

Getting Started with ZSign for Alfresco



ZSign is a secure electronic signature add-on for Alfresco that allows users to sign documents within their repository. ZSign creates a legal signature that is compliant with the eSign ACT and UETA. As ZSign is an on-premise solution, it can be used by organizations that prohibit their content from being passed in the cloud for added security.

This guide covers the basic multi-user workflow that is similar to the review and approval workflow built into Alfresco.

1. *Login to Alfresco as the initiator, Mike Jackson* - username: mjackson, password: mjackson
2. *Navigate to the user profile* - ZSign adds two sections to the profile area:
 - a. **A signature image** that is uploaded by the user, similar to the way a photo is added in Alfresco. This image will be applied to the last page of all documents signed by the user.
 - i. *Upload your signature* here if desired.
 - b. **A tab for a unique PIN.** *Click on the PIN tab.* The user must first enter their Alfresco password and then create a code.
 - i. The PIN can be as long as the user would like and contain numbers and letters in any combination. This code will be entered and verified each time this user signs a document in Alfresco.
 - ii. The Alfresco password and PIN serve as two authentication factors for the electronic signature, assuring signatures match the user.
 - iii. *Enter PIN and save.*
3. *Navigate to the document library* to review of the electronic signature workflow.
 - a. Notice that two folders have already been created for this demonstration:
 - i. **Documents to be Signed**
 - ii. **Signed Documents**
 - b. ZSign uses an aspect called “Signable Document” which can be applied in a number of ways – it can be applied manually, it can be applied by another workflow, or it can be applied by a **content rule**.
 - i. For the purposes of this demonstration, we have created a content rule so that when we drop a document into the “Documents to be Signed” folder it will gain the signable aspect.
4. *Upload a document to the “Documents to be Signed” folder.*

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- a. Once this document is uploaded, we can look at the document properties and see that it is now signable, as the “Sign Document” link is visible in the properties area.
 5. *Open the document.*
 - a. *Click “Sign Document” and enter your unique PIN.*
 - b. You can also choose the filing location - this is where you can opt to send your document to the “Signed Documents” folder.
 - c. *Select other ZSign user Alice Beecher* who will also need to sign the document by highlighting her name.
 - d. Upon *clicking OK*, the workflow has started.
 6. When you select another user to be a co-signer, the first task will be assigned to them. *Login as Alice Beecher* - username: abeecher, password abeecher
 - a. The task to sign a document will appear on her dashboard. *Click this task.*
 - b. This user can now review the document, add comments, reject signing the document, or accept signing the document.
 - i. If she chooses to reject signing the document, an unsigned notice will go back to the initiator along with any comments made.
 - Comments are only viewed in the workflow -- they are not included on the document itself.
 - ii. If she agrees to sign the document, she *must enter her PIN and hit Sign Document.*
 - You can adjust Alice’s PIN in her profile if needed.
 - iii. At this point the workflow returns to the initiator as an indication that the signatures are complete.
 - Had there been other users needing to sign the document, the next user would have been notified.
 7. *Login as the initiator, Mike Jackson*, to see what happens on that side.
 - a. *Click the assigned task.* Review the task to see that it’s been signed by the other user, which folder it’s filed in, and view the document.
 - b. *Open document.* Scroll to the last page and see the signature images have been added along with some metadata including the signers’ names, titles, and company information from Alfresco user profiles, and the date and time each user signed.
 - c. *Scroll down to properties* and notice ZSign also added a couple of properties to the document including the last date it was signed and who it was signed by.