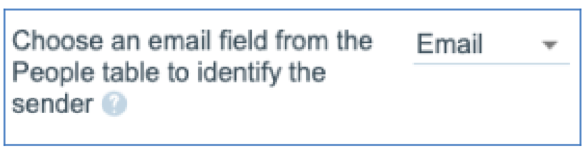
Adobe Sign Setup

This article describes the setup process that an administrator should follow to integrate a KB with AdobeSign. To use Adobe Sign for contract management and other eSigning requirements, see Manage Documents with Adobe Sign. To set up AdobeSign, you must complete the Integration wizard, as well as have an existing AdobeSign account.

Setup

Follow the process below to set up AdobeSign.

1. Navigate to the **Setup** gear icon and click **Integration**. Look under the Adobe Sign heading.
2. Click **Configure** and proceed to step 3. However, if the button is labeled Deploy:
    a. Click **Deploy** to deploy the Adobe Sign configuration elements to the KB.
    b. Click **OK** on the message that appears. The system adds all the necessary configuration elements, which may take a few minutes. When complete, proceed to step 3.
3. In the Adobe Sign wizard, select an Email field from the People table. This is used to identify the sender. The field determines whether you send agreements from a single account or multiple accounts.



4. Click **Register a New Account**. This opens the Adobe Sign Licensing Portal in Agiloft.

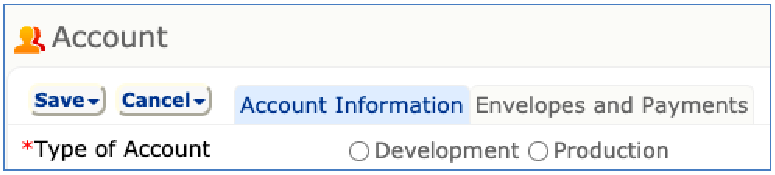
Before proceeding, consider the type of account that you are registering: a testing account or a production account. Adobe Sign Developer accounts can be created specifically for testing purposes. When creating a testing account, register a separate account from the main account you intend to use for production. We recommend first creating the Developer account for testing, as this can be changed to a Production account when testing is complete. For more information about moving from a Developer account to a Production account, see Manage Production and Development Environments.

> Your Adobe Sign account email address must be unique to the current KB due to requirements in licensing. If you enter an email address already being used in another KB, you receive an error message and are unable integrate your account. It is best to use an admin or system account for this address rather than an end user account.

Account Setup

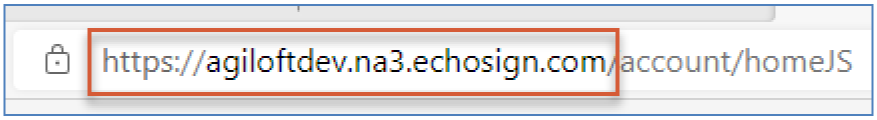
After you have determined your account type, proceed in the Adobe Sign Licensing Portal that appears after clicking **Register a New Account**:

1. On the main Account screen, select whether the account is either Development (for testing) or Production (for a live environment). Note that documents produced by a Development account have watermarks. Selecting Production also adds the 'Notify when Number of Available Agreements is less than' field, which is explained below.

2. Choose either to link an existing Adobe Sign account or to create a new one.
   - If you select "I already have an Adobe Sign account":
     a. First, verify your server URL. In a separate browser tab or window, go to the Adobe Sign Login Page, log in with the email and password for your Adobe Sign account, and copy the domain name from the address bar, including the `.com` in the address. For example, your domain might be something like `example.agiloft.com`.
     b. Go back to the Account screen in Agiloft and ensure that the server URL you copied matches the URL in the "Adobe Sign account server URL" field. If it doesn't, replace the old URL with the one you just copied.
     c. If you are creating a Production account, choose whether to use agreements purchased through either Agiloft or Adobe. If you would like to use agreements purchased through Adobe, pause here and go complete the steps to Use Your Existing Adobe Sign Account with Agiloft.
     d. Enter the remaining account details on the Account screen in Agiloft.
     e. Proceed to step 4.
   - If you select "I want to create a new Adobe Sign account", enter an email address for Agiloft notifications. If you are creating a Production account, you can enter a number in the "Notify When Number of Available Agreements is Less Than" field. This field notifies you via email when that condition is met. We recommend using an admin account for this address, and it may be the same as your Adobe Sign account email address.
3. Complete the other required fields with the information you want to display on agreements. Remember that if you plan to use a single shared account, the name you enter here is shown on all agreements sent from Agiloft.
4. Accept the Adobe Sign terms and conditions.
5. Click Save and close the account screen.
6. If you selected to use an existing Adobe Sign account in step 2, proceed to the Grant Access to the Account section. If you selected to create a new Adobe Sign account in step 2, click Manage Account and follow the substeps below.
   a. In a separate browser tab or window, go to the Adobe Sign Login Page.
   b. Enter the email and password for your Adobe Sign account. These are the credentials you chose a few moments ago when you set up your account in Agiloft.
   c. When you log in, follow the given instructions to check your email and verify your account.

d. After your account is verified, go to your account page and copy the server URL from the address bar, which includes everything up to and including the ".com" in the address. For example, your sever URL might be something like `https://agiloftdev.na3.echosign.com`.



e. Go back to the Account screen in Agiloft, click Edit, and replace the default server URL in the Adobe Sign Account Server URL field with your server URL.

f. Click Save and then close the Account screen.

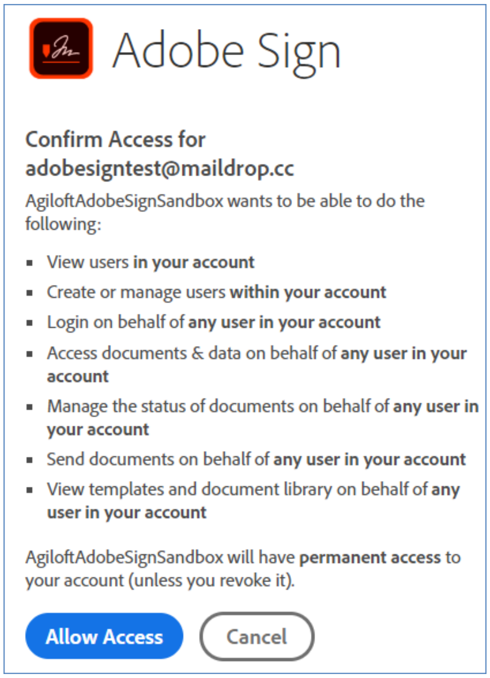
Grant Access to the Account

1. In the Adobe Sign wizard, click Proceed with Account Setup.
2. In the Knowledge Base Server URL field, enter the first part of the URL in your current address bar. This is usually something like `https://companyname.agiloft.com`. Do not include a slash (/) at the end of the URL.
3. Click Grant Access to Adobe Sign Connect. This opens the Adobe Sign page where you can log in and grant access to the knowledgebase using your Adobe Sign credentials.

> ⚠ If you receive an error message in Agiloft that your account is not authorized or similar, click Deactivate Account and repeat the steps in the previous section to again register the account with your KB. If you created a new Adobe Sign account in the previous section, select the option that you already have an Adobe Sign account this time and enter the login credentials you created. You do not need to create the account again.

4. For new accounts, you might need to click an email verification link if you didn't previously verify your account. Otherwise, if the login attempt is unsuccessful for any reason, navigate back to your AgiloftKB, click Grant Access to Adobe Sign Connect, and enter your Adobe Sign credentials again.

5. Click Allow Access.



6. Once the connection has been successfully established, return to the KB and click Grant Access again. Make sure the Access Granted field says Yes. At this point, you can add or edit Adobe Sign agreement actions and corresponding action buttons if necessary. For more information, see Add Adobe Sign Actions to Other Tables.
7. Click Save.

Configure Adobe Sign Account Web Settings

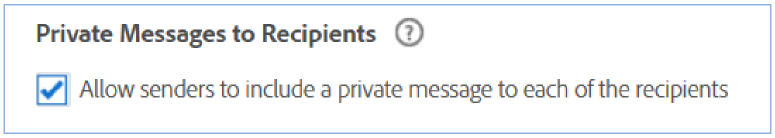
You might need to adjust the Adobe Sign configuration once the account is created.

Enable Message and Send Settings

Once you have an Adobe Sign account, log in at Sign In to Adobe Sign and complete the following steps to ensure certain settings are enabled.

1. In the Adobe Sign Account menu, select **Account > Account Settings > Send Settings** .
2. If you want to use additional recipient roles like delegators and acceptors, select the appropriate values under Allowed Recipient Roles.

3. Under Private Messages to Recipients, select "Allow senders to include a private message to each of the recipients."



Allow private messages in Adobe Sign settings

4. Under Signing Order, select "Recipients will sign in any order," "Allow senders to select signing order," and "Allow senders to specify hybrid routing order."
5. Click Save.

For information on adding senders through the Adobe Sign web interface, see Add Users in Adobe Sign, or see Add Users in Agiloft to add senders through your knowledgebase.

Configure Digital Signature Settings

Adobe Sign accounts on the Adobe Sign EU1 instance in Europe have eIDAS compliant Qualified Timestamps applied by default. If your organization isn't based in Europe, but you need your signatures to be e-IDAS compliant, make sure that digital signatures are enabled in Adobe Sign under **Account > Account Settings > Digital Signatures**. For more information, refer to the Adobe Sign documentation about eIDAS and configuring digital signatures.

Customize Branding

With Adobe Sign, you can customize the eSignature process to reflect your own branding. For more information, refer to the Adobe Sign documentation about branding.

Add Adobe Sign Actions to Other Tables

After setting up your Adobe Sign account and granting access from an Agiloft knowledgebase, you can make the Adobe Sign agreement action available to specific tables other than the default Adobe Sign tables. This lets you send out Adobe Sign agreements from tables of your choice.

1. Navigate to **Setup > Integration** and click Configure under Adobe Sign.
2. Select a table and click Add Action to open the Adobe Sign Action screen.
3. Add a name and description for the action.
4. Select an Attached Document file field from the table that holds the document to be signed.

5. If desired, select a signature workflow. Signature workflows are used only when a signing order is not defined on the Recipients tab. However, we strongly recommend always using a signing order because it offers more predictable control over agreement behavior. If the signature workflow is left at the default value and no signing order is defined, the agreement is sent to all recipients at the same time. For more information about signing order and signature flow, see Manage Documents with Adobe Sign.
6. Add any other information to be included in the email to the Adobe Sign recipient.
7. Click the Recipients tab and configure each option:
    a. **Number of Recipients**: Indicates the number of recipients to whom agreements are sent. The maximum number of recipients is 9.
    b. **Signing Order**: Determines the order in which a recipient signs, approves, and delegates. Subsequent recipients do not receive email notifications to interact with the document until previous recipients have completed the action specified by their role.
    c. **Role**: Determines how the recipient interacts with the document:
        - **Signer**: Recipient receives the document for signing.
        - **Approver**: Recipient receives the document for approval but is not required to sign it.
        - **Delegate to Approver**: Recipient receives the document and may review it, but they cannot otherwise interact with it. They must delegate it to another individual for approval by manually entering the approver's email address. The approver to which they delegate cannot be a party to the current agreement in any role.
        - **Delegate to Signer**: Recipient receives the document and may review it, but they cannot otherwise interact with it. They must delegate it to another individual for signing by manually entering the signer's email address. The signer to which they delegate cannot be a party to the current agreement in any role.

        > ⚠ To allow recipients to approve and delegate documents, you must first enable the appropriate options in your Adobe Sign account:
        >
        > i. Log in to your account at https://agiloft.na2.echosign.com/public/login.
        > ii. Go to **Account > Account Settings > Send Settings**.
        > iii. Under Allowed Recipient Roles, select the appropriate options.
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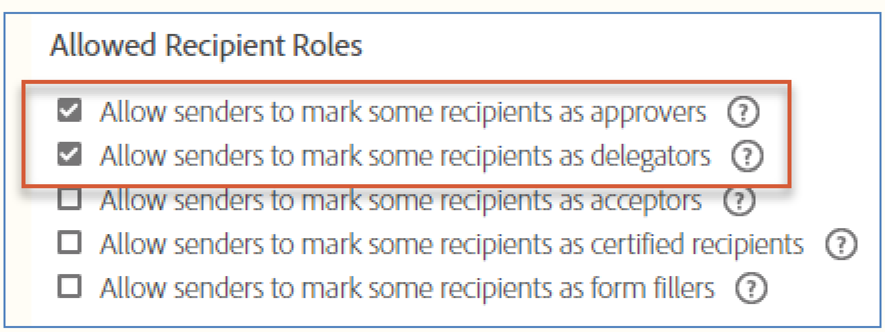
        > 
        >
        >
        > iv. Click Save.

    d. **Recipient Field**: Indicates the linked field to the People table used to identify the recipient.
    e. **Message**: Provides an optional message to the recipient.

8. Click Save when complete. The Adobe Sign Agreement action is added to the list of available actions in the table. This also automatically creates an Adobe Sign Agreements tab in the table, which contains a Create Adobe Sign Agreement action button, as well as fields for Adobe Sign Agreements and Adobe Sign Recipients.

Manage Agreements

If you're using a Production account, you can purchase agreements directly through the Adobe Sign wizard in Agiloft:

1. Navigate to **Setup > Integration** and click Configure under Adobe Sign.
2. Click Manage Account and go to the Envelopes and Payments tab.
3. Click Buy Agreements once the Production account has been authenticated. This opens the Adobe Sign payment screen. The current pricing tiers will be displayed at the top.

*Payment Method Credit Card

Pricing Tiers

Number of Envelopes	Cost per Envelope (USD)
25 - 499	$3.95
500 - 2,499	$3.50
2,500 - 9,999	$3.00
10,000 - 49,999	$2.25
50,000 - 1,000,000	$1.50

4. Choose a payment method. You can either pay by credit card or by invoice.
   - If paying by card, add the card details to the fields and click Buy. This processes the purchase through your own card.
   - If paying by direct invoice to Agiloft, you should have a payment agreement prearranged. Enter a number of agreements and click Buy.

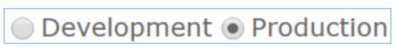
You can navigate back to this screen at any time to see the current status of your available agreements and payment history.

For more information on agreement pricing, see eSigning Integrations. If you have an existing Adobe Sign Enterprise account, you can also purchase agreements through Adobe and use them in Agiloft. For more information on using an existing Adobe Sign account, see Use Your Existing Adobe Sign Account with Agiloft.

Manage Development and Production Environments

A single knowledgebase can be used to both test the Adobe Sign integration in development and then use it in production. Once testing has been completed successfully, perform the following steps to change the account type to Production:

1. In Agiloft, navigate to **Setup > Integration** and click Configure under Adobe Sign.
2. Click Deactivate Account to disconnect the Development account.
3. Click OK in the confirmation dialog.
4. On the Integration screen, again click Configure under Adobe Sign.
5. Click Register a New Account.
6. Select the Production checkbox.



7. Register a new Production account by following the steps above to create an account.

Recommended Migration Process

Due to the complications inherent with migrating user accounts in Adobe Sign, we recommend a process of testing and then migration:

1. Set up a development knowledgebase with test accounts for Adobe Sign.
2. Perform testing to make sure the signature process works as desired.
3. Export the relevant entities, such as the Adobe Sign Agreements table and relevant action buttons in other tables, to a production knowledgebase.
4. In the development knowledgebase, deactivate the Adobe Sign integration and remove the test accounts.
5. In the production knowledgebase, set up the real user accounts for Adobe Sign.

This process prevents situations where the user accounts need to be unlocked manually with Adobe Support. If you need to unlock accounts with Adobe Support, see Using Senders with Existing Adobe Sign Accounts.

Retrieve Audit Reports

In Agiloft version 2019_01 and later, you can automatically retrieve the Adobe Sign Audit Report with the signed document via email. The Audit Report is generated by Adobe Sign and includes details about the document, its creation, its signing status, and transaction information.

1. Click Setup Adobe Sign Agreements to access the Table wizard.
2. On the Layout tab, add the Include Audit Report with Signed Document field to the layout and save your changes.
3. Select Yes in the field for an Adobe Sign Agreement record. You can also use a rule to automatically set this field to Yes.

You can also view the Audit Report from within your Adobe Sign account. For information on the required steps and permission settings to view audit reports, see Adobe's Agreement History and Audit Report help guide.