



Adobe Sign for iManage V9.x

Technical Overview

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Aim of this Document

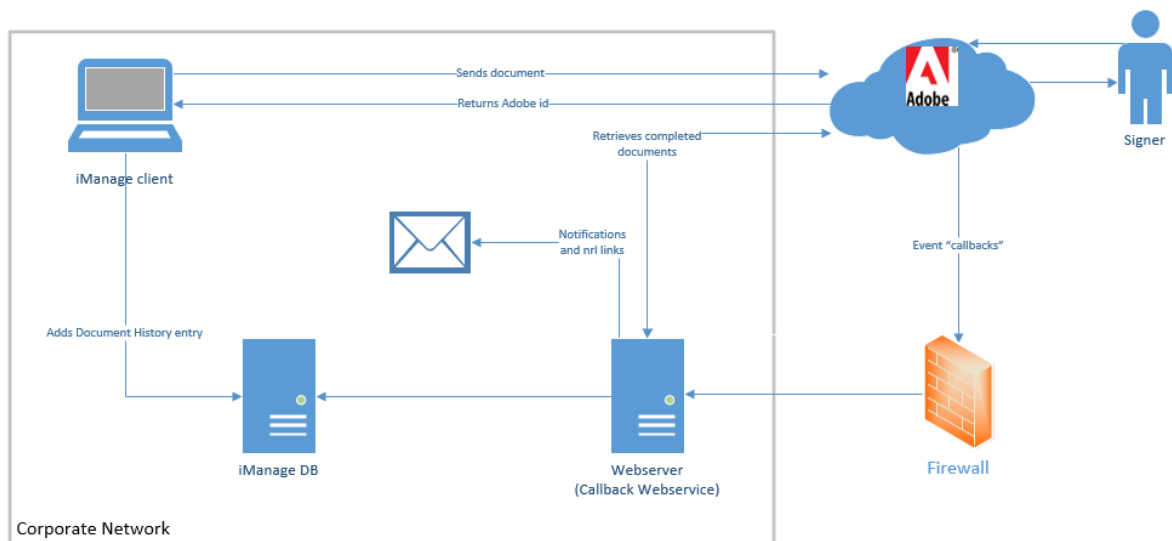
This document provides a High-Level Overview of the components used for the iManage Adobe Sign integration. This document is intended to be used by technical representatives and product owners.

High-Level Overview

The integration allows a user to send document(s) for signature using the Adobe Sign system directly from iManage V9.x (Filesite or Desksite). Realtime updates are provided to the user by making use of the “callback” architecture provided by Adobe. Callbacks are received by a webservice within the sites infrastructure with callback metadata and signed documents being saved directly back into iManage.

An overview of the key steps is given below and Fig1 shows the interplay between the components:

1. User selects a document to send and sets the transaction information (eg recipients etc) by “right clicking” on the document in the Filesite or Desksite Client to display the a tabbed dialog. (note: the user will receive an OAuth challenge at first use and must authenticate with their Adobe account credentials).
2. Adobe handles the request, sends the document to the recipient and returns an Adobe ID.
3. iManage document history is updated to record the ‘send’.
4. Recipient interacts with the document.
5. Adobe sends events to the callback webservice as the document goes through the signing process (eg viewed, rejected, signed etc).
6. iManage document history updated based on the callback events.
7. Once completed, the signed document is downloaded and added as a new document into the same workspace as the original document.
8. Notifications with nrl links are sent if requested by the sender.



1. User sends document
2. Adobe returns id
3. iManage document history updated to record the “send”
4. Signer interacts with document
5. Adobe send events as “callbacks”
6. Signed document retrieved from Adobe and added to workspace –
7. Notifications and nrl links (if required) generated and sent.

Fig 1.

Components

As can be seen from the overview above, a number of components are used within the solution. Zylpha will supply the following:

1. Desktop client installer
2. Server installer for callback webservice
3. Administration Application

The details of each of these are set out in more detail below.

1. Desktop Client

Purpose

Provides the application user interface from within the Desksite/Filesite application.

Prerequisites

Technical

- .NET Framework 4.6 or above.

Software/accounts

- Adobe Enterprise account.
- Desksite/Filesite client must exist on the user machine.
- The user must have an active iManage user account.
- Adobe API Application must exist in the Adobe account with the appropriate scope allow the user to send documents for signature.

Installation

- The desktop client is installed via an MSI package

Note that the msi will also add the workspace context menu registry entries to the end of the context menu at:

```
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Interwoven\WorkSite\Client\DeskSite\Commands\
Menus\Document
```

In addition, access to the users Adobe account can be provided by way of a menu button which is added at:

```
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Interwoven\WorkSite\Client\DeskSite\Commands\
Menus\Zylpha
```

2. Callback Webservice

Purpose

Receives callbacks from Adobe and updates iManage with the new details of events occurring during the signing process.

Prerequisites

Technical

- IIS 7 or above.
- Server 2012 R2 or above (min .net framework 4.5.2).

Software/Accounts

- Adobe Enterprise account.
- Windows domain user.
- Filesite/Desksite present on the server
- Adobe API Application must exist in the Adobe account with the appropriate scope to get updates and download documents
- iManage admin user account must be available to enable the process to save documents and updates to any workspace.

Configuration

- We suggest IP filtering for the Adobe callbacks so that only Adobe can use the webservice. The Adobe website list the details of the IP Ranges used in their callbacks which can be found at <https://helpx.adobe.com/sign/system-requirements.html>
- An iManage admin user is required to be able to write document history update and save documents.
- Note: it is recommended that the “API Application” used to receive updates and download signed documents is separate from the client side API Application in order to limit the scope for updating only – i.e. there is no requirement for this “user” to send agreements.

3. Administration Application

Purpose

Allows administration of the Callback Webservice application and its connection to iManage. This is installed as part of the Callback Webservice.

Prerequisites

Technical

- .net framework 4.5.2.