eSignLive for Nintex (SP2013)

User Guide

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General

This user guide covers how to use ***eSignLive for Nintex*** and explains in detail the steps that should be followed to obtain secure signatures within Nintex.

About This Document

Before you begin, ensure you have completed the installation steps found in the ***eSignLive for Nintex Installation and Guide*** found in the downloaded zip file.

Terminology

Document Package or Transaction – An object within eSignLive that holds the content and definitions for all documents and signers. This is the piece that contains all documents that is sent to the signer to complete.

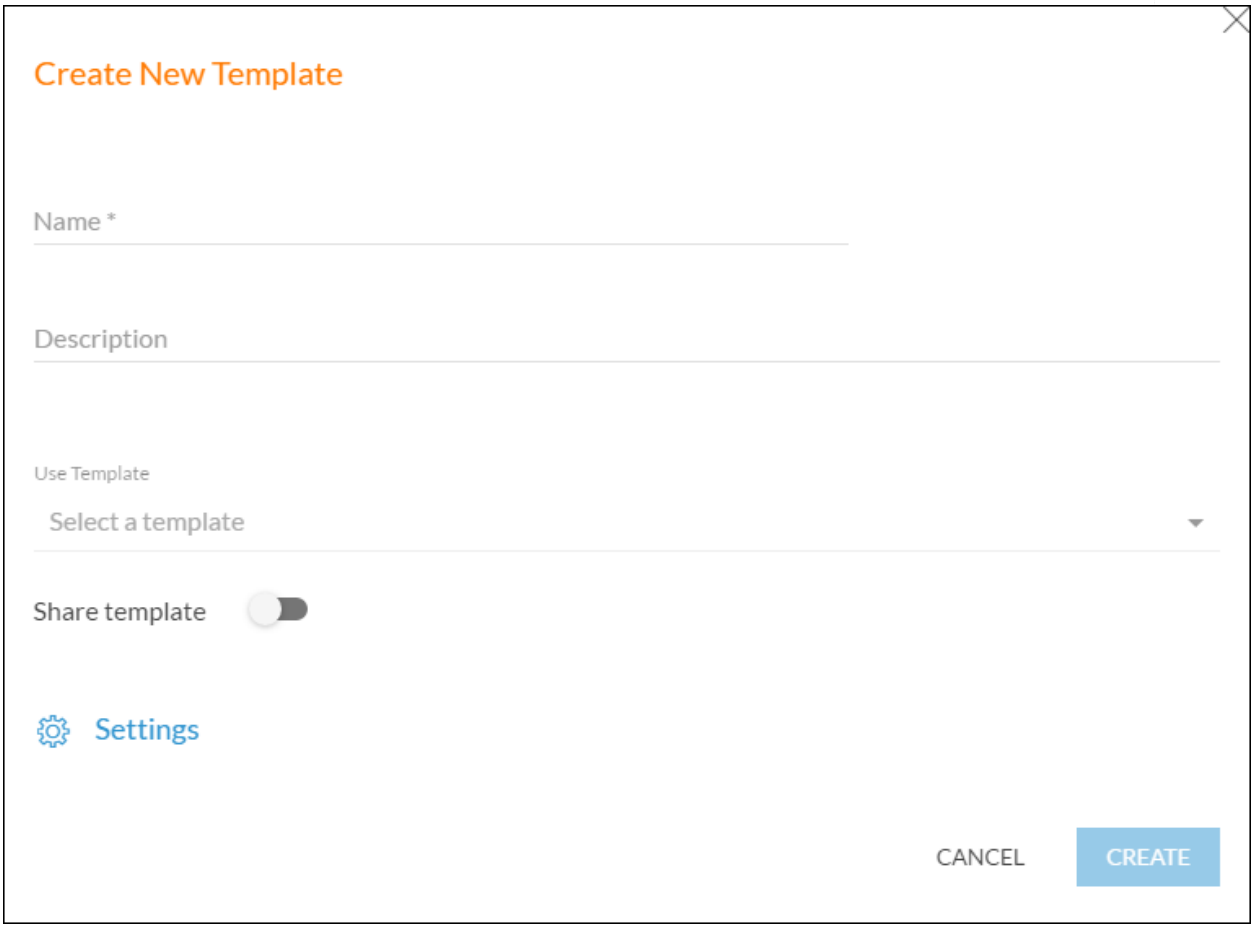
Template – A special type of Document Package/Transaction that can contain documents and signers/signer placeholders and be used as a starting point when creating a document package/transaction in eSignLive. In version 1 of this connector, this is a required item.

Placeholder – When you are wanting to use dynamic signer information (when creating a template), you would use a placeholder signer to allow you to define signature and other field locations for this "signer". When creating a transaction from the template, you'd replace the placeholder signer with the actual signer information. All signatures and fields associated with this placeholder would then be assigned to the actual signer.

Setting up templates

1. The first release of ***eSignLive for Nintex*** requires the use of templates. To begin, set up templates for your workflow(s) in ***eSignLive***. Select the instance of ***eSignLive*** you're using (example: https://sandbox.esignlive.com/), log in, and select templates from the top navigation.

2. Select ***New Template*** or ***Create Template***, depending on which version of ***eSignLive*** you're using. This guide will show eSignLive's new UI in the Sandbox environment.



3. Enter a **Name** for your template (required) and any other optional settings you wish to set for your template and click **Create**.

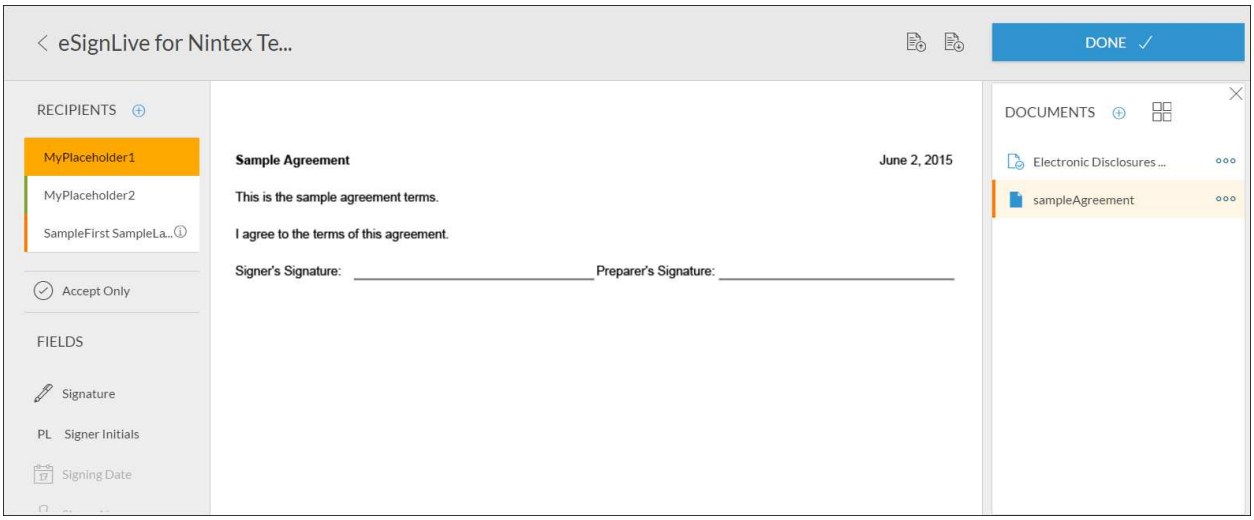
4. Next, add the documents you'll be using for your workflow process. Click **+Add** in the **Documents** section and select your desired documents.

5. Next, add your recipients/signers to the template. You can add static signers if you have someone that will sign all packages or you can set placeholders that will be replaced by values you set in your ***eSignLive for Nintex*** workflow configuration. You can see both types, below:

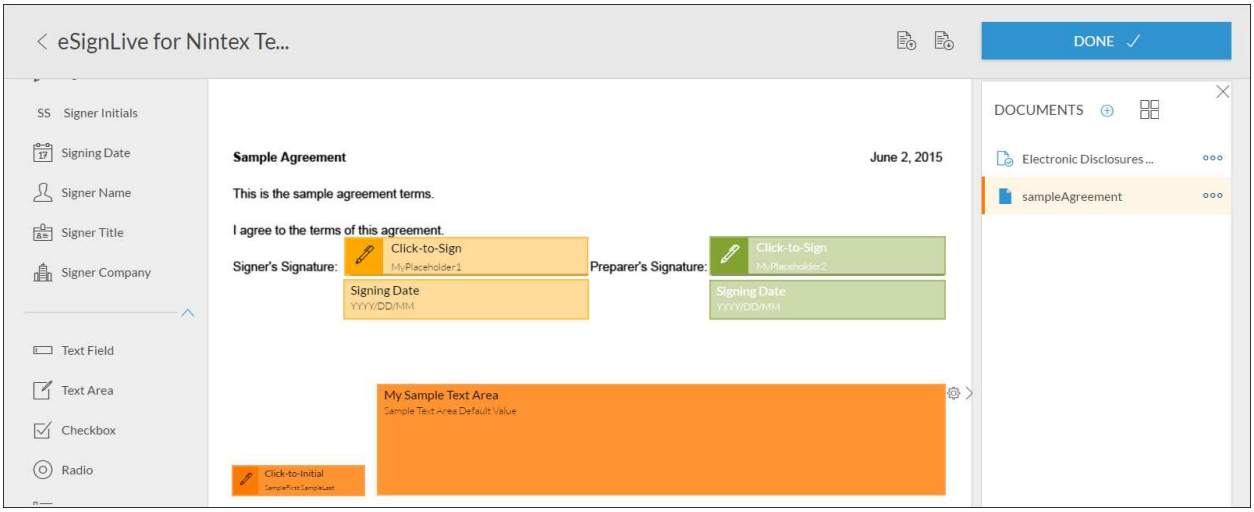
To switch between **Placeholder** and a static **Recipient** signer, click on the silhouette icon to the left of the recipient.

6. Once you have your documents, recipients/placeholders, and any other desired settings set on your template, it's time to prepare the signature field locations on the documents. Click the **Next** button found at the top right-hand corner.

7. You will now see your first document in the middle of the screen with your signers, the different field options to the left, and your package/transaction document list to the right:



8. Select the desired signer and drag a signature field to the document. Once you've added a signature field, you can click on that signature element and add any other fields from the left to that signature. To ensure you have the correct fields associated with the correct signers, signature fields are color coded by signer.

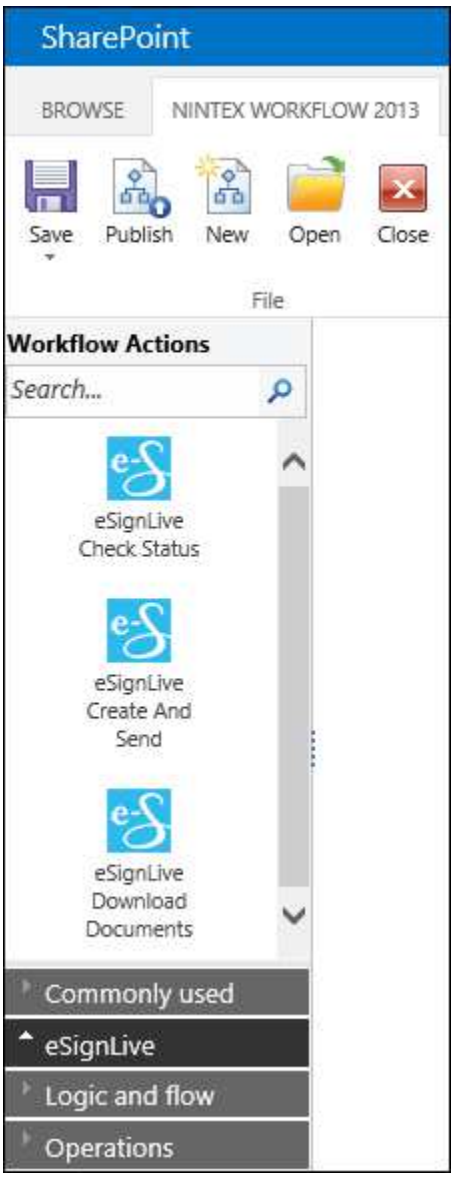


9. Once you're done laying out your template, click **Done**.

Using the eSignLive for Nintex Actions

1. Create a new workflow inside of Nintex Workflow or open an existing workflow.

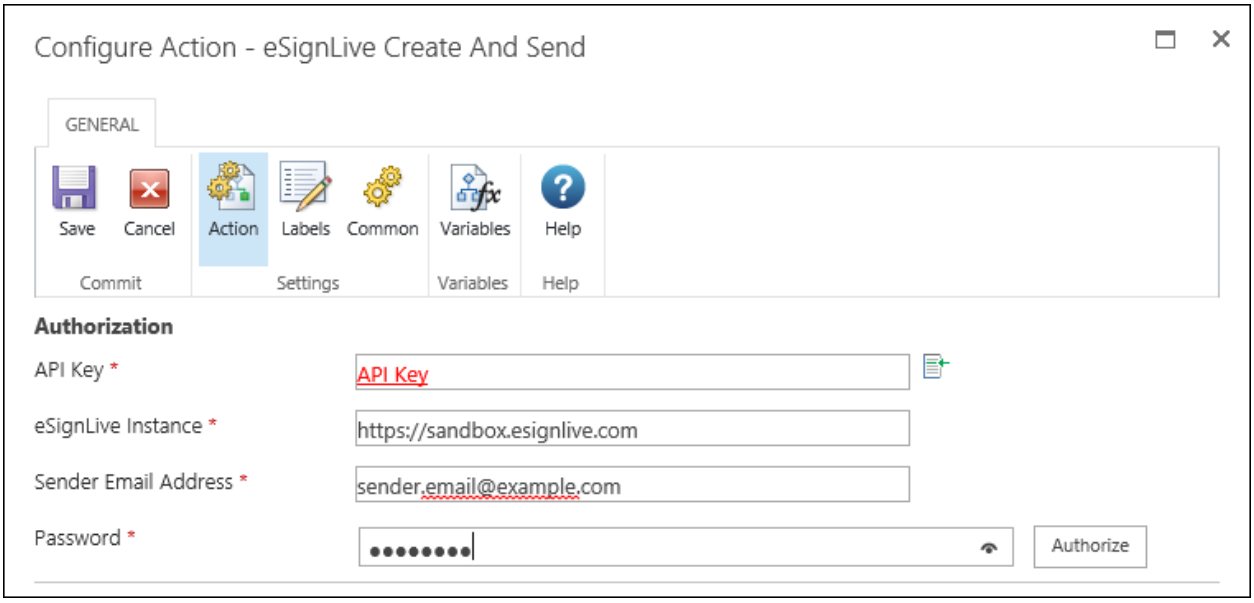
2. Within the **Nintex Workflow Designer**, you should see a section in the left pane called ***eSignLive***. If you do not see this, make sure you have installed ***eSignLive for Nintex*** properly. Please refer to the ***eSignLive for Nintex: Installation and Configuration Guide***



Create and Send

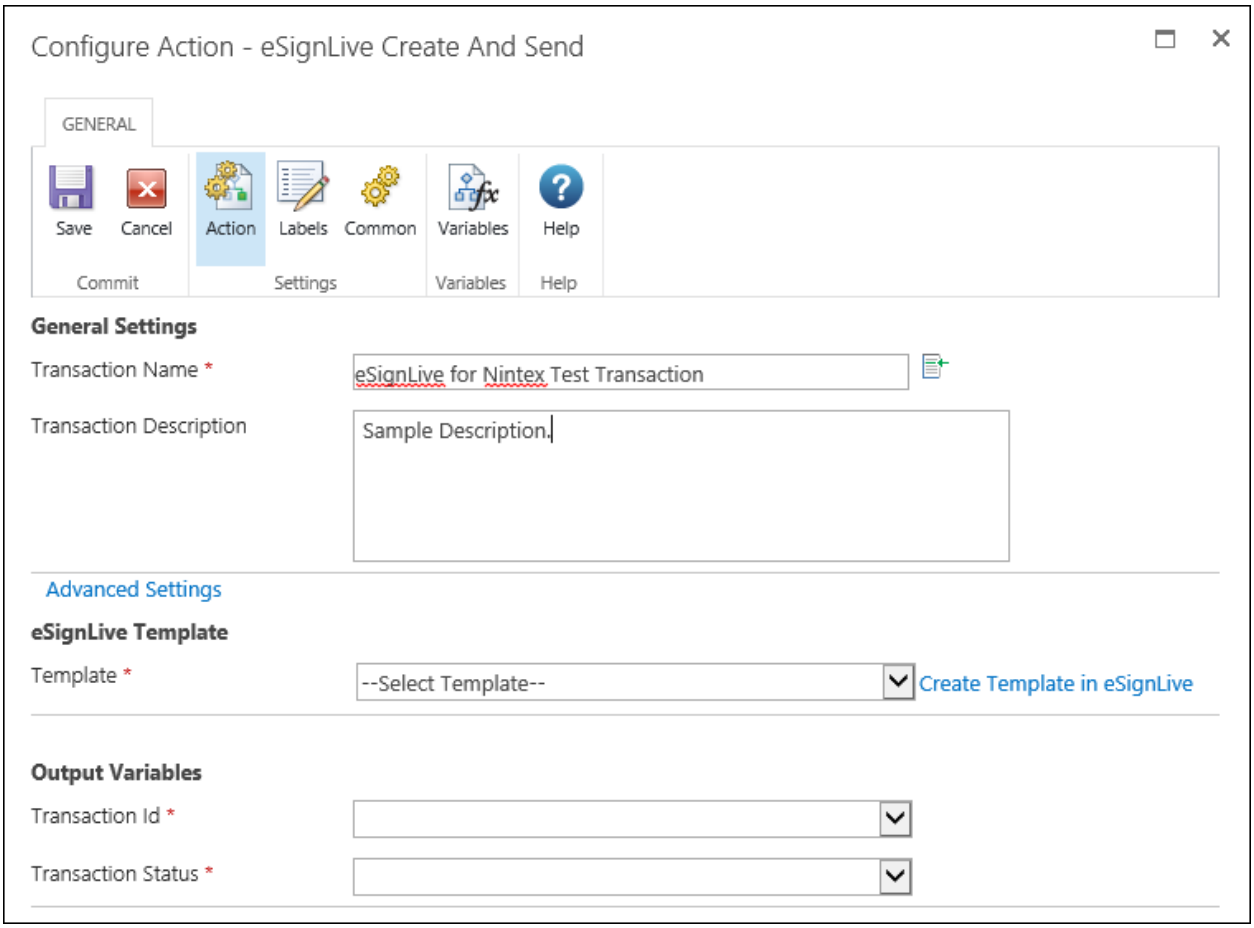
1. First, you will need to add a ***Create and Send*** action to your workflow.

2. Open the configuration page for the action.



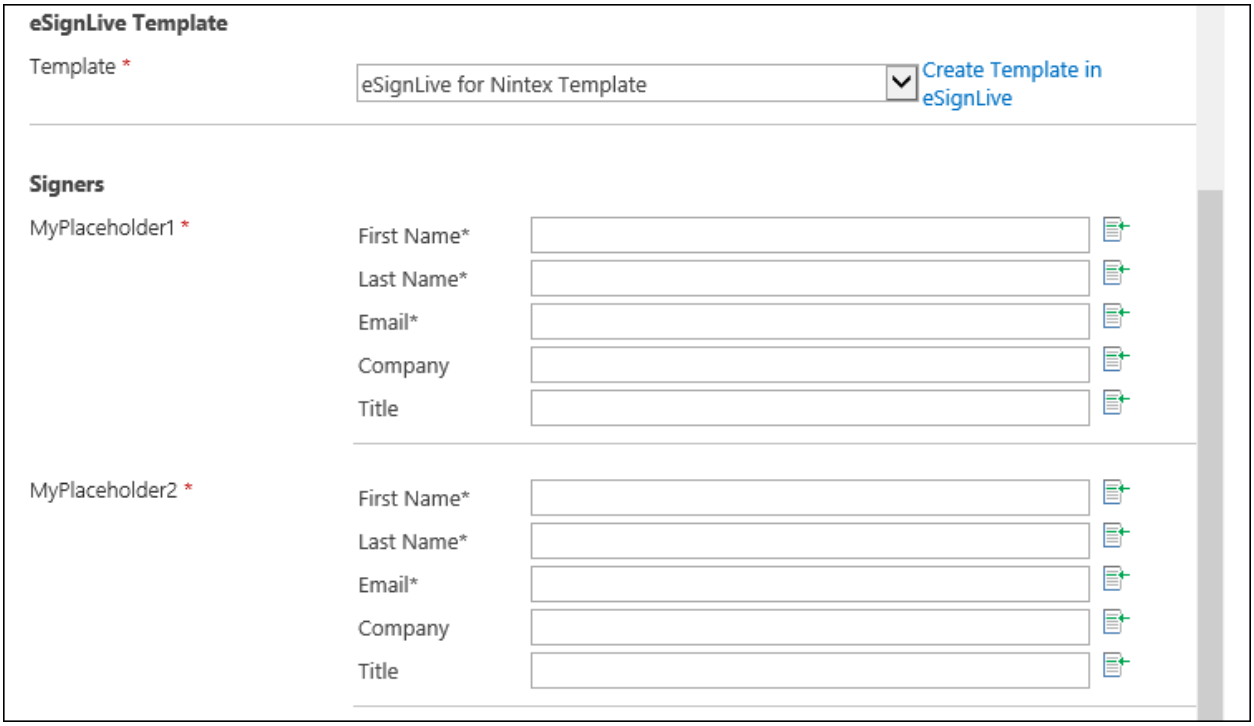
3. Fill out the **Authorization** information. Enter your **API Key**. This can be entered statically or pulled from a SharePoint/Nintex variable. If you don't know your API Key and are using a Sandbox account, you can find it by logging into your sandbox account, going to the dropdown in the top right corner, then to Admin, and finally to Integration. If you're in production or have a professional account, contact support@esignlive.com. Next, enter the **eSignLive Instance** you're using (example: https://sandbox.esignlive.com). Finally, you will need to enter the credentials of a valid sender on the account and click **Authorize**. If you enter improper information, you will see a "Invalid Authorization" message. In this case, please check the entered information to ensure its accuracy. Any time an action is re-entered, this section will be required, for security purposes.
Note: Any valid sender credentials for the given API Key can be used. Not just the original sender.

4. Once authorized, you will see the configuration page below:



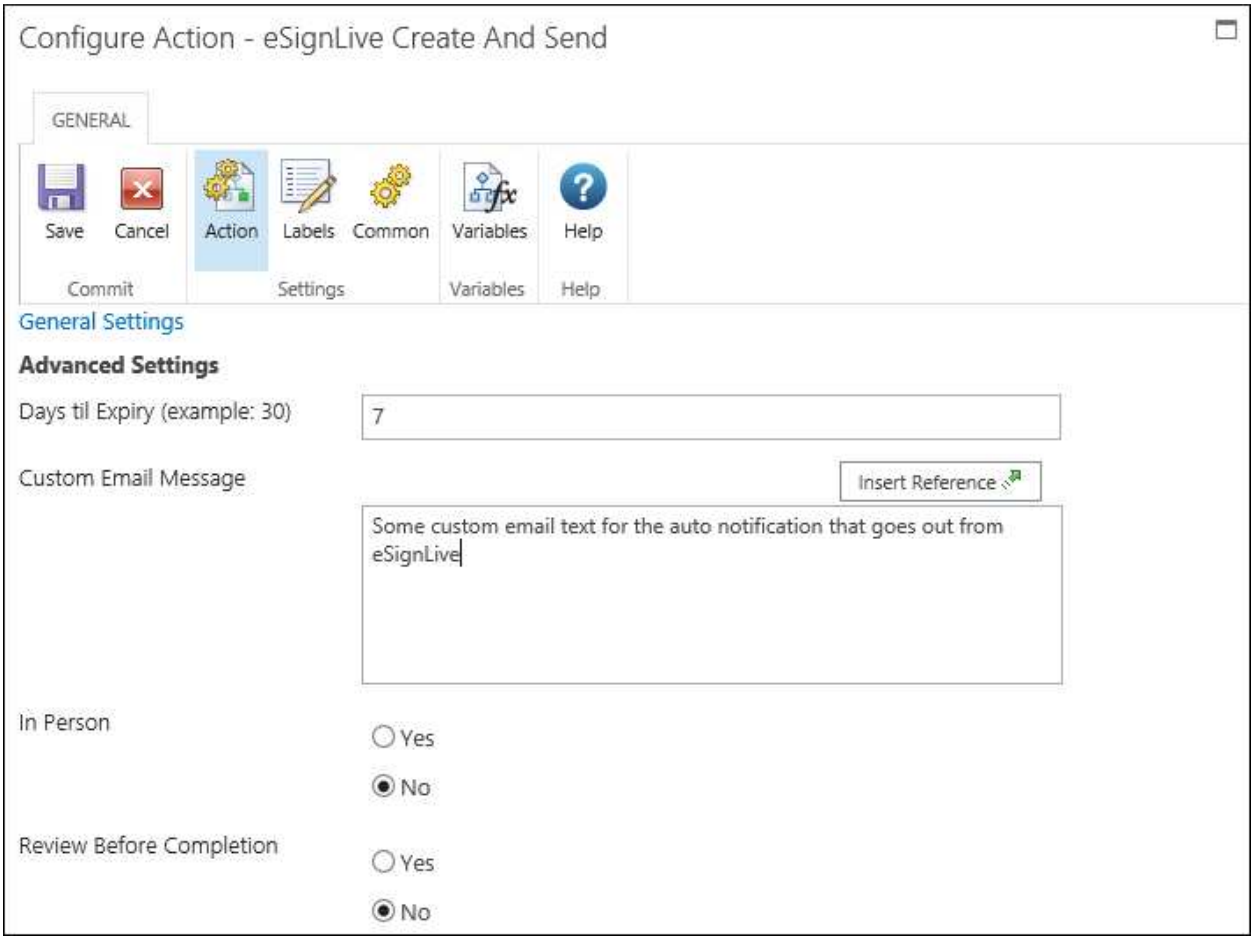
5. Enter a **Transaction Name**. This can be static text or built dynamically by selecting ***Insert Reference*** to the right of the text control. You can also set an optional description.

6. In the ***eSignLive Template*** drop down, select your desired template. When selecting the template from the list, form fields will appear for the placeholders in the transaction that you must specify information for (notice that the placeholder names you specified in the template also appear so you know which placeholder you're entering info for). If you don't have any templates in your account, you can click on **Create Template in eSignLive** and you will be directed to the instance you entered in your authorization and can log in to create one.

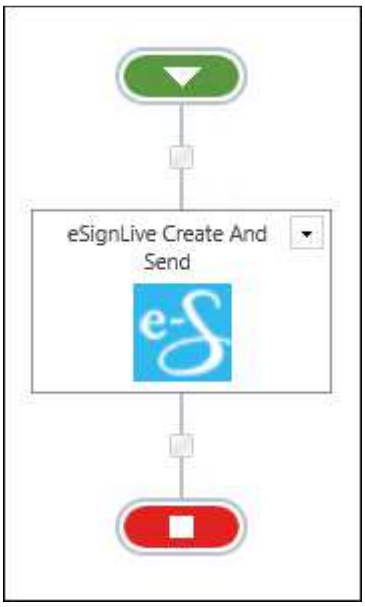


Similar to the **Transaction Name**, all of these text fields can be set as static or with workflow variables and other dynamic text by selecting the **Insert Reference** icon to the right of the text control. Only **First Name**, **Last Name**, and **Email address** are required for a signer in ***eSignLive***.

7. If you select **Advanced Options** at the top of the configuration page, you will find a few of the **Advanced Settings** you saw when setting up your template in ***eSignLive***:
    - **Expiry date:** Indicate to all signers that the documents are to be signed by a specified date. For example, if you want the package to expire in a week, you'd simply enter '7'.
    - **Custom Email Message:** Set a custom email message to all signers. The email message will go out to all recipients in the email notification from ***eSignLive***. This can be static or dynamic text.
    - **In-Person:** If you want to sign in person, check this option.
    - **Review Before Completion:** If you need to review the package and its documents before marking it complete, check this option.

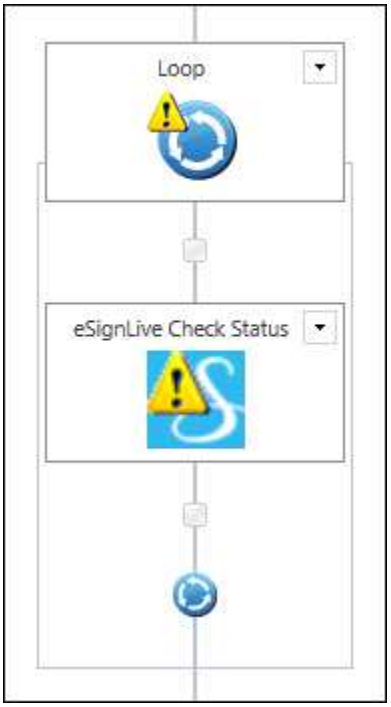


8. Finally, you must create a workflow variable for passing the transaction/package ID for this eSignLive transaction to the ***Check Status*** and ***Download Documents*** actions. From the toolbar at the top of the configuration page, select **Variables** and add a new Variable to pass the Transaction ID. Then, select the variable from the ***Transaction Id*** drop down. You will also need to do the same for the ***Transaction Status*** output variable. Finally, **Save** the action.



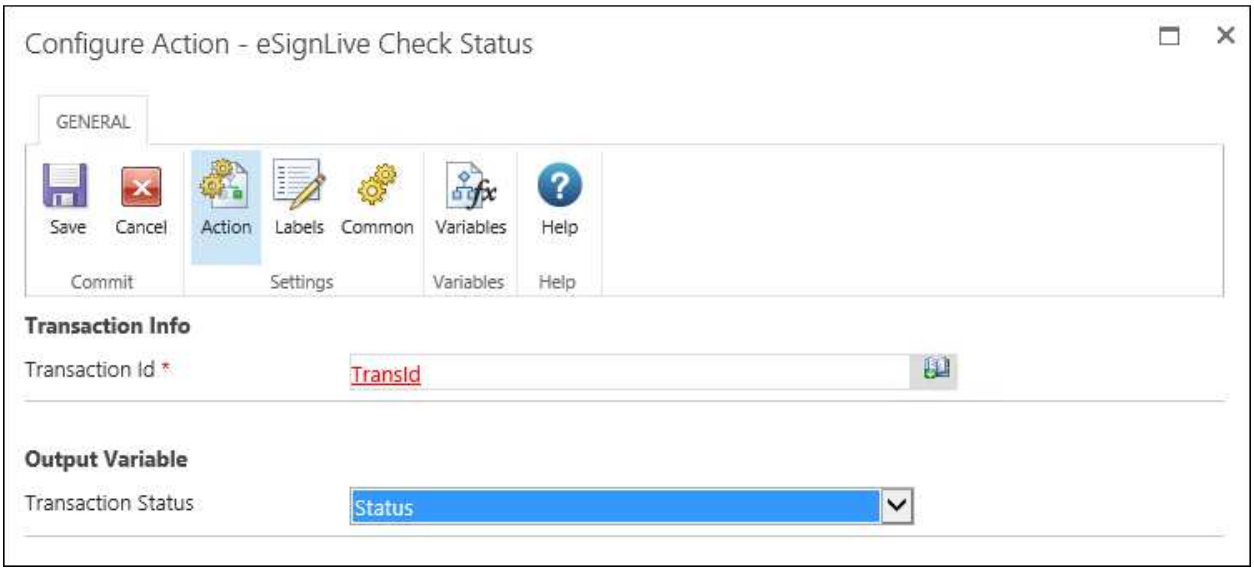
Check Status

1. The next action to add to your workflow will be the **Check Status** action. This simple action will check the status of a transaction and push the status out to a workflow variable. This action should be surrounded by a **Loop** action from the **Logic and Flow** actions group.

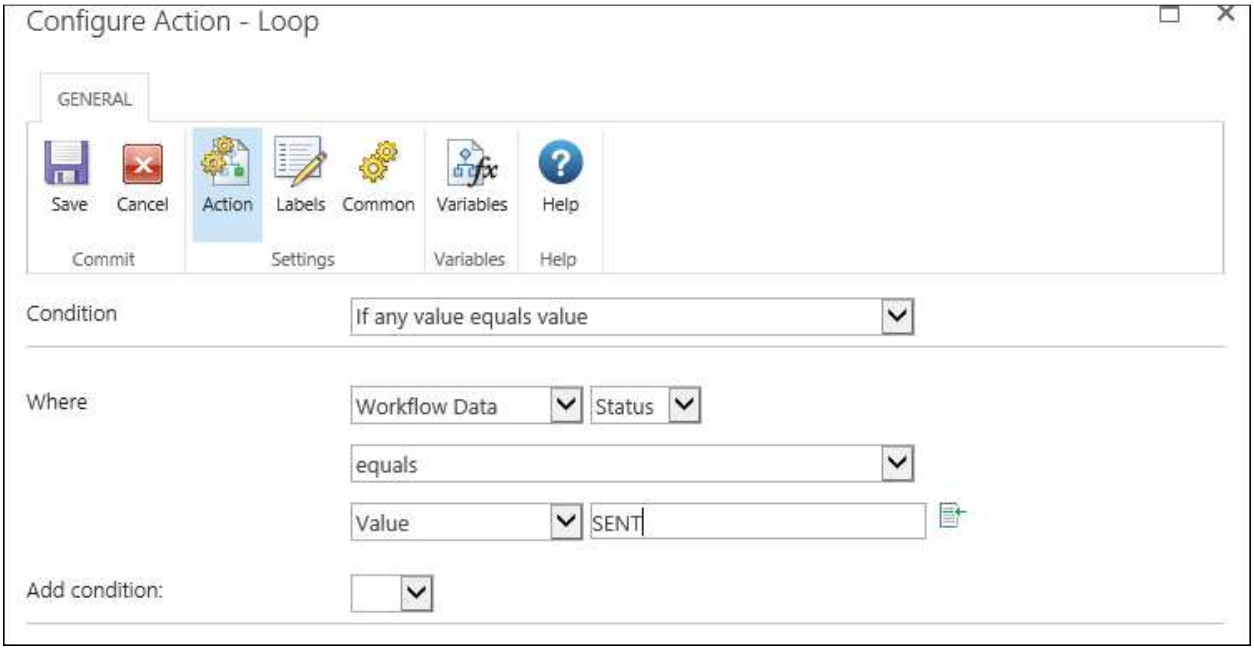


2. To configure the **Check Status** action, you will need to complete the same **Authorization** section as you did with the **Create and Send** action above. Once authorized, select the **Insert Reference** icon and select the **Workflow Variable** that you passed the transaction/package ID through from the **Create and Send** action. Next, select the variable you created to store the status value in for use in the **Loop** action and possibly further down the line in your workflow:

3. The configured **Check Status** action would look like this:



4. For the **Loop** action surrounding the **Check Status** action, continue to loop as long as the Status workflow variable is still set as **SENT**.



5. **Note:** You may also want to set a **Pause** workflow action inside the loop to slow the interval at which the workflow will go out and check the status. For example, maybe you only care to check on the status every hour.

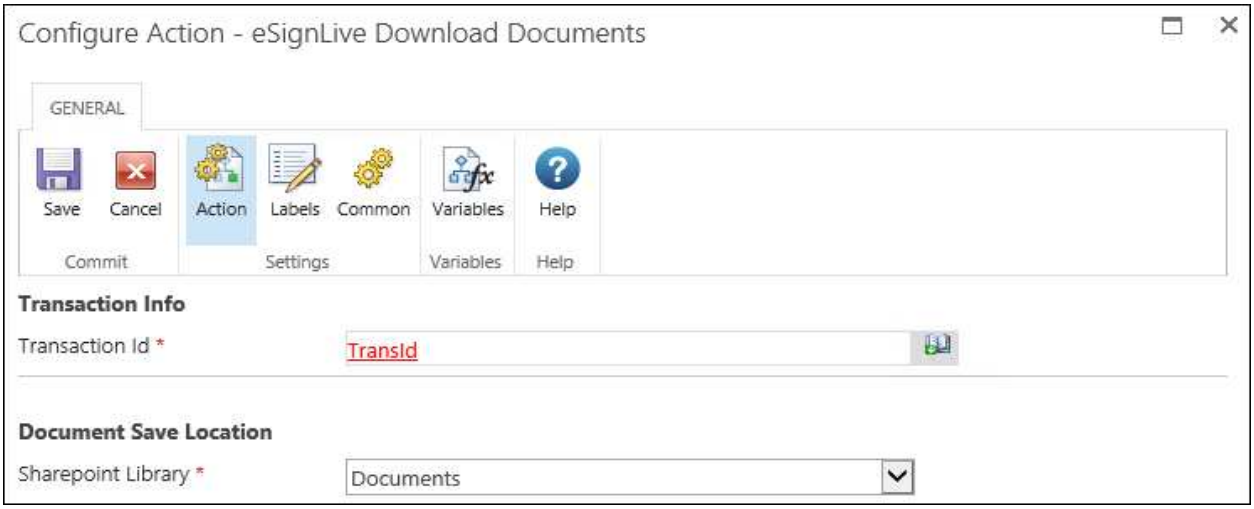
6. With **Check Status** added and configured, your workflow will now look like this:

7. Depending on the output value of the Check Status action – Opted-Out, Completed, Expired, etc. – you can decide where to take your workflow, next.

Download Documents

1. When the transaction is **COMPLETED**, you have the option to download the completed e-signed documents into a SharePoint library. To do this, simply add the **Download** action into the workflow in the **COMPLETED** channel of your workflow.

2. To configure the download action, you'll need to complete the **Authorization** section as you did in the **Create and Send** action. Next, simply select the variable from the **Create and Send** action that contains the necessary ID and choose a SharePoint library in which to save your documents.



3. The documents from the transaction will be downloaded into the chosen library with the path: ***{SharePoint Library}/{Transaction Name}/{packageId}/documentName.pdf***

Questions or Issues?

Visit the eSignLive Developer Community forums:

https://developer.esignlive.com/forums/