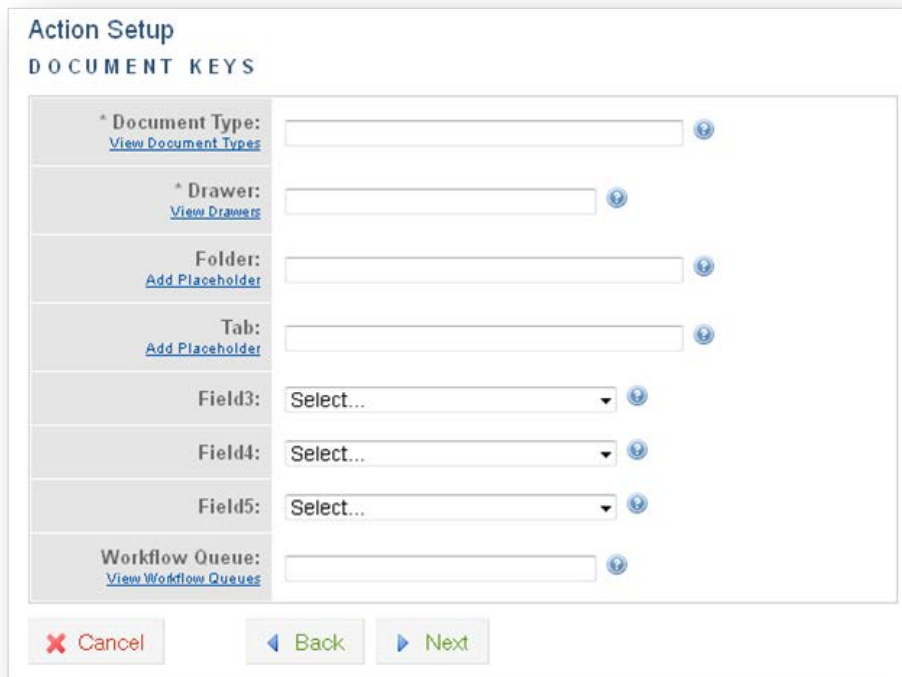


The 'Action Setup' dialog box, titled 'IMAGENOW SERVER', contains the following fields and controls:

- \* ImageNow Server:** A dropdown menu set to 'localhost', with a help icon.
- Perceptive eAuthorize:** Two checkboxes: 'Store Perceptive eAuthorize Document' (checked) and 'Multiple Signing Steps' (unchecked).

At the bottom, there are three buttons: a red 'Cancel' button, a grey 'Back' button, and a green 'Next' button.

11. Select **Document Keys** and then complete the appropriate fields.



**Action Setup**  
**DOCUMENT KEYS**

\* Document Type:  [View Document Types](#) ⓘ

\* Drawer:  ⓘ [View Drawers](#)

Folder:  ⓘ [Add Placeholder](#)

Tab:  ⓘ [Add Placeholder](#)

Field3:  ⓘ

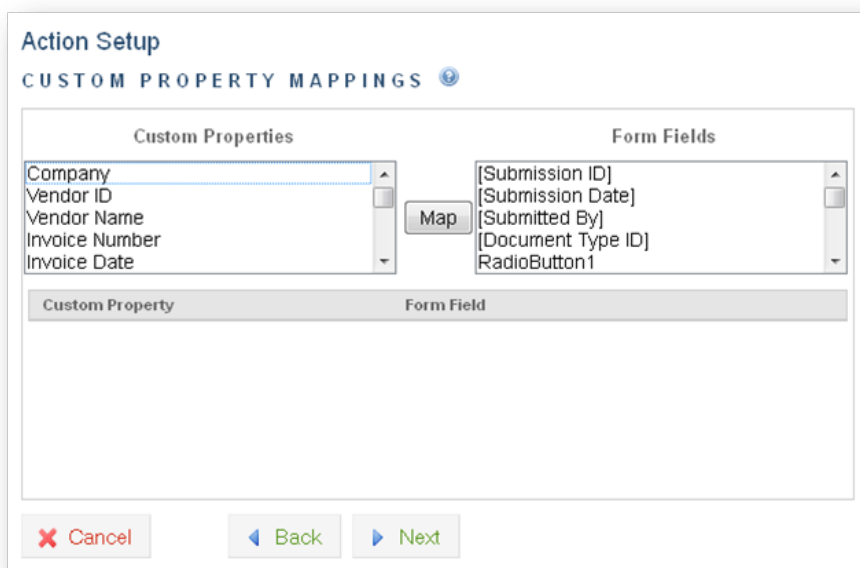
Field4:  ⓘ

Field5:  ⓘ

Workflow Queue:  ⓘ [View Workflow Queues](#)

12. Map the custom properties to the form fields.

**Note** This dialog box only displays if the document type contains custom properties.



**Action Setup**  
**CUSTOM PROPERTY MAPPINGS** ⓘ

Custom Properties		Form Fields
Company	Map	[Submission ID]
Vendor ID		[Submission Date]
Vendor Name		[Submitted By]
Invoice Number		[Document Type ID]
Invoice Date		RadioButton1
Custom Property		Form Field

13. Enter the attachment and image options.

### Action Setup

#### ADDITIONAL SETTINGS

Image Format:	tif	
Image Resolution:	8	Bits per Pixel
	200	Dots Per Inch (Between 100 and 300)
Export Attachments?:	<input checked="" type="checkbox"/>	
Pages to Export:	<input checked="" type="radio"/> All	
	<input type="radio"/> Pages:	<input type="text"/>

Cancel
 Back
 Finish

14. Click **Finish**.

15. Click **OK** to enable the action.

### Workflow Rule Details

#### DETAILS

Rule Name: Export  
 Rule Type: Submission  
 Rule Order: 1  
 Conditional?: No  
 # of Actions: 1

#### ACTIONS

[New Action](#)

Action Name	Action Type	Edit	Delete
Export to Perceptive Content	Export to ImageNow		

OK

16. Ensure **Enable Workflow** is selected and click **Save Changes**.

**Form Management Properties** [Version Details](#)

General | Submission | Signing | Data | Imaging | Autofill | Autowrite | Perceptive eAuthorize | **Workflow**

☒ Enable Workflow ✓ Save Changes

Submission Rules | Callable Rules | Email Templates | Autowrite Handlers

[New Rule](#)

Rule Name	Conditional?	# of Actions	Edit	Delete
Export	No	1		

## Publish your form

After you define the management properties for your form, you can approve and then publish the form.

1. To approve the form, click the **Approve** button.

**Form Publishing Information**

Form Title: Restrictive Covenant and Assignment of Inventions Agreement Version ID: 1

File Name: Inventions\_Agreement[1].pff Version: 0.0

Status: **Staged** | Approved | Scheduled | Published | Expired

[Download Form:](#)

[Upload Revision](#) [Approve](#) [Publish](#)

2. To publish the form, click the **Publish** button.

**Form Publishing Information**

Form Title: Restrictive Covenant and Assignment of Inventions Agreement Version ID: 1

File Name: Inventions\_Agreement[1].pff Version: 0.0

Status: Staged | **Approved** | Scheduled | Published | Expired

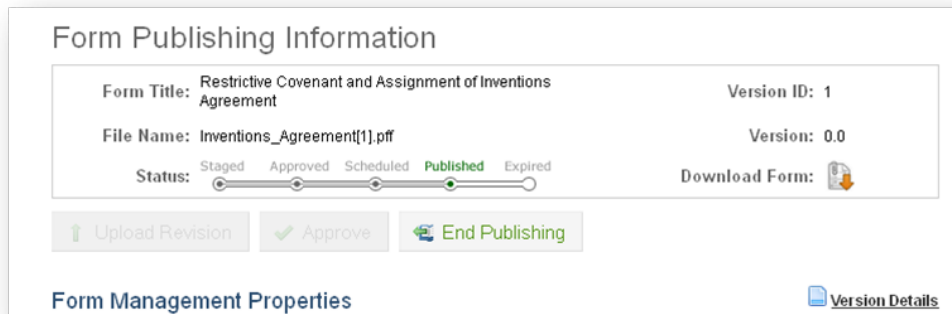
[Download Form:](#)

[Upload Revision](#) [Approve](#) [Publish](#)

## Test the form URL

To test the form URL, complete the following steps.

1. Select **Version Details**.

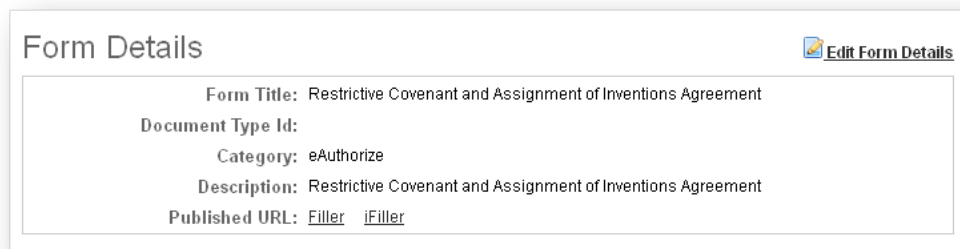


**Form Publishing Information**

Form Title: Restrictive Covenant and Assignment of Inventions Agreement	Version ID: 1
File Name: Inventions_Agreement[1].pdf	Version: 0.0
Status: Staged Approved Scheduled <b>Published</b> Expired	Download Form:

Form Management Properties [Version Details](#)

2. Select the **iFiller** link to the form URL.

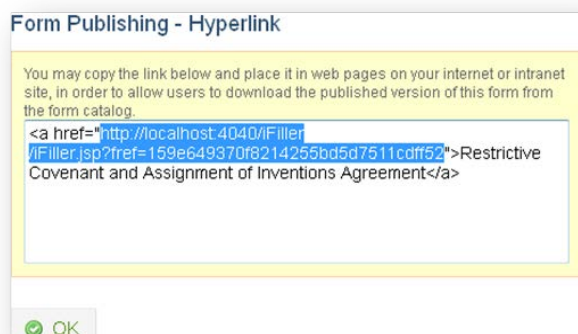


**Form Details** [Edit Form Details](#)

Form Title: Restrictive Covenant and Assignment of Inventions Agreement
Document Type Id:
Category: eAuthorize
Description: Restrictive Covenant and Assignment of Inventions Agreement
Published URL: <a href="#">Filler</a> <a href="#">iFiller</a>

3. Copy the form URL or select the whole HTML statement if you want to use it for a webpage or in an HTML email.

**Note** The **Published URL** links for **Filler** and **iFiller** are the static universal links to your forms.



**Form Publishing - Hyperlink**

You may copy the link below and place it in web pages on your internet or intranet site, in order to allow users to download the published version of this form from the form catalog.

```
<a href="http://localhost:4040/iFiller/iFiller.jsp?ref=159e649370f8214255bd5d7511cdf52">Restrictive Covenant and Assignment of Inventions Agreement</a>
```

4. Paste the URL into a browser.
5. Test the export process.

## Check the form submission status

To check the status of a submitted form, complete the following steps.

1. Select the **Submissions** tab from **E-Forms Manager**.
2. Select the **ECM Connectors** section.
3. Filter for the desired date ranges.
4. Select **Export Status**.

### Notes

- For submissions with the Failure Status, they can be queued for resubmission by individually selecting the **Submission** check box next to the form and then selecting **Retry**, or by selecting the check box next to **Submission** to select all forms and then selecting **Retry**.

If you are experiencing a failure for a form that previously exported successfully, check that the ImageNow Server Connection setup is still successful. The most common cause for this connection to fail is that the ImageNow Message Agent service is not running.