

DocuSign® Connector for Alfresco

Integrate e-Signatures with your Alfresco Deployments

Your company has recently made the decision to standardize on Alfresco's Digital Business Platform, or perhaps you currently utilize Alfresco Process Services or Alfresco Content Services, or both. Each are excellent choices, and you are now poised to take advantage of the many features and capabilities of a modern process and content-based computing platform.



Your users require the need for collaboration and vetting of certain enterprise content, and that culminating with electronic signature(s) to complete the process. End-to-end, streamlined processing is of utmost importance, with ease of use and no manual steps along the way, and all signed documents published correctly to the Alfresco Content Services (ACS) enterprise repository.

ClearCadence understands that power, uniformity, flexibility, and consistency are the cornerstones of an effective integration. That's why we developed the **DocuSign® Connector for Alfresco**, a powerful integration connector that facilitates the review and collaboration of a document prior to it being sent to DocuSign® for e-signature. Once the process has completed and the document is electronically signed, it can be successfully published to the ACS content repository.

By utilizing the DocuSign® Connector for Alfresco, organizations put the processing power in each user's hands by allowing them to simplify and accelerate the use of electronic signatures and enterprise content management. This in-turn improves efficiencies and lowers your overall deployment and training costs.

DocuSign® Connector Features

The ClearCadence DocuSign® connector for Alfresco is a prebuilt set of RESTful services that can be used within a custom application or an Alfresco Process Services (APS) workflow to coordinate the activities required to get an e-signature completed for a document. Specifically, the connector provides the following services:

- ✓ *A REST service that accepts a document attachment with metadata that identifies the document and person(s) that are required to review the document, and the destination recipient required to sign the document,*
- ✓ *A REST service that tracks every party involved and when they have viewed the document. This provides a complete audit trail of viewers and can also be called to determine the status of the review cycle (number of people viewed versus those required to review before signature),*
- ✓ *Once the document is ready for signature, a REST service retrieves the document from ACS and submits it to DocuSign® based on the identified signer metadata that was provided.*

Each of these services are provided in a complete library with documentation for the inputs and outputs of each service call. The Connector can also be used standalone as REST services and it comes packaged with an example APS process workflow.

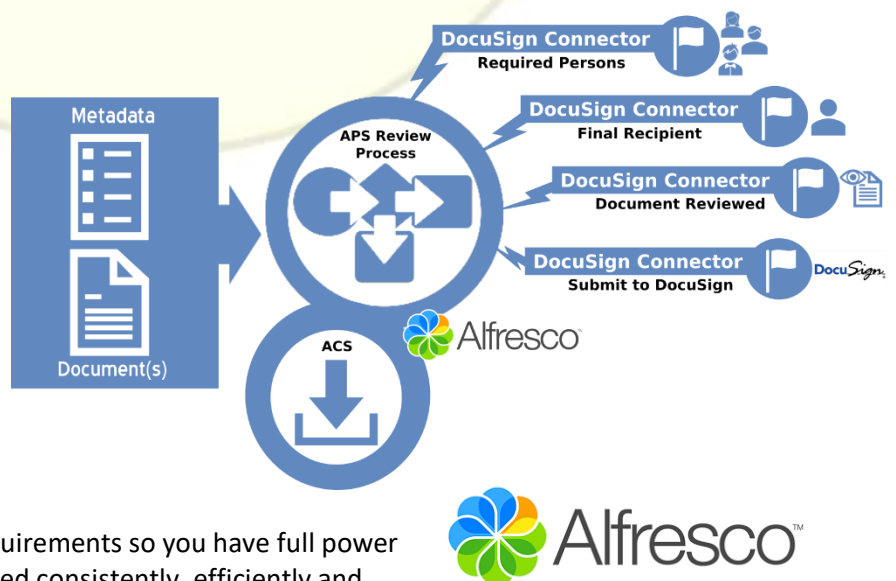
An impactful, business-centric use-case for utilizing the DocuSign Connector for Alfresco is provided below:

Consider a new Compliance regulation that needs to be implemented and requires sign off from top executives, but only after each department head reviews and approves:

1. Compliance launches an APS business process by collecting together relevant documents and metadata. The metadata includes properties such as:
 - A summary of the new regulation and any other data deemed important by the Compliance department,
 - A list of email recipients (the Approvers) required to review the document before signatures;
 - Email addresses for the Signers,
 - A true/false flag to indicate if all Approvers must review the document before signatures.
2. The document goes through a review cycle where the Approvers activity will be tracked via one of the *DocuSign Connector* REST services.
3. If required, the document is made available as an external link to the Approvers. This link will be monitored by the *DocuSign Connector* to track when the Approvers previewed the document before making a decision. The flow will progress further only when all the relevant Approvers have previewed the document and made a review decision.
4. Once the document is approved, a task is generated for the document and it is sent to the Signers for e-signatures. Emails are sent out to the Signers with the document link.
5. After review, the Signers electronically sign via a DocuSign® previewer. The Signers also complete signature date, signer title, or other required fields along with e-signature as per a custom template designed originally by Compliance to ensure proper processing of the document.
6. Once the Signers have completed the e-signature step, the fully signed document is sent by DocuSign® back to Compliance via email.
7. Finally, once the flow is completed, the signed document is published to the company's ACS repository along with relevant document metadata.
8. During the entire process, DocuSign® Administrators can track the status of the documents pending signatures at any point in time.

Value of the DocuSign® Connector for Alfresco

Imagine, your business users no longer have to manually complete electronic signatures separate from the Alfresco content to complete their work. One integration for expedient processing with the ability to integrate seamlessly with the Alfresco Digital Business Platform. And, the integration is fully extendable to other specific interface requirements so you have full power and control. And work is getting performed consistently, efficiently and effectively. Life is good!



Highlights

- Our mission and focus is the automation of manual processes, organizing and managing your digitized assets, and integrating with back-end systems.
- Leverage Consulting Services experience and optimize your digital implementation and achieve greater productivity.
- See and learn the correct and recommended method to install, configure, upgrade, and use digital content products.
- Responsive, flexible, and easy to contract and work with.

Benefits

- Receive expert help from the company that understands challenges unique to digital content.
- Unbiased, consultants who understand ECM and process improvement strategy.
- Exploit the full power of digital transformation products and achieve greater business flexibility.
- Apply best practices to facilitate successful digital-based solutions.

We Know Digital Transformation

ClearCadence can provide assistance from learning, defining, developing, and maintaining your Digital Transformation Strategy and provide expert-level skills from analysis to implementation. Our services allow you to have the right path for success in executing your digital strategy at the department and/or enterprise level. Our expertise in process and enterprise content management fields is provided by certified professionals with real-world, practical experience.

Proven Delivery Methodology

The ClearCadence Delivery Methodology is a complete and adaptable approach to rapidly deploying your Digital Transformation initiatives. Developed and continuously enhanced by the industry experts of the ClearCadence Professional Services team, the best practice delivery methodologies help you increase speed to value and establish a solid foundation for on-going process and enterprise content management improvements by fully leveraging the depth of capabilities and flexibility offered in transformation software solutions.

With a strong customer focus and emphasis on collaboration, the ClearCadence Delivery Methodology helps ensure your implementation is easily understood and embraced. Throughout the entire engagement, you maintain full project visibility and participation, allowing checkpoints and milestones to be easily tracked and measured by everyone involved. The ClearCadence approach to implementation enables the transfer of knowledge and skills to your team, and helps you achieve a rapid and successful solution roll-out that delivers immediate results.

Why ClearCadence?



ClearCadence

ClearCadence has the experience and resources necessary for successful planning, architecture, design, development, customization, project management, technical support and education to help you get the most out of your digital transformation investment. We offer the right combination of the industry's top people and solutions to help you meet your business objectives. ClearCadence Professional Services deliver:

- ✓ Expert consultants who truly understand workflow, content, integration, and digital transformation challenges in your industry,
- ✓ Trainers experienced in knowledge transfer,
- ✓ Superior customer service for immediate response and results with 100% client satisfaction.

ClearCadence is committed to your success and to building a long-lasting relationship that helps you realize a strong return from your investment – both now and into the future. Let our Professional Services team help you take full advantage of process-based and enterprise content management disciplines and technology by analyzing your business and system processes, identifying issues, and transforming them into efficient solutions.