

Perceptive TransForm eAuthorize Integration Setup Guide

Version: 8.x

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

Table of Contents

About Perceptive eAuthorize and TransForm.....	4
Software prerequisites	4
Request and install the AssureSign certificate.....	4
Request the testing (sandbox) certificate.....	5
Request the production certificate	5
Install the AssureSign certificate.....	6
eAuthorize connection setup.....	7
Configure an eAuthorize handler for your account	7
Form design requirements.....	7
E-Forms Manager settings.....	8
Configure the new form settings	8
eAuthorize template setup: single signature	10
Configure the template settings	10
JotBlock settings.....	11
E-Forms Manager eAuthorize web notification setup.....	17
eAuthorize template setup: multiple signatures	18
Configure the template settings	18
JotBlock settings.....	20
Assign signatory settings.....	23
Email setup.....	26
Web notification setup.....	28
Review your settings.....	28
Continue setting up your form in E-Forms Manager	29
Configure eAuthorize handler for your form	29
Configure an ImageNow handler for your form	33
Publish your form	36
Test the form URL.....	37
Submission tips.....	38
Form submission status	38
AssureSign status.....	38
AssureSign document template tips	38

About Perceptive eAuthorize and TransForm

Perceptive eAuthorize is a solution that enables you to send documents for electronic signature to any authorized signatory, including non-ImageNow users. When eAuthorize is used in conjunction with TransForm, this allows a form to be immediately signed at the time of submission with any subsequent signers receiving email alerts. The signed documents are automatically uploaded and stored in the ImageNow repository.

This solution offers the following advantages.

- The flexibility of a form solution with electronic signatures from a leading electronic signature provider.
- Anyone inside or outside your organization can sign the documents.
- Signatories do not need access to Perceptive content.
- Form data and data collected during the signing process are captured as custom properties.

This document provides the instructions to set up and send a document to AssureSign for signature from a TransForm form.

Software prerequisites

Before you configure the eAuthorize solution in TransForm, ensure that your system meets the following prerequisites.

- ImageNow Client is installed and running properly.
- You can log in to an ImageNow user account.
- You have access to your AssureSign account.
- The ImageNow Message Agent Service is running.
- TransForm E-forms Manager is installed, running, and licensed on your system.
- The Form Workflow, ECM Connector, and Perceptive eAuthorize Connector components are registered and licensed in your E-Forms Manager installation.
- You have configured TransForm iFiller.

Request and install the AssureSign certificate

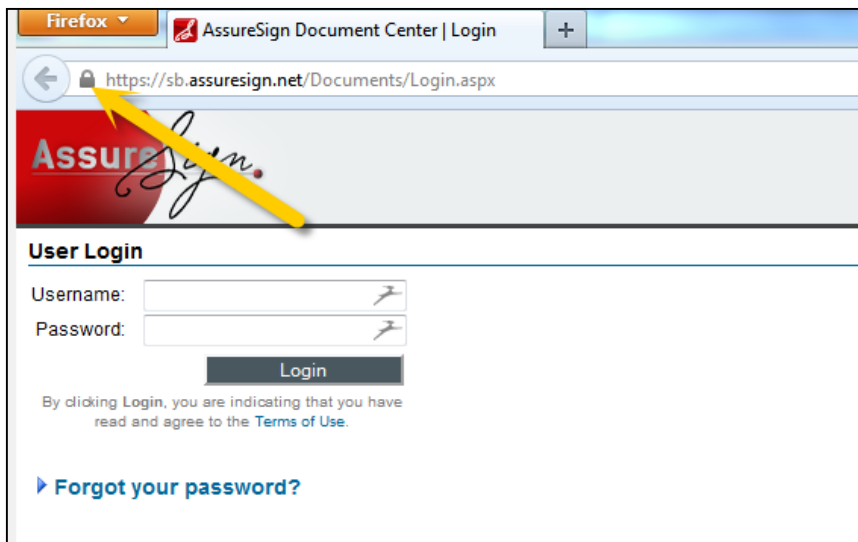
The HTTP server software on which E-Forms Manager runs is a Java-based servlet/JSP engine. This type of server uses a specific type of SSL certificate to encrypt its communications with client browsers. For AssureSign to communicate with TransForm, you need to import the certificate from your AssureSign environment into the keystore used by the TransForm E-Forms Manager.

Download a certificate from the test environment (sandbox) or production AssureSign URL and install it on the same server as TransForm E-Forms Manager. The certificate you download and install depends on whether you are currently testing AssureSign or are in production.

The following steps assume you have not already created an `efmkeystore.jks` file. If you have created this file, copy the file to the `utilities\ssl` folder to add additional certificates.

Request the testing (sandbox) certificate

1. Open the Firefox browser and go to the test environment for AssureSign at the following location.
<https://sb.assuresign.net/Documents/Login.aspx>.
2. Left-click the lock icon next to the URL in the address bar.



1. Click the **More Information** button.
2. Click the **View Certificate** button.
3. Click the **Details** tab.
4. Click the **Export** button and save the certificate to your computer.

Request the production certificate

1. Open the Firefox browser (must be in Firefox) and go to the production environment for AssureSign at the following location.
<https://na1.assuresign.net/Login.aspx>
2. Left-click the lock icon next to the URL in the address bar, as shown in the screenshot in the previous section.
 1. Click the **More Information** button.
 2. Click the **View Certificate** button.
 3. Click the **Details** tab.
 4. Click the **Export** button and save the certificate to your computer.

Install the AssureSign certificate

To install the AssureSign certificate, complete the following steps.

1. After the certificate has been downloaded, navigate to the TransForm E-Forms Manager installation folder and then to the **utilities\ssl** folder. Create a new folder there called **certs** if one does not already exist.
2. Copy the certificate downloaded in the [Request the testing \(sandbox\) certificate](#) section into the **certs** folder.
3. From the command prompt, with the current directory set to **utilities\ssl**, run the script **05-import-server-cert.bat**, passing the name of the file you copied into the certs directory as a parameter. For example: `05-import-server-cert.bat sb.assuresign.net.crt`.
 1. When prompted for the keystore password, enter a password of your choosing. For example:
Enter keystore password: transform
 2. When prompted as to whether or not to trust the certificate, type `yes` and press ENTER. For example:
Trust this certificate? [no]: yes

You should see the following message: **Certificate was added to keystore.**
4. At this point, you should see an **efmkeystore.jks** file created in the **utilities\ssl** directory
5. Create a directory on the server to hold the trusted certificate store, such as **[drive:]TransForm\Certificates**.
6. Copy or move the **efmkeystore.jks** file that was created in the previous set of steps into this directory.
7. Stop the E-Forms Manager server, if it is running, by stopping the Windows service called **TransForm E-Forms Manager Server**.
 1. In the **FSBServer\conf** directory, open the **wrapper.conf** file in Notepad or another text editor. (Create a backup copy first.)
 2. Edit the **wrapper.conf** file, adding a line at the end of the section labeled **Java Additional Parameters** that looks like the following line.

```
wrapper.java.additional.5=-Djavax.net.ssl.trustStore=C:/TransForm/Certificates/efmkeystore.jks
```

To add this new line to the file, you may find it helpful to copy the one above it (which starts with `wrapper.java.additional.4=`), then paste it below and edit it. When doing so, remember to change the parameter name to use an index of **5** instead of 4. Specify the full path to the **EFMTrustStore.jks** file, and use forward slashes instead of backslashes to separate directory names.
 3. Save and close the **wrapper.conf** file.
8. Start the E-Forms Manager Server service.

eAuthorize connection setup

This section contains the steps to set up an eAuthorize connection. This only has to be done once per AssureSign environment.

Configure an eAuthorize handler for your account

To configure an eAuthorize handler for your account, complete the following steps.

1. Log in to **Perceptive TransForm E-Forms Manager**, select the **Administration** tab, and click **Perceptive eAuthorize**.
2. Select **New Perceptive eAuthorize Server**.
 1. Enter the **Server Name** (can be anything).
 2. Enter the **Server URL**, which is the URL to the AssureSign website.
 3. Enter the **Username**, which is the email user name for your AssureSign account.
 4. Enter the **DocumentNOW Account Context Identifier**, which is found in your AssureSign account under **administration > settings > DocumentNOW integration**.

Perceptive eAuthorize Server Setup

* Server Name:	<input type="text" value="Local"/>	?
* Server URL:	<input type="text" value="https://www.assuresign.net/documents/"/>	?
* Username:	<input type="text" value="signature@yoursitehere.com"/>	?
* DocumentNOW Account Context Identifier:	<input type="text" value="12548457-1245-4512-7845-183560457158"/>	?
Enabled?:	<input checked="" type="checkbox"/>	?

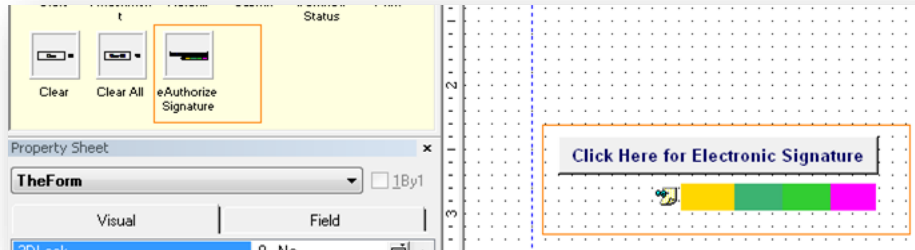
Form design requirements

This section contains the steps to set up a form for eAuthorize.

1. Ensure the form includes the following elements (or fields that can be mapped to these).
 - First Name
 - Last Name (or full name)
 - Email Address
2. Ensure the form includes a new e-sig button with remote commands.

Note The Default catalog includes an eAuthorize Signature object.

3. Ensure the eAuthorize Signature object includes an Electronic Signature button and four hidden fields, as shown in the following example.



E-Forms Manager settings

After you have designed and locked your form, follow the procedures in this section to set up the form within E-Forms Manager for eAuthorize use.

Configure the new form settings

1. Upload the form to **E-Forms Manager**.
 1. On the **Catalog** tab, click **New Form**.
 2. Enter the required fields, denoted with an asterisk (*).
 3. Click **Upload**.

The screenshot shows the 'Perceptive TransForm E-FORMS MANAGER' interface. The top navigation bar includes 'HOME | PUBLISHED E-FORMS | MY PROFILE | HELP | LOG OUT'. Below this is a secondary navigation bar with 'CATALOG', 'SUBMISSIONS', and 'ADMINISTRATION'. The 'CATALOG' tab is active, showing a breadcrumb trail: 'New Form | Staged | Approved | Scheduled | Published | Expired | Search | Form Details'. The main content area is titled 'Step 1: Upload Form' and contains the following fields:

- * Path to Form: A text input field containing 'Perceptive e...g Sample.pff' and a 'Choose File' button.
- * Form Lock Password: A password input field with masked characters (dots).
- * Version Notes: A large text area containing the text 'Perceptive eAuthorize Configuration'.
- Upload Form: A green 'Upload' button with an upward arrow icon.

The footer of the page displays 'www.perceptivesoftware.com' on the left and '© 1997 - 2012' on the right.

2. Click **Form Details**.

3. In the **Form Management Properties**, ensure the following properties are set in the **General** tab.
 1. Set a publish date.
 2. Select the **Enable Processing** check box.
 3. Select the **Enable Submission** check box.
 4. If needed, select the **Enable Data Export** check box.
 5. Select the **Enable iFiller** check box.
 6. Ensure the **PFF Download toolbar button** checkbox is cleared.

The screenshot displays the Perceptive TransForm eForms Manager web application. The top navigation bar includes links for HOME, PUBLISHED E-FORMS, MY PROFILE, HELP, and LOG OUT. Below this, there are tabs for CATALOG, SUBMISSIONS, and ADMINISTRATION. The main content area is titled 'Form Publishing Information' and shows details for a form titled 'Perceptive eAuthorize Configuration'. It includes fields for File Name, Version ID, and Version, along with a status indicator (Staged, Approved, Scheduled, Published, Expired) and a 'Download Form' button. Below this, there are buttons for 'Upload Revision', 'Approve', and 'Publish'. The 'Form Management Properties' section is visible, with the 'General' tab selected. It contains various settings including Version, Publish On/End dates, Version Upgrade options, Version Download settings, Authentication Scheme, and checkboxes for enabling Form Processing, Remote Signing, Submission, Data Export, iFiller, and PFF Download toolbar buttons. At the bottom, there are 'Export' and 'Import' buttons for settings, and a 'Save Changes' button.

4. Generate a PDF of your form so you can determine the location for the signature.
 1. Open the form from the staging user interface in iFiller by selecting the **Print** icon from the **Form Management Properties** page.
 2. Export the form as a PDF for Perceptive eAuthorize import. You use this PDF to create the position for the JotBlocks.

eAuthorize template setup: single signature

Before you can complete the configuration of your form, you must set up the template in AssureSign for the signing process. After you complete the template setup, you can continue your form setup in the [Continue setting up your form in E-Forms Manager](#) section.

Configure the template settings

1. In a new tab, go to the AssureSign website.
2. Log into AssureSign and select the **Template** tab.
3. Select **Start from Scratch** and click **Next**.
4. Upload the PDF.
5. Provide a name for the template.

Note The other default settings do not need to be modified.

The screenshot shows the AssureSign web interface for creating a new document template. The page title is 'Document Templates >> Start From Scratch'. On the left, there are links for 'New' and 'Existing' templates. A yellow instruction box states: 'To create a new template, please select a document that is a representative of the template by clicking 'Browse'. Afterward, provide a name for the template that can be used to clearly identify it. You must also choose who will be able to access and use this template. Once this is complete, please click 'Next' to continue.'

The main form contains the following fields and options:

- Create A Workflow-Only Template?** Radio buttons for Yes and No (No is selected).
- Select Document:** A 'Choose File' button and the text 'No file chosen'.
- Template Name:** A text box containing 'Perceptive eAuthorize Configuration'.
- Description (optional):** A text box containing 'This is the new training file for Perceptive' with a character count of 44 / 250.
- Accessibility:** A dropdown menu set to 'User'.
- Language:** A dropdown menu set to 'English (United States)'.
- Email Design Set:** A dropdown menu set to 'Built-in - English (US)'.
- Define Workflow Template?** Radio buttons for Yes and No (Yes is selected).
- Lock this Template?** Radio buttons for Yes and No (No is selected).
- Hide Advanced Options:** A checkbox that is currently unchecked.
- Allow Immediate Presentment?** Radio buttons for Yes and No (Yes is selected).
- Signatory Digital Certificate Behavior:** A dropdown menu set to 'Ignore all digital certificates'.
- Template Tag (optional):** An empty text box.

At the bottom of the form are 'Next' and 'Cancel' buttons.

6. Set up JotBlocks by left-clicking the mouse where you want the JotBlock to be and dragging until you reach the appropriate size for signature, timestamp, or other input information.

Perceptive eAuthorize Connector - Training Form

The core requirements of the Perceptive eAuthorize connector:

Fields:
 First name (or field can be mapped to it)
 Last name (or field can be mapped to it)
 Email address: (this also can be a non-printable field or if you have an existing field it can be used)

Buttons:
 The remote signing button (for Perceptive eAuthorize) that triggers the new iFiller components. There is an included .cat file that can be added to the TransForm Designer catalog.
 There are 2 required pieces the button and the hidden field w/ the URL

First Name Last Name Email Address

JotBlocks

Page	Name	Actions

©2012 AssureSign, LLC All Rights Reserved.

JotBlock settings

The following procedures define how to set up the JotBlocks for your form.

1. Finish adding all needed JotBlocks.
 - This is an example of JotBlock settings for where the first user will sign.

Edit JotBlock

Basic Settings

Name: JotBlock 1

Type: Signature

Input: Signatory

Required: Yes

Instructions: Please sign with your mouse. This is legally equivalent to signing with a pen on paper.

Visual Settings

Position (x, y): 133 722

Size (w, h): 522 89

Certified: No

Border: None

Ink Color: Black

OK Cancel

- This is an example of a timestamp JotBlock setting for when a user signs.

Edit JotBlock

Basic Settings

Name: JotBlock 2

Type: Text

Input: Signatory

Input Type: Timestamp

Visual Settings

Position (x, y): 680 766

Size (w, h): 446 46

Certified: No

Border: None

Font: Courier New

10 B I U

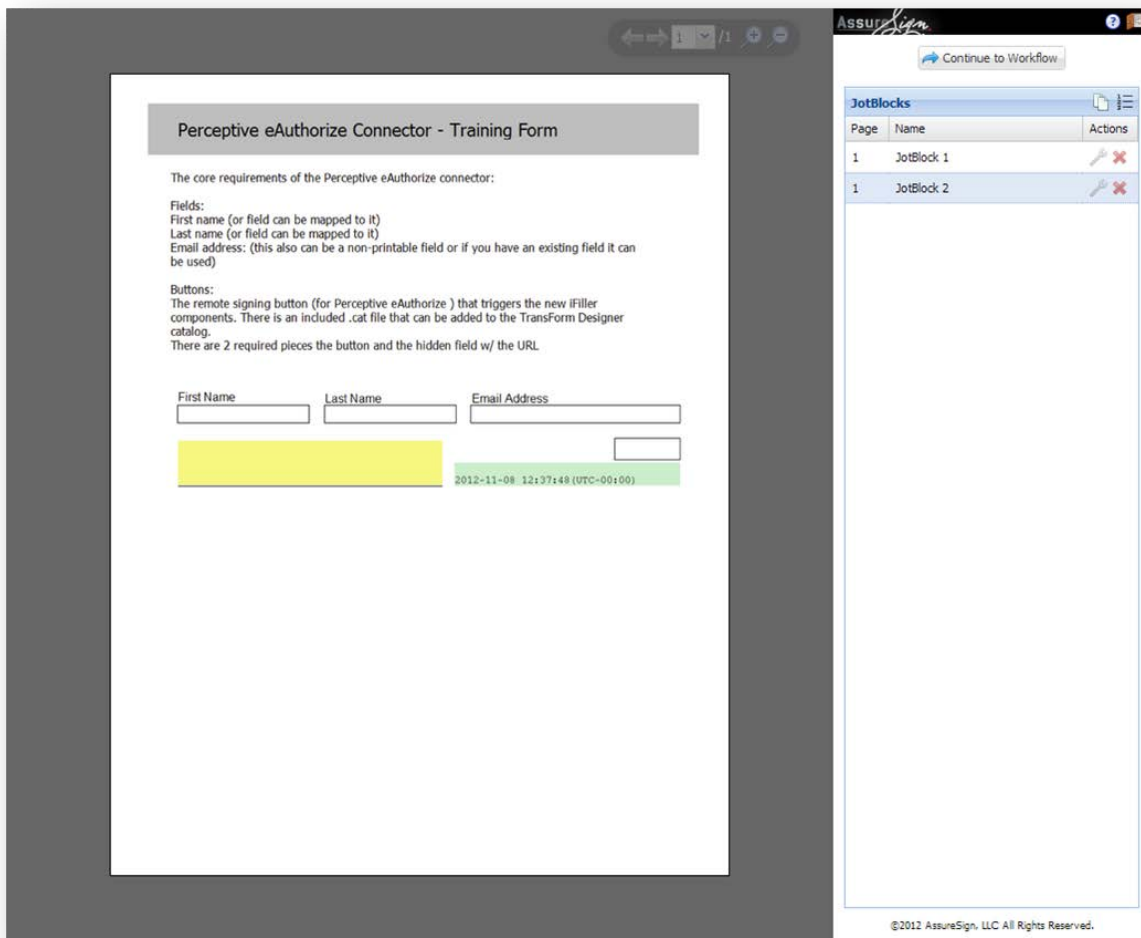
Alignment: Left

Bottom

Word Wrap: Off

OK Cancel

2. Click **Continue to Workflow**.



3. To assign signatory settings, complete the following substep.

1. Click **Save** or **Click here to use full name** and **Save**.

Notes

- If the switch to full name is not successful, delete the signatory and add a new signatory.
- Although a fixed value can be assigned for the email address or signatory name, we recommended using the TransForm constants or static values so that these can be assigned to custom properties if needed.

AssureSign

Workflow Template

- 1. Signatories
- 2. JotBlocks
- 3. Signing Process
- 4. Emails
- 5. Web Notifications
- 6. Document Transmission
- 7. Review

[Reset Form](#)

Please define signatories for the document.
At least one signatory must be defined in order to continue.

New	Signatory Name	Email Address
Save Cancel	[Signatory 1 First Na... Change Click here to use full name	[Signatory 1 Last Nam... Change [Signatory 1 Email Address] Change

Password (optional):
[Signatory 1 Password] Change

Next

4. To assign JotBlocks for the signatory, complete the following steps.
 1. Add all of your JotBlocks for the signatory.
 2. Click **Save**.
 3. Click **Next**.

AssureSign

Account Administrator | [My Profile](#) | [Logout](#) | [Help](#)

Home Administration Reports Templates Documents

Workflow Template

- 1. Signatories
- 2. JotBlocks
- 3. Signing Process
- 4. Emails
- 5. Web Notifications
- 6. Document Transmission
- 7. Review

[Reset Form](#)

Please assign one or more JotBlocks to each signatory.
Now you can specify the order in which JotBlocks are signed by clicking on the 'Next' button below.

Signatory	Assigned JotBlocks
Save Close [Signatory 1 First Name] [Signatory 1 Last Name]	2

Available JotBlocks

[Add](#)
[Add All](#)
[Remove](#)
[Remove All](#)

Assigned JotBlocks
JotBlock 1
JotBlock 2

Previous Next

5. To assign JotBlock settings for the signing process, complete the following steps.
 1. Add all of your JotBlocks for the signing step.
 2. Click **Save**.
 3. Click **Next**.

AssureSign Access e-Forms
Account Administrator | [My Profile](#) | [Logout](#) | [Help](#)

Home Administration Reports Templates Documents

Workflow Template

- 1. Signatories
- 2. JotBlocks
- 3. Signing Process**
- 4. Emails
- 5. Web Notifications
- 6. Document Transmission
- 7. Review

[Reset Form](#)

Please define the order in which the document is signed.
Now you can setup any emails you would like to have sent during the document signing process by clicking on the 'Next' button below.

Step #	JotBlocks	Assigned JotBlocks
Step 1	# of JotBlocks: 2	JotBlock 1 JotBlock 2

Available JotBlocks:

Buttons: Add, Add All, Remove, Remove All, Add all for...

Previous Next

6. To configure email, complete the following steps.

1. Edit the email templates.

AssureSign Access e-Forms
Account Administrator | [My Profile](#) | [Logout](#) | [Help](#)

Home Administration Reports Templates Documents

Workflow Template

- 1. Signatories
- 2. JotBlocks
- 3. Signing Process
- 4. Emails**
- 5. Web Notifications
- 6. Document Transmission
- 7. Review

[Reset Form](#)


Please setup any emails you would like to have sent during the document signing process.
Now you can optionally set up any web notifications you would like to send out during the signing process by clicking on the 'Next' button below.

Stage	Emails	Timing	Design	Recipients
Document Started	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Step 1	New Edit Preview Edit Preview	Before Step	Document available to sign	# of Recipients: 1
Document Completed	New Edit Preview	After Document Completed	Document completed	# of Recipients: 2
Expiration Warning	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Document Expired	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Document Cancelled	No emails have been setup for this stage in the document signing process. Click here to create a new email.			

Previous Next

©2012 AssureSign, LLC All Rights Reserved. DEV-EXT2

2. Delete all emails other than the ones for **Document Completed**.



Access e-Forms
[Account Administrator](#) | [My Profile](#) | [Logout](#) | [Help](#)

Home
Administration
Reports
Templates
Documents

Workflow Template

- ▶ 1. Signatories
- ▶ 2. JotBlocks
- ▶ 3. Signing Process
- ▶ **4. Emails**
- ▶ 5. Web Notifications
- ▶ 6. Document Transmission
- ▶ 7. Review

[Reset Form](#)

Please setup any emails you would like to have sent during the document signing process. Now you can optionally set up any web notifications you would like to send out during the signing process by clicking on the 'Next' button below.

Stage	Emails	Timing	Design	Recipients
Document Started	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Step 1	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>New</p> <p>Save Cancel Delete</p> <p>After Document Completed</p> <p>Document completed (Built-in)</p> <p>Select which signatories will receive this email:</p> <p>All signatories defined for this document</p> <p><input checked="" type="checkbox"/> [Signatory 1 First Name] [Signatory 1 Last Name]</p> </div> <div style="width: 45%;"> <p>Setup any other recipients to send a copy of this email to:</p> <p>Full Name: None Change</p> <p>Email Address: None Change</p> <p>Add</p> </div> </div>			
Document Completed	<p>Send a copy of this email to the document originator?</p> <p><input type="checkbox"/> Document originator</p> <p>Use the following 'sender' name and email address when this email is sent:</p> <p><input type="radio"/> Account Default: DoNotReply (donotreply@assuresign.com)</p> <p><input checked="" type="radio"/> Document originator</p> <p>Custom email text (optional):</p> <p>None Change</p>			
Expiration Warning	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Document Expired	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Document Cancelled	No emails have been setup for this stage in the document signing process. Click here to create a new email.			

Previous
Next

©2012 AssureSign, LLC All Rights Reserved.

DEV-EXT2

7. To configure email setup for **Document Completed**, complete the following substep.
 - Uncheck **Document Originator** (unless needed by host company for audit).
 8. Review your settings and click **Finish**.
- Note** You can ignore the warning for Step 1.

AssureSign Access e-Forms
Account Administrator | [My Profile](#) | [Logout](#) | [Help](#)

Home Administration Reports Templates Documents

Workflow Template

1. Signatories
2. JotBlocks
3. Signing Process
4. Emails
5. Web Notifications
6. Document
7. Transmission
7. **Review**

[Reset Form](#)

Please review the details about your workflow template below for accuracy. Once you have confirmed that all of the details about your workflow template are correct, you may click 'Finish' to return to the document templates page.

Signing Process Review [Print View](#)

Workflow Template Setup is Complete

Template Details:

- Template ID: 63ade22f-bd4c-4ab2-b722-a10300cfaeda
- Template Name: Perceptive eAuthorize Configuration

↓

Signatories assigned to Step '1' complete signing

The following JotBlocks are signed during this step:

- JotBlock 1 ([Signatory 1 First Name] [Signatory 1 Last Name])
- JotBlock 2 ([Signatory 1 First Name] [Signatory 1 Last Name])

↓

Emails with a timing of 'After Document Completed' are sent

An email based on the 'Document completed' email design is sent from the document originator to:

- [Signatory 1 First Name] [Signatory 1 Last Name]

↓

Document Signing Process is Complete

Workflow Template Setup Complete

The workflow template setup process has been completed successfully. If there are any setup warnings listed below you may wish to review them before finishing this template.

Otherwise, click 'Finish' to return to the document templates page.

Setup Warnings

The following steps in the signing process do not currently have any emails scheduled to go out before the step is started. This may prevent the document signing process from being completed successfully. You may click [here](#) to go back and modify your selection of emails for these steps.

- Step 1

[Previous](#)
[Finish](#)

©2012 AssureSign, LLC All Rights Reserved. DEV-EXT2

E-Forms Manager eAuthorize web notification setup

For multiple signatures, it is required to set up E-Forms Manager eAuthorize web notification.

Log in to AssureSign to configure the following DocumentTRAK web notifications. If you are using a local instance of the AssureSign environment, refer to *Appendix C: Copy web notification templates* of the *eAuthorize Installation and Setup Guide* for information on copying AssureSign web notification templates from the sandbox environment.

To configure web notification, complete the following steps.

1. On the **Administration** tab, on the left, click **DocumentTRAK**.
2. In the **Web Notifications** section, copy the **TransForm EFM eAuthorize** 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. Click **Next**.
6. Select **Evaluate XPath expression** and click **Next**.
7. Click **Next** and then click **Finish**.

eAuthorize template setup: multiple signatures

This section provides instructions for setting up a template for multiple signatures.

Configure the template settings

1. In a new tab, go to the AssureSign website.
 2. Log in to AssureSign and select the **Template** tab.
 3. Select **Start from Scratch**.
 4. Upload the PDF.
 5. Provide a name for the template.
- Note** You do not need to modify the other default settings.

AssureSign

Home Administration

Document Templates >> Start From Scratch

☒ New
☐ Existing

To create a new template, please select a document that is a representative of the template by clicking 'Browse'. Afterward, provide a name for the template that can be used to clearly identify it. You must also choose who will be able to access and use this template. Once this is complete, please click 'Next' to continue.

Create A Workflow-Only Template? ☐ Yes ☒ No ?

Select Document: No file chosen ?

Template Name: ?

Description (optional): ? 44 / 250 characters

Accessibility: ?

Language: ?

Email Design Set: ?

Define Workflow Template? ☒ Yes ☐ No ?

Lock this Template? ☐ Yes ☒ No ?

☒ Hide Advanced Options

Allow Immediate Presentment? ☒ Yes ☐ No ?

Signatory Digital Certificate Behavior: ?

Template Tag (optional): ?

- Set up JotBlocks by left-clicking the mouse where you want the JotBlock to be and dragging until you reach the appropriate size for signature, timestamp, or other input information.

The screenshot displays the Perceptive TransForm eAuthorize integration setup interface. The left pane shows a document preview of an employment agreement with sections 12, 13, and 14. The right pane shows the JotBlocks configuration window with a 'Finish' button and a table for adding blocks.

Document Preview (Left Pane):

12. **Non-Waiver.** Waiver by either me or the Company of strict performance of any provision of this Agreement shall not be a waiver of, nor prejudice either party's right to require, strict performance of the same or any other provision in the future.

13. **Assignment.** In the event of the merger, consolidation, transfer, or sale of all or substantially all of the assets of the Company with or to any other individual or entity, or in the event that my employment transfers to any affiliate without a break in employment, this Agreement shall, subject to the provisions hereof, be binding upon and inure to the benefit of such successor or Affiliate without further express consent by me. This Agreement shall not be assignable by me, it being understood and agreed that this is a contract for my personal services.

14. **General.** I agree that this Agreement shall be governed for all purposes by the laws of the State of Washington as such laws apply to contracts performed within Washington by its residents and that exclusive venue and exclusive personal jurisdiction for any action arising out of this Agreement shall be in state or federal court located in King County, Washington. If a court declares any provision of this Agreement excessively broad, it shall be reformed and enforced to the maximum extent permissible by law. If a court declares any provision of this Agreement void, it shall be severed from this Agreement, the remainder of which shall remain in full force and effect. This Agreement supersedes any prior agreements related to the subject matter herein, except (i) as to any provisions of any prior agreements that I have breached, (ii) as to any prior intellectual property assignments or rights granted to the Company I have made and/or (iii) to the extent this Agreement is deemed unenforceable, in which case my prior agreements will remain in full force and effect. This Agreement sets forth the entire agreement of the Company and myself as to the subjects discussed herein, and it may not be modified except by a subsequent written agreement signed by me and an officer of the Company. This Agreement, however, supplements and does not supersede any obligations I have to the Company regarding non-disclosure, noncompetition, non-solicitation, or intellectual property protection under applicable statutory or common law. The terms and conditions of this Agreement shall survive termination of my employment for any reason.

HAVING READ AND FULLY UNDERSTOOD THIS AGREEMENT, I indicate my agreement with and understanding of the terms of this Agreement by signing this Agreement and I understand that this Agreement shall be effective as to the company and myself upon my signature.

Employee Signature _____

Employee Name _____

Date _____

Prior versions identified on Exhibit A to this Agreement: ☒ Yes ☐ No

Company Witness _____

JotBlocks Configuration (Right Pane):

AssureSign

Finish

JotBlocks

Page	Name	Actions

JotBlock settings

- The following procedures define how to set up the JotBlocks for your form. Finish adding all needed JotBlocks.
 - This is an example of JotBlock settings for where the first user will sign.

Edit JotBlock

Basic Settings

Name: JotBlock 1

Type: Signature

Input: Signatory

Required: Yes

Instructions: Please sign with your mouse. This is legally equivalent to signing with a pen on paper.

Visual Settings

Position (x, y): 133 722

Size (w, h): 522 89

Certified: No

Border: None

Ink Color: Black

OK Cancel

- This is an example of JotBlock settings for where the second user will sign.

Edit JotBlock

Basic Settings

Name: JotBlock 2

Type: Signature

Input: Signatory

Required: Yes

Instructions: Please sign with your mouse. This is legally equivalent to signing with a pen on paper.

Visual Settings

Position (x, y): 103 1088

Size (w, h): 350 45

Certified: No

Border: None

Ink Color: Black

OK Cancel

- This is an example of a timestamp JotBlock setting for when a user signs.

The screenshot shows a dialog box titled "Edit JotBlock" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Basic Settings" and "Visual Settings".

Basic Settings:

- Name:** JotBlock 2
- Type:** Text (with a large 'T' icon)
- Input:** Signatory (with a person icon)
- Input Type:** Timestamp (with a clock icon)

Visual Settings:

- Position (x, y):** 680 (x) and 766 (y)
- Size (w, h):** 446 (w) and 46 (h)
- Certified:** No (with a red dot icon)
- Border:** None (with a grid icon)
- Font:** Courier New (with a large 'A' icon)
- Font Size:** 10
- Text Formatting:** Bold (B), Italic (I), and Underline (U) buttons
- Alignment:** Left (with a left-align icon) and Bottom (with a bottom-align icon)
- Word Wrap:** Off (with a red dot icon)

At the bottom right of the dialog are "OK" and "Cancel" buttons.

2. Click **Continue to Workflow**.

12. Non-Waiver. Waiver by either me or the Company of strict performance of any provision of this Agreement shall not be a waiver of, nor prejudice either party's right to require, strict performance of the same or any other provision in the future.

13. Assignment. In the event of the merger, consolidation, transfer, or sale of all or substantially all of the assets of the Company with or to any other individual or entity, or in the event that my employment transfers to any Affiliate without a break in employment, this Agreement shall, subject to the provisions hereof, be binding upon and inure to the benefit of such successor or Affiliate without further express consent by me. This Agreement shall not be assignable by me, it being understood and agreed that this is a contract for my personal services.

14. General. I agree that this Agreement shall be governed for all purposes by the laws of the State of Washington as such laws apply to contracts performed within Washington by its residents and that exclusive venue and exclusive personal jurisdiction for any action arising out of this Agreement shall lie in state or federal court located in King County, Washington. If a court declares any provision of this Agreement excessively broad, it shall be reformed and enforced to the maximum extent permissible by law. If a court declares any provision of this Agreement void, it shall be severed from this Agreement, the remainder of which shall remain in full force and effect. This Agreement supersedes any prior agreements related to the subject matter herein, except (i) as to any provisions of any prior agreements that I have breached, (ii) as to any prior intellectual property assignments or rights granted to the Company I have made and/or (iii) to the extent this Agreement is deemed unenforceable, in which case my prior agreements will remain in full force and effect. This Agreement sets forth the entire agreement of the Company and myself as to the subjects discussed herein, and it may not be modified except by a subsequent written agreement signed by me and an officer of the Company. This Agreement, however, supplements and does not supersede any obligations I have to the Company regarding non-disclosure, noncompetition, non-solicitation, or intellectual property protection under applicable statutory or common law. The terms and conditions of this Agreement shall survive termination of my employment for any reason.

HAVING READ AND FULLY UNDERSTOOD THIS AGREEMENT, I indicate my agreement with and understanding of the terms of this Agreement by signing this Agreement and I understand that this Agreement shall be effective as to the company and myself upon my signature.

Employee Signature

Employee Name

Date

Prior inventions identified on Exhibit A to this Agreement: ☐ Yes ☐ No

Company Witness

Assign signatory settings

The following procedure defines how to assign the signatory settings for your form.

1. Click **Save** or **Click here to use full name** and **Save**.

Notes

- If the switch to full name is not successful, delete the signatory and add a new signatory.
- Although you can assign a fixed value for the email address or signatory name, it is recommended to use the TransForm constants or static values so that these can be assigned to custom properties if needed.

AssureSign

Workflow Template

- 1. Signatories
- 2. JotBlocks
- 3. Signing Process
- 4. Emails
- 5. Web Notifications
- 6. Document
- Transmission
- 7. Review

Please define signatories for the document.
At least one signatory must be defined in order to continue.

New	Signatory Name	Email Address
Save Cancel	[Signatory 1 First Na... Change Click here to use full name]	[Signatory 1 Last Nam... Change [Signatory 1 Email Address] Change

Password (optional):
[Signatory 1 Password] Change

Next

Reset Form

2. Click **New** to add the second signatory information.
3. Modify **Signatory 2** or click **Save**.
4. Click **Next**.

AssureSign

Workflow Template

- 1. Signatories
- 2. JotBlocks
- 3. Signing Process
- 4. Emails
- 5. Web Notifications
- 6. Document
- Transmission
- 7. Review

Please define signatories for the document.
At least one signatory must be defined in order to continue.

New	Signatory Name	Email Address
Save Cancel	[Signatory 1 First Na... Change Click here to use full name]	[Signatory 1 Last Nam... Change [Signatory 1 Email Address] Change

Password (optional):
[Signatory 1 Password] Change

Next

Reset Form

5. Add all of your JotBlocks for the signatory.
6. Click **Save**.

The screenshot shows the 'Workflow Template' page in the Perceptive University eAuthorize Administrator. The left sidebar lists steps 1 through 7, with 'JotBlocks' (step 2) selected. The main content area has a yellow instruction box: 'Please assign one or more JotBlocks to each signatory. Now you can specify the order in which JotBlocks are signed by clicking on the 'Next' button below.' Below this is a table with two columns: 'Signatory' and 'Assigned JotBlocks'. The 'Signatory' column shows 'Edit' and 'Save Close' buttons, and the 'Assigned JotBlocks' column shows 'JotBlock 2' and the number '2'. Below the table are two lists: 'Available JotBlocks' (empty) and 'Assigned JotBlocks' (containing 'JotBlock 1' and 'JotBlock 3'). Between these lists are buttons: 'Add', 'Add All', 'Remove', and 'Remove All'. At the bottom are 'Previous' and 'Next' buttons.

7. Click **Edit Signatory 2**.
8. Add all of your JotBlocks for the signatory.
9. Click **Save** for the **Signatory 2** settings.
10. Click **Next**.

This screenshot is identical to the one above, showing the 'JotBlocks' configuration for Signatory 2. It displays the 'Workflow Template' page with the 'JotBlocks' step selected. The instruction box, table, and lists are the same as in the previous screenshot.

11. Add all of your JotBlocks for the first signing step.
12. Click **Save**.

AssureSign **Perceptive University**
eAuthorize Administrator | [My Profile](#) | [Logout](#) | [Help](#)

[Home](#) [Administration](#) [Reports](#) [Templates](#) [Documents](#)

Workflow Template

1. Signatories
2. JotBlocks
3. **Signing Process**
4. Emails
5. Web Notifications
6. Document Transmission
7. Review

[Reset Form](#)

Please define the order in which the document is signed.
Now you can setup any emails you would like to have sent during the document signing process by clicking on the "Next" button below.

Step #	JotBlocks
Step 1	# of JotBlocks: 2
Step 2	# of JotBlocks: 1

[Previous](#) [Next](#)

13. Click **Edit** for signing step 2.
14. Add all of your JotBlocks for the signing step.
15. Click **Save** for signing step 2.
16. Click **Next**.

AssureSign **Perceptive University**
eAuthorize Administrator | [My Profile](#) | [Logout](#) | [Help](#)

[Home](#) [Administration](#) [Reports](#) [Templates](#) [Documents](#)

Workflow Template

1. Signatories
2. JotBlocks
3. **Signing Process**
4. Emails
5. Web Notifications
6. Document Transmission
7. Review

[Reset Form](#)

Please define the order in which the document is signed.
Now you can setup any emails you would like to have sent during the document signing process by clicking on the "Next" button below.


Step #	JotBlocks
Step 1	# of JotBlocks: 2
Step 2	# of JotBlocks: 1

[Previous](#) [Next](#)

Email setup

The following procedures define the email setup.

1. Edit the email templates.



eAuthoriz

Home

Administration

Report

Workflow Template

1. Signatories

2. JotBlocks

3. Signing Process

4. Emails

5. Web Notifications

6. Document Transmission

7. Review

Reset Form

Please setup any emails you would like to have sent during the document signing process.
Now you can optionally set up any web notifications you would like to send out during the signing process by clicking on the 'Next' button below.

Stage	Emails	Timing	Design	Recipients
Document Started	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Step 2	<div>New</div> <div>Edit Preview</div> <div>Edit Preview</div>	Before Step	Document available to sign	# of Recipients: 1
		Before Step	Before signing step - Originator	# of Recipients: 1
Step 1	<div>New</div> <div>Edit Preview</div> <div>Edit Preview</div>	Before Step	Document available to sign	# of Recipients: 1
		Before Step	Before signing step - Originator	# of Recipients: 1
Document Completed	<div>New</div> <div>Edit Preview</div>	After Document Completed	Document completed	# of Recipients: 3
Expiration Warning	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Document Expired	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Document Cancelled	No emails have been setup for this stage in the document signing process. Click here to create a new email.			

Previous

Next

2. Delete all emails for signing Step 1 since this originates in TransForm.

Please setup any emails you would like to have sent during the document signing process. Now you can optionally set up any web notifications you would like to send out during the signing process by clicking on the 'Next' button below.

Stage	Emails	Timing	Design	Recipients
Document Started	No emails have been setup for this stage in the document signing process. Click here to create a new email.			
Step 2	New Edit Preview Edit Preview	Before Step	Document available to sign	# of Recipients: 1
	New Edit Preview Edit Preview	Before Step	Before signing step - Originator	# of Recipients: 1
Step 1	<div> <div> Save Cancel Delete </div> <div> Before Step </div> <div> Document available to sign (Built-in) </div> </div> <div> Select which signatories will receive this email: </div> <div> All signatories assigned to this signing step </div> <div> <input type="checkbox"/> [Signatory 2 Full Name] <input checked="" type="checkbox"/> [Signatory 1 First Name] [Signatory 1 Last Name] </div> <div> Send a copy of this email to the document originator? </div> <div> <input type="checkbox"/> Document originator </div> <div> Use the following 'sender' name and email address when this email is sent: </div> <div> <input checked="" type="radio"/> Account Default: DoNotReply - eAuthorize (hevmsignatures@gmail.com) <input type="radio"/> Document originator </div> <div> Custom email text (optional): </div> <div> None Change </div> <div> Add </div>			
	Edit Preview	Before Step	Before signing step - Originator	# of Recipients: 1
Document Completed	New Edit Preview	After Document Completed	Document completed	# of Recipients: 3
Expiration Warning	No emails have been setup for this stage in the document signing process. Click here to create a new email.			

3. Optional. Delete **Before signing step – Originator** for **Step 2**.

Note Complete this step unless you wish for the document originator to receive an email before the document is signed by the last signer.

Web notification setup

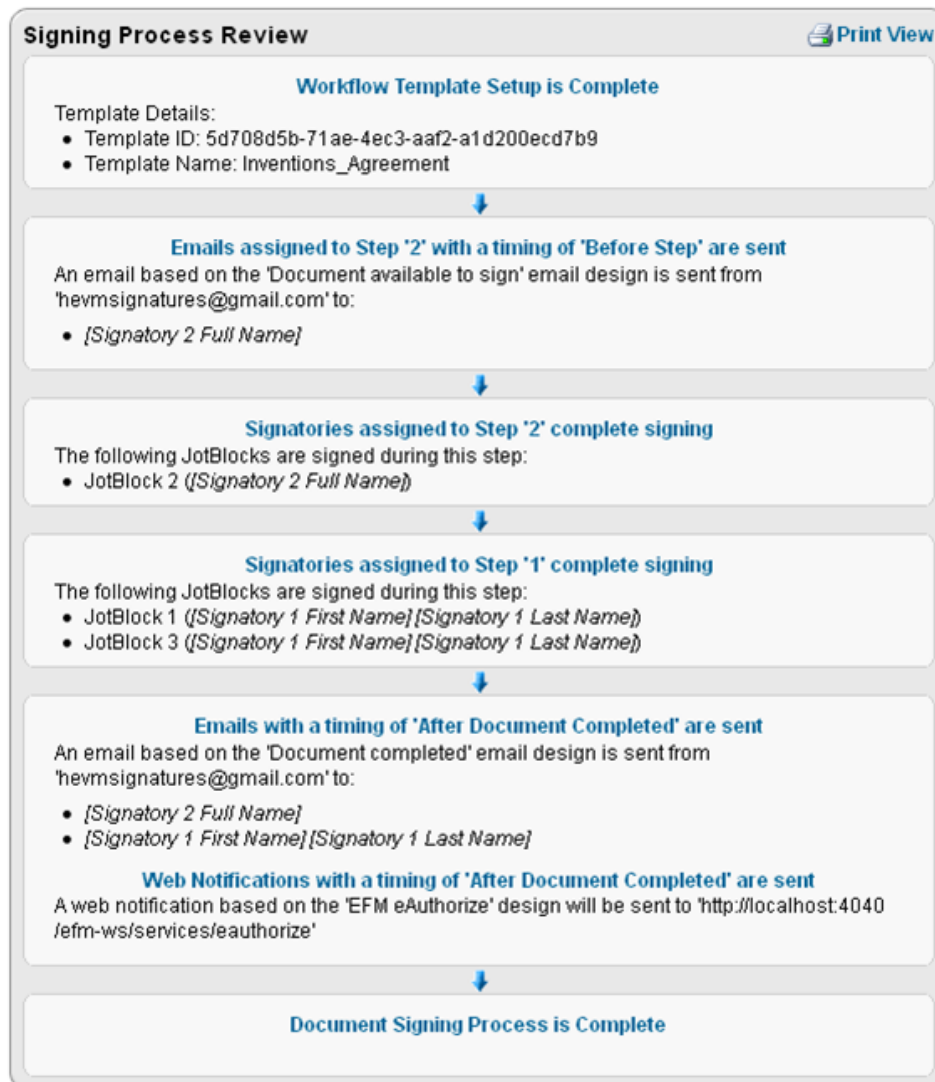
1. Create a new notification on **Document Complete**.
2. In the **Design Name** column, in the **Document Completed** row, select **TransForm EFM eAuthorize** from the list.

Review your settings

You can review the settings you defined in a process review page.

- Review your settings and click **Finish**.

Note You can ignore the warning for Step 1.



Continue setting up your form in E-Forms Manager

After the template is finished within AssureSign, the following steps continue setting up the form for eAuthorize within TransForm.

Configure eAuthorize handler for your form

The following procedure defines the process for configuring the eAuthorize handler for your form.

1. Select **New Perceptive eAuthorize Handler**.

The screenshot displays the Perceptive Transform E-FORMS MANAGER interface. At the top, there is a navigation bar with links: HOME | PUBLISHED E-FORMS | MY PROFILE | HELP | LOG OUT. Below this is a secondary navigation bar with tabs: CATALOG, SUBMISSIONS, and ADMINISTRATION. A blue banner below the tabs contains links: New Form | Staged | Approved | Scheduled | Published | Expired | Search | **Form Details**.

The main content area is titled "Form Publishing Information". It contains the following details:

- Form Title: Restrictive Covenant and Assignment of Inventions Agreement
- Version ID: 1
- File Name: Inventions_Agreement[1].pdf
- Version: 0.0
- Status: A progress bar with stages: Staged, **Approved**, Scheduled, Published, Expired.
- Download Form: Two download icons (one with a red 'X', one with a blue plus).

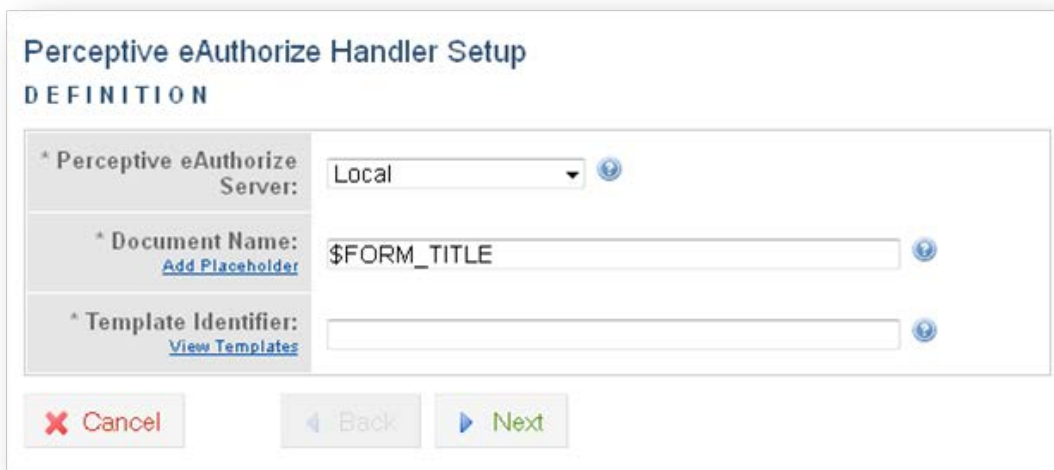
Below the status bar are three buttons: Upload Revision, Approve, and Publish.

The next section is "Form Management Properties" with a [Version Details](#) link. It includes a sub-navigation bar: General | Submission | Signing | Data | Imaging | Autofill | Autowrite | **Perceptive eAuthorize** | Workflow.

Under "PERCEPTIVE EAUTHORIZE HANDLER", there is a [New Perceptive eAuthorize Handler](#) link and a message box stating: "No Perceptive eAuthorize handlers have been defined for this form version".

The footer contains the website address www.perceptivesoftware.com and the copyright notice © 1997 - 2013.

2. Select **Server**.
3. Enter a **Document Name**.
4. Enter a **Template Identifier** (paste or select **View Templates** to select a template from a list).

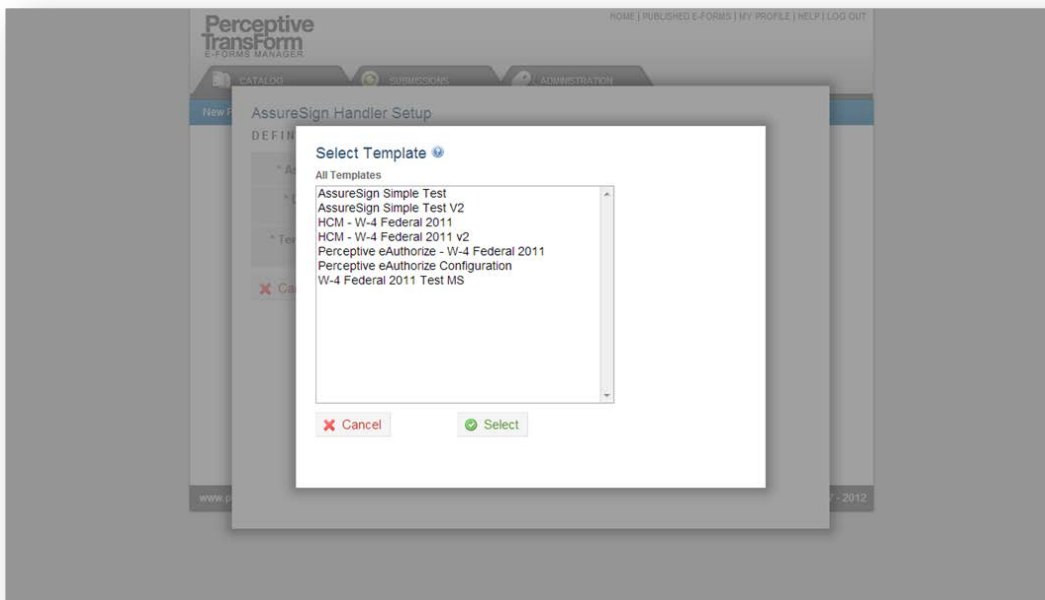


The image shows a web form titled "Perceptive eAuthorize Handler Setup" with a sub-header "DEFINITION". The form contains three main sections, each with an asterisk indicating a required field:

- * Perceptive eAuthorize Server:** A dropdown menu with "Local" selected and a help icon.
- * Document Name:** A text input field containing "\$FORM_TITLE" and a help icon. Below the field is a link labeled "Add Placeholder".
- * Template Identifier:** An empty text input field and a help icon. Below the field is a link labeled "View Templates".

At the bottom of the form are three buttons: "Cancel" (with a red X icon), "Back" (with a left arrow icon), and "Next" (with a right arrow icon).

- If you chose to **View Templates**, select a template and click **Select**.



5. Map your fields to the appropriate template parameters using the following options.
 - Form fields
 - EFM constants
 - Static values
6. Select **Finish**.

Perceptive eAuthorize Handler Setup

TEMPLATE PARAMETERS

Template Parameters

Signatory 1 Password

Form Fields

Supervisor_Email_Work

Employee_HomeAddress_State

Password_Recovery_Change

Constants

demoemail_manager

demoemail_submitter

Template Parameter	Form Field	
Signatory 1 Email Address	\$PFF.Employee_Email_Personal	✖
Signatory 1 Last Name	\$PFF.Employee_Name_Last	✖
Signatory 1 First Name	\$PFF.Employee_Name_First	✖

7. Click **Enable Handler**.

The screenshot displays the Perceptive Transform E-FORMS MANAGER interface. At the top, there is a navigation bar with links: HOME | PUBLISHED E-FORMS | MY PROFILE | HELP | LOG OUT. Below this is a secondary navigation bar with tabs: CATALOG, SUBMISSIONS, and ADMINISTRATION. A blue banner contains links: New Form | Staged | Approved | Scheduled | Published | Expired | Search | **Form Details**.

The main content area is titled "Form Publishing Information". It shows the following details:

- Form Title:** Restrictive Covenant and Assignment of Inventions Agreement
- File Name:** Inventions_Agreement[1].pdf
- Version ID:** 1
- Version:** 0.0
- Status:** A progress bar with stages: Staged, **Approved** (highlighted), Scheduled, Published, Expired.
- Download Form:** Two download icons (PDF and XPS).

Below the status bar are three buttons: Upload Revision, Approve, and Publish.

The next section is "Form Management Properties" with a [Version Details](#) link. It features a sub-navigation bar: General | Submission | Signing | Data | Imaging | Autofill | Autowrite | **Perceptive eAuthorize** | Workflow.

Under the "PERCEPTIVE EAUTHORIZE HANDLER" section, there is a table:

Server Name	Template Identifier	Status	Edit	Delete
Local	5d708d5b-71ae-4ec3-aaf2-a1d200ecd7b9	Enabled		

Below the table are two buttons: Enable Handler and Disable Handler.

The footer contains the website address www.perceptivesoftware.com and the copyright notice © 1997 - 2013.

Configure an ImageNow handler for your form

From the workflow Rule Action to Export to ImageNow, use the following settings to store the eAuthorize document. For additional instruction on configuring a form to export to Perceptive Content, refer to the *Perceptive TransForm Content Integration Configuration Guide*.

Action Setup
DETAILS

Action Name:	Export to Perceptive Content
Action Type:	Export to ImageNow
Action Order:	1
Logging:	<input checked="" type="checkbox"/> Enable Logging

1. Select the ImageNow Server you previously set up.
2. Select **Store Perceptive eAuthorize Document**.
3. Select **Multiple Signing Steps if Applicable**.

Note This is the flag to check for the EFM eAuthorize web service.

Action Setup
IMAGENOW SERVER

* ImageNow Server:	localhost
Perceptive eAuthorize:	<input checked="" type="checkbox"/> Store Perceptive eAuthorize Document <input type="checkbox"/> Multiple Signing Steps

4. Map signatory parameters to custom properties.

Note This action setup allows you to map signatory parameters directly if they are not form fields.

Action Setup
CUSTOM PROPERTIES - PERCEPTIVE EAUTHORIZE ⓘ

Custom Properties		Template Parameters
Company	Map	Signatory 1 Email Address
Vendor ID		Signatory 1 First Name
Vendor Name		Signatory 1 Last Name
Invoice Number		Signatory 1 Password
Invoice Date		
Custom Property		Template Parameter

- Enter the attachment and image options.
- Click **Finish**.

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"/> ⓘ

- 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

1. Approve the form by clicking 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. Publish the form by clicking the **Publish** button.

Form Publishing Information

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

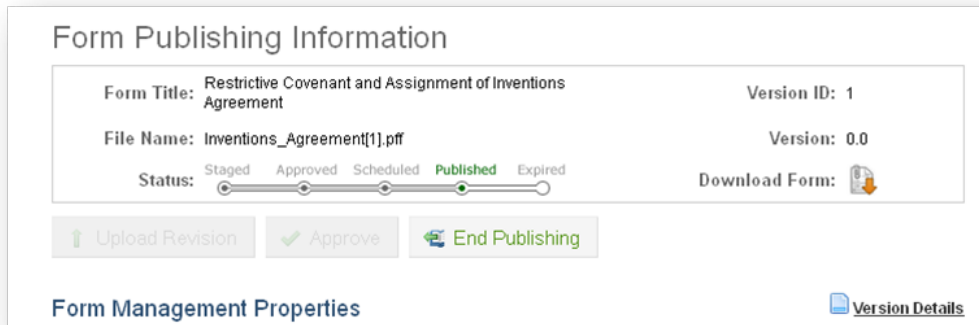
File Name: Inventions_Agreement[1].pff Version: 0.0

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

Upload Revision Approve Publish

Test the form URL

1. Select **Version Details**.

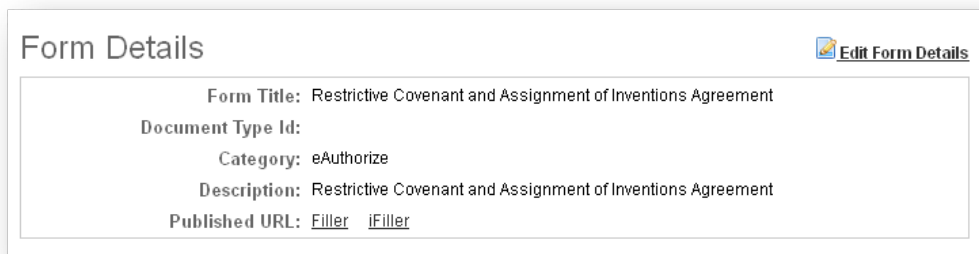


Form Publishing Information

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:

Form Management Properties [Version Details](#)

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

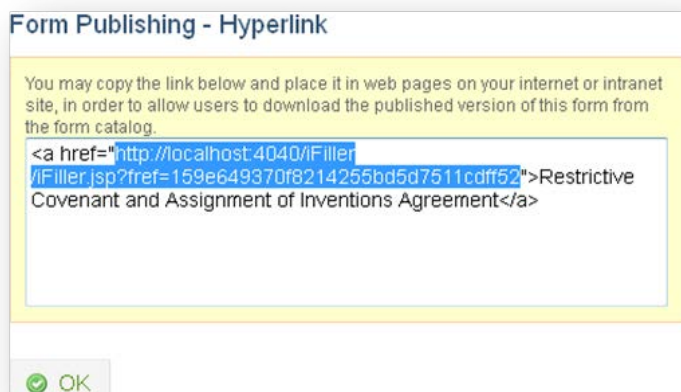


Form Details [Edit Form Details](#)

Form Title: Restrictive Covenant and Assignment of Inventions Agreement
Document Type Id:
Category: eAuthorize
Description: Restrictive Covenant and Assignment of Inventions Agreement
Published URL: Filler iFiller

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?fref=159e649370f8214255bd5d7511cdf52">Restrictive Covenant and Assignment of Inventions Agreement</a>
```

4. Paste the URL into a browser.

5. Test the signing process.

Note After all signatories have signed the form, the final form is stored in Perceptive Content with the assigned indexes and any mapped custom properties.

Submission tips

Form submission status

The following instructions state how to check the status of a submitted form.

1. Select the **Submissions** tab from the E-Forms Manager.
2. Select document search.
3. Select the **ECM Connectors** section.
4. Filter for the desired date ranges.
5. Select the **Export Status**.
6. For submission with the Failure Status, you can queue these for resubmission by individually selecting the **Submission** check box next to the form and **Retry** or by selecting the check box next to **Submission** to select all forms and **Retry**.

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

AssureSign status

If you do not see a submission error but the form has not successfully submitted, you can check the status of the document in AssureSign.

The following instructions state how to check the status of a document template in AssureSign.

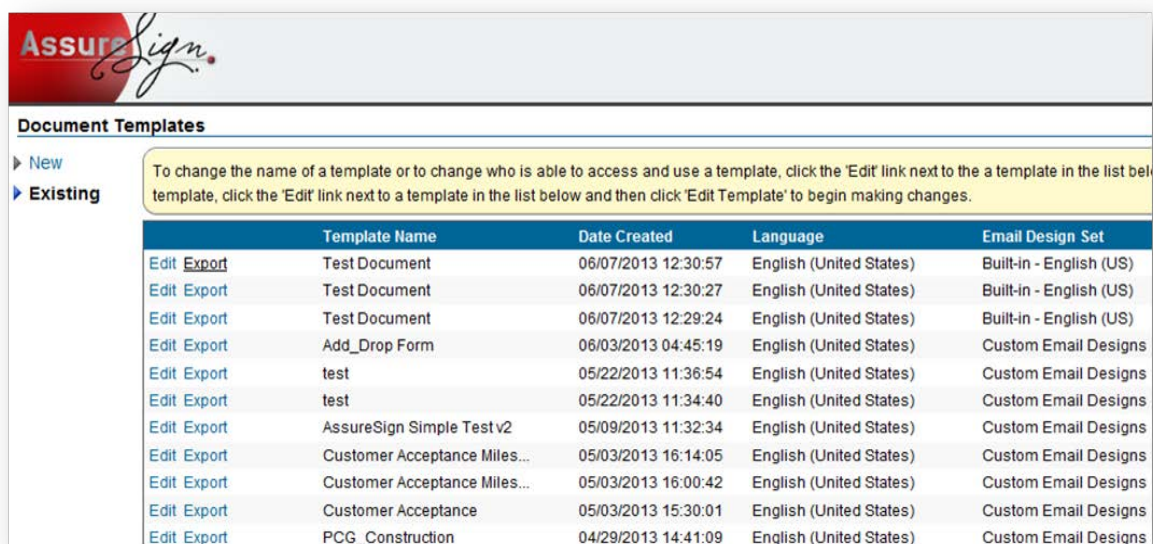
1. Select the **Reports** tab from your AssureSign account.
2. Select document search.
3. Filter for the desired date range.
4. Select the desired document.
5. Check the status of the signing process.

Note If the web notification for TransForm EFM eAuthorize has attempts but does not have a date sent, restart the TransForm_EFM_DB service.

AssureSign document template tips

If a new document requires the same signing process for a different environment, complete the following steps.

1. Select the template tab.
2. Select **Existing**.
3. Export the template.



AssureSign

Document Templates

► New


► Existing

To change the name of a template or to change who is able to access and use a template, click the 'Edit' link next to the a template in the list below template, click the 'Edit' link next to a template in the list below and then click 'Edit Template' to begin making changes.

	Template Name	Date Created	Language	Email Design Set
Edit Export	Test Document	06/07/2013 12:30:57	English (United States)	Built-in - English (US)
Edit Export	Test Document	06/07/2013 12:30:27	English (United States)	Built-in - English (US)
Edit Export	Test Document	06/07/2013 12:29:24	English (United States)	Built-in - English (US)
Edit Export	Add_Drop Form	06/03/2013 04:45:19	English (United States)	Custom Email Designs
Edit Export	test	05/22/2013 11:36:54	English (United States)	Custom Email Designs
Edit Export	test	05/22/2013 11:34:40	English (United States)	Custom Email Designs
Edit Export	AssureSign Simple Test v2	05/09/2013 11:32:34	English (United States)	Custom Email Designs
Edit Export	Customer Acceptance Miles...	05/03/2013 16:14:05	English (United States)	Custom Email Designs
Edit Export	Customer Acceptance Miles...	05/03/2013 16:00:42	English (United States)	Custom Email Designs
Edit Export	Customer Acceptance	05/03/2013 15:30:01	English (United States)	Custom Email Designs
Edit Export	PCG_Construction	04/29/2013 14:41:09	English (United States)	Custom Email Designs

If a new document requires the same signing process for a different environment, complete the following steps.

1. Select the template tab.
2. Select **New**.
3. Select **Import template from a Template Export File**.
4. Change the name of the template.
5. Position the JotBlocks over the new signing areas.



Document Templates

▶ **New**

▶ Existing

Choose a selection below to start the process of creating a new template. A detailed description is below each selection.

- ☐ **Start From Scratch**
Select this option to create a new template from scratch. You will be asked to upload a new document and will be able to create new JotBlocks.
- ☐ **Copy Template and Preserve Original Document**
Select this option to copy all aspects of an existing template. You will be asked to select which template to copy and will be able to modify existing JotBlocks.
- ☐ **Copy Template and Upload New Document**
Select this option to create a new template while copying JotBlocks and Workflow from an existing template. You will be asked to upload a new document and to select which template to copy from. You will be able to modify existing JotBlocks.
- ☒ **Import Template from a Template Export File**
Select this option to create a new template copying JotBlocks and Workflow from a Template Export File. You will be asked to upload the template export file. You will be able to modify existing JotBlocks.

[Next](#)