OneSpan Sign for Salesforce

Deployment Guide

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Introduction

This is the Deployment Guide for *OneSpan Sign for Salesforce*. It describes:

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TIP: After you have installed and configured *OneSpan Sign for Salesforce*, see the OneSpan Sign for Salesforce User's Guide for a description of how to use the product.

Configuration Prerequisites

Deployment Guide: ***Prerequisites (you are here)*** *→ Installing → Connecting → Permission Sets → Existing Users → New Users → App Menu → Optional Configurations*

- You are a Salesforce System Administrator.
- The user who will become an *eSignLive System Administrator* has the profile of a Salesforce System Administrator.
- You have either a eSignLive admin username and password (recommended) or a eSignLive API key.
- In Salesforce, *Chatter* must be enabled to use the *OneSpan Sign for Salesforce* application.
- You have an *eSignLive Professional* or *eSignLive Integrated* account. If you don't yet have an account, you can sign up for one.
- You have the minimum required version of eSignLive for your version of *OneSpan Sign for Salesforce*:
  - For *OneSpan Sign for Salesforce* v4.5, the minimum required eSignLive version is 10.13.
  - For *OneSpan Sign for Salesforce* v4.1.4, the minimum required eSignLive version is 10.9.

> **NOTE:** Your configuration settings depend on the URL into which you log. If you aren't sure which URL to use, in the email you received when you signed up, click **Log into your account**. In the *Login* screen that appears, your login URL will appear in your browser's address bar. Note that eSignLive is in the process of removing the hyphen from its URLs.

You must provide the URL of an eSignLive server.

If you are exploring the system or performing tests, you can connect to our *Sandbox* environment. Alternatively, if you have completed your integration with our system and want to launch your product, you can connect to our *Production* environment.

Sandbox Accounts are not equivalent to Production Accounts. To connect to the eSignLive Production Environment, you must purchase a Production Account.

For more information on which Environment URLs you should use to connect to, and which IP addresses need to be whitelisted to do so, see Environment URLs and IP Addresses.

Installing the Application

Deployment Guide*: Prerequisites* → ***Installing (you are here)*** → *Connecting* → *Permission Sets* → *Existing Users* → *New Users* → *App Menu* → *Optional Configurations*

To install *OneSpan Sign for Salesforce* v4 for the first time, or to upgrade to that application version from a previous version:

1. Open a web browser and navigate to https://appexchange.salesforce.com.
2. Using the search field at the top of the page, search for **eSignLive**.
3. Click the **OneSpan Sign for Salesforce** app, and then click **Get It Now**.
4. Click **Log in to the App Exchange**, and enter your Salesforce login credentials.
5. Click **Install in production**. An *Almost there!* screen appears.
6. Select the **I have read and agree to the terms and conditions** box.
7. Click **Confirm and Install**.
8. On the screen that appears, enter the username of your Salesforce production account. One of the following happens:
   - If you are installing the application for the first time, the *Transaction Installation Details* page appears.
   - If you are upgrading the application from a previous version, the *Transaction Upgrade Details* page appears.
9. Review the installation details, then click **Continue**. An *Approve Third-Party Access* dialog box opens.
10. Select the **Yes, grant access to these third party web sites** box, and click **Continue**. An *Approve Transaction API Access* page appears.
11. Review the displayed information, and click **Next**. A *Choose security level* page appears.
12. Select **Grant Access to Admins Only**, and click **Next**. An *Install Transaction* page appears.
13. Click **Install**. The *eSignLive Installed Transaction Details* page appears, enabling you to review the application details.
    - If you are installing the application for the first time, you have only one Salesforce license. For additional licenses, contact your eSignLive CSR (*Customer Satisfaction Representative*).
    - If you are upgrading from a previously installed version of the application, your previous active licences remain valid.
14. After the installation is complete, click **Manage Licenses** to ensure that your Salesforce licences are assigned to the right users.

    > **NOTE:** Salesforce users will not be able to use *OneSpan Sign for Salesforce* until they are assigned a Permission Set.

Upgrading to Version 4.12

If you are upgrading to *OneSpan Sign for Salesforce* version 4.12 then certain additional procedures need to be performed. These procedures are needed to:

- Configure the available languages for a transaction
- Update to our new OneSpan Sign corporate design

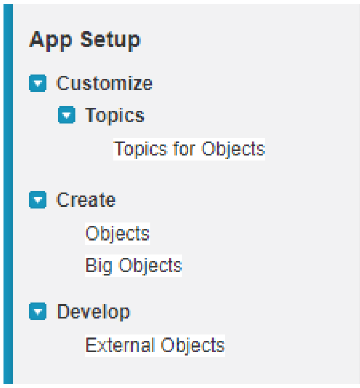
Configure the Available Languages for a Transaction

To allow your administrators to set the languages that can be displayed in a transaction, you must first enable those languages for the *OneSpan Sign for Salesforce* app.

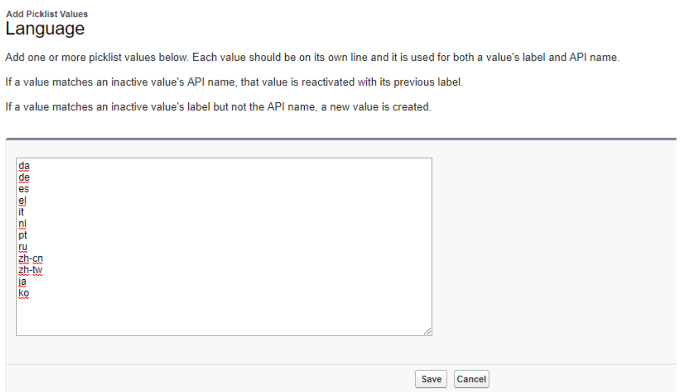
> **NOTE:** This procedure is only required if you are upgrading to this version of *OneSpan Sign for Salesforce*. If you are performing a fresh install, please see Selecting Display Languages.

To configure the available languages for a transaction:

1. From the drop-down menu next to your account name, click **Setup**.
2. In the *App Setup* menu on the left-hand side, click **Create > Objects**. The *Custom Objects* page appears.



3. In the *Label* column, click **Transaction**.
4. In *Label Field* column of the *Custom Fields & Relationships* table, click **Language**.
5. In the *Values* table, click **New**. The *Add Picklist Values* page appears.
6. Enter the language codes for all the languages that you would like to enable. Ensure that each language code is entered on its own line.



TIP: The following languages are supported:

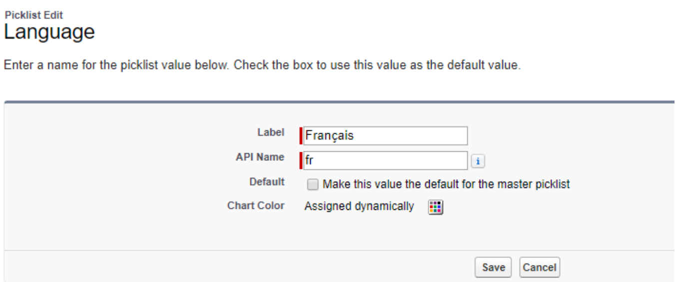
Language	Value in the Code
English	[en]
Français (French)	[fr]
Danske (Danish)	[da]
Deutsch (German)	[de]
Español (Spanish)	[es]
Ελληνικά (Greek)	[el]
Italiano (Italian)	[it]

Language	Value in the Code
Nederlands (Dutch)	[nl]
Português (Portuguese)	[pt]
Русский (Russian)	[ru]
中文简体 (Chinese - Simplified)	[zh-cn]
中文繁體 (Chinese - Traditional)	[zh-tw]
日本語 (Japanese)	[ja]
한국어 (Korean)	[ko]

7. Click **Save**. The *Transaction Custom Field Language* page appears. You must now ensure that the language values and their corresponding API Names match.

To match language values with their corresponding API Names:

1. In the *Transaction Custom Field Language* page scroll to the *Values* table.
2. Click **Edit** next to the language that you want to match API Names with.
3. In the API field, ensure that the selected language has the proper code, using the table above. For example, for *Français*, enter **fr**.



4. Repeat for each language.

Rebranding to our new OneSpan Sign Corporate Design

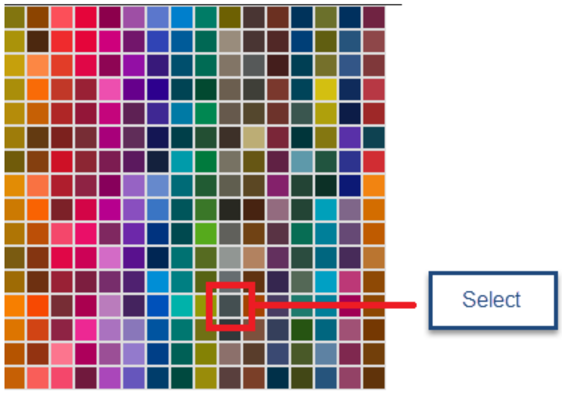
Recently eSignLive rebranded itself as OneSpan Sign. In addition to the steps described above, to upgrade to Version 4.12 additional steps are required to ensure that our new corporate logo, colors, and labels are also updated. Updating to the latest corporate look involves the following:

- Rebranding the tabs
- Rebranding the application name and labels

To rebrand your tabs:

1. In Salesforce navigate to **App Setup > Create > Tabs**.
2. In the *Custom Object Tabs* section, locate the tab you would like to rebrand. For example, the **Conventions** tab. Click **Edit**.
3. In the *Tab Style* field, click the search icon.
4. In the *Tab Style Selector* page, click **Create your own style**.

5. In the *Define a new color style* page, click the search icon and select the color shown below:



6. In the *Icon* field, click **Insert an Image**.
7. Navigate to the *Silanis* folder and select the **OneSpan Tab Icon.**
8. Click **OK**, and then **Save**.

Repeat this procedure for each tab:

- Conventions
- Field Mappings
- Templates
- Transactions
- Admin

Rebranding the Application Name and Labels

1. In Salesforce navigate to **App Setup > Create > Apps**.
2. In the *Apps* section, click **Edit** next to *eSignLive*. The *Custom App Edit* page appears.
3. In the *App Label* field, enter **OneSpan Sign**.
4. Click **Insert an Image**.
5. Navigate to the *Silanis* folder and select the **OneSpan Sign Logo.**
6. Click **OK**, and then **Save**.

Connecting to eSignLive

Deployment Guide: *Prerequisites → Installing → **Connecting (you are here)** → Permission Sets → Existing Users → New Users → App Menu → Optional Configurations*

To connect *OneSpan Sign for Salesforce* to your Production eSignLive account:

1. Log in to the relevant *Salesforce.com* organization as a System Administrator.
2. Click the **Salesforce.com App Menu** in the top-right corner. From the drop-down menu, choose **eSignLive**. The *eSignLive Transactions Home* page appears.
3. Click the **Admin** tab. The *Admin* page appears.
4. Do one of the following:
   - If you want to connect using your eSignLive credentials, choose the *Connection Method* to be **Credentials**. Then type your **Username** and **Password** in the text fields.
   - If you want to connect using your eSignLive Account API key, choose the *Connection Method* to be **Account API Key**. Then type your API key in the text field.

   > **NOTE:** Your Production Salesforce account can connect only to a Production eSignLive account (*apps.esignlive.com*). It cannot connect to a Sandbox eSignLive account (*sandbox.esignlive.com*).

5. Click **Connect**. A dialog box requests the permission to connect.
6. Click **Allow**. A connection is established between *OneSpan Sign for Salesforce* and your Production eSignLive account.

Configuring Permission Sets

Deployment Guide: *Prerequisites → Installing → Prerequisites → Connecting* → ***Permission Sets (you are here)*** → *Existing Users → New Users → App Menu → Optional Configurations*

Any combination of the following three Permission Sets can be configured on a given *OneSpan Sign for Salesforce* account:

- **eSignLive User** – These users: (1) have access to the *Transactions* page; (2) can create, modify, and send document transactions; (3) can create transactions from scratch or from templates.
- **eSignLive Template Admin** – These users can: (1) create, modify, activate and deactivate templates; (2) create and modify transactions from scratch or from templates; (3) send transactions; (4) create, modify, and delete eSignLive Conventions.
- **eSignLive Admin** – These users: (1) have all the permissions of the previous two Permission Sets; (2) can access the *eSignLive Admin* page; (3) can modify the Permission Sets of other users.

> **TIP:** eSignLive Admins must have the profile of a *Salesforce System Administrator*. eSignLive Admins can prepare transactions or templates only if they own them.

To enable the above Permission Sets to view and access the *eSignLive* option in the Salesforce.com App Menu, see Configuring the Salesforce.com App Menu (on page 14).

Configuring an Existing Salesforce User

Deployment Guide*: Prerequisites → Installing → Connecting* → *Permission Sets* → ***Existing Users (you are here)*** → *New Users* → *App Menu* → *Optional Configurations*

To enable an existing Salesforce user to access *OneSpan Sign for Salesforce*:

1. Log in to the relevant *Salesforce.com* organization as a System Administrator.
2. In the top menu, click **Setup**.
3. In the *Administer* section, select **Manage Users**.
4. Click **Users**.
5. Click the name of the Salesforce user.
6. Click **Permission Set Assignments**, and then click **Edit Assignments**.
7. From the list of *Available Permission Sets*, select the appropriate Permission Set.
8. Click **Save**.

Configuring a New Salesforce User

Deployment Guide: *Prerequisites* → *Installing* → *Connecting* → *Permission Sets* → *Existing Users* → ***New Users (you are here)*** → *App Menu* → *Optional Configurations*

To create a new Salesforce user, and give them access to *OneSpan Sign for Salesforce*:

1. Log in to the relevant *Salesforce.com* organization as a System Administrator.
2. In the top menu, click **Setup**.
3. In the *Administer* section, select **Manage Users**.
4. Click **Users**.
5. To begin creating a new user, click **New User**. The *User Edit* page appears.
6. Appropriately edit information for your new user (*First Name, Last Name*, etc.). In the *User License* field, select **Salesforce**, and check the **Active** box.
7. When you've finished editing the user's information, click **Save**. The new user's *Details* page appears.
8. Click **Permission Set Assignments**, and then click **Edit Assignments**.
9. From the list of *Available Permission Sets*, select the appropriate Permission Set.
10. Click **Save**.

Configuring the *Salesforce.com* App Menu

Deployment Guide: *Prerequisites → Installing → Connecting → Permission Sets → Existing Users → New Users → **App Menu (you are here)** → Optional Configurations*

If you are a eSignLive Admin, you should also be a Salesforce System Administrator. When that is the case, you can always view and access the eSignLive option in the *Salesforce.com* App Menu.

The following procedure describes how to enable that functionality for:

- eSignLive Users
- eSignLive Template Admins
- eSignLive Admins who are not Salesforce System Administrators

WARNING: The following procedure won't work on a Permission Set that is provided as part of a managed Transaction.

To configure the *Salesforce.com* App Menu with the functionality described above:

1. Log in to the relevant *Salesforce.com* organization as a System Administrator.
2. Go to the *Setup* page.
3. On the left pane, click **Manage Users > Permission Sets**. The *Create Permission Set* page appears.
4. Click **New** to create a Permission Set.
5. Type relevant Permission Set information, and ensure that the *User License* is set to **None**.
6. Click **Save**. The *eSignLive User Permission Set* page appears.
7. Under Apps, click **Assigned Apps**, and then click **Edit**.
8. Select the **eSignLive** app from the *Available Apps* section, and then click **Add**.
9. Click **Save**.
10. Repeat this procedure for all relevant users.

Optional Additional Configuration

Deployment Guide: *Prerequisites → Installing → Connecting → Permission Sets → Existing Users → New Users → App Menu → **Optional Configurations (you are here)***

The following procedure describes how to manually configure certain parameters that are configured automatically when you install or upgrade *OneSpan Sign for Salesforce*.

To manually configure the *OneSpan Sign for Salesforce* parameters that appear below:

1. After the application is installed, in the menu bar click ***Your User Name* > Setup**.
2. Under *App Setup*, click **Develop > Custom Settings**. The *Custom Settings* page appears.
3. Next to *eSignLive Configuration*, click **Manage**. The *eSignLive Configuration* page appears.
4. Click **New**. The *eSignLive Configuration Edit* page appears.

   > **NOTE:** If you upgraded the application from a previous version, you may already have a eSignLive configuration. In this case, click **Edit** next to the *Default* configuration. The *eSignLive Configuration Edit* page opens.

5. In the **Name** field, type *Default*.
6. In the **Permitted file extensions** field, type *.doc,.docx,.pdf*.
7. If you want to enable the *Save/Apply Layout* button on the signer page, specify **profile=salesforce4.0**.
8. If you are using the new version of *OneSpan Sign for Salesforce*, specify the *Custom Canvas App Name* parameter as follows:
   - For Sandbox: *eSignLive_Sandbox_2*
   - For Production: *eSignLive_Production_2*
9. Click **Save**. Depending on the server's bandwidth, package installation can take several minutes. Once the package is installed, either an *Install Complete* message will appear, or you will receive a confirmation e-mail from Salesforce.

Uninstalling the Application

To uninstall *OneSpan Sign for Salesforce*:

1. Log in to the *Salesforce.com* organization as a System Administrator.
2. If eSignLive Permission Sets are assigned to users, remove them as follows:
    a. Click **Manage Users > Permission Sets**.
    b. For each assigned eSignLive Permission Set:
        i. Click the set's name.
        ii. Click **Manage Assignments > [*Select Users*] > Remove Assignments**.
3. Click ***Your Name*** **> Setup**.
4. In the left pane under *Build*, click **Installed Transactions**. The *Installed Transactions* page appears.
5. Click **Uninstall** under the *Action* column next to the *OneSpan Sign for Salesforce* package name. A dialog box appears.
6. Check the box **Yes**, **I want to uninstall this package and permanently delete all associated components**.
7. Click **Uninstall**. After the package is uninstalled, you will receive a confirmation e-mail from Salesforce.

