

## Psiog Adobe e-Sign Integration Documentation

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## 1. Document Info

<b>Software Release:</b>	<b>V1.4</b>
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## 2. Revision History

S No	Date of Modification	Change Made
1	06 Oct 2023	Document V1
2	04 Jan 2024	Added link to parent record from which the agreement is generated
3	25 Apr 2024	Included delegated user data collection and UI changes
4	27 May 2024	Modifications in System settings

## 3. Purpose

The document is intended to provide functional and technical information about the Adobe e-sign plug-in to help Users and Creatio Developers understand the functionalities and configure settings.

## 4. Plug-in Information

The Adobe e-sign plug-in is designed to facilitate the generation of Adobe e-sign agreements, sending them out for signature and receiving the signed documents directly from Creatio UI. The plug-in can be used by organizations which use/ intend to use Adobe e-sign for agreement generation with Creatio.

## 5. Build Information

S No	Particular	Details
1	Version	1.4.2405.27
2	Creatio Version Compatibility	8.0.6 +
3	Creatio Product	Across all products
4	Database	Postgres, MS SQL
5	Operating System	Windows 10
6	Platform	.NET Framework 4.7
7	Dependent Package	CrtCore
8	Environments supported	Cloud & On-premise

## 6. Features

The Adobe e-sign Integration will enable users to:

1. Generate Adobe e-sign agreements from the attachments of Freedom UI sections.
2. Send them out for signatures to the selected participants.
3. View the overall status of the agreement.
4. View the status of every participant in the agreement.
5. View the timeline of events pertaining to the agreement.
6. Obtain the signed document from Adobe e-sign.

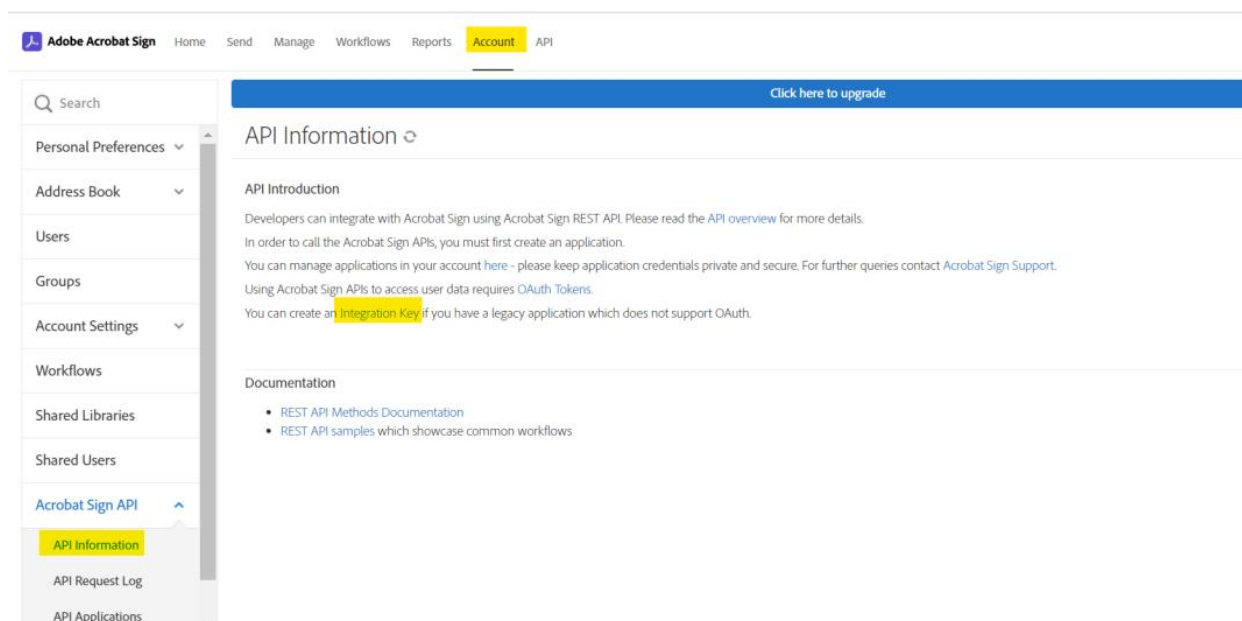
## 7. Control Points

1. Files from Classic UI Sections cannot be sent for signing.
2. The connector supports the generation of Adobe e-sign agreements from existing Freedom UI sections and new sections created with the default base form page.
3. The connector does not support the generation of Adobe e-sign agreements if the default view of the attachment list is changed to 'List' view.

## 8. Configuration

### 8.1 Adobe e-Sign Integration key generation

1. Login to Adobe Acrobat Sign and navigate to Account. Under API Information, click on "Integration Key".



2. In the Create Integration Key window, enter a name for your Integration Key, select all the permissions and click on Save.

#### Create Integration Key

Integration Keys can be used to enable legacy third-party applications to access Acrobat Sign data.


If your application requires an Integration Key, create one by providing a name below and selecting which permissions to grant to this application.

This Integration Key will have **permanent access** to your account until it is revoked.

Integration Name:

Enabled?	Scope	Description
<input checked="" type="checkbox"/>	user_read	View users in your account
<input checked="" type="checkbox"/>	user_write	Create or manage users within your account
<input checked="" type="checkbox"/>	user_login	Login access – providing full access to any user in your account overriding other requests
<input checked="" type="checkbox"/>	agreement_read	Access documents & data on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_write	Manage the status of documents on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_send	Send documents on behalf of any user in your account
<input checked="" type="checkbox"/>	widget_read	View web forms on behalf of any user in your account
<input checked="" type="checkbox"/>	widget_write	Create, edit or publish web forms on behalf of any user in your account
<input checked="" type="checkbox"/>	library_read	View templates and document library on behalf of any user in your account
<input checked="" type="checkbox"/>	library_write	Manage the templates and document library on behalf of any user in your account
<input checked="" type="checkbox"/>	workflow_read	View workflows on behalf of any user in your account
<input checked="" type="checkbox"/>	workflow_write	Create workflows on behalf of any user in your account
<input checked="" type="checkbox"/>	webhook_read	View webhooks on behalf of any user in your account
<input checked="" type="checkbox"/>	webhook_write	Create or edit webhooks on behalf of any user in your account
<input checked="" type="checkbox"/>	webhook_retention	Permanently delete webhooks on behalf of any user in your account
<input checked="" type="checkbox"/>	application_read	View applications.
<input checked="" type="checkbox"/>	application_write	Manage applications, includes: managing OAuth scopes, application name, display name.

3. The Integration Key now appears under your 'Access Tokens'.


[Home](#)
[Send](#)
[Manage](#)
[Workflows](#)
[Reports](#)
[Account](#)
[API](#)

[Personal Preferences](#)



- My Profile
- [Access Tokens](#)
- Auto Delegation
- My Notifications
- Shared Notifications

### Access Tokens

Application	Permissions	Date
Creatio E-Sign Test	View users in your account Create or manage users within your account Login access – providing full access to any user in your account overriding other requests Access documents & data on behalf of any user in your account Manage the status of documents on behalf of any user in your account Send documents on behalf of any user in your account	10/05/2023

- Click on the name of the newly generated Integration Key and click on 'Integration Key'.

#### Access Tokens

 Search
 

[Integration Key](#) | [Revoke](#)

Creatio E-Sign Test

View users in your account
10/05/2023

Create or manage users within your account

Login access – providing full access to any user in your account overriding other requests

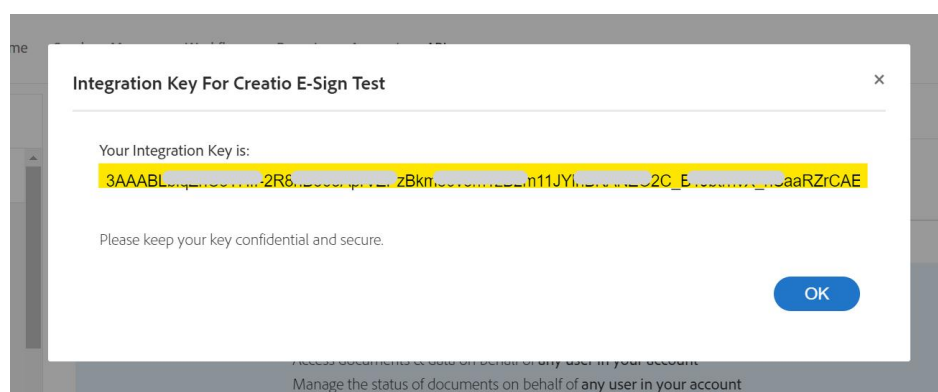
Access documents & data on behalf of any user in your account

Manage the status of documents on behalf of any user in your account

Send documents on behalf of any user in your account

View web forms on behalf of any user in your account

- Copy your Integration Key from the box that pops up.



## 8.2 System Settings

In the System settings section, configure the following values:

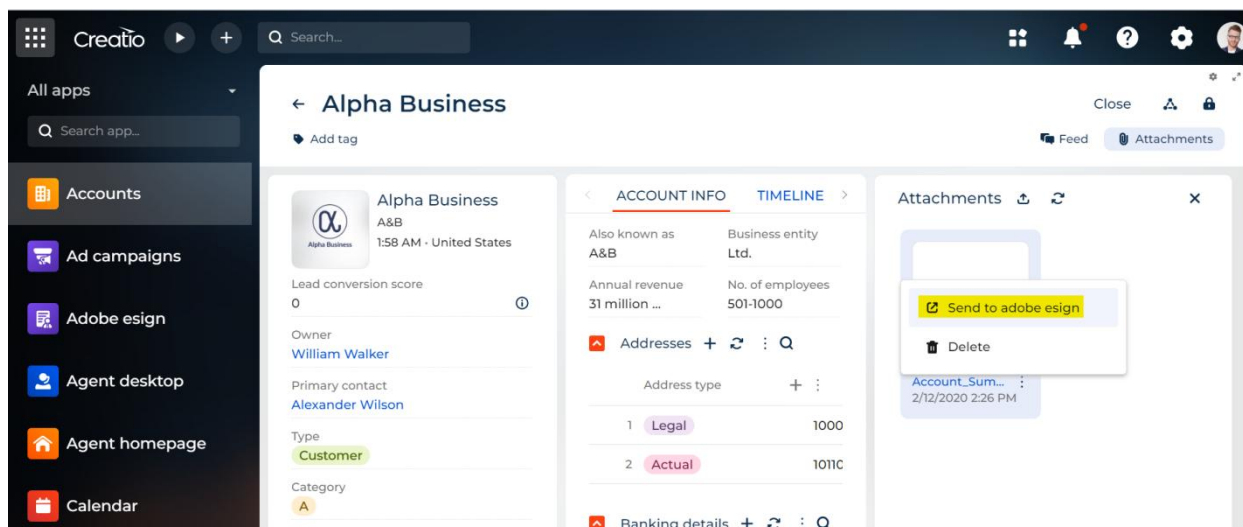
S No	Name	Code	Description
1	Adobe E-Sign Integration Key	PsgAESIntegrationKey	Integration Key (obtained in Step <a href="#">8.1</a> )

## 8.3 License Allocation

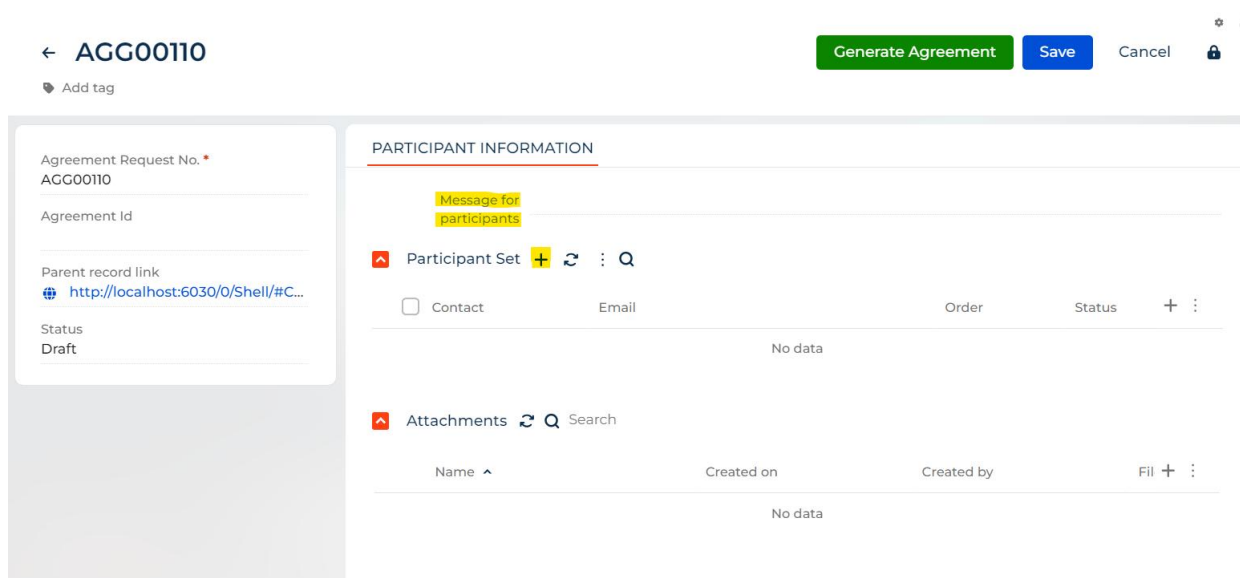
A license must be allocated to Supervisor and other relevant system users.

## 9. Walk-through

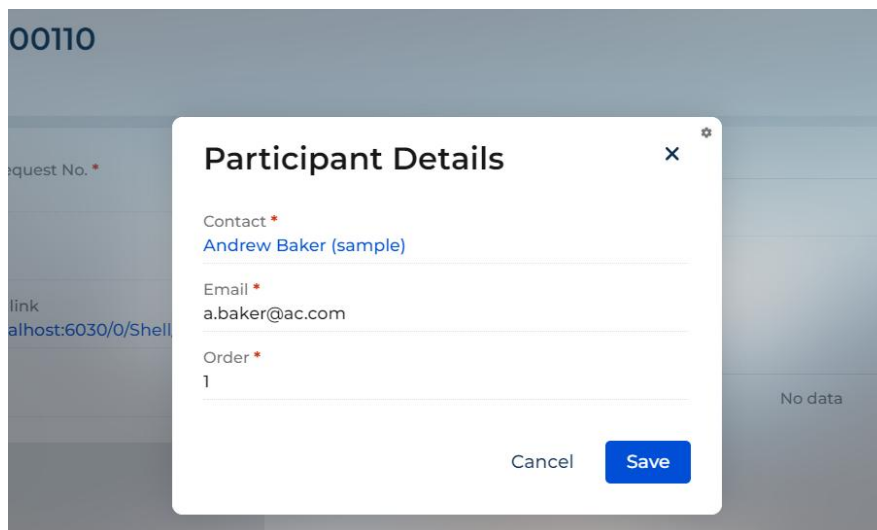
1. Go to the 'Attachments' list of the record (in a Freedom UI section) where your file is located. Click on the menu options and select "Send to adobe esign".



2. An Adobe Esign page to fill out participant details opens up. You can enter a message to be sent to the participants (optional) and add the list of participants under Participant Information Tab.



- 2.1. Once you click on the “+” (Add record) button for the Participant Set, a mini page opens up, asking for the participant details. The ‘Email’ field is auto-populated if there is an email associated with the selected contact. You can also edit the email field if you want to send the agreement to an alternate email address.



**Participant Details**

Contact \*  
Andrew Baker (sample)

Email \*  
a.baker@ac.com

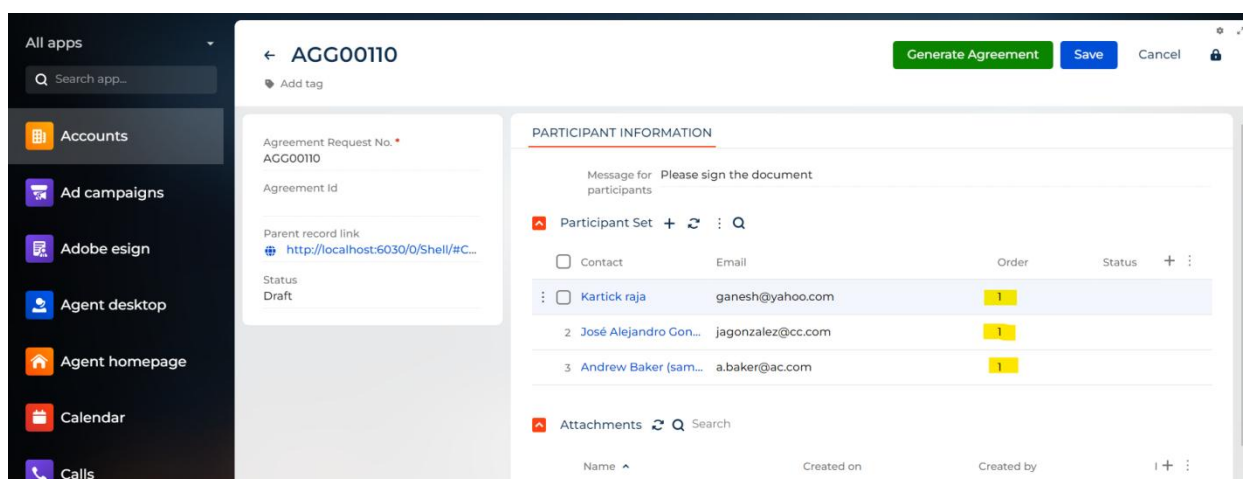
Order \*  
1

Cancel Save

- 2.2. The ‘Order’ field is filled in based on the order in which the participant is supposed to sign the agreement.

### 2.3. Guidelines for filling ‘Order’ of participant set:

- 2.3.1. If the agreement must be sent out for signing by multiple participants at the same time, i.e., in parallel, fill the ‘Order’ field with the value **1** for all participants.



**AGG00110**

Generate Agreement Save Cancel

Agreement Request No. \*  
AGG00110

Agreement Id

Parent record link  
<http://localhost:6030/0/Shell/#C...>

Status  
Draft

**PARTICIPANT INFORMATION**

Message for participants  
Please sign the document

Participant Set + - : Q

Contact	Email	Order	Status
<input type="checkbox"/> Kartick raja	ganesh@yahoo.com	1	
2 José Alejandro Gon...	jagonzalez@cc.com	1	
3 Andrew Baker (sam...	a.baker@ac.com	1	

Attachments - Q Search

Name ^ Created on Created by

- 2.3.2. If the agreement must be sent out for signing by multiple participants in a sequential manner, fill the ‘Order’ field with the order in which the participant must sign (1, 2, 3, etc.).



**AGG00110**

Generate Agreement Save Cancel

Agreement Request No. \* AGG00110

Agreement Id

Parent record link <http://localhost:6030/0/Shell/#C...>

Status Draft

**PARTICIPANT INFORMATION**

Message for participants Please sign the document

Participant Set + - : Q

Contact	Email	Order	Status
1 Kartick raja	ganesh@yahoo.com	1	
2 José Alejandro Gon...	jagonzalez@cc.com	2	
3 Andrew Baker (sam...	a.baker@ac.com	3	

Attachments Search

2.3.3. If the agreement must be sent out for signing by multiple participants in a hybrid manner, i.e., say the first 2 participants have to receive the document for signing at the same time and the third participant has to receive it only after the first 2 have signed, then the value of the 'Order' field for the first 2 participants will be 1 and that for the third participant will be 2.

**AGG00110**

Generate Agreement Close

Agreement Request No. \* AGG00110

Agreement Id

Parent record link <http://localhost:6030/0/Shell/#C...>

Status Draft

**PARTICIPANT INFORMATION**

Message for participants Please sign the document

Participant Set + - : Q

Contact	Email	Order	Status
1 José Alejandro Gon...	jagonzalez@cc.com	1	
2 Kartick raja	ganesh@yahoo.com	1	
3 Andrew Baker (sam...	a.baker@ac.com	2	

Attachments Search

(Note: Agreements can be generated in Hybrid signing mode only if you have enabled "Allow senders to specify hybrid routing order" in Adobe Acrobat Sign -> Account -> Account Settings -> Send Settings -> Signing Order)

Adobe Acrobat Sign Home Send Manage Workflows Reports Account API

Search

Account Settings

Global Settings

Account Setup

Signature Preferences

Digital Signatures

Electronic Seals

Digital Identity

Report Settings

Security Settings

Send Settings

**Send Settings**

Signing Order

- Recipients will sign in the order they are entered
- Recipients will sign in any order
- ☒ Allow senders to select signing order
- ☒ Allow senders to specify hybrid routing order

Liquid Mode

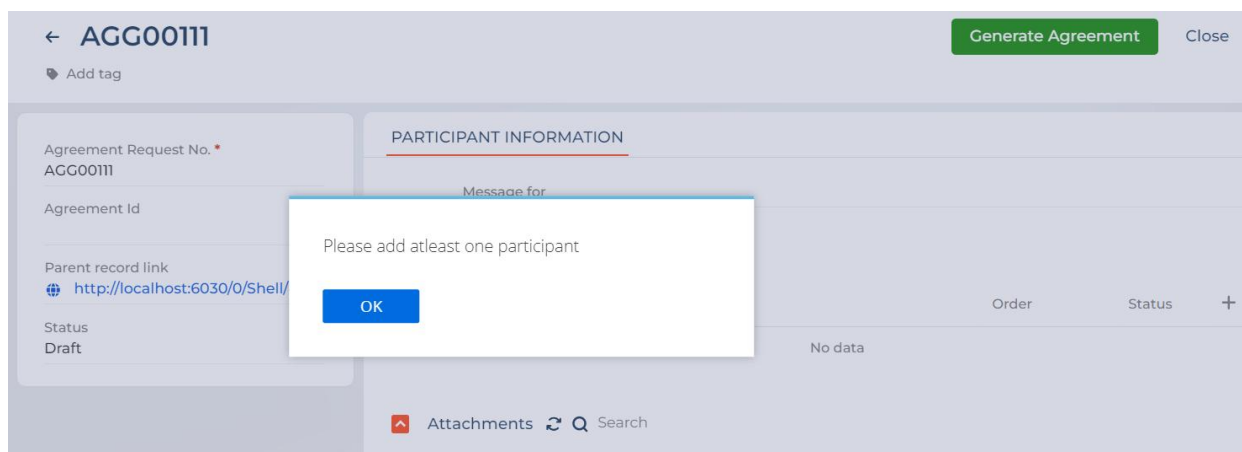
- ☐ Allow recipients to review and sign in a mobile responsive view of the agreement

Custom Workflow Controls

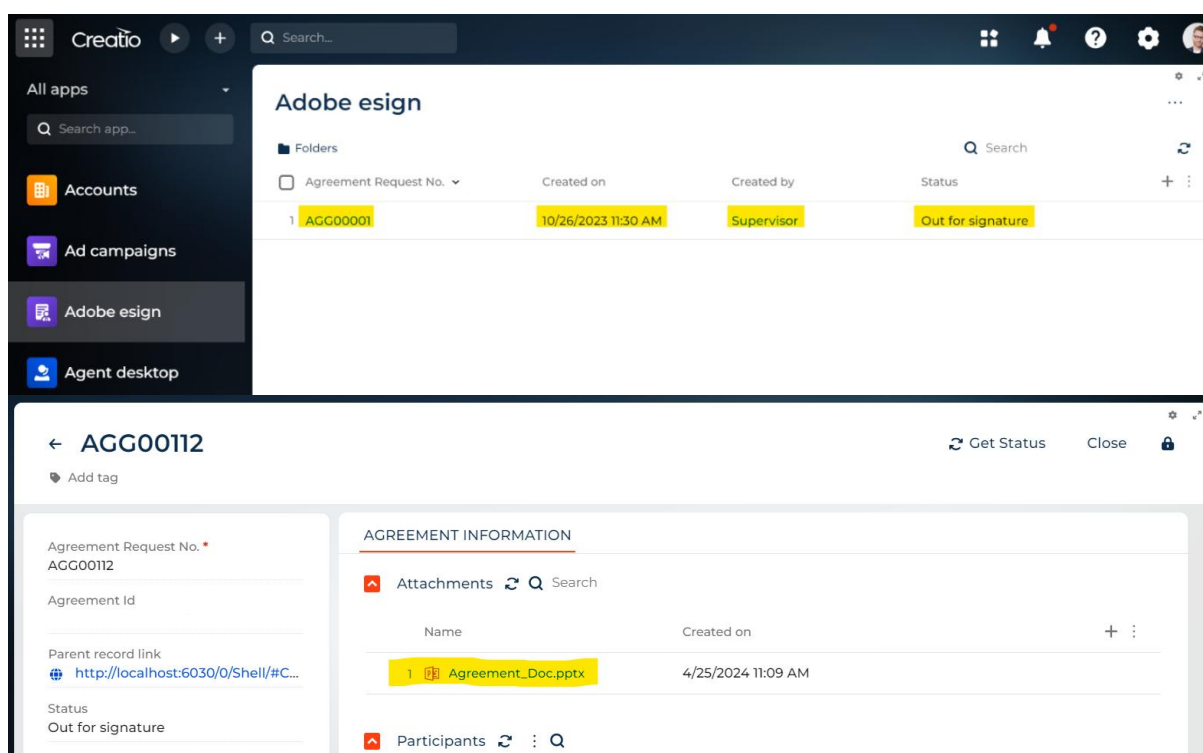
- ☒ Enable new Custom Workflow send experience
- ☐ Enable template defined signature placement

Upload Options on E-sign Page

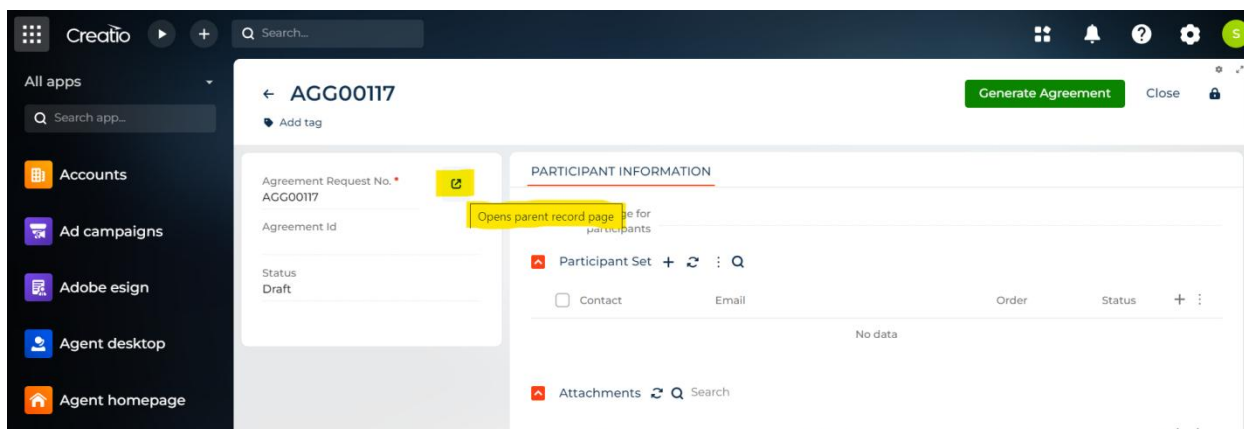
2.3.4. After you fill the participants, click 'Save'. A **minimum of 1 participant** must be filled in for agreement generation. In case no participant is filled in, the following error message is displayed:



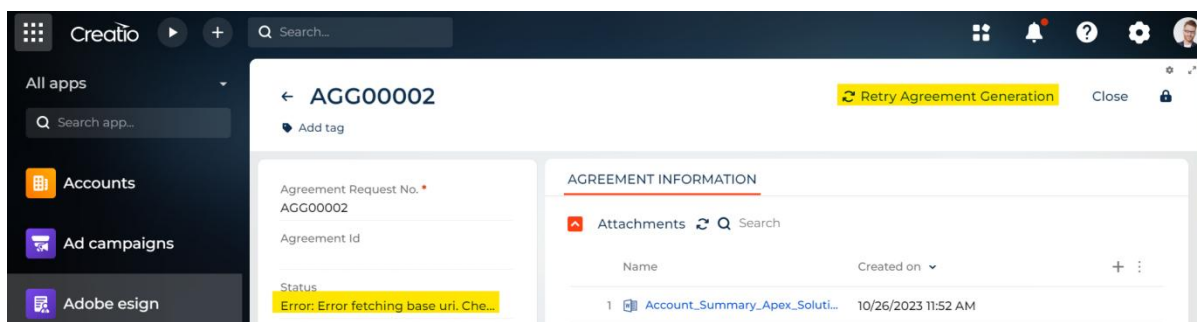
3. The newly generated agreement can be seen in the 'Adobe esign' section. The document sent for signing can be found in the 'Attachments' list of that agreement.



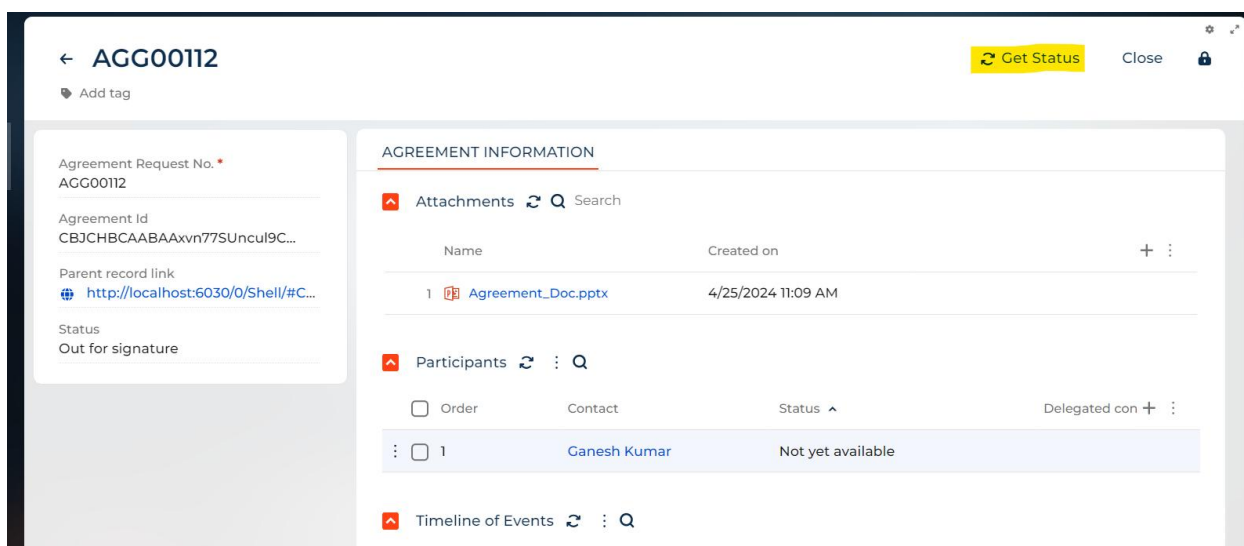
Users can access the page of the "Parent record" where the attachment is located, by clicking the button adjacent to the "Agreement request No." field.



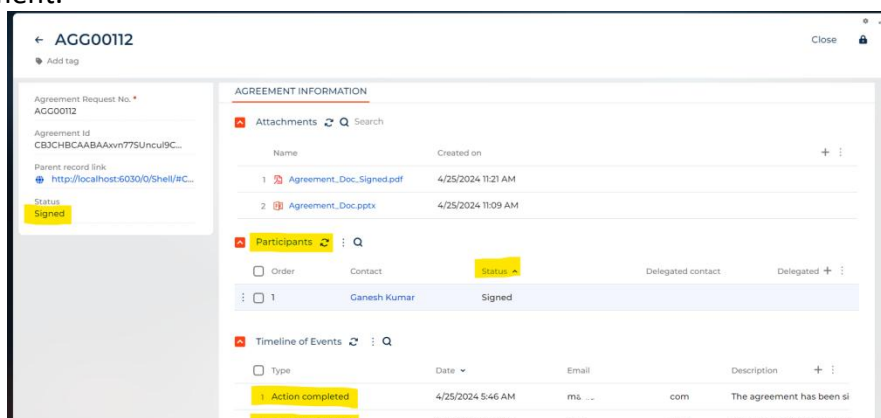
4. In case an error is encountered during document generation, the error message can be seen in the status field of the corresponding agreement. Click on the [Retry Agreement Generation](#) button to retry generating the agreement.



5. Once an agreement is generated, the status is checked every 5 minutes. You can also manually check the status of a pending agreement by clicking on the [Get Status](#) button.



This will update the overall status, participant-wise status and the timeline of events pertaining to the agreement.



**AGG00112**

Agreement Request No. \* AGG00112

Agreement Id CB3CHBCAABAAxv775Uncu9C...

Parent record link <http://localhost:6030/0/Shell/#C...>

Status **Signed**

**AGREEMENT INFORMATION**

**Attachments**

Name	Created on
1 Agreement_Doc_Signed.pdf	4/25/2024 11:21 AM
2 Agreement_Doc.pptx	4/25/2024 11:09 AM

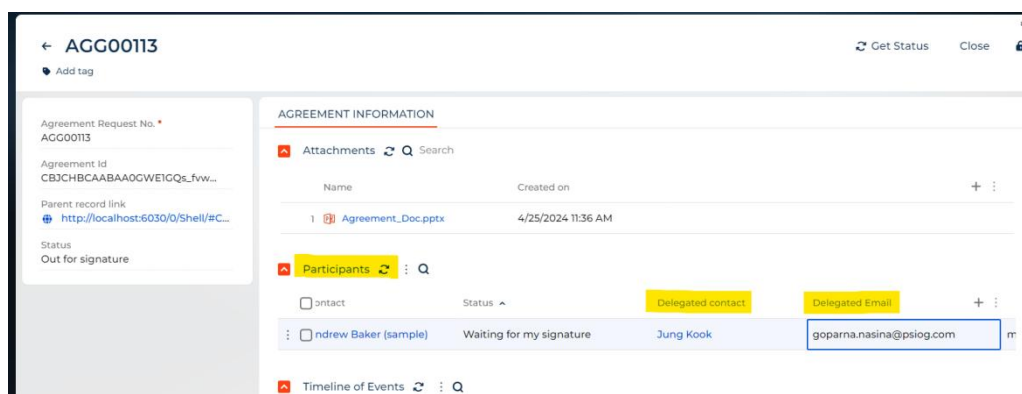
**Participants**

Order	Contact	Status	Delegated contact	Delegated
1	Ganesh Kumar	Signed		

**Timeline of Events**

Type	Date	Email	Description
1 Action completed	4/25/2024 5:46 AM	ma...com	The agreement has been si
2 Documents viewed	4/25/2024 5:45 AM	mar...com	Agreement viewed by Mani

- If a signatory delegates to others the Email address of the delegated user and the contact (if email has a contact in Creatio) will be set to the “Delegated Email, Delegated Contact” fields. When the task is delegated to others, the email address of the delegated user and, if available, the contact (if email contains a contact in Creatio) will be assigned to **Delegated Email, Delegated Contact** fields for that participant.



**AGG00113**

Agreement Request No. \* AGG00113

Agreement Id CB3CHBCAABAAOCWEIGQs\_fwv...

Parent record link <http://localhost:6030/0/Shell/#C...>

Status Out for signature

**AGREEMENT INFORMATION**

**Attachments**

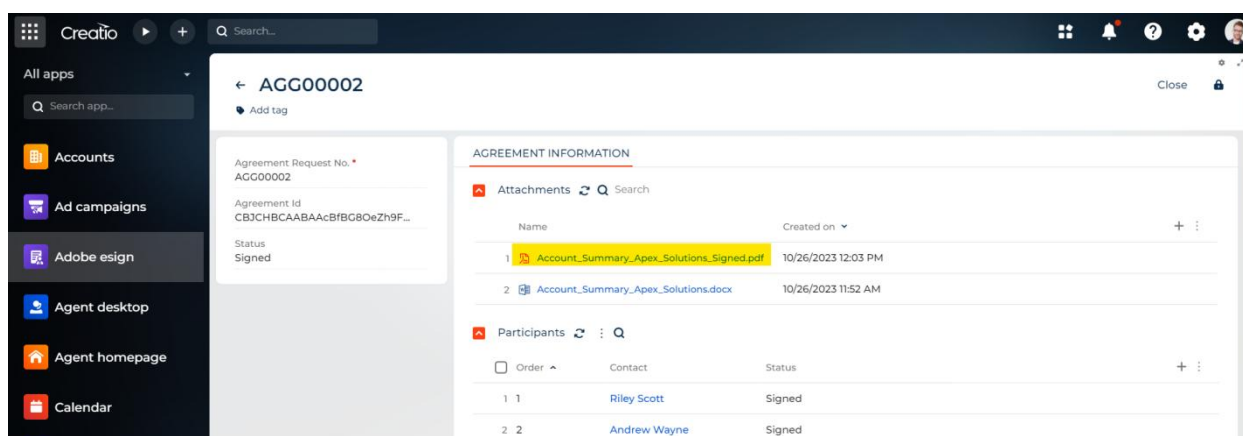
Name	Created on
1 Agreement_Doc.pptx	4/25/2024 11:36 AM

**Participants**

Order	Contact	Status	Delegated contact	Delegated Email
1	ndrew Baker (sample)	Waiting for my signature	Jung Kook	<a href="mailto:goparna.nasina@pslog.com">goparna.nasina@pslog.com</a>

**Timeline of Events**

- Once an agreement has been signed, the signed document is added to the ‘Attachments’ list with the name **{fileName}\_Signed.pdf**. This signed document can be downloaded by clicking on the file name.



**AGG00002**

Agreement Request No. \* AGG00002

Agreement Id CB3CHBCAABAAcBfBG8OeZh9F...

Status Signed

**AGREEMENT INFORMATION**

**Attachments**

Name	Created on
1 Account_Summary_Apex_Solutions_Signed.pdf	10/26/2023 12:03 PM
2 Account_Summary_Apex_Solutions.docx	10/26/2023 11:52 AM

**Participants**

Order	Contact	Status
1	Riley Scott	Signed
2	Andrew Wayne	Signed