OneSpan Sign for Salesforce

Deployment Guide

Date: May 09, 2019

Product Release: 4

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Date: May 09, 2019

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Introduction

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

> **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

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

You must provide the URL of a OneSpan Sign 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 OneSpan Sign 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**.

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Installing the Application

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 ***OneSpan Sign***.
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 **Trans-action 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 ***OneSpan Sign*** **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 *OneSpan Sign* 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.

3.1 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

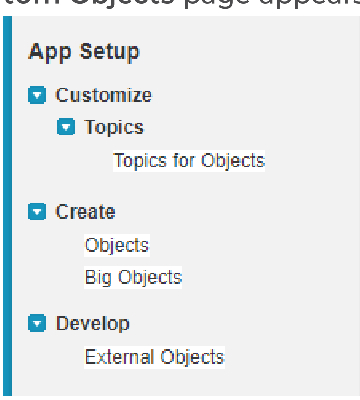
3.1.1 Configure the Available Languages for a Transaction

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.

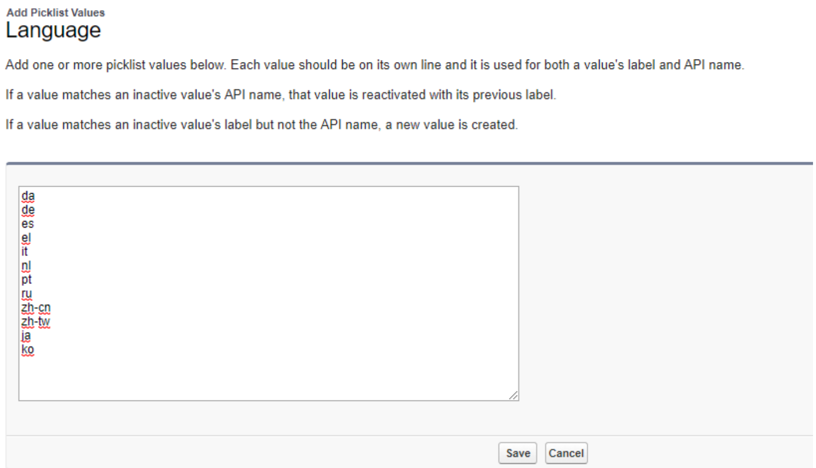


3. In the **Label** column, click **Transaction**.

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.



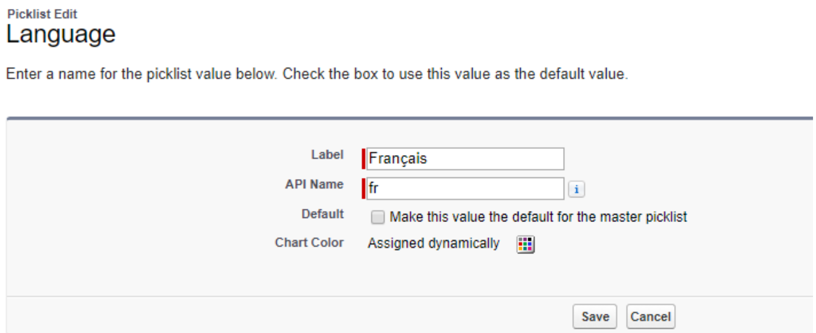
The following languages are supported:

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]
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.

3.1.2 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 *OneSpan Sign*

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To connect *OneSpan Sign for Salesforce* to your Production *OneSpan Sign* 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 ***OneSpan Sign***. The ***OneSpan Sign* 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 *OneSpan Sign* 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 *OneSpan Sign* 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 *OneSpan Sign* account (**apps.esignlive.com**). It cannot connect to a Sandbox *OneSpan Sign* 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 *OneSpan Sign* account.

5 Configuring Permission Sets

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

- **OneSpan Sign User on page 13**
- **OneSpan Sign Template Admin on page 14**
- **OneSpan Sign Admin on page 15**

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

To enable the above Permission Sets to view and access the ***OneSpan Sign*** option in the Salesforce.com App Menu, see **Configuring the Salesforce.com App Menu on page 18**.

5.1 *OneSpan Sign* 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.

A *OneSpan Sign* User must have the following permissions enabled:

Permission Name	Reason
API Enabled	Allows the user to perform any transaction-related operation.

5.2 *OneSpan Sign* 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 *OneSpan Sign* Conventions.

A *OneSpan Sign* Template Admin must have the following permissions enabled:

Permission Name	Reason
API Enabled	Allows the user to perform any transaction-related operation.

5.3 *OneSpan Sign* Admin

These users: (1) have all the permissions of the previous two Permission Sets; (2) can access the ***OneSpan Sign* Admin** page; (3) can modify the Permission Sets of other users.

A *OneSpan Sign* Template Admin must have the following permissions enabled:

Permission Name	Reason
API Enabled	Allows the user to perform any transaction-related operation.
Customize Applic-ation	To select the URLs to connect to, and to connect with the backend. The backend allows you to modify settings on Admin page.
Manage Custom Per-missions	Required by the Customization Application permission.
Manage Connected Apps	Used to setup a Connected App, if the user is connecting to a cus-tom *OneSpan Sign* instance.
View Roles and Role Hierarchy	Required by the View Setup and Configuration permission.
View Setup and Configuration Permission	Required by the Customize Application permission.

Configuring an Existing Salesforce User

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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

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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.

> **NOTE:** A Salesforce User License is required to use the OneSpan Sign for Salesforce app.

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**.

8 Configuring the Salesforce.com App Menu

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

The following procedure describes how to enable that functionality for:

- *OneSpan Sign* Users
- *OneSpan Sign* Template Admins
- *OneSpan Sign* Admins who are not Salesforce System Administrators

> **CAUTION:** 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 ***OneSpan Sign*** **User Permission Set** page appears.
7. Under Apps, click **Assigned Apps**, and then click **Edit**.
8. Select the ***OneSpan Sign*** app from the **Available Apps** section, and then click **Add**.
9. Click **Save**.
10. Repeat this procedure for all relevant users.

Optional Additional Configuration

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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 ***OneSpan Sign* Configuration**, click **Manage**. The ***OneSpan Sign* Configuration** page appears.
4. Click **New**. The ***OneSpan Sign* Configuration Edit** page appears.

> **NOTE:** If you upgraded the application from a previous version, you may already have a *OneSpan Sign* configuration. In this case, click **Edit** next to the **Default** configuration. The ***OneSpan Sign* 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 recipient 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, transaction installation can take several minutes. Once the transaction is installed, either an **Install Complete** message will appear, or you will receive a confirmation e-mail from Salesforce.

Uninstalling the Application

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To uninstall *OneSpan Sign for Salesforce*:

1. Log in to the **Salesforce.com** organization as a System Administrator.
2. If *OneSpan Sign* Permission Sets are assigned to users, remove them as follows:
   a. Click **Manage Users > Permission Sets**.
   b. For each assigned *OneSpan Sign* 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* transaction name. A dialog box appears.
6. Check the box **Yes, I want to uninstall this transaction and permanently delete all associated components**.
7. Click **Uninstall**. After the transaction is uninstalled, you will receive a confirmation e-mail from Salesforce.