



PMWeb DocuSign® Integration

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Introduction

For over a decade, PMWeb Visual Workflow has been used to manage many of the most complex construction projects in the world. Clients love how easy to use and intuitive PMWeb Workflow is, and managers appreciate the power and flexibility it provides them to establish consistent business processes. In PMWeb, workflows are defined by simply dragging and dropping elements onto the design screen, as the system automatically builds the logic in the background.

During the same time frame, DocuSign® has established itself as the leading digital signature software application, providing the range of features and unparalleled security that users demand. Combining the convenience of a cloud-based platform with sophisticated algorithms, DocuSign has become the de facto standard for secure, legally enforceable, digital signatures.

The PMWeb DocuSign Integration brings these industry leaders together for the first time. With the optional integration enabled, any PMWeb Visual Workflow step can automatically become a DocuSign step as well.

Defining a DocuSign Step

Once the PMWeb DocuSign Integration is licensed, workflow steps can be designated as a “DocuSign Step” by checking the box in the Define Role Step dialog. (The default is unchecked.)

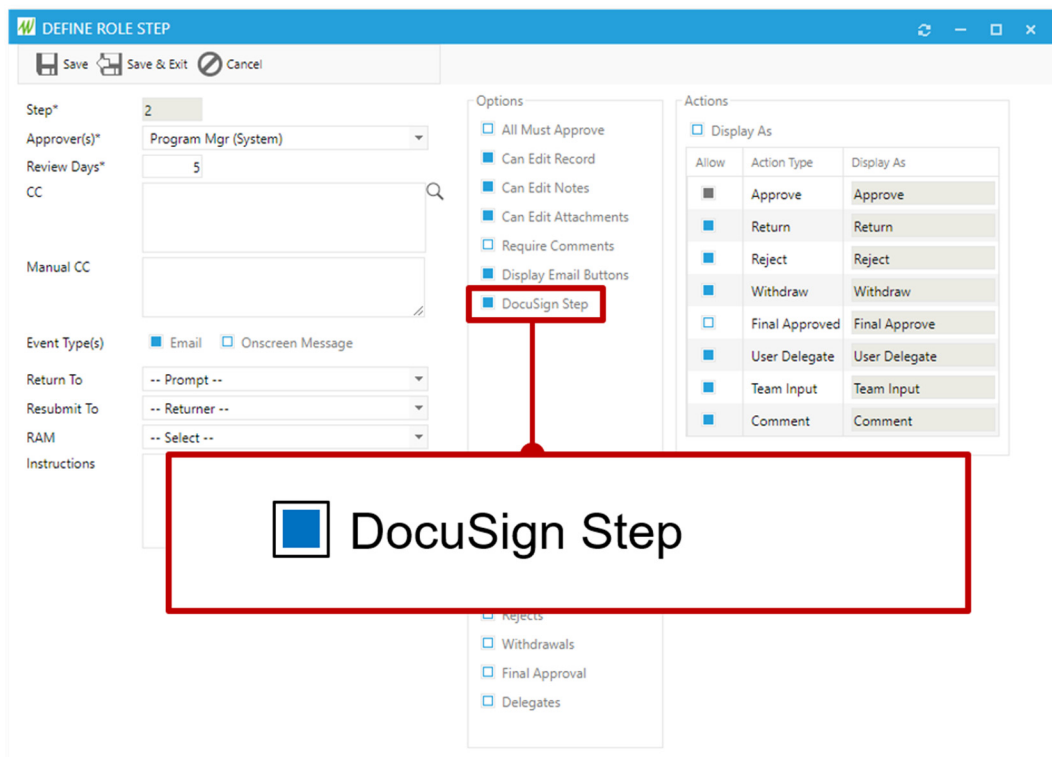


Figure 1 - Workflow Steps can now be Designated as DocuSign Steps

The DocuSign notation checkbox also appears in the Steps table:

#	Type	Description	Level	Action	Return To	Delegate	DocuSign
1	Person	RFI Electrical		Branch		<input type="checkbox"/>	<input type="checkbox"/>
1.1	Person	Electrical Engineer	Project	Next Step	-- Previous Approver --	<input type="checkbox"/>	<input type="checkbox"/>
2	Person	Project Mgr	System	Next Step	-- Previous Approver --	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Person	Program Manager	System	Final Approve		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 2 - The DocuSign Notation Checkbox

Beginning a DocuSign Step

When a document reaches a DocuSign step, the standard Visual Workflow actions are replaced by the “Begin DocuSign” button, both on the Workflow tab of the record and in the Workflow Inbox:

The screenshot shows the PMWeb interface with a workflow record. On the left, the 'WORKFLOW INBOX' shows a record for 'Lease - 001' with a 'Begin DocuSign' button highlighted. The main window shows the 'Workflow (Step 2 of 3)' tab with a table of workflow steps. Step 2 is highlighted in orange, and its 'DocuSign' checkbox is checked. A callout box points to the 'Begin DocuSign' button in the workflow tab, and another callout box points to the 'BEGIN DOCUSIGN' text in the workflow inbox.

#	Type	Must Approve	Due Date	Role	User	Delegate	Instructions	RAM	DocuSign
1	Person	<input type="checkbox"/>	Oct-19-2019	-- Submitter --	Admin				<input type="checkbox"/>
2	Person	<input checked="" type="checkbox"/>	Oct-24-2019	Program Mgr	Admin				<input checked="" type="checkbox"/>
3	Person	<input type="checkbox"/>	Oct-29-2019	Project Mgr	Admin				<input type="checkbox"/>

Figure 3 - Standard Workflow Actions are Replaced by the "Begin DocuSign" Button

Clicking the button creates a new DocuSign transaction, which DocuSign calls an “envelope”. Embedded in the envelope is the pdf output of the PMWeb record in its default BI reporting format.

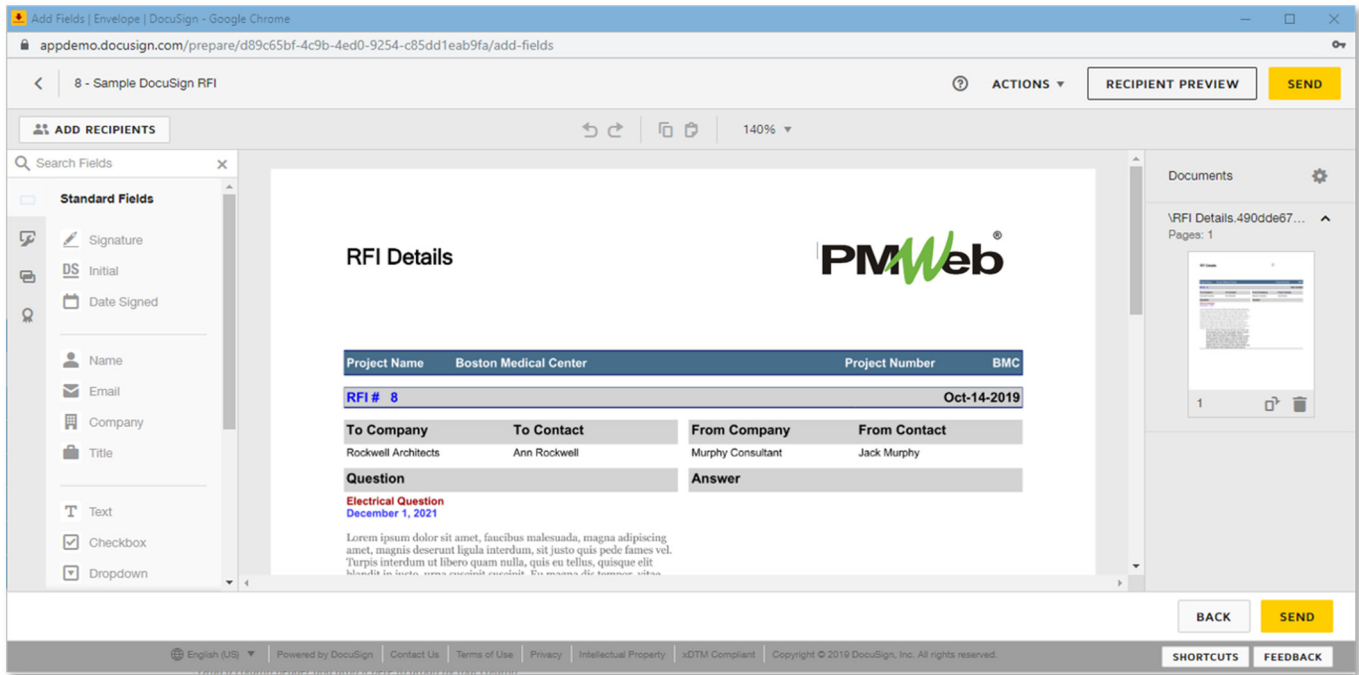


Figure 4 - The DocuSign Envelope with the Default PMWeb Output PDF

From here, DocuSign proceeds as usual, until the final signature is obtained. Finishing the DocuSign transaction automatically updates PMWeb, as described in the next section.

Finishing a DocuSign Step

Two actions, “Begin DocuSign” and “End DocuSign”, appear in the PMWeb Visual Workflow log:

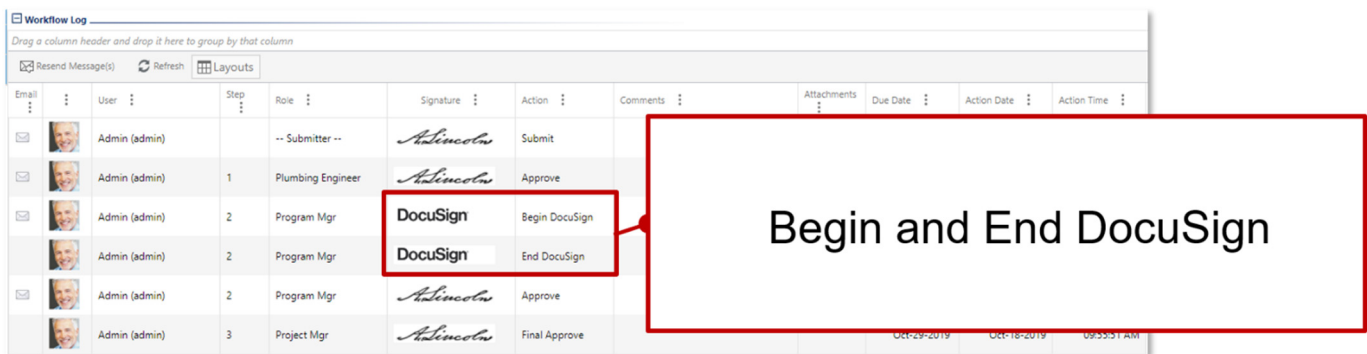


Figure 5 - "Begin DocuSign" and "End DocuSign" Actions are Logged

When the DocuSign envelope is completed, two items automatically appear on the Attachments tab of the PMWeb record:

1. The digitally signed document
2. The DocuSign Summary

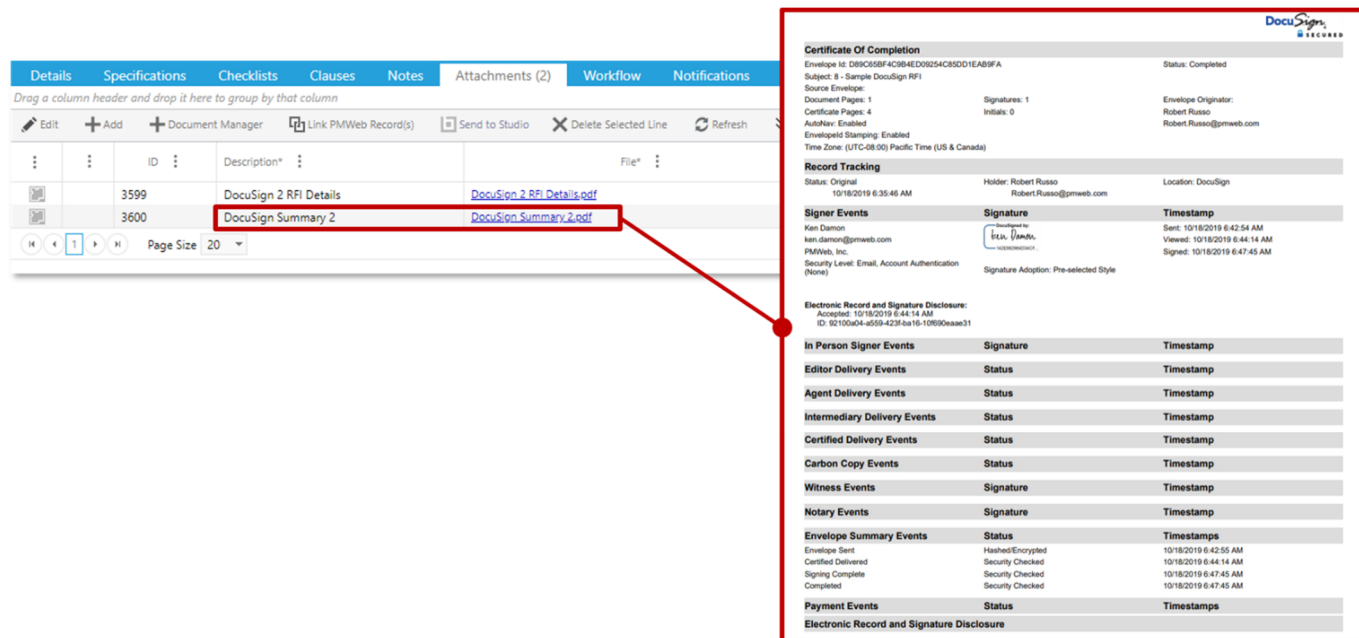


Figure 6 - The Signed Document and the DocuSign Summary are Automatically Attached to the PMWeb Record

Important note: Depending on the speed of your Internet connection, the momentary load on DocuSign’s servers, and other factors, there might be a lag between the time the DocuSign envelope is completed and when it updates your PMWeb database.

Conclusion

The PMWeb DocuSign Integration adds secure, cloud-based, digital signature capabilities to the leading project management workflow platform. Ask your PMWeb sales consultant for more information.