
User Reference

DocuSign Integration v10x

By CMiC

CMiC
Computer Methods
international Corp.

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DocuSign Integration

Overview – DocuSign Integration

The CMiC DocuSign integration provides the easiest and most robust Enterprise electronic signing solution. Layered on top of CMiC ECM (Enterprise Content Management), the solution allows users to quickly prepare documents for signing by selecting project documents and specifying recipients. Then with the click of a button, the documents are locked and transmitted to DocuSign's eSignature transaction management platform. Recipients are notified to complete the signing process in DocuSign. After completing the signing process, the signed document, with signatures, is made available in CMiC as a new revision.

This seamless CMiC eSigning solution simplifies the signing process by:

- allowing quick document selection
- specifying recipients either from project defaults or contacts
- keeping track of both the unsigned and signed versions of the document
- providing the complete signing history
- applying version control

Prerequisites

The following is needed to run the integration successfully:

1. Appropriate CMiC PM JSP licenses.
2. A CMiC DocuSign license.
3. CMiC (v10x or later) configured and running over HTTPS (on port 443).
4. The server must be running TLS 1.1 or 1.2, however, TLS 1.2 is recommended by CMiC. This is to ensure DocuSign is able to transmit status updates and signed documents back to CMiC (integration will not work with TLS 1.0).
5. DocuSign licenses (purchased from DocuSign) for each CMiC user that will be sending documents for eSignatures.
6. Email based login method for DocuSign licenses. It can be set on the System Contact details – **External Software Login** tab. For details, please refer to the following section, [PM Setup](#).

7. Any sending user on the project must have the appropriate document security in PM JSP (i.e. must be assigned to a project and must have a project role that allows access to the PM document types being used in the integration).
8. Ensure the JCE (Java Cryptography Extension) for JDK 1.6 is installed on your server. CMiC DBA Services can assist with this or provide a document with the details.

Setup

Overview – Setup

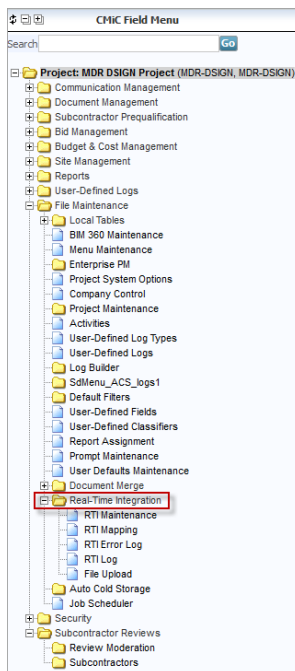
In order to use the CMiC DocuSign integration, you must configure CMiC RTI (Real-Time Integration) and the DocuSign Connect service as follows. CMiC RTI accepts document status updates and the signed document sent by the DocuSign Connect service in real time.

DocuSign Documentation

DocuSign provides online support resources, which can be searched via their main support webpage:

<https://support.docusign.com/en/>

RTI Setup



Log in to CMiC Field and open RTI Maintenance.

Internal Site

Internal Site	Internal Adapter	External Site	External Adapter	External Site Ip	Communication Links	E-Mail	Blackout Schedule	Adapter Type	Version
Save									
Internal Site Name			Transmit Url			Internal Site Version			Action
CMiC			https://www.mycompany.c			v1			+ x

If it doesn't already exist, create an internal site called CMiC, then click on [Save].

Internal Adapter

Internal Site	Internal Adapter	External Site	External Adapter	External Site Ip	Communication Links	E-Mail	Blackout Schedule	Adapter Type	Version	Resource	Software System	Resource Category	Software System By Category				
Save																	
Adapter Type		Adapter Name		Adapter ID		JMS Queue Connection Factory		JMS Queue Name		Adapter Protocol		Message Type		System		Action	
Http Receive Adapter for DocuSign		DOCUSIGNRA		DOCUSIGNRA						HTTP		REST		DocuSign		+ x	
Http Transmit Adapter for DocuSign		DOCUSIGNITA		DOCUSIGNITA						HTTP		REST		DocuSign		+ x	

Select "CMiC" from the Internal Site drop-down list. Create a new record by clicking on the add [+] button. Select "Http Receive Adapter for DocuSign" as the Adapter Type. For Adapter Name and Adapter ID, enter "DOCUSIGNRA". Create another new record. Select "Http Transmit Adapter for DocuSign" as the Adapter Type. For Adapter Name and Adapter ID, enter "DOCUSIGNITA". Click on [Save].

External Site

Internal Site	Internal Adapter	External Site	External Adapter	External Site Ip	Communication Links	E-Mail	Blackout Schedule	Adapter Type	Version	Resource	Software System	Resource Category	Software System By Category
Save													
External Site Name										External Site Version			Action
DocuSign										v1			+ x

Create a new record. Call the external site "DocuSign" and click on [Save].

External Adapter

Internal Site	Internal Adapter	External Site	External Adapter	External Site Ip	Communication Links	E-Mail	Blackout Schedule	Adapter Type	Version	Resource	Software System	Resource Category	Software System By Category								
Save																					
Adapter Type		Adapter Name		Adapter ID		External Client ID		External Username		External Password		Confirm Password		Adapter Protocol		Message Type		System		Action	
Http Receive Adapter for DocuSign		DOCUSIGNERA		DOCUSIGNERA						Ⓟ		Ⓟ		HTTP		REST		DocuSign		+ x	
Http Transmit Adapter for DocuSign		DOCUSIGNETA		DOCUSIGNETA						Ⓟ		Ⓟ		HTTP		REST		DocuSign		+ x	

Select "DocuSign" from the External Site drop-down list. Create a new record. Select "Http Receive Adapter for DocuSign" as the Adapter Type. For Adapter Name and Adapter ID, enter "DOCUSIGNERA". Create another new record. Select "Http Transmit Adapter for DocuSign" as the Adapter Type. For Adapter Name and Adapter ID, enter "DOCUSIGNETA". Click on [Save].

External IP Address

Internal Site	Internal Adapter	External Site	External Adapter	External Site Ip	Communication Links	E-Mail	Blackout Schedule	Adapter Type	Version	Resource	Software System				
Save															
Site FQDN		Site IP		Transmit Flag		Receive Flag		Transmit Ip Port		Transmit JEE Server		Transmit Use SSL		Action	

As an added layer of security, you can specify the DocuSign IP addresses from which to accept transmissions. The IP Address details can be supplied by CMiC and/or DocuSign at setup time.

Communication Links

Link	Link Identity Code	Internal Site	Internal Receive Adapter	Internal Transmit Adapter	External Site	External Receive Adapter	External Transmit Adapter	Validate IP Address	Action
DOCUSIGN	DOCUSIGN	CMiC	DOCUSIGNIRA	DOCUSIGNITA	DocuSign	DOCUSIGNERA	DOCUSIGNETA	No	+X

Select "DocuSign" from the Software System drop-down list. Create a new record. Enter the Link and Link Identity Code as "DOCUSIGN". Select "CMiC" as the Internal Site. Select "DOCUSIGNIRA" and DOCUSIGNITA" as the Internal Receive Adapter and Internal Transmit Adapter respectively. Select "DOCUSIGNERA" and DOCUSIGNETA" as the External Receive Adapter and External Transmit Adapter respectively. If you have entered valid DocuSign IP addresses in the External IP Address tab then select "Yes" for Validate IP Address, otherwise select "No".

DocuSign Environment

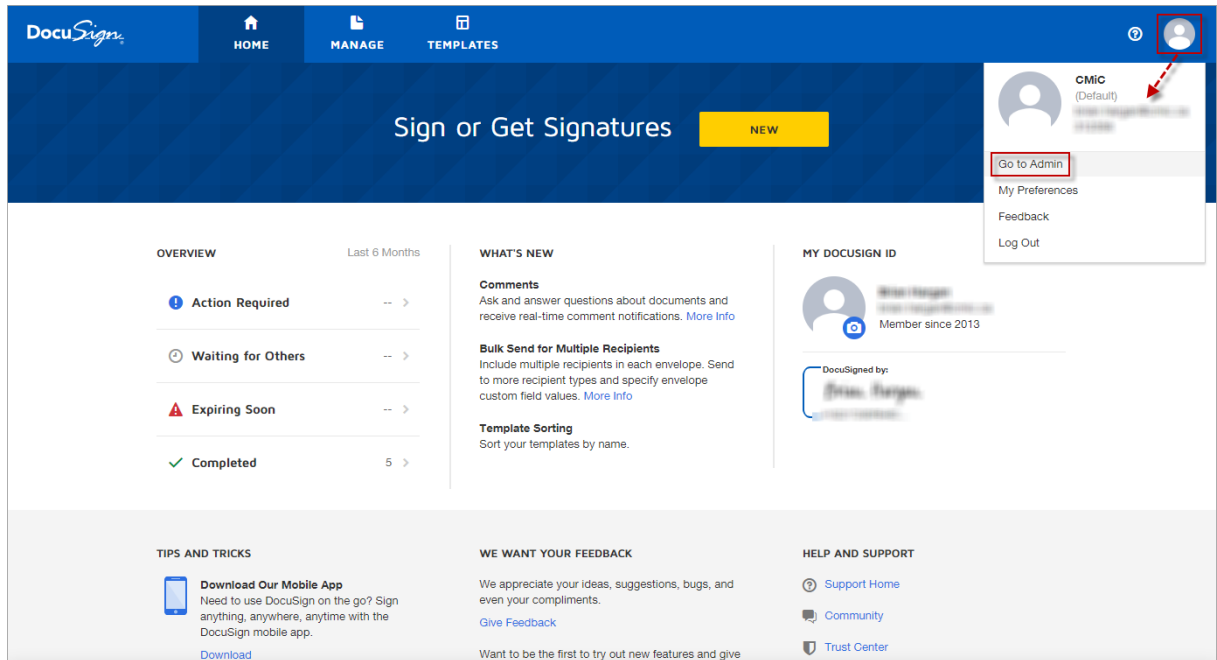
The screenshot shows the 'Project System Options' configuration interface. On the left, a treeview lists various system options, with 'Project System Options' highlighted. The main panel displays configuration settings for 'Field Options'. Key settings include:

- Start Page URL: <http://www.google.com>
- Auto Copy Quoted PCI Amt:
- Spec Section LOV Options: Allow Both CSI Code & Free Form
- Spec Sub-Section LOV Options: Allow Both CSI Code & Free Form
- Bid Contacts By Company:
- Hide Legal Entity Type In BP LOV:
- Apply User Profile Changes To All Projects:
- Use Daily Journal Date for Autonumbering:
- Show Remaining Budget Amount In Phase LOV Of SC And SC CO:
- Recycle PCI Number Upon Modify Type:
- Submittal Status Update by Last Submittal Review Cycle:
- Multiple Report Printing:
- Submittal Header and Latest Review Cycle Contacts Update:
- Use Note/Attachment flags in Email Notification Setup:
- Add From Email ID to CC Field:
- Use new Enhanced Cost Detail popup in JcContractForecast:
- Exclude Closed Subcontracts from Single and Aggregate Project Limits Amount:
- Auto Fill Description on Subcontract Change:
- Allow for Changing to Same PCI Type:
- Allow Cancelling PCIs with Posted SCOs:
- Keep Same PCI Number Upon Modify Type:
- Show Highlighted Submittal in Tree-view:
- SC Pre-qualification Limits on Controlling BP:
- Use Dates Required by Schedule and Current Progress for Submittals:
- Project Contact Default PM Role: **DocuSign Environment** (selected)
- Allow Multiple Bid Contacts per Partner:
- Allow Multiple Bid Responses:
- Show Subcontract UDF on Subcontract Change Order:
- OCO Original Amount Job Roll-In:
- Show only Assigned to Project Checklists:
- Collaborate - Gateway SSO passthrough:

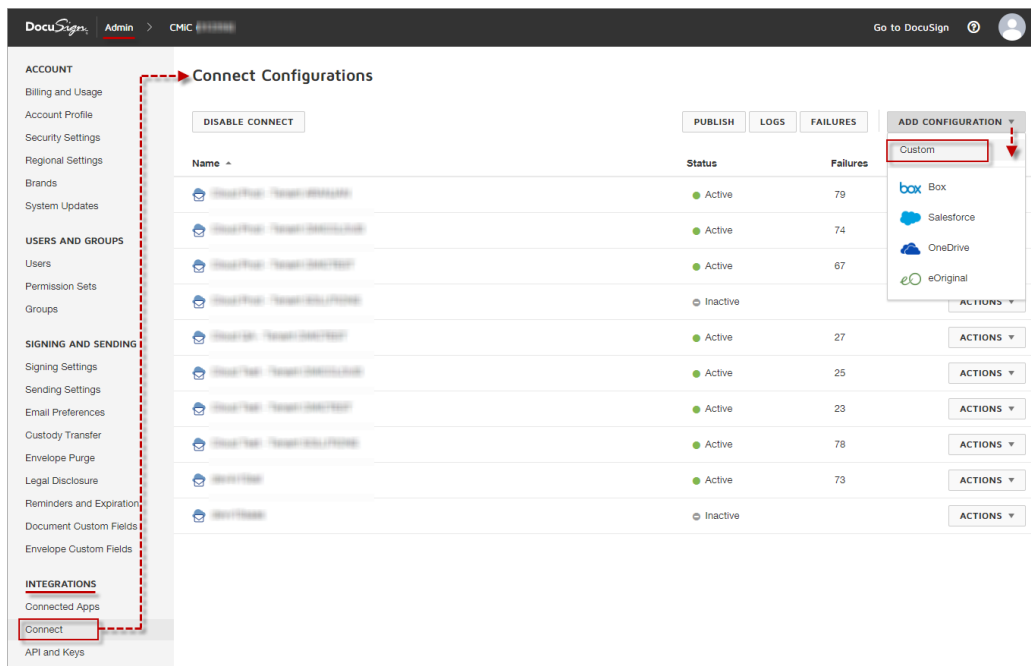
Project System Options; standard Treeview path: CMiC Field > File Maintenance > Project System Options

Go into Project System Options and, depending on the DocuSign environment you are using, select either "Demo" or "Prod". If you manually log in to DocuSign using a URL starting with www.docusign.com or www.docusign.net, then you would select "Prod". If you manually log in to DocuSign using a URL starting with demo.docusign.net, then you would select "Demo".

DocuSign Setup



Log in to DocuSign and click on your User Profile in the upper right-hand corner of the screen. In the drop-down menu, select “Go to Admin” to open the Account Administration screen.



On the Account Administration screen, in the left-hand toolbar under Integrations, click on “Connect” to open the Connect Configurations screen. On the Connect Configurations screen, click on the Add Configuration drop-down menu and select “Custom” to open the Custom Configurations Settings screen.

DocuSign Admin > CMiC (111111) Go to DocuSign

Connect Configurations List > Custom Configuration Settings

Custom Configuration Settings

SAVE CANCEL

System Settings

ACTIVE CONNECTION ▼

Name: dev4v10ssl

URL to Publish (HTTPS required): https://dev4v10ssl.cmic.ca/cmicodev10x/WsRti/receive/v1/docusignstatus_list?_cmicLinkIdentityCode=DOCUSIGN&_cmicReceiveAdapterIdentityCode=DOCUSIGNIRA&_cmicTransmitAdapterIdentityCode=DOCUSIGNETA

Include Basic Authentication Header

Enable Log (maximum 100)

Require Acknowledgement

Include:

Document PDFs

Certificate of Completion

Time Zone Information

Envelope Voided Reason

Sender Account as Custom Field

Document Fields

Associated Users

All users (includes new users)

Select users to include

Trigger Events

Envelope Events:

Envelope Sent

Envelope Delivered

Envelope Signed/Completed

Envelope Declined

Envelope Voided

Recipient Events:

Recipient Sent

Recipient Delivery Failed

Recipient Delivered

Recipient Signed/Completed

Recipient Declined

Recipient Authentication Failure

Integration and Security Settings

Use SOAP Interface (SOAP Method: DocuSignConnectUpdate)

Enable Mutual TLS

Require Mutual TLS

SAVE CANCEL

In the Custom Configuration Settings screen, you're setting up the path to CMiC RTI and specifying what information is being sent to CMiC.

Important Configuration Values

URL to Publish to - This is the URL to CMiC RTI. An example of this would be:

https://dev4v10ssl.cmic.ca/cmicodev10x/WsRti/receive/v1/docusignstatus_list?_cmicLinkIdentityCode=DOCUSIGN&_cmicReceiveAdapterIdentityCode=DOCUSIGNIRA&_cmicTransmitAdapterIdentityCode=DOCUSIGNETA

NOTE: DocuSign will only send status updates to an SSL server (where the URL starts with “https” as opposed to http).

You can figure out the URL to use by logging in to CMiC Field. If the CMiC Field URL is:

https://dev4v10.cmic.ca:7785/cmicodev10x/SdMenu/

remove "SdMenu/" and replace it with the text below:

WsRti/receive/v1/docusignstatus_list?_cmicLinkIdentityCode=DOCUSIGN&_cmicReceiveAdapterIdentityCode=DOCUSIGNIRA&_cmicTransmitAdapterIdentityCode=DOCUSIGNETA

which would give you:

https://dev4v10.cmic.ca:7785/cmicodev10x/WsRti/receive/v1/docusignstatus_list?_cmicLinkIdentityCode=DOCUSIGN&_cmicReceiveAdapterIdentityCode=DOCUSIGNIRA&_cmicTransmitAdapterIdentityCode=DOCUSIGNETA

If you set up RTI Maintenance in the previous steps exactly as shown, then the text above is correct. Otherwise, if any of the link or adapter codes are different, that will have to be reflected in parameters passed in the URL.

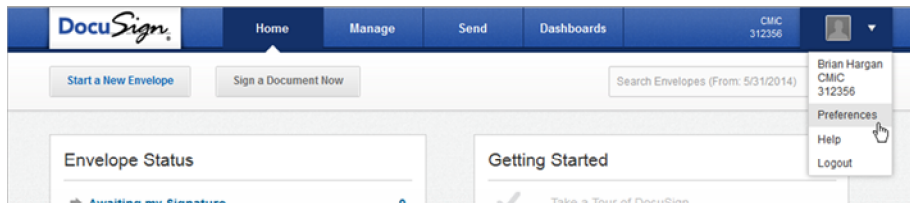
- **Name** - The name should reflect the environment being configured (DEV, TEST, PROD, etc.).
- **Allow Envelope Publish** - Must be checked in order to send the status updates to CMiC RTI.
- **Include Documents** - Must be checked in order for CMiC RTI to receive the signed document.
- **Send information on these envelope events** - Select all to retrieve all events related to the envelope.
- **Select users to integrate** - Select **All users integrated**, otherwise select each specific user.

Accept all other default settings or speak to your CMiC or DocuSign representative.

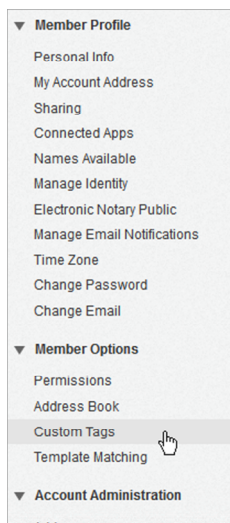
DocuSign Custom Anchor Tags

DocuSign provides the ability to create custom anchor tags that you can then put into your documents. These anchor tags are used to indicate where signatures or initials are required, to enter dates and names automatically, and more. Below is a brief description of how you can set up your own custom anchor tags. For full details, please refer to DocuSign documentation.

Sign in to DocuSign and go to Preferences.



Under Member Options, select Custom Tags.



When adding a new tag, set the Label and Tool Tip values as desired. In Type, select the appropriate value for this tag. In the example below, the tag will be used to indicate where a signature is required, therefore type Sign Here is selected. In the Anchor field, type the value that will appear in your documents to indicate where this

tag should be placed when viewed in DocuSign. You can enter any text you wish, but it should be unique enough that it will not be duplicated elsewhere in your document. In this example, the value entered is `\s{r}`. The `{r}` is used to indicate the signature number. Therefore, wherever values such as `\s1\` or `\s2\` appear in your document, DocuSign will indicate that a signature is required at that location.

Once the custom tags have been created in DocuSign, they can be added to your documents. In the example below, the values enclosed in backward slashes (`\s1\`, `\fn1\`, etc.) were added to the document (in a font color of white so as not to be seen) in the various locations where signatures or other values are required. The `\s1\` anchor will indicate where the 1st recipient, as sent from the CMiC dialogue, will be required to sign. The `\s2\` anchor will indicate where the 2nd recipient, as sent from the CMiC dialogue, will be required to sign. Custom tags were also created for Full Name (`\fn{r}`) and Date Signed (`\ds{r}`), these values are populated automatically by DocuSign.

Below is a screenshot of the section of the CMiC dialogue in which you select the contacts to whom the document will be sent for signature. Using this example and the sample document above, Jeannette Warren would be required to sign at `\s1\` because Signing Order 1 is selected for her in the CMiC dialogue. Subsequently, Steve Tolleson would be required to sign at `\s2\`.

Contact	Signer or CC Signing Order
Jeannette Warren	Signer 1 + x
Steve Tolleson	Signer 2 + x

CMiC Field Setup

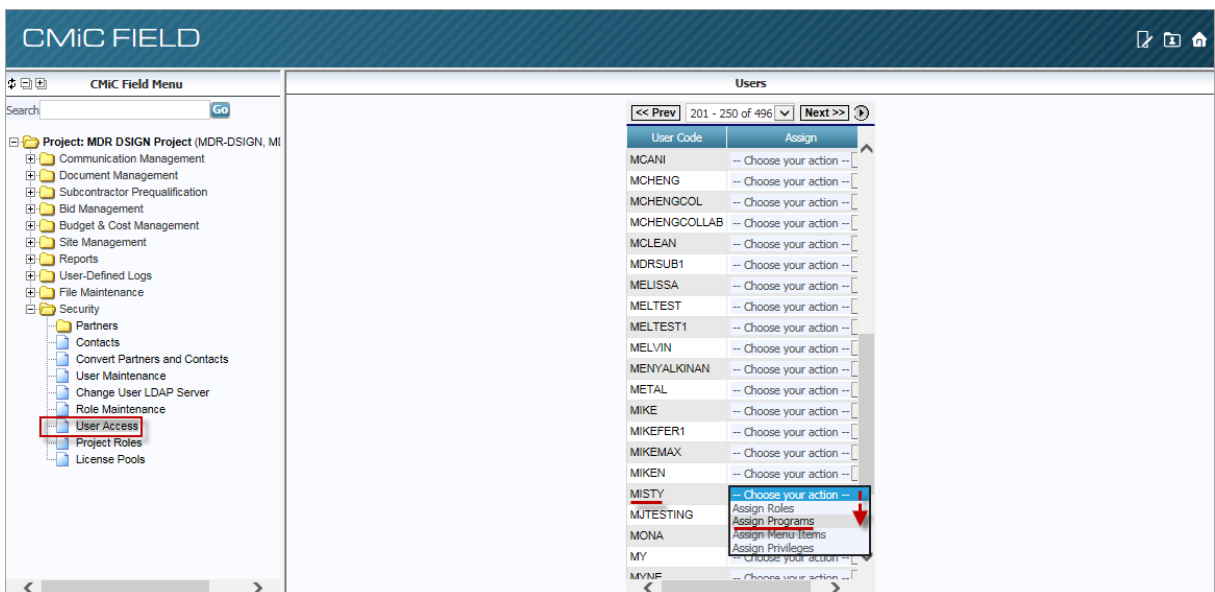
ESign Program Access

DocuSign users require that the ESign program is assigned to them in CMiC Field in one of two ways:

- User Access: Access is assigned to the user in the User Access screen (standard Treeview path: *CMiC Field > Security > User Access*)
- Security Role Access: Access is assigned to user’s security role in the Role Maintenance screen (standard Treeview path: *CMiC Field > Security > Role Maintenance*)

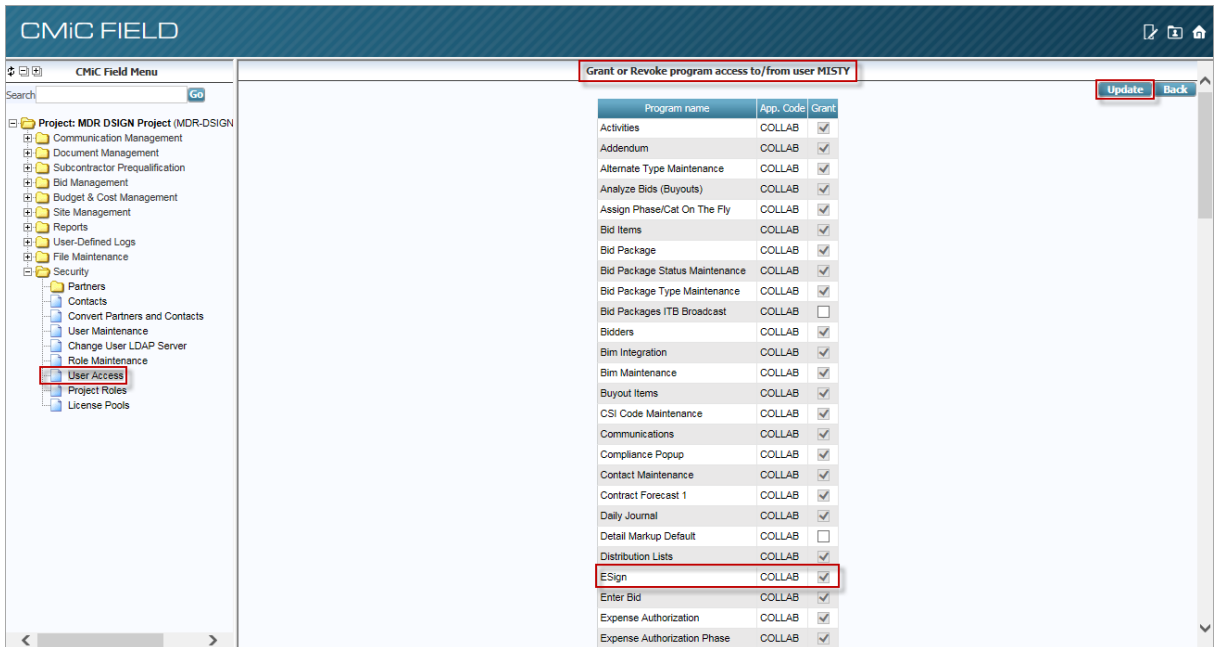
Each of these methods is described below.

User Access

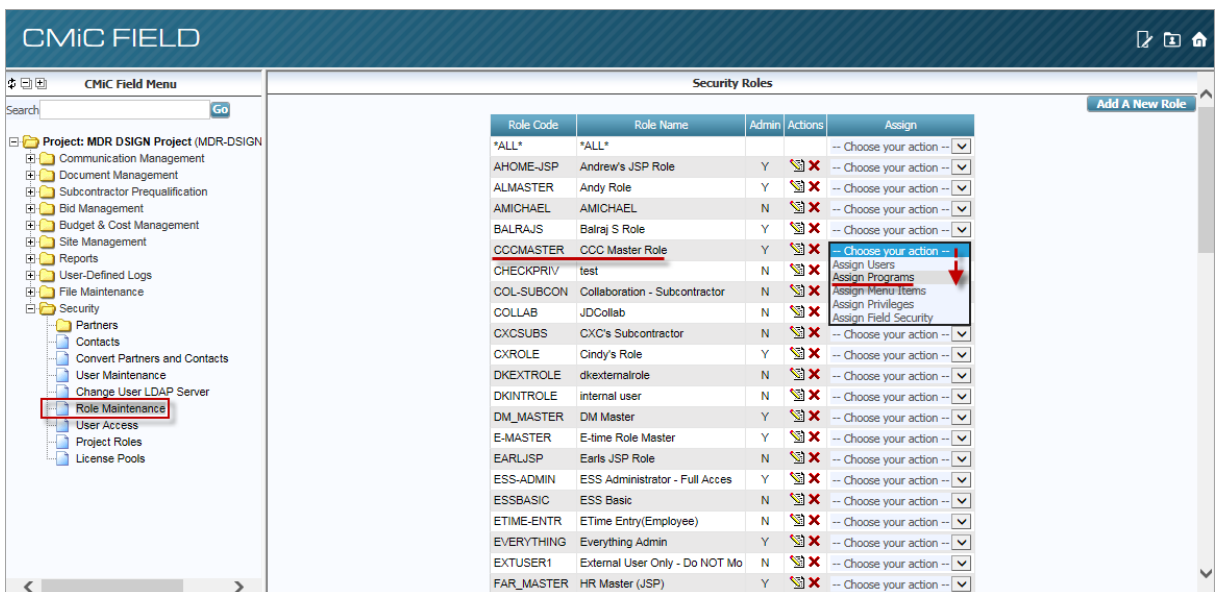


Example of assigning E-sign program to user (standard Treeview path: *CMiC Field > Security > User Access*)

On the User Access screen in CMiC Field, find the user and select “Assign Programs” in the drop-down menu. Next, ensure that the ‘Esign’ checkbox is checked for the user and then click on the [Update] button (as shown in the screenshot below).

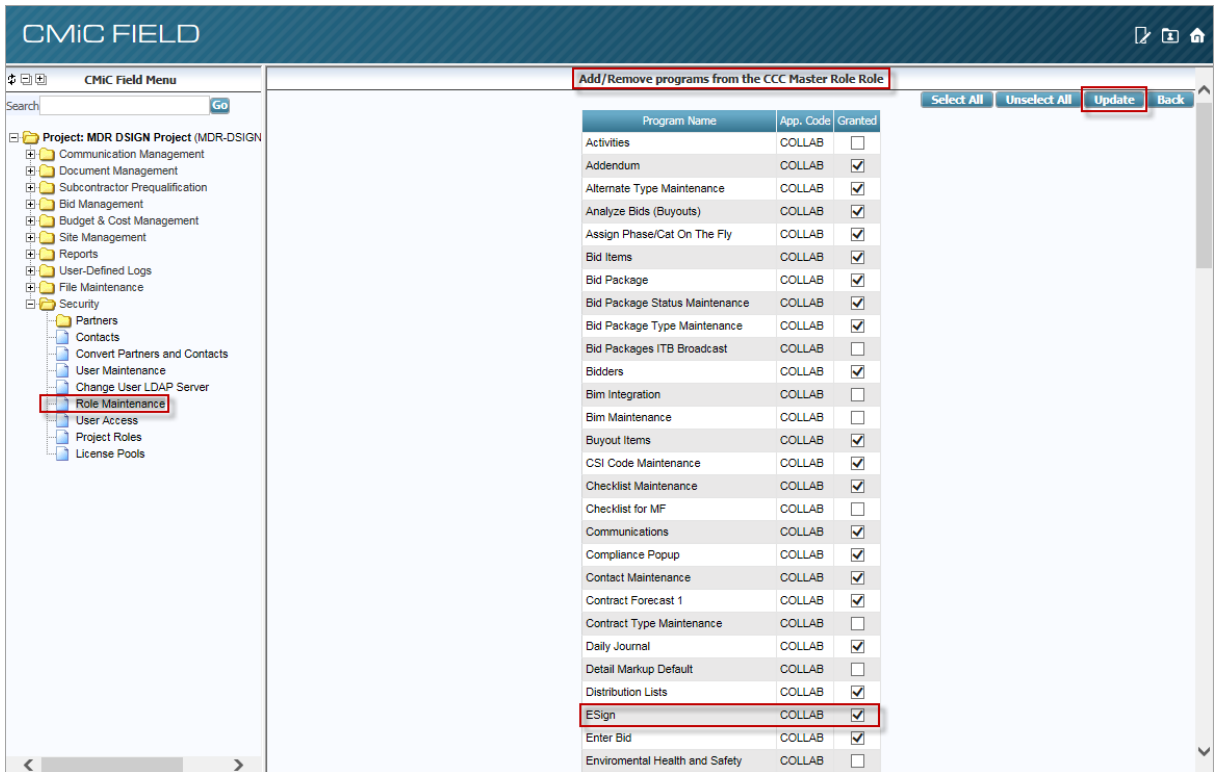


Security Role Access

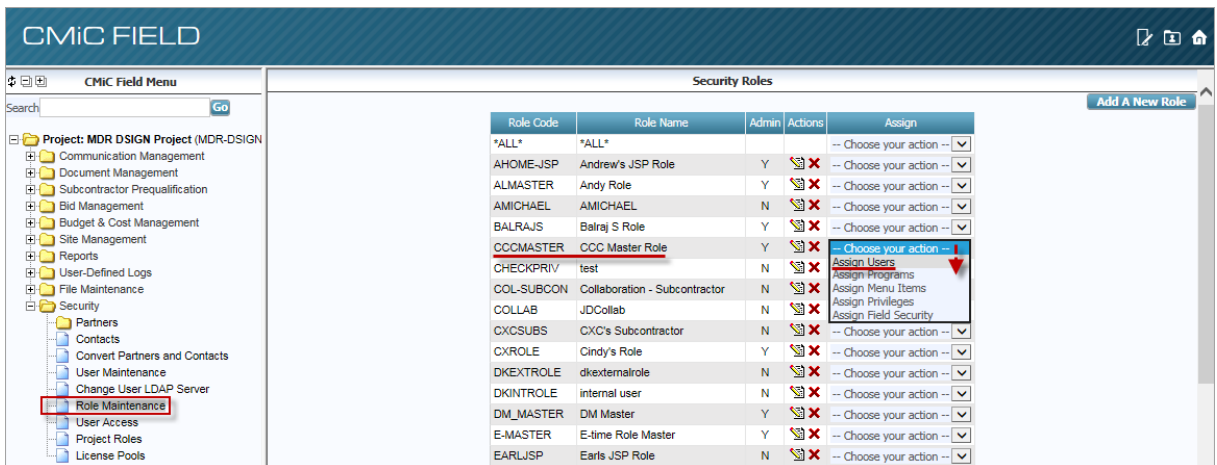


Example of assigning E-sign program to a security role (standard Treeview path: CMiC Field > Security > Role Maintenance)

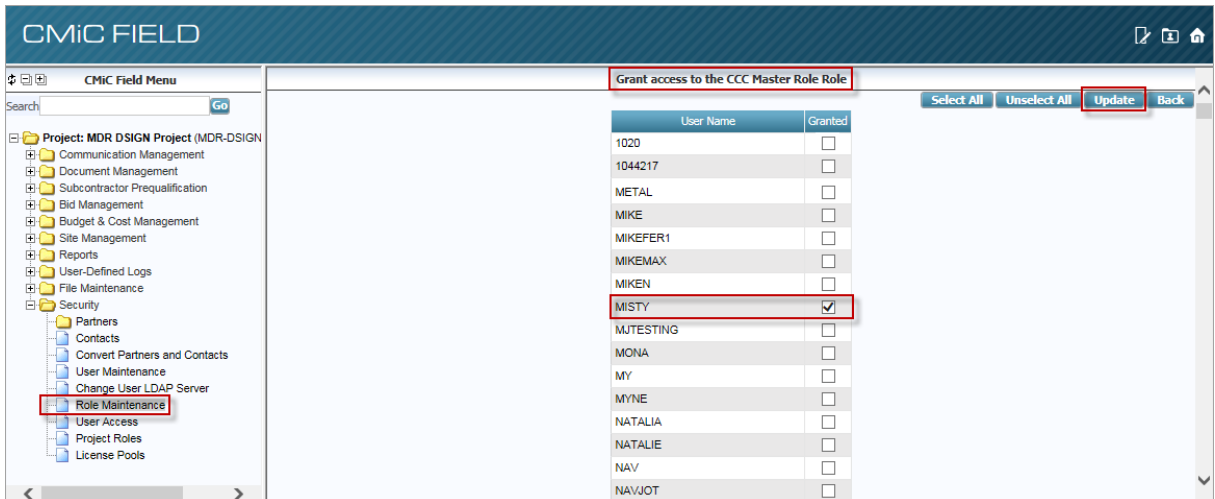
On the Role Maintenance screen in CMiC Field, find the security role and select “Assign Programs” in the drop-down menu. Next, ensure that the ‘Esign’ checkbox is checked for the security role and then click on the [Update] button (as shown in the screenshot below).



To verify that the user is assigned to that security role, return to the first screen, find the security role, and select “Assign Users” from the drop-down menu.

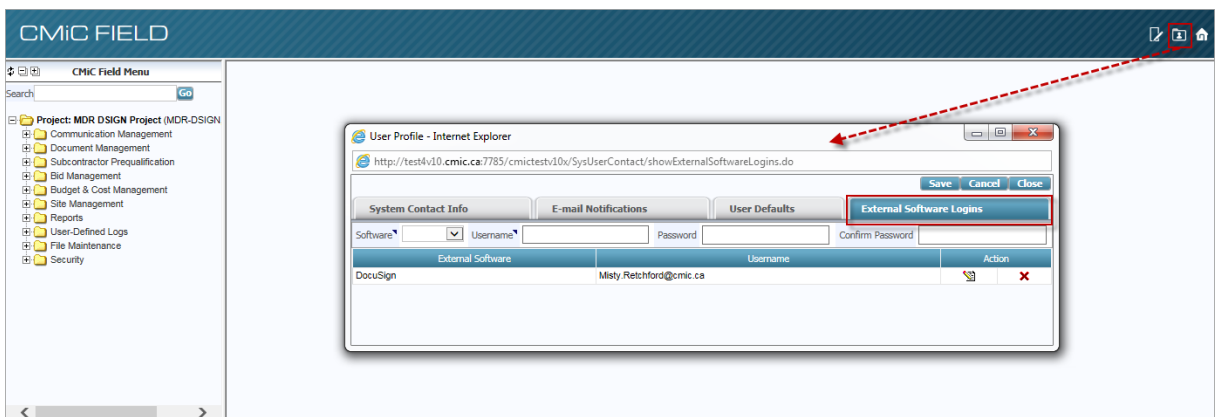


Next, ensure that the checkbox beside the user’s name is checked and then click on the [Update] button (as shown in the screenshot below).



The E-Sign program has now been assigned to a security role to which the user has been granted access.

Username and Passwords



Pop-up window launched from user profile icon in CMiC Field

DocuSign usernames and passwords are maintained for each user in the External Software Logins tab of the user profile pop-up. DocuSign logins are maintained in the DocuSign system, and any changes to DocuSign usernames and passwords must subsequently be made in CMiC.

DocuSign Security Certificates

DocuSign security certificates can be accessed from the following link:

<https://www.docusign.com/trust/compliance/public-certificates>

Default Signers

Default signers and CCs are set up on two tabs of the Project Maintenance screen:

- Esign Maintenance tab
- Key Players tab

The system will retrieve default signers and CCs from the Esign Maintenance tab first, then from the Key Players tab.

If there is no record defined for a specific PM object using the Esign Maintenance tab, any documents sent from that PM object will use the default set up on the Key Players tab (Esign Order Column).

The system also supports system-level default value settings for each PM object type. If in the specified project, there are no Default Message/Advance Options set up for a specific PM object type, the system will load the system-level default value settings and show them in the Project Maintenance screen for the project. The values can be changed to be specific for a project per PM object.

Subcontract Contact Default Functionality

A special contact default functionality exists for both subcontracts and subcontract change orders in which the system takes the Subcontract Contact and inserts them as a first signer in the Esign pop-up window, regardless of the defaults that are set up on the Esign Maintenance tab or the Key Players tab. First signer is defined as the first available signer, meaning the Subcontract Contact will be inserted in the first available slot in the current signing order. For example, if the key player Esigners are listed as 1 and 3, the Subcontract Contact will be slotted in as number 2.

E-Sign Maintenance – Tab

The screenshot shows the Project Maintenance screen with the Esign Maintenance tab selected. The table below lists the signers and their roles:

Signer	Company	Order	Role
Mike Fern	CMIC Test Construction Company	3	CC
Misty Retchford	CMIC Test Construction Company	1	Signer
Terry Salandanan	CMIC Test Construction Company	2	CC

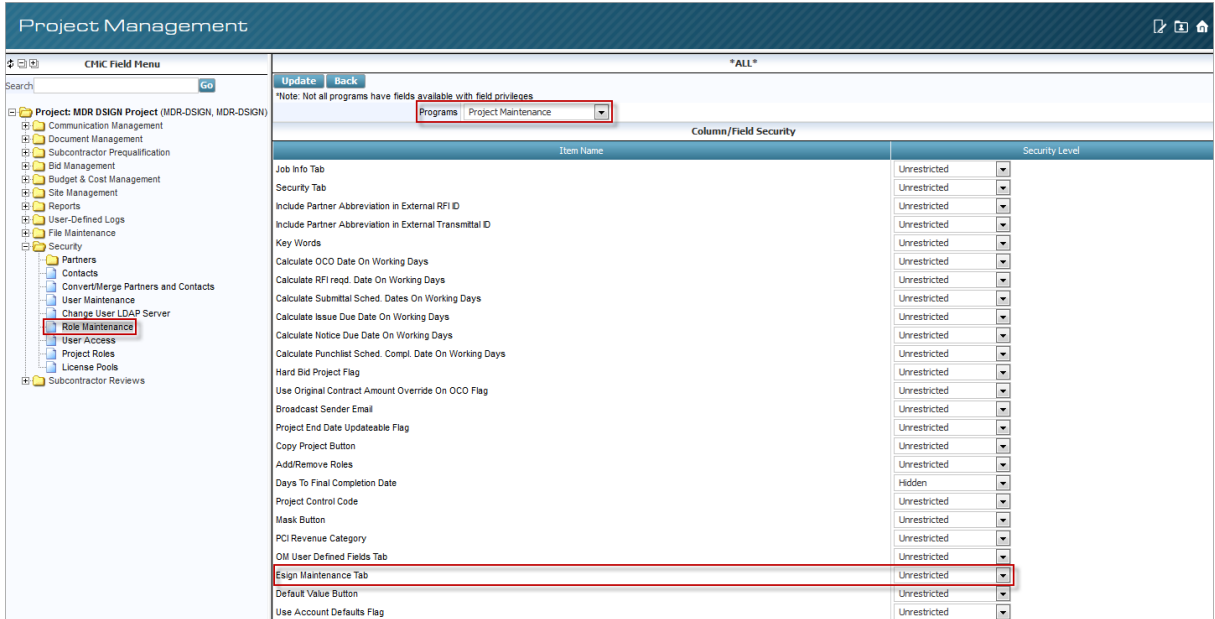
The Advanced Options section includes the following settings:

- Document Type for New Documents: [Dropdown]
- Recipient Privileges:
 - Allow recipients to change signing responsibility:
 - Allow recipients to edit the document:
 - Use Account Defaults:
- Reminders:
 - Send automatic reminders:
 - Number of days before sending first reminder: 2
 - Number of days between reminders: 1
- Expiration:
 - Number of days before request expires: 10
 - Number of days to warn signers before expiration: 2

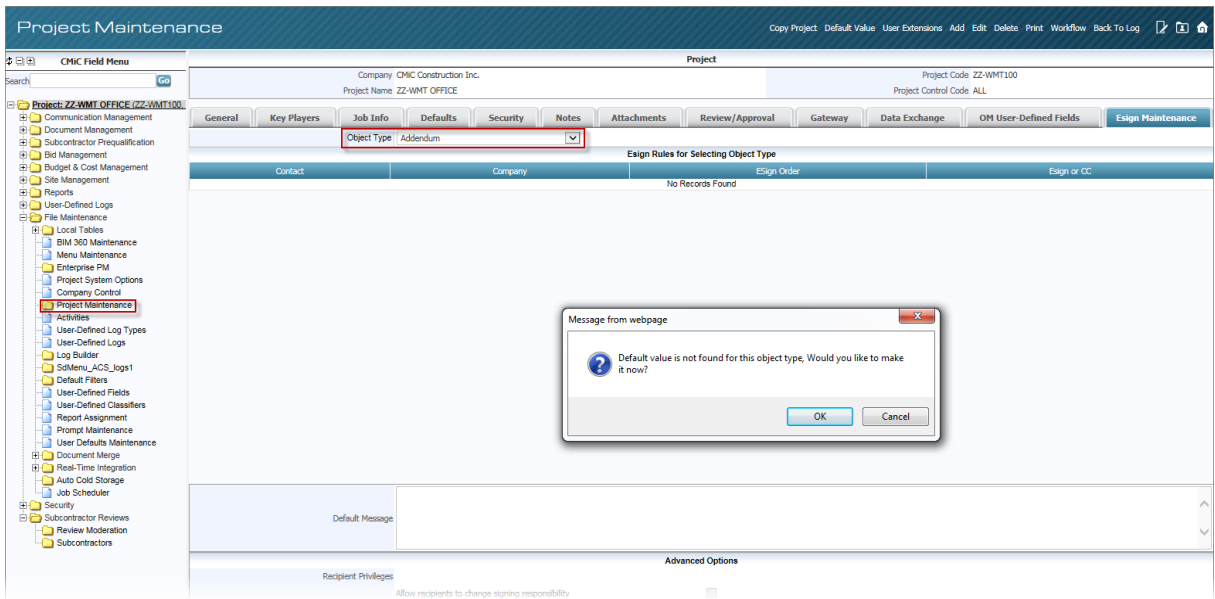
Example of DocuSign Esign Maintenance tab on the Project Maintenance screen (standard Treeview path: CMiC Field > File Maintenance > Project Maintenance - Esign Maintenance tab)

The E-Sign Maintenance screen allows users to set default signers and CCs for DocuSign by project and PM object type, eliminating the need to select the same person(s) each time a specific document type is being sent out. This screen is available from the Esign Maintenance tab on the Project Maintenance screen.

Field security can be applied to the Esign Maintenance tab if necessary. The options are “Unrestricted” or “Hidden”.



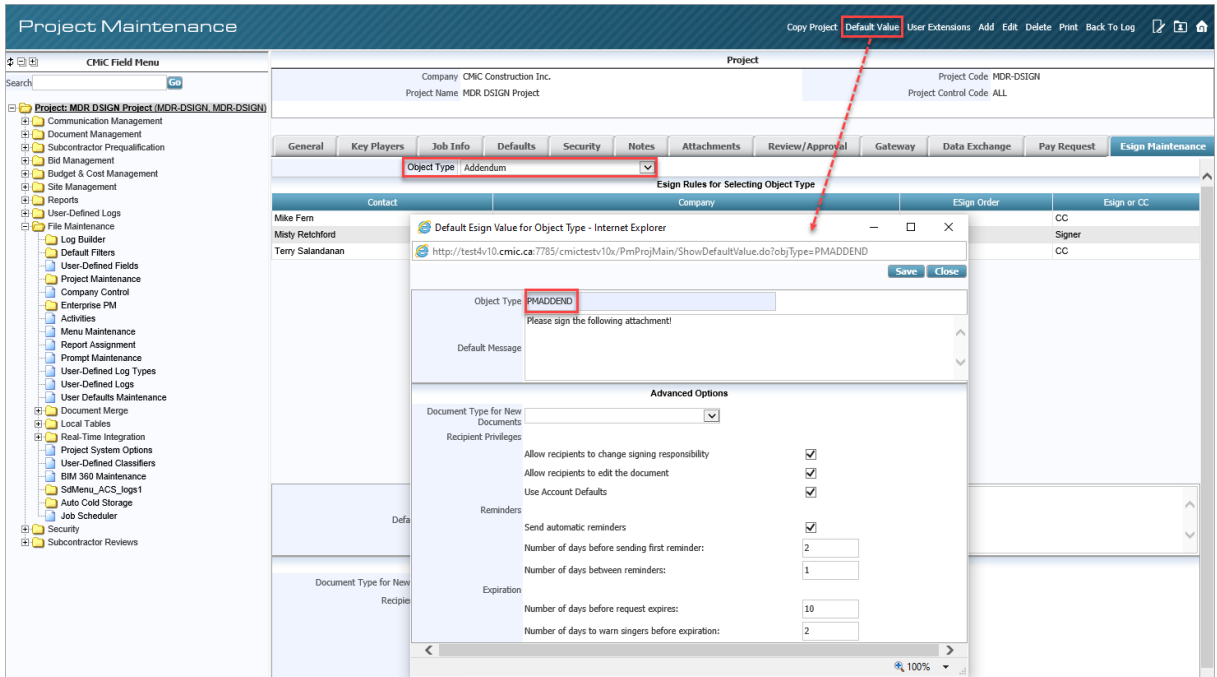
System-Level Defaults



When the user enters the Esign Maintenance tab for the first time, a pop-up window will appear asking the user if they would like to set up system-level defaults for the selected Object Type.

If the user clicks on [Cancel] in the pop-up window, the system-level defaults for Message and Advanced Options can be set up at a later time. In edit mode of the current project, project-level Esign settings can be made for each PM Object Type that is selected.

If the user clicks on **[OK]**, the Default Esign Value for Object Type pop-up window will be launched. This pop-up window can also be launched using the **[Default Value]** button on the main console.



Example of pop-up window used to define system-level defaults for the PM Object Type selected

Complete the Default Message and Advanced Options in the pop-up window, as required, for the Object Type that is selected in the header. Refer to [ESign Documents Process](#) section for more information on setting the document type for new documents.

When the user clicks on **[Save]** and **[Close]**, the default values defined in the pop-up window will be displayed at the bottom of the screen, as shown in the screenshot below.

NOTE: System-level defaults will default to each project, but can be overwritten by editing the project and changing the values.

Project-Level Defaults

Project Maintenance

Company: CHIC Construction Inc. Project Code: MDR-DSIGN
Project Name: MDR DSIGN Project Project Control Code: ALL

Object Type: Addendum

Contact	Company	ESign Order	Esign or CC	Action
Mike Fern	CCC	3	CC	+ X
Misty Retchford	CCC	1	Signer	+ X
Terry Salandanan	CCC	2	CC	+ X

Please sign the following attachment!

Default Message

Advanced Options

Document Type for New Documents

Recipient Privileges

- Allow recipients to change signing responsibility
- Allow recipients to edit the document
- Use Account Defaults

Reminders

- Send automatic reminders
- Number of days before sending first reminder: 2
- Number of days between reminders: 1

Expiration

- Number of days before request expires: 10
- Number of days to warn signers before expiration: 2

Click on the **[Edit]** button (available in View mode) to edit the screen at the project-level and use the add **[+]** button to add the Esign Rules for the Object Type. This is where default signers and CCs for DocuSign by project and PM Object Type are set.

Project Maintenance

Company: CHIC Construction Inc. Project Code: MDR-DSIGN
Project Name: MDR DSIGN Project Project Control Code: ALL

Object Type: Addendum

Contact	Company	ESign Order	Esign or CC	Action
Mike Fern	CCC	3	CC	+ X
Misty Retchford	CCC	1	Signer	+ X
Terry Salandanan	CCC	2	CC	+ X

Please sign the following attachment!

Default Message

Advanced Options

Document Type for New Documents

Recipient Privileges

- Allow recipients to change signing responsibility
- Allow recipients to edit the document
- Use Account Defaults

Reminders

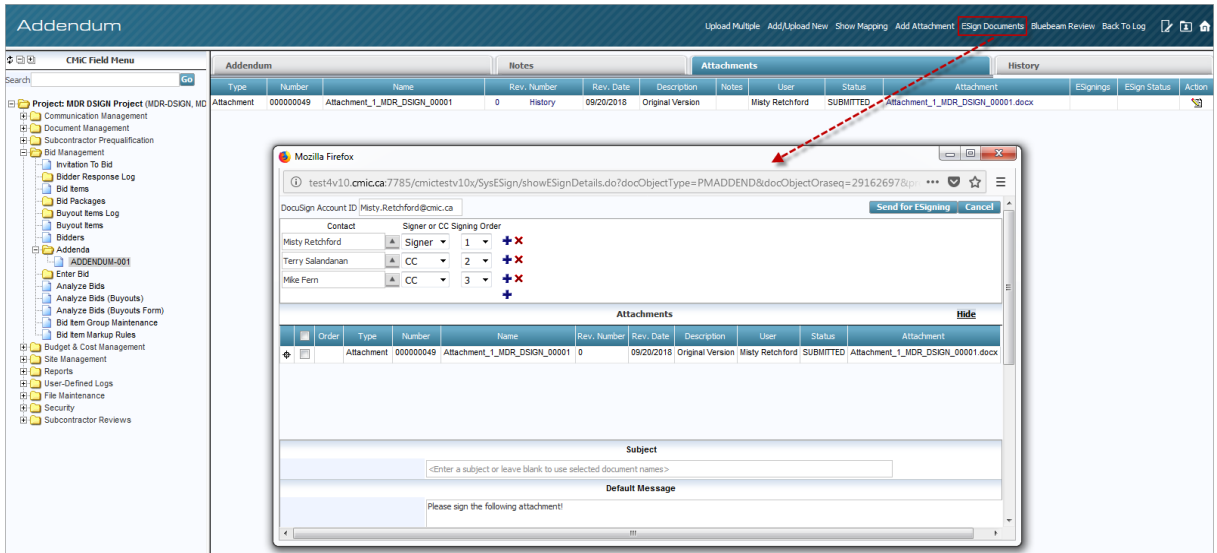
- Send automatic reminders
- Number of days before sending first reminder: 2
- Number of days between reminders: 1

Expiration

- Number of days before request expires: 10
- Number of days to warn signers before expiration: 2

Example of setting up Default Signers and CCs for DocuSign by Project and PM Object Type

The values defined on this screen will default to the Attachments tab of the PM object that has been set up for Esign. Clicking on the **[Esign Documents]** button in the Attachments tab will launch the Esign pop-up window displaying the default values. Any defaults displayed in the Esign pop-up window can be overwritten by the user, as required.



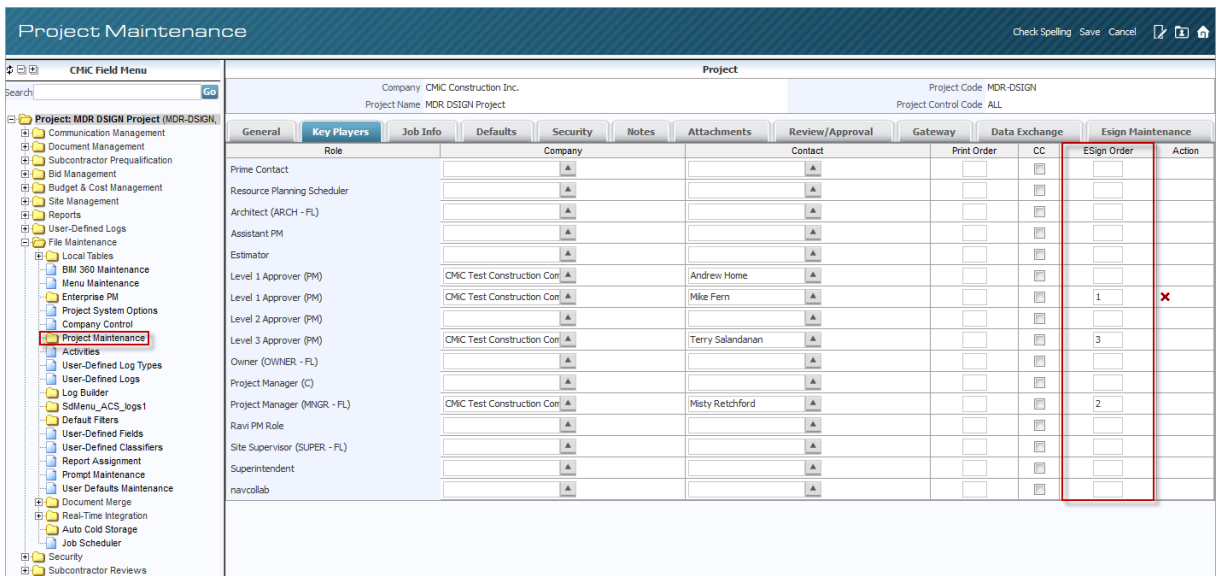
Example of ESign pop-up window displaying defaults set on the ESign Maintenance tab of the Project Maintenance screen

Key Players – Tab

The system will retrieve default signers and CCs from the Esign Maintenance tab first, then from the Key Players tab.

NOTE: If there is no record defined for a specific PM object using the Esign Maintenance tab, any documents sent from that PM object will use the default set up on the Key Players tab (Esign Order Column).

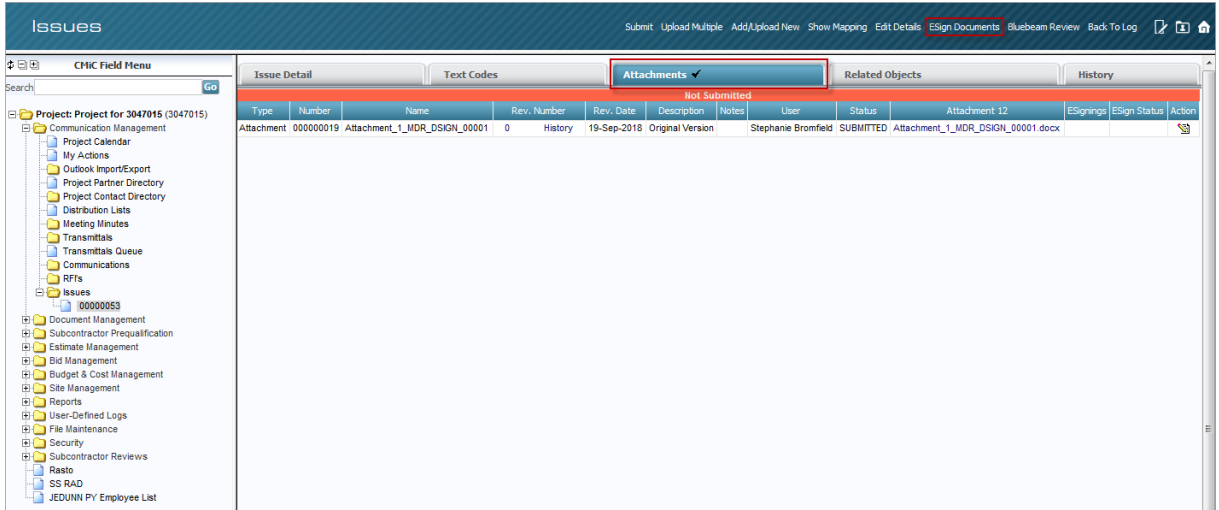
Default signers are set up in the ESign Order column of the Key Players tab in Project Maintenance.



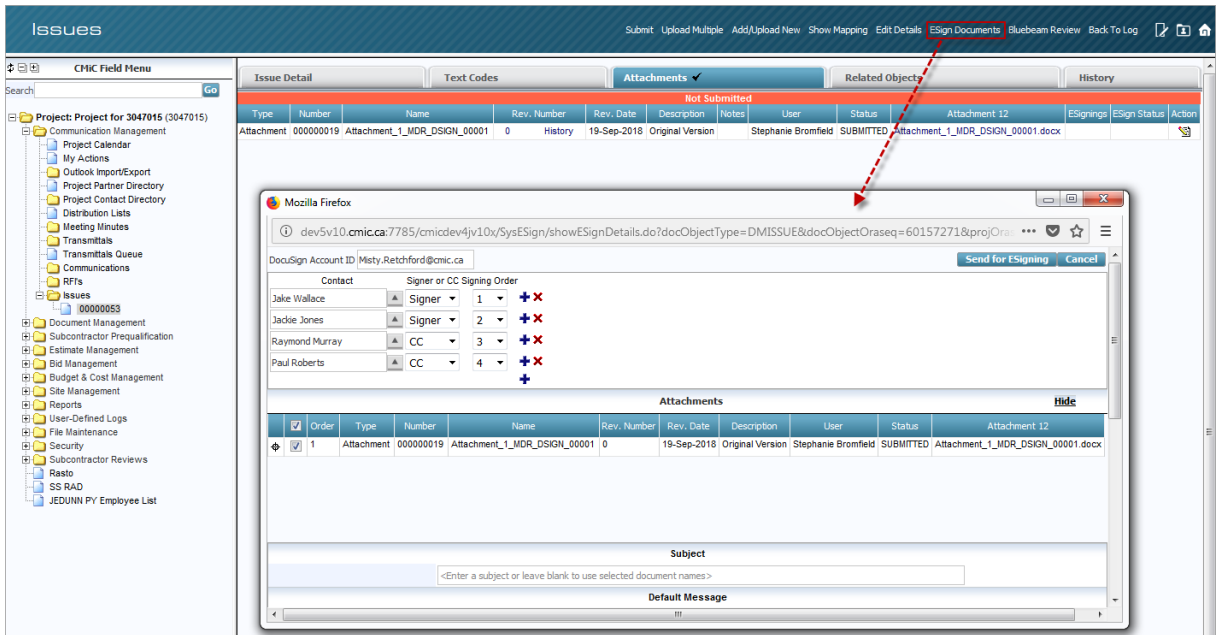
Project Maintenance; standard Treeview path: CMiC Field > File Maintenance > Project Maintenance – Key Players tab

ESign Documents Process

A user starts the process by accessing the Attachments tab of any PM object and pressing the [ESign Documents] button.



In the ESign pop-up window, the user can select contacts to be included in the envelope as signers or CCs (in addition to or instead of any default signers) and assign a signing/viewing order. The user also selects one or more documents to be signed.



Pop-up window launched from [Esign Documents] button in CMiC Field

Once documents have been sent for signing, attachments that have been included in an envelope will display a 'View ESignings' link. This link displays a pop-up to view the ESigning history.

Issue Detail		Text Codes		Attachments <input checked="" type="checkbox"/>				Related Objects		History		
Not Submitted												
Type	Number	Name	Rev. Number	Rev. Date	Description	Notes	User	Status	Attachment 12	ESignings	ESign Status	Action
Attachment	000000019	Attachment_1_MDR_DSIGN_00001	1	History	19-Sep-2018	Esigned Document	Stephanie Bromfield	SUBMITTED	Attachment_1_MDR_DSIGN_00001.pdf	View ESignings	Completed	
Attachment	000000019	Attachment_1_MDR_DSIGN_00001	0	History	19-Sep-2018	Original Version	Stephanie Bromfield	SUBMITTED	Attachment_1_MDR_DSIGN_00001.docx	View ESignings	Completed	

If the attachment has been included in multiple submissions then multiple envelopes will be displayed, allowing the user to select the submission they would like to view.

Esign Submissions			
Date	User	Envelope ID	
2018-09-19 04:13 PM	STEPHANIE	1ed261a8-cc17-4eb2-a864-c1eb6fea9bf0	
2018-09-20 08:30 AM	STEPHANIE	d4447d1e-8e1d-4e28-8409-76c9110492f1	

The detail page shows the envelope details, signers/CCs, sent/signed documents and status history. It also allows the user to void the envelope, providing the envelope is not in a completed state.

Details								
Sent 2018-09-19	User STEPHANIE	Envelope ID 1ed261a8-cc17-4eb2-a864-c1eb6fea9bf0						
Signers/CC's								
Contact	Type	Order						
Jake Wallace	Signer	1						
Documents								
Type	Number	Name	Rev. Number	Rev. Date	Description	User	Status	Attachment 12
Attachment	000000021	Attachment_3_MDR_DSIGN_00003	1	2018-09-19	Esigned Document	Stephanie Bromfield	SUBMITTED	Attachment_3_MDR_DSIGN_00003.pdf
Attachment	000000021	Attachment_3_MDR_DSIGN_00003	0	2018-09-19	Original Version	Stephanie Bromfield	SUBMITTED	Attachment_3_MDR_DSIGN_00003.docx
History								
Date	Type	Status						
2018-09-19	Envelope	Completed						
2018-09-19	Envelope	Delivered						
2018-09-19	Envelope	Sent						

Setting the Document Type for New Attachments

The screenshot shows the 'Project Maintenance' interface. The 'Esign Maintenance' tab is active. The 'Object Type' dropdown is set to 'Addendum'. The 'Advanced Options' section shows 'Document Type for New Documents' set to 'Addendum'. The 'Recipient Privileges' section has two checkboxes checked: 'Allow recipients to change signing responsibility' and 'Allow recipients to edit the document'.

Project Maintenance; standard Treeview path: CMiC Field > File Maintenance > Project Maintenance - Esign Maintenance tab

The Document Type for New Documents field, located on the Project Maintenance screen (shown in the screenshot above) and on PM objects, is used to define the document type for new documents uploaded in DocuSign and sent to CMiC.

This field can be set at the system level or the project level. If this field is left empty for an object type at the system and project level, documents sent back to CMiC from DocuSign must keep the original file name and no new attachments can be included in the envelope for the selected object type.

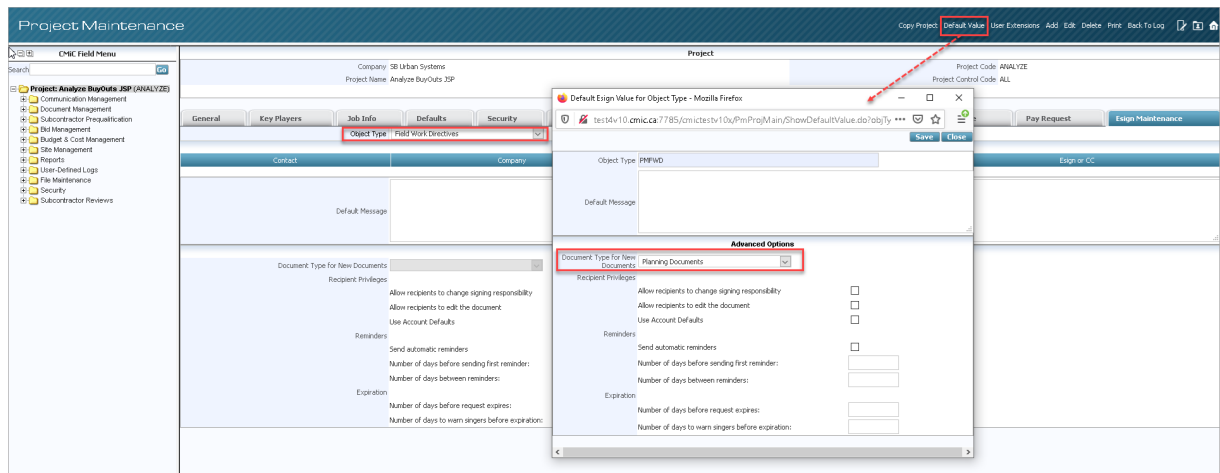
If a document type is selected at either the system or project level for an object, documents that are new to the envelope can be uploaded to DocuSign and added as a new document in CMiC using the object's selected document type.

The following three scenarios demonstrate why a user might want to replace the original document sent with a newly named document or include new documents in the envelope:

- If the user wants to delete a sent document in DocuSign and upload and sign a new document.
- If the user wants to add an attachment to the envelope.
- If the user wants to select the option to manually sign the document in DocuSign.

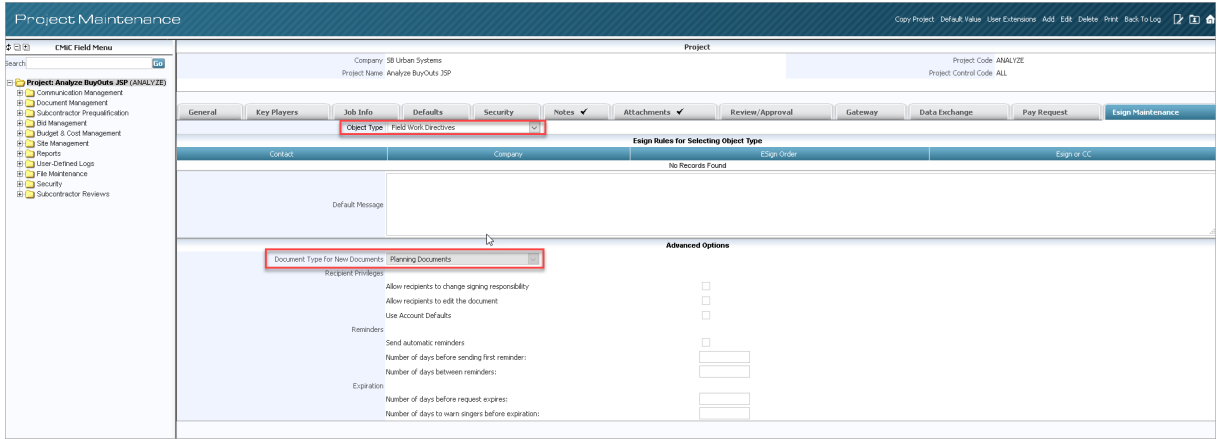
Default document types can be set in the E-Sign Maintenance tab of the Project Maintenance screen, which default to the PM object, or the document type can also be selected directly on the PM object.

Setting the Default Document Type



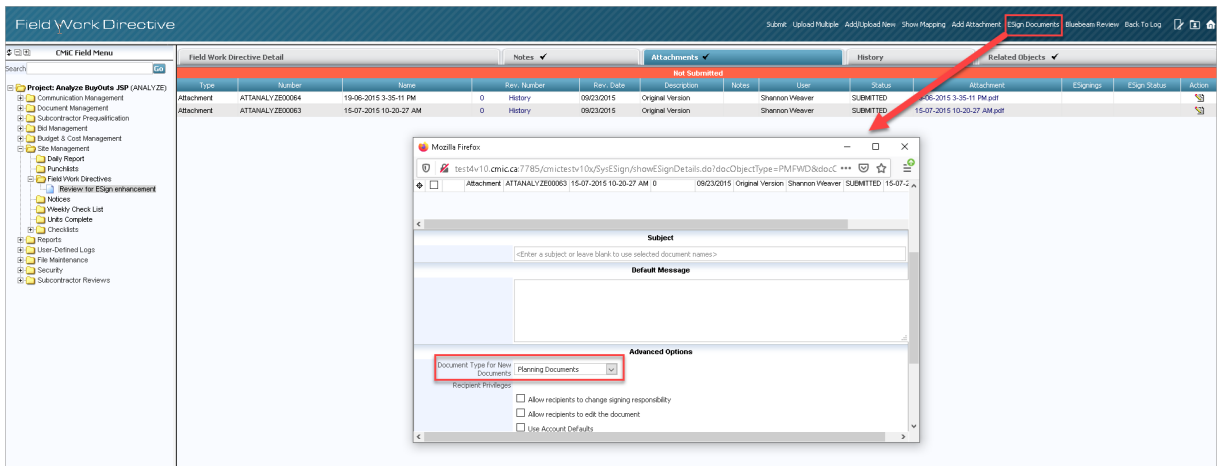
Project Maintenance; standard Treeview path: CMiC Field > File Maintenance > Project Maintenance - Esign Maintenance tab

The default document type can be set for each object type on the E-Sign Maintenance tab of the Project Maintenance screen. Select the object type from the Object Type drop-down menu, then click on the [**Default Value**] button in the console to launch the Default Esign Value for Object Type pop-up window, as shown in the screenshot above. In the pop-up window, use the Document Type for New Documents field's drop-down menu to select the document type to be used when a new document is received from DocuSign. The type selected in this pop-up window will be used as the default in the PM object's ESign pop-up when defaults have not been set at the project level.



NOTE: Field security can be assigned to the Document Type for New Documents field on the Project Maintenance screen or the ESign screen for the PM object, if required. Refer to *Security Settings* in this section for more information.

Selecting the Document Type from the PM Object

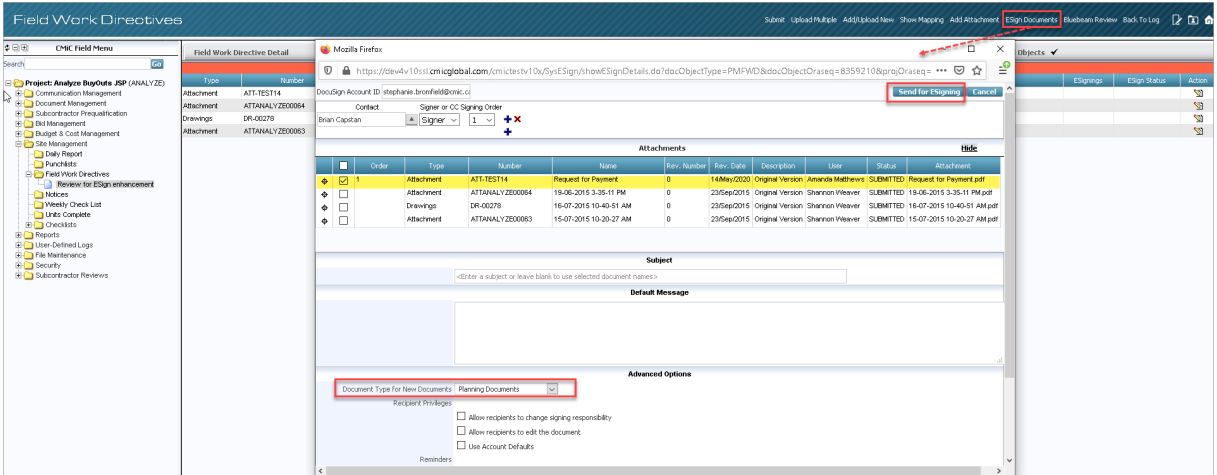


Example of setting the document type for a PM object

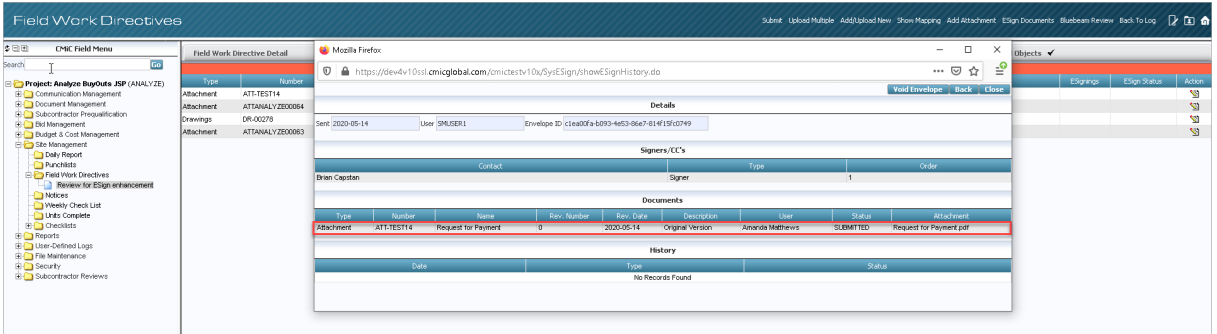
If the default document type has been set in the E-Sign Maintenance tab of the Project Maintenance screen for the PM object, then that document type will default to the PM object, but can be updated for the object if required.

DocuSign Process Using Document Type

The following shows an example of sending a PM object (e.g. Field Work Directive) to DocuSign with a document type selected for the object.



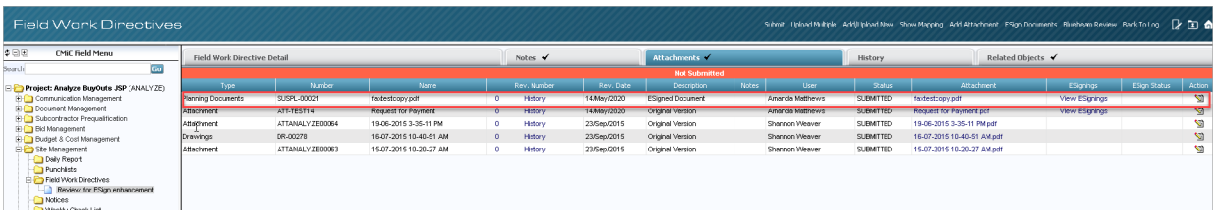
Example of sending PM object to DocuSign with document type defined for the object



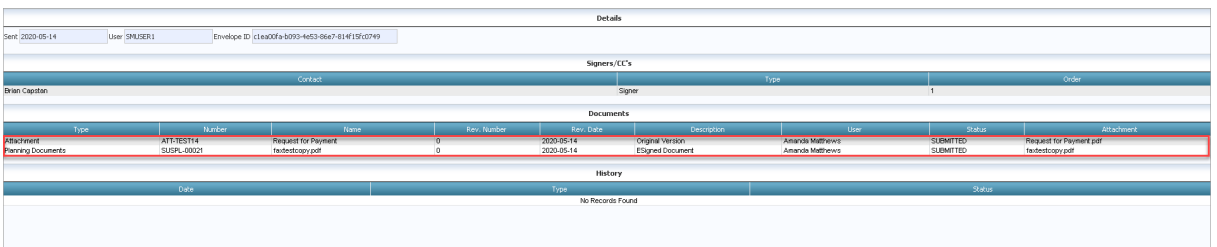
After the document is sent to DocuSign, the user logs into DocuSign using their account credentials and makes changes to the document (e.g. deletes the one sent and adds a different one). After completing the updates, the user resends the document from DocuSign.

Recipient receives email and responds by signing it.

CMiC is updated with the new signed document, which uses the pre-defined document type.



Clicking on the View ESignings link for the document details the two different document types.



Security Settings

Field security exists for the Document Type for New Documents field on the Project Maintenance screen and the ESign screen, as shown in the screenshots below.

Project Maintenance

The screenshot shows the CMiC FIELD interface for Project Maintenance. The left sidebar contains a treeview with categories like Communication Management, Document Management, and Security. The main area displays a table of security settings for 'Project Maintenance'. A dropdown menu is set to 'Project Maintenance'. The table has columns for 'Item Name', 'Column/Field Security', and 'Security Level'. The 'Document Type for New Documents for default' row is highlighted with a red box, showing 'Unrestricted' in the Security Level column.

Item Name	Column/Field Security	Security Level
Number of days between reminders for default		Unrestricted
Number of days before request expires for default		Unrestricted
Number of days to warn signers before expiration for default		Unrestricted
Document Type for New Documents for default		Unrestricted

Role Maintenance; standard Treeview path: CMiC Field > Security > Role Maintenance

E-Sign

The screenshot shows the CMiC FIELD interface for E-Sign. The left sidebar contains a treeview with categories like Partners, Contacts, and Security. The main area displays a table of security settings for 'ESign'. A dropdown menu is set to 'ESign'. The table has columns for 'Item Name', 'Column/Field Security', and 'Security Level'. The 'Document Type for New Documents' row is highlighted with a red box, showing 'Unrestricted' in the Security Level column.

Item Name	Column/Field Security	Security Level
Allow recipients to change signing responsibility		Unrestricted
Allow recipients to edit the document		Unrestricted
Use Account Defaults		Unrestricted
Send automatic reminders		Unrestricted
Number of days before sending first reminder:		Unrestricted
Number of days between reminders:		Unrestricted
Number of days before request expires:		Unrestricted
Number of days to warn signers before expiration:		Unrestricted
Document Type for New Documents:		Unrestricted

Role Maintenance; standard Treeview path: CMiC Field > Security > Role Maintenance

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