eDottedLine™

AssureSign Edition

A Quick Start Guide

1   Introduction

eDottedLine™ is an exciting new product that integrates AssureSign's world-class, on-demand, e-signature technology with Microsoft Outlook. It enhances your AssureSign experience by allowing you to leverage the features and conveniences of Outlook as you transact e-signatures. Outlook is, after all, the most natural context for performing e-signature transactions. Features include a simple-to-use wizard interface, full support for your online templates and workflows, and synchronization of your Outlook Task receipts with just a single button click.
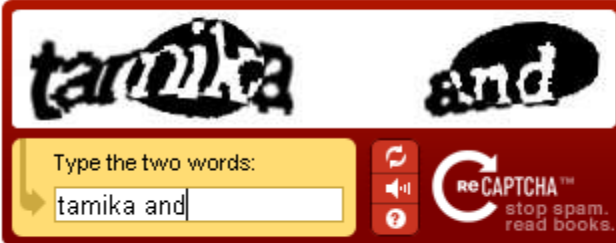
This guide assumes you are already familiar with AssureSign's technology and its processing model. You should know what an online template is and how Jot Blocks and Workflows are used, for example. If these concepts are unfamiliar to you, then please consult AssureSign's online product tutorials first, before reading further.

2   Product Registration & Downloading

You must register yourself as an eDottedLine user prior to installing the product. This is a strict prerequisite. Registration is easy: simply go to http://www.atware.com/edl-as-trial.php, enter your name and email address into the respective form fields and then enter the displayed reCaptcha™ words. Please note: The email address you provide **MUST** match the SMTP address of your Outlook mailbox.[1] If it does not, the product will not work after it is installed on your system, as explained on the webpage. Sample registration input is shown in Figure 1.

Figure 1. eDottedLine Product Registration

After pressing the Submit button, an email message is sent to the SMTP address you provided. This message contains the URL where you may download your copy of eDottedLine.

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[1] Defined by RFC 822 and sometimes referred to as an Internet email address, this format contains the @ character. For Exchange users, this is your SMTP proxy address.

3 Installation

The link contained within your product registration email message takes you to the eDottedLine product download page (http://www.atware.com/getassuresign.html). This page contains a single link to a self-extracting, product installation program. Depending upon your browser, you will be asked to either save or open the file named eDottedLine AssureSign Edition.msi. The prompt displayed by Firefox is shown in Figure 2.

Before proceeding further, it is best to exit Outlook if it is currently running. If you forget to do this, don't worry; you will be prompted to do so at the conclusion of the installation process.
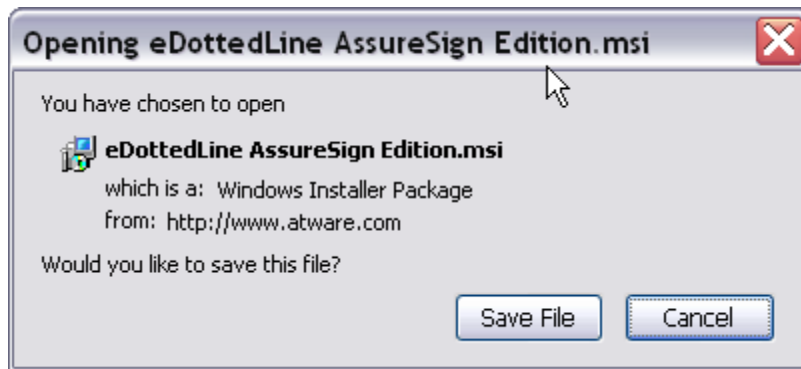

Figure 2. Accessing the Installation Program

When you run this file, you might see a security warning as the one shown in Figure 3. This again depends upon the identity and version of your browser. Simply acknowledge the warning by pressing the Run button. Bear in mind, additional warnings might be encountered when installing.
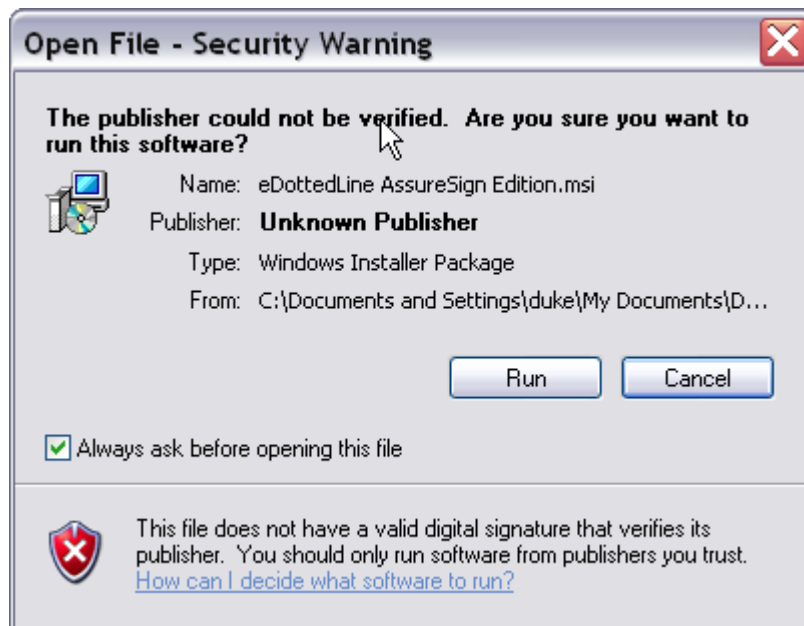

Figure 3. Digital Signature Security Warning

The eDottedLine, AssureSign Edition.msi program, being a Microsoft Installer file, presents the standard interface used for most Windows applications. The first page of this user interface will look as shown in Figure 4.

Figure 4. Running the Installer

Continually press the Next button to proceed through the installation. As you go, you will be required to do two things:

1) Confirm the product folder, which defaults to C:\Program Files\@Ware. You can change this location if you desire.
2) Accept the terms of the License Agreement. Please review these terms carefully.

Upon completing this process, eDottedLine will be ready to use the next time you start Microsoft Outlook.

4 Verifying the Installation

After installing any Windows application, it is always prudent to verify that the product is functioning properly. The way to do this for eDottedLine is as follows:

1. Start Outlook.

2. If you are using Outlook 2003 or 2007, execute the Tool/Options menu command from Outlook's main window. You should see an AssureSign tab within this user-interface. Click on this tab to ensure that the interface displays properly, as shown in Figure 5. You may want to take this opportunity to enter and verify your AssureSign account credentials (your Username and Context ID). You may obtain a Context ID from either your system administrator or your AssureSign representative. Press the Test button after providing these values. Click the OK button.
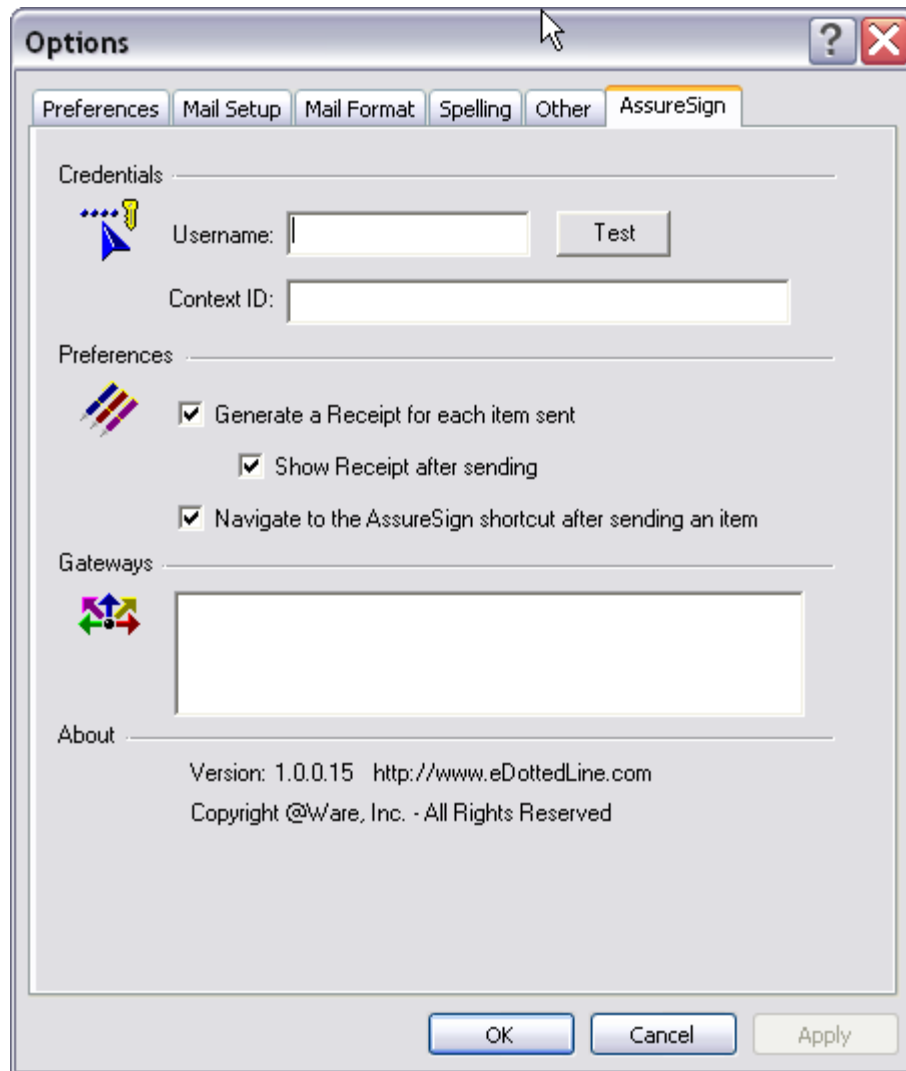

Figure 5. AssureSign Options

3. If you are using Outlook 2010, then you will find the AssureSign Options by clicking the Options link within the File tab of Outlook's main window. Click on the Add-Ins link and then press the Add-in Options… button. The interface is the same as described in step 2 above.

4. Click on your Outlook Tasks folder. You should see an *AssureSync-It* toolbar button on Outlook's main window. This button will assume one of two possible

forms, depending upon which version of Outlook you are running, as shown in Figures 6 and 7.

If any of the above steps do not yield the expected result, please contact customer support at *eDottedLine@atware.com*.
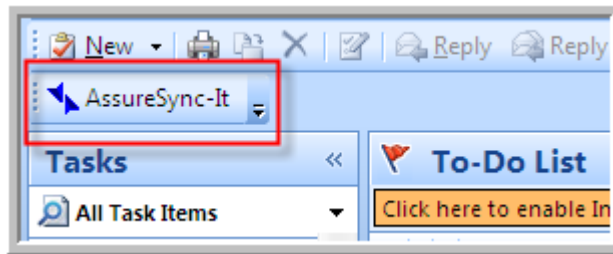

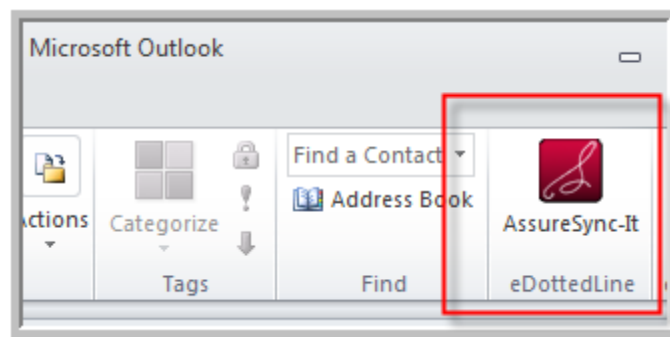**Figure 6. AssureSync-It Button (Outlook 2003 & 2007)**

Figure 7. AssureSync-It Button (Outlook 2010)

5 Executing your first e-Signature Transaction

Executing your first e-signature transaction is an exciting proposition. The exact details of this process can vary greatly depending on the templates and workflows you have configured within your AssureSign account. There are, however, many aspects of this process that are common to all scenarios:

- Every e-signature transaction begins by pressing the *AssureSign-It* button when composing an email item. The email can be either a new email or a response (Reply/Forward) to an existing email.
- Documents sent out for e-signature come from online templates maintained within the user's AssureSign account. There's no need to attach the documents to be signed to the email message.
- A three-step wizard guides you through the processes of initiating the transaction. The first step involves selecting an online template, the second step involves assigning values to Jot Block fields and the third step allows you to specify general workflow preferences.
- Every e-signature transaction you create with eDottedLine leaves you with an Outlook Task receipt.

- Your task receipts can be used to manage your outstanding e-signature transactions. Specifically, the due date of each task is set to correspond to the expiration date of the corresponding transaction, so you will receive standard Outlook notifications as these due dates (i.e., expirations) approach. You can monitor the current status of these transactions by pressing the *AssureSync-It* button within Outlook's Tasks view.
- When a transaction is completed with all its required e-signatures, a final PDF copy of this document is downloaded and attached to the corresponding task as a by-product of synchronization. In this way, your task receipts become part of a larger, auto-archiving system.
- Every e-signature transaction email is saved in a separate repository within your computers hard disk. An Outlook shortcut is created for convenient access.

With the above in mind, we'll initiate an e-signature transaction as follows:

1. Start Outlook.
2. Compose a new email message.
3. Address this email to those individuals who are to participate in the e-signature process. If you will be signing, then be sure to include yourself as a recipient.
4. Add an appropriate subject and body to your email.
5. Find and press the *AssureSign-It* button within the email item's toolbar or ribbon. The appearance and position of this button is largely dependent upon what version of Outlook you are running.

The above sequence will lead you to the eDottedLine wizard interface, as shown in Figure 8.

Figure 8. The eDottedLine Wizard

This first page of the wizard is purely explanatory; it describes the AssureSign transaction as a 3 step process.[2] The online template is selected in step 1. Recipient roles and data parameters are set in step 2. Various workflow settings are applied in step 3.

Upon pressing *Next*, the *Choose a Template* page is displayed. This interface allows you to select the online template you would like to send out for e-signatures, as shown in Figure 9. This template not only identifies the document(s) you will be sending,[3] but it also defines the signature positions and related workflow. As you make your selection, general information about the template is displayed. This additional context can be helpful if you have lots of online templates from which to choose. As an AssureSign user, you should be quite familiar with the concept of a template, a workflow and the related Jot Blocks. All of these concepts are manifest in the ensuing steps of this process.

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[2] Notice the *Don't show me this explanation again* option. Checking this box suppresses this page for subsequent transactions, which increases the efficiency of the workflow.
[3] This isn't necessarily true. You can attach a file to your email and, in doing so, your attached file will be used in lieu of the document stored within your online template.
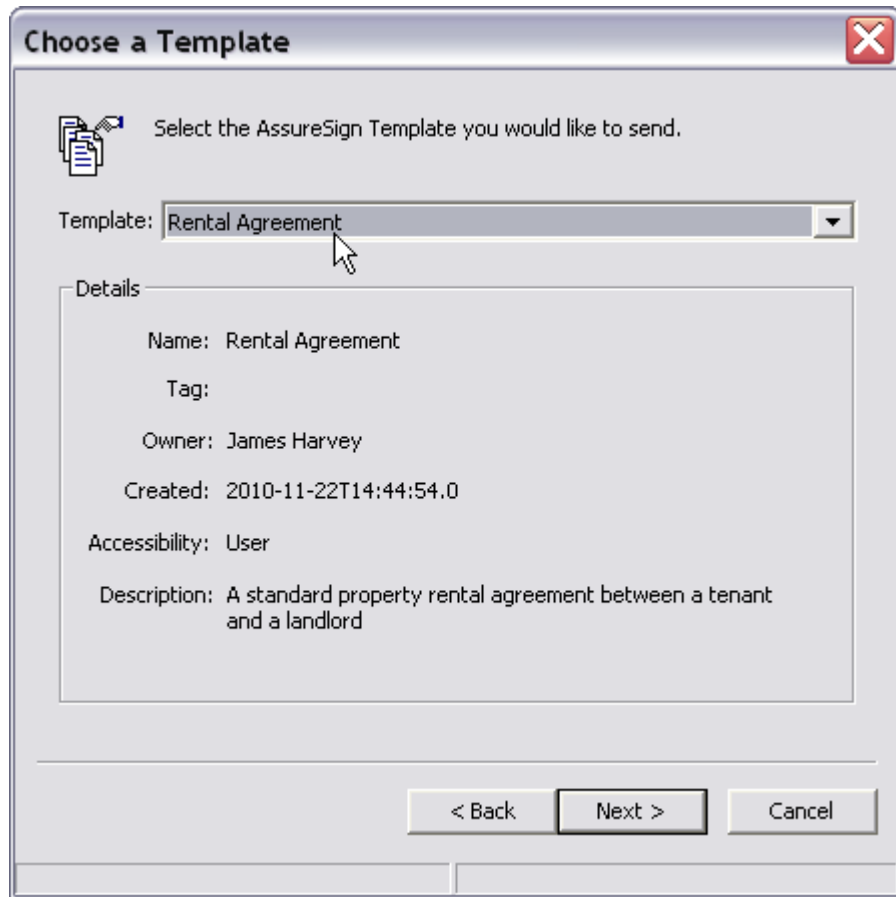
Figure 9. Selecting a Template

After selecting your template and pressing the *Next* button, the *Recipient Roles and Parameters* page is displayed, as shown in Figure 10. This is where you assign values to the Jots Block parameters defined by your selected template. Please note that the content of this page is entirely dependent upon the template being used. In this case, the selected Rental Agreement template contains two named participants – a Landlord and a Renter.

If your template uses named participants (see section 6), then it is best to select a role for each recipient before assigning values for the individual parameters. The reasons for this guideline can be subtle. Generally speaking, you give eDottedLine the opportunity to supply the correct parameter values on your behalf by selecting the roles first. The benefit is quite obvious - this relieves you from having to enter this information manually. Whether this actually happens, however, depends upon how you've designed your template and the disposition of your recipients. For recipients that are Outlook Contacts, the chances that eDottedLine can provide these parameter values is greater because the recipient can convey more information – Job Title, Physical Addresses, Phone Numbers, etc.. The exact details of this are described in section 6.
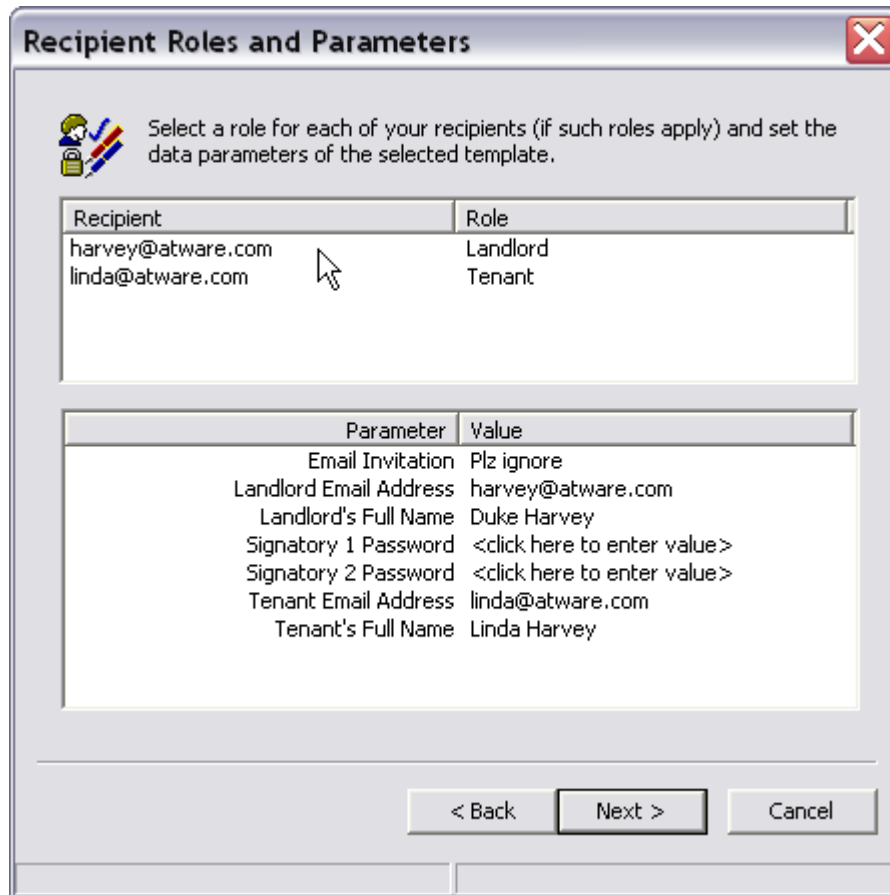
Figure 10. Recipient Roles and Parameters

Upon pressing *Next*, the third and final *Workflow Settings* page is displayed, as shown in Figure 11. Through this interface, you may assign specific options like an expiration date or additional password protection. All of these settings reflect those available through the AssureSign web console. Please refer to AssureSign's online tutorials for further details.

Upon pressing Finish, your envelope is injected up to AssureSign, which notifies the recipients as you would expect. The AssureSign service takes over at this point to facilitate the e-signature transaction to its completion. An Outlook Task receipt is generated to allow you to subsequently monitor this transaction (see section 7 for further details).
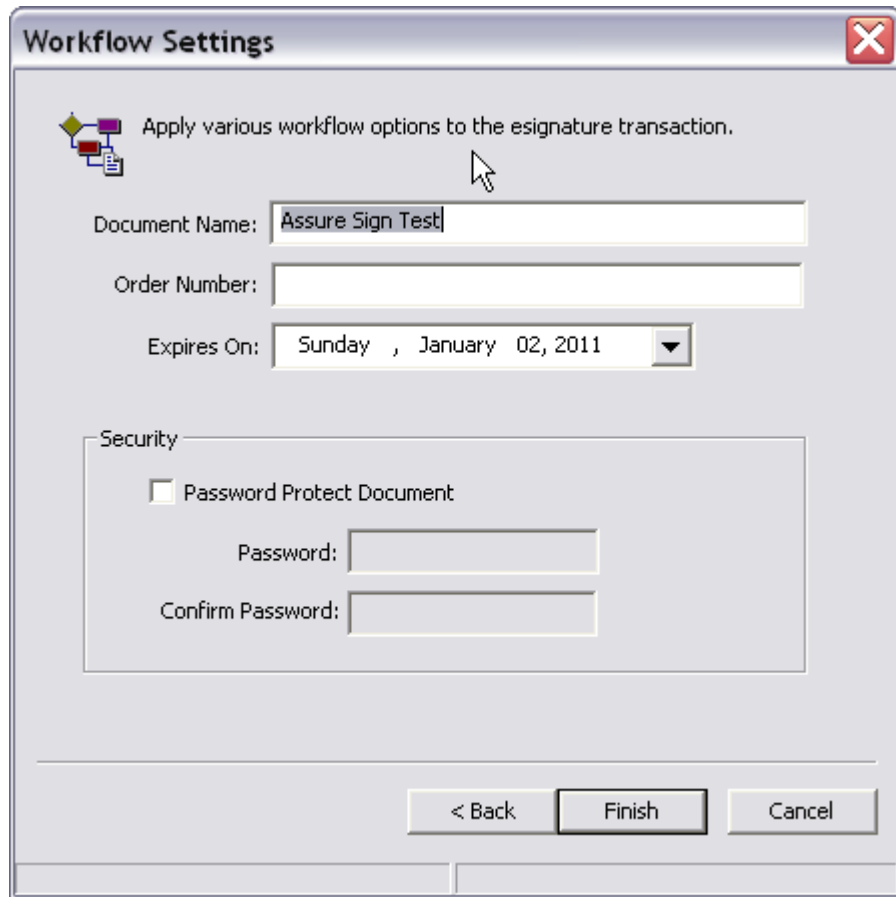
Figure 11. Workflow Settings

6 Named Participants and Other Useful Techniques

The key to tapping the full power of eDottedLine relies upon leveraging a few simple techniques effectively. These are applied as you create your online templates. There are three such techniques:

- Named Participants. Specially formatted Custom Tags can be applied to Jot Block Parameters to form logical groups. Each group corresponds to a named participant in the e-signature transaction. In step 2 of the eDottedLine wizard, a recipient can be designated as a named participant, which effectively binds that recipient to all of the Jot Block parameters of that group. The net effect is to assign correct values to all of the group's parameters automatically (to the extent the recipient information is available).

- Parameter Bindings. Individual Jot Block Parameters can be bound to various, well-defined Outlook fields. These fields relate mostly to Outlook Contacts as defined by the *Outlook Object Model*; but they can, under certain circumstances, relate to recipient identity values derived from email addresses.

- Parameter Types. eDottedLine recognizes two additional Jot Block input parameter types – date and picklists. Both are conveyed through the parameter's Regular Expression.

- Email Inclusion. The text you enter in your Outlook email item can be included within the e-signature invitations sent from the AssureSign service to each recipient/signatory. It is important to realize that this content isn't included by default. Like the other techniques above, this is accomplished using Custom Tags.

Each technique is described in what follows.

6.1 Named Participants

As mentioned, eDottedLine promotes the concept of named participants, sometimes referred to as roles. A named participant corresponds to an individual signatory as defined in an AssureSign workflow. The purpose is to provide a convenient means of assigning a recipient to the signatory, which is a notion that carries clear benefits. Names are provided to the participants as a simple abstraction to make the whole process more intuitive. An example of this was given in section 5 where a rental agreement template had two named participants – a Landlord and a Tenant. So let's look at how this particular example was accomplished through the AssureSign Web Console.

Using the AssureSign web interface, I do the following:

1. I go to the *Templates* tab.
2. I click the *Existing* link within the Templates tab.
3. I click the *Edit* link next to my existing Rental Agreement template.
4. I click on the *Edit Workflow* link.

The Rental Agreement template has two signatories; each uses the full name option. By clicking on the Change link next to the signatory full name, I step through the *Change Field* sequence to *Edit this parameter*.

The resulting user interface appears as shown in Figure 12. Notice that this field carries the Custom Tag *Landlord.FullName*. This tag conveys two things to eDottedLine:

a) the signatory is to participate in the e-signature transaction as *Landlord* and
b) this particular field should be derived from the recipient's *FullName*.

The latter is a precise term that refers to the Outlook Contact's FullName as defined by the Outlook Object Model. This suffix is case-sensitive and must appear *exactly* as shown.[4]

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[4] I also changed the field's name to Landlord's Full Name. This isn't necessary, strictly speaking; but it is always a good idea to be explicit with your field names as this adds clarity.

Figure 12. Signatory's Full Name

The underlying technique for creating named participants is made apparent and it can be summarized as follows:

> Technique: For any AssureSign parameter field that has a Custom Tag of the form *name.field*, the *name* prefix conveys the signatory's role and the *field* must match a Contact item's property/field as defined by Outlook's Object Model.

This technique applies to all Jot Block parameters as we'll soon see. A partial list of the field names defined for an Outlook Contact includes:

- *BusinessAddress*
- *BusinessTelephoneNumber*
- *CompanyName*
- *Email1Address*
- *FirstName*
- *FullName*
- *Gender*
- *HomeAddress*
- *Initials*
- *HomeTelephoneNumber*
- *JobTitle*
- *LastName*
- *Title*

For a complete list of contact fields/properties, use your favorite search engine to look for "Outlook Contact Item Properties".

Continuing with our Rental Agreement example, if I click on the link to Change the Landlord's (Signatory's) Email Address, I see the values shown in Figure 13. As before, a Custom Tag has been added; but this time, it is Landlord.Email1Address. This conveys to eDottedLine that this field should be set according to the recipient's primary email address. All of the other circumstances surrounding the signatory's full name apply here as well.

Figure 13. Signatory Email Address

It is important to point out some special-cases, which arise when the Outlook recipient is not an Outlook Contact. When the recipient is expressed as a simple RFC822 short form address (e.g., jdoe@edotteline.com), eDottedLine will bind this address to the corresponding signatory's email address if it carries the *Email1Address* custom tag. When the recipient is in RFC822 long form (e.g., John Doe <jdoe@edottedline.com>), eDottedLine will do it's best to correlate the *FirstName*, *LastName*, *FullName* as well as the *Email1Address* fields. Accuracy is not guaranteed in this regard because the name at the beginning of the email address might be malformed.

6.2 Parameter Bindings

The technique of binding signatory parameters to Outlook properties (outlined above) can be applied to all Jot Block input parameters. The parameter's custom tag assumes the same *name.field* format. So, for example, if I wanted to add a textual Jot Block to contain the landlord's place of business, I would use the custom tag *Landlord.BusinessAddress*. That's all that's required to facilitate the binding.

6.3 Parameter Types

As shown in Figure 10, eDottedLine provides an interface that allows the user to enter parameter input values. The overall purpose of eDottedLine is to promote convenience and reduce the potential for human errors when formulating an e-signature transaction. To this end, eDottedLine extends this convenience through two custom parameter types – dates and pick-lists. If a template uses either of these types, eDottedLine adapts its UI as one would expect. For any parameter input that expects a date value, a standard Windows Date control is provided. For any parameter input that expects a specific value from a discrete list (i.e., a pick-list), a standard Windows combo-box control is provided. In both cases, the resulting user interface is streamlined and geared toward promoting accuracy; that is to say, a more friendly and efficient UI is the yield.

Let's assume, as an example, I want to create a template for an insurance form. Let's also assume that two of the template's Jot Blocks are input parameters for *Policy Type* and *Policy Renewal Date*. The policy type should contain one of three possible values – *Standard*, *Premium* or *Gold*. The policy renewal date should contain a well-formed date like 01/01/2011. Validation expressions are used to convey both of these semantics, which is done through the web console's *Change Input* interface.

The validation expression for the Policy Type pick-list is shown in Figure 14. Each choice within the expression is separated using the vertical bar character ("|").

Figure 14. Pick-list Validation Expression.

The validation expression for the Policy Renewal Date is shown in Figure 15. Don't be intimidated by the expression itself – it is a standard form that comes from the Internet. That said, it is best to copy and paste this value into the web console's user interface as it must match the value shown exactly.

Figure 15. Date Validation Expression

6.4 Email Inclusion

The text of your Outlook email message isn't conveyed to your e-signature participants/recipients by default. You must make a modification to your AssureSign templates to prevent this loss of content. This is done as follows:

- Select your AssureSign template.
- Click on the *Edit Workflow* link.
- Click on the *Emails* category/link.
- Click on the *Edit* link on the *Document available to sign* line of *Step 1*.
- Click on the *Change* link to the right of the *[Email Invitation]* label.
- Add the Custom Tag *Email_Text* for this parameter, as shown in Figure 16.

Please note that the AssureSign protocol restricts this email text to a maximum length of 255 characters. You will receive a warning if you try to exceed this limit.

Figure 16. Including Email Text

7 Receipts and Sent Items

An Outlook Task receipt is created for each e-signature transaction you initiate. These tasks have several very important characteristics.

1. The due date of each task matches the expiration date of the corresponding AssureSign transaction. This allows you to benefit from Outlook notifications since warnings of impending document expirations will be generated.

2. By synchronizing a receipt, its Completion Status is updated to reflect the signing status of the corresponding transaction. For example, if all the individuals required to sign a given document have done so, then the task is marked complete. This gives you an embedded dashboard view of your outstanding e-signature transactions.

3. When a synchronized receipt is deemed complete (i.e., all required signatures have been applied), a final copy of the signed document(s) is downloaded and attached to the task. This gives you an automatic archive of your e-signature transactions. Please refer to section 8 for more details about synchronization.

Along with your task receipts, for each e-signature transaction you send, a *Sent Item* is created to preserve the details. This includes an attached copy of the original email message and a link to take you directly to the corresponding transaction within AssureSign.

Your task receipts and your sent items are made available through the Outlook Shortcuts Bar, as shown in Figure 17.
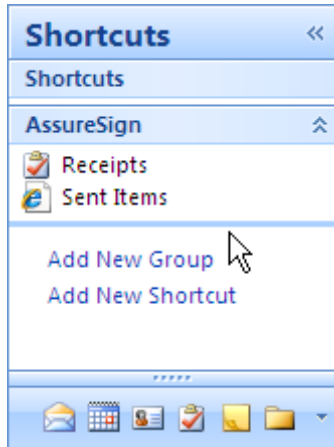
Figure 17. AssureSign Shortcuts

The *Receipts* shortcut takes you to your default Outlook Tasks folder and the *Sent Items* shortcut takes you to a folder within your file system that contains a copy of each e-signature email.

8 Synchronization

eDottedLine provides a synchronization feature that is enormously convenient – it is easy to use and it's benefits are obvious. You can synchronize your Outlook Task receipts with their corresponding e-signature transactions. You can focus your synchronization operations on specific Tasks, or you can synchronize all of these items at once. It is your choice to make.

8.1 Synchronizing Task Receipts

Task receipt synchronization works the exact same way – either select only those tasks you wish to synchronize, or select no particular task to synchronize them all. The benefit of synchronizing your tasks receipts is three fold:

- Synchronizing updates the respective *Percent Complete* and the *Completion Status* fields. It does this by interrogating the signature status of each respective transaction, which reports those individuals who have signed and those who have not. In this way, your task receipts give you a dashboard view of your outstanding e-signature documents.

- When a synchronized task is deemed complete, a final copy of the signed document is downloaded and attached to the receipt. Each receipt is a complete record of a signature transaction, therefore.

- Synchronizing your task receipts pre-validates future Outlook Task notifications. If a task receipt due date is about to expire, then so too is the corresponding transaction. The Outlook notification alerts you to this fact, which affords you the opportunity to address the matter before the expiration!

9 Product Videos

All of the features described in this document are presented through product videos up on @Ware's website. You'll find these at http://www.atware.com/assureflix.html. Through these videos, you get a very clear and comprehensive view of how to use eDottedLine, including its advanced features. It is highly recommended that you take advantage of these. Each is fairly short, around three to four minutes long.