

SHAREPOINT CONNECTOR DOCUMENTATION FOR CONSIGNO CLOUD

V1.0
Date: 2021-03-12

Table of Contents

How to install the ConsignO Cloud connector for SharePoint	2
Configure your account.....	7
Use the Connector.....	10
Create a signature project.....	10
Synchronizing and downloading signed documents (Synchronize)	12
Management and Troubleshooting.....	15
Validate the account.....	15
Manage permissions.....	18
Delete the connector.....	19

How to install the ConsignO Cloud connector for SharePoint

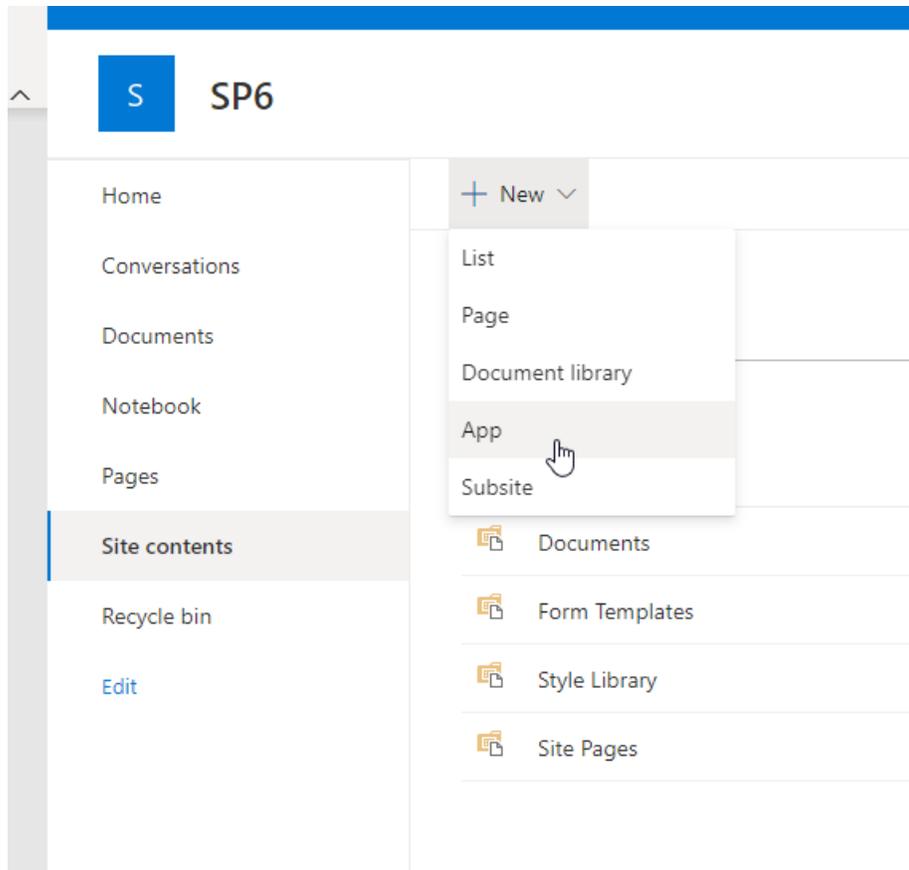
The SharePoint connector is available for free through the '**SharePoint Store**' from Microsoft.

To install it, a user must have the necessary rights to a SharePoint environment and follow these steps. If you cannot install it, please talk to your SharePoint Administrator.

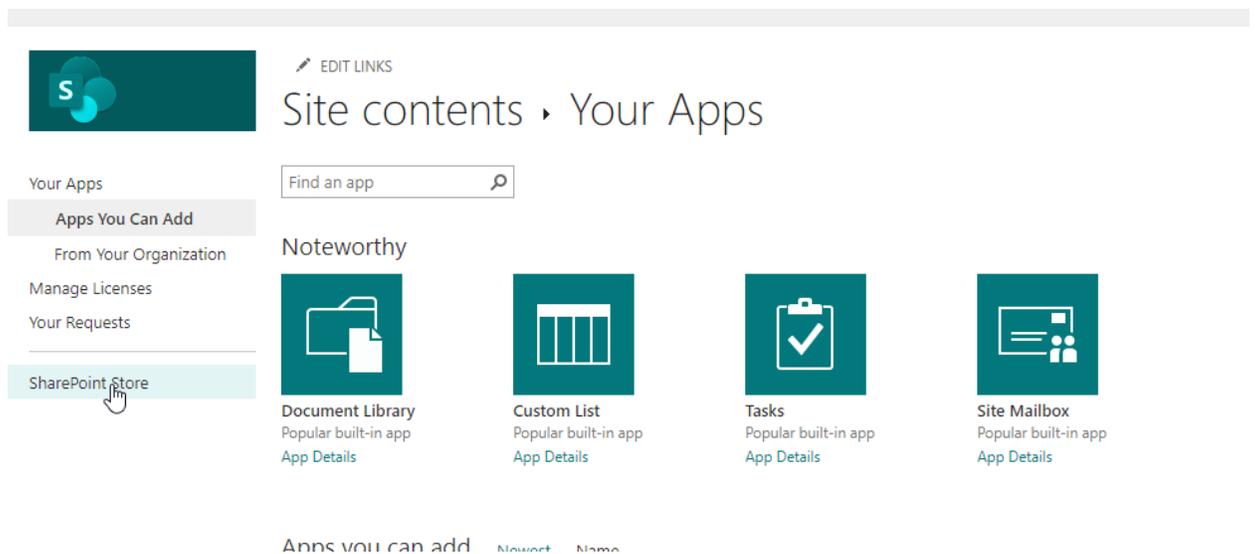
The connector can only be used with a ConsignO Cloud account in production. It can be an Enterprise, Business, Individual or Trial account. It cannot be used however with an account created in the ConsignO Cloud sandbox environment.

To install the connector, follow those steps:

- Login under the desired SharePoint account (in classic experience mode).
- Go to **Site contents** or **Home** and select + **New**, then select **App** from the list.



- Select **SharePoint Store** from the menu on the left of your screen.



- Enter **ConsignO Cloud** in the search bar on the right side of your screen.



SharePoint Store

Price

Featured Apps



The application **ConsignO Cloud – Electronic Signature** should appear.



SharePoint Store

Price

All

Free

Categories

All

Best Apps of the Year

Business

Clocks & Calendars

Most Relevant

Highest Rat



Sign, get electronic signatures and synchronize your projects directly within Sharepoint.

C



Fr

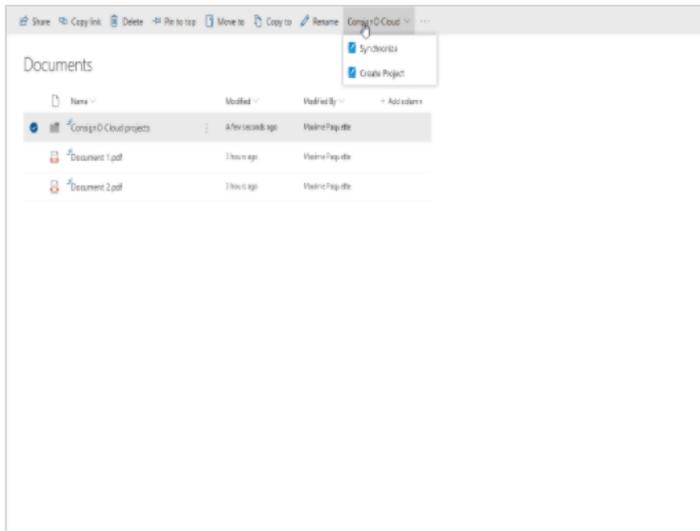
- Click on **ConsignO Cloud** and then click **ADD IT** on the next page.



ConsignO Cloud - Electronic Signature

from Notarius

consign



Free

ADD IT

Good news - you already own this app.

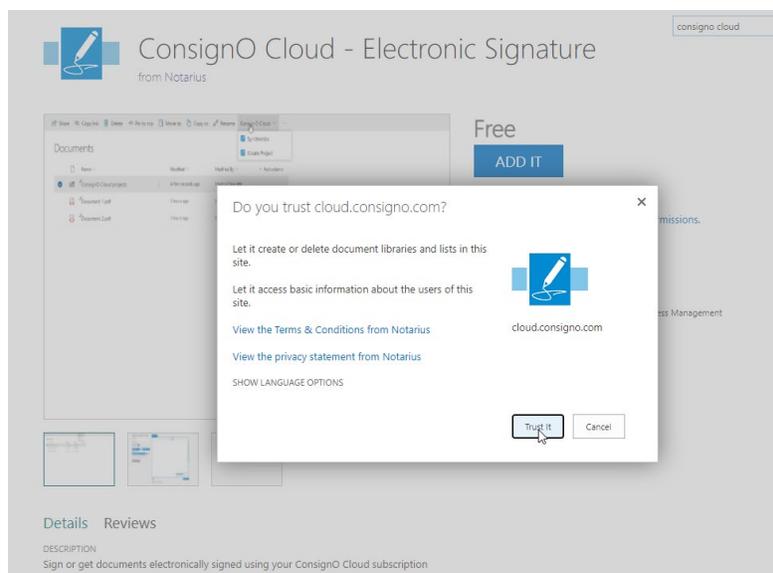
By acquiring this app you agree to its [permissions](#).

VERSION 1.0.0.0
RATING ★★★★★ (0)
RELEASE DATE February 2019
CATEGORY Productivity,Workflow & Process Managen
SUPPORT [App Website](#)

MORE ACTIONS ▾



- Accept the **Trust** request from the next window.



- Wait until the installation is complete. You should now be able to see the **ConsignO Cloud** connector under the **Site Content** and from the menu bar under **Documents**.

- Home
- Conversations
- Documents
- Notebook
- Pages
- Site contents**
- Recycle bin
- Edit

+ New ▾

Contents Subsites

 Name	Type
 Documents	Document library
 Form Templates	Document library
 Style Library	Document library
 <u>ConsignO Cloud - Electronic S</u> :	App
 Site Pages	Page library

- Home
- Conversations
- Documents**
- Shared with us

+ New ▾ ↑ Upload ▾ 📄 Edit in grid view 🔄 Sync 📌 Add shortcut to OneDrive 📄 Export to Excel **ConsignO Cloud** ▾ ⚙️ Power Apps ▾

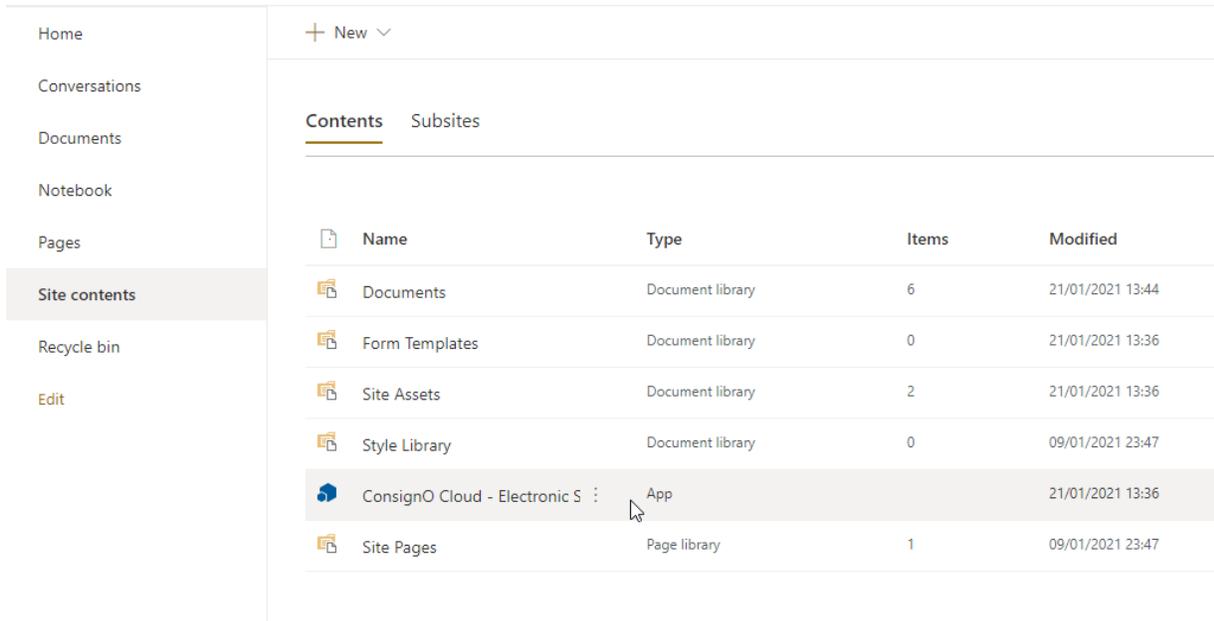
Documents

 Name ▾ Modified ▾ Modified By ▾ + Add column ▾

Configure your account

Once the connector is installed, the user will be required to connect to their ConsignO Cloud account to be able to link the two components together. To perform this step:

- Go under **Site content** on the left side of your screen and click on **ConsignO Cloud - Electronic Signature**.



The screenshot shows the SharePoint interface. On the left is a navigation pane with 'Site contents' selected. The main area shows a table of site content under the 'Contents' tab. The table has columns for Name, Type, Items, and Modified. The entry 'ConsignO Cloud - Electronic S' is highlighted, and a mouse cursor is pointing at the word 'App' in its Type column.

Name	Type	Items	Modified
Documents	Document library	6	21/01/2021 13:44
Form Templates	Document library	0	21/01/2021 13:36
Site Assets	Document library	2	21/01/2021 13:36
Style Library	Document library	0	09/01/2021 23:47
ConsignO Cloud - Electronic S	App		21/01/2021 13:36
Site Pages	Page library	1	09/01/2021 23:47

- You will then be able to click on **Account information**



The screenshot shows the 'SharePoint Add-in for ConsignO Cloud' interface. It features a light blue informational box with text and bullet points. Below the box is a link to 'Create an account'. At the bottom, there are two buttons: 'Account information' and 'Return to SharePoint'.

SharePoint Add-in for ConsignO Cloud

With ConsignO Cloud for SharePoint, you are a click away from signing or requesting signatures on documents stored in your SharePoint Document Library.

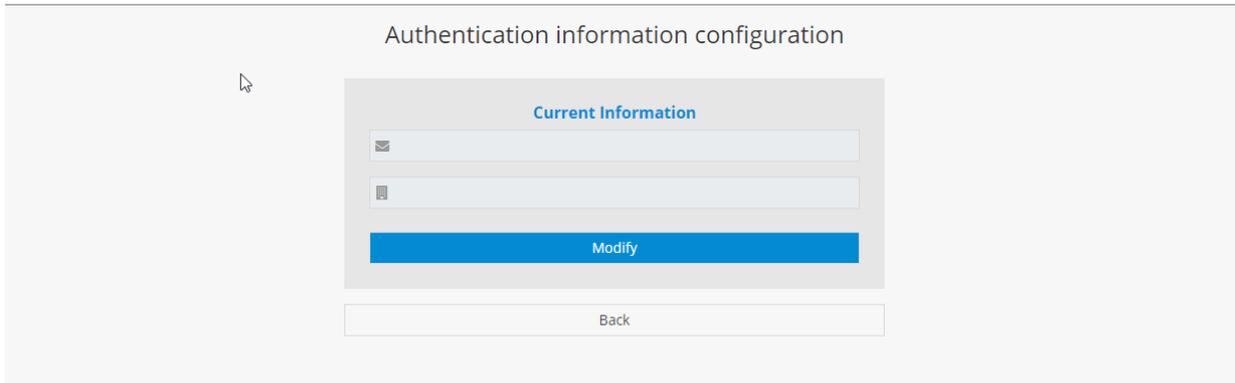
- Digitally sign document or send a signature project to other signers.
- Synchronize back signed projects into one of your SharePoint folder.

Simply connect your ConsignO Cloud account by adding your authentication information and you will be ready to create signature projects directly from your documents stored in SharePoint.

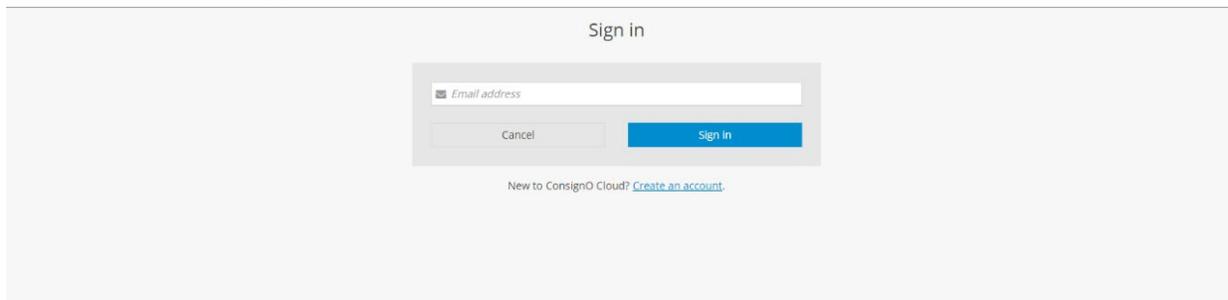
New to ConsignO Cloud? [Create an account.](#)

Account information

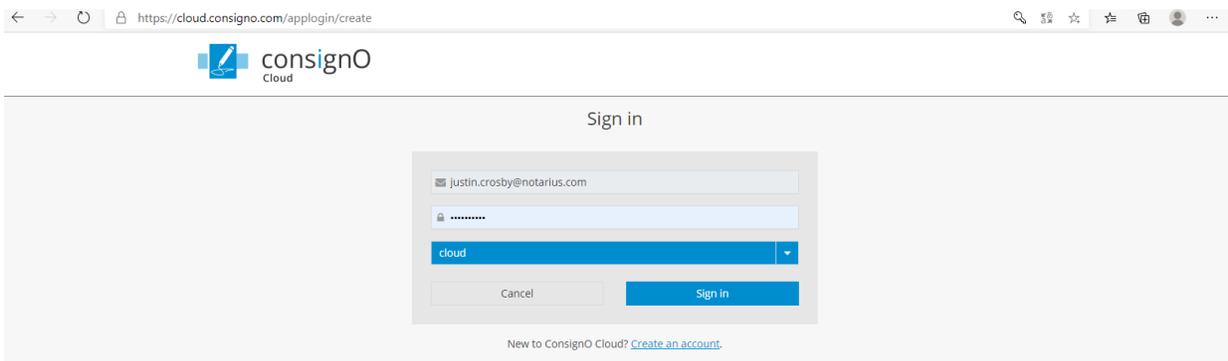
Return to SharePoint



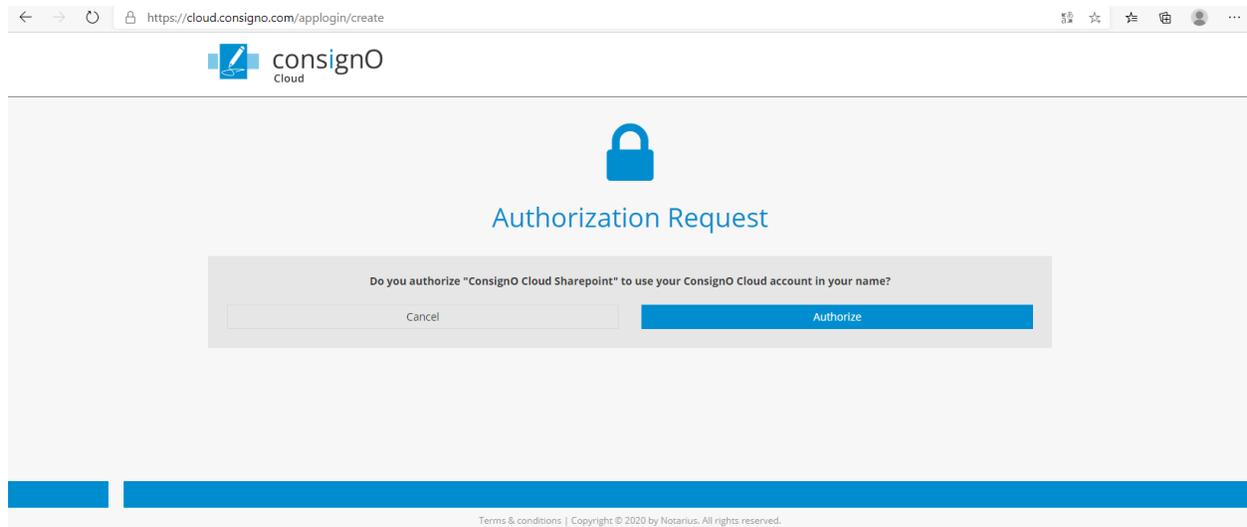
- After having clicked the **Modify** button, the user will be prompted to enter in their ConsignO Cloud username account information (Email).



- If the user has more than one account for the same email address, they will be required to select the account they wish to link. The "Cloud" option refers to any account that is not an "Enterprise" account, such as a Business plan. If the user has a single account, this option may not be displayed, and the user should input their password or connect directly if SAML and Active Directory login is required.



- Once this step is complete, a confirmation page will be shown to confirm that the user is authorising the connector to be linked to the account.



- Once this step is completed, the user can go back to SharePoint via the displayed menu.

Use the Connector

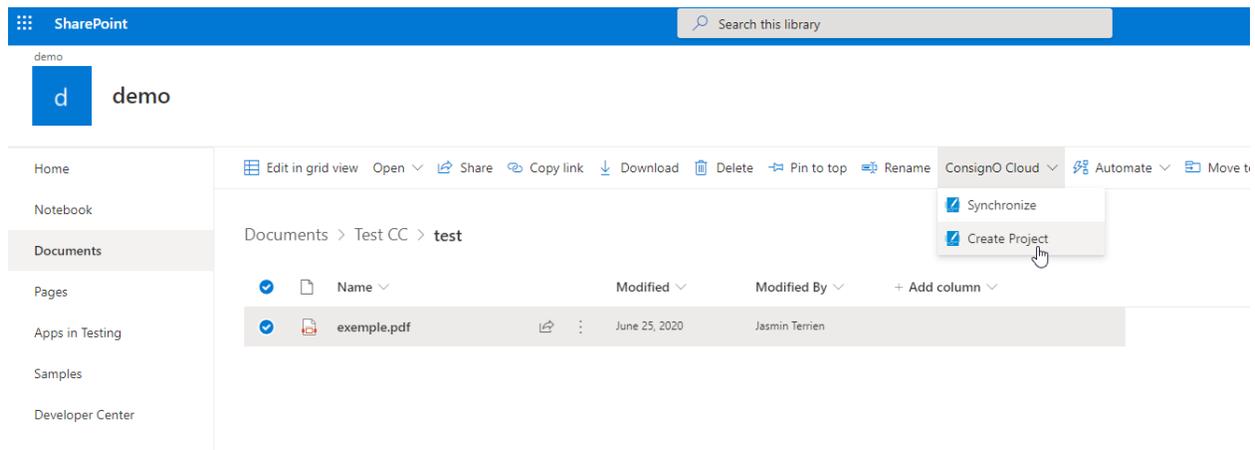
The SharePoint connector allows for two main actions:

- Create a signature project
- Download signed documents from the ConsignO Cloud account to SharePoint

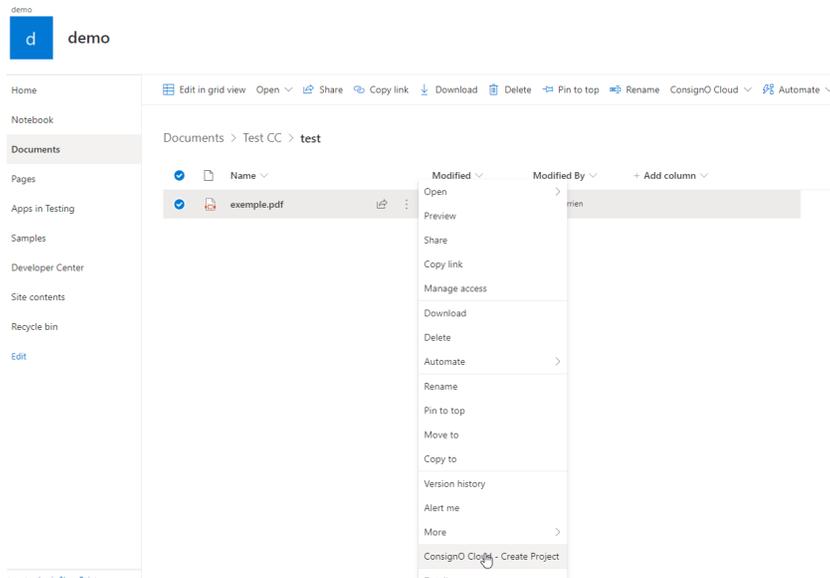
Create a signature project

To create a signature project from SharePoint, two options are available:

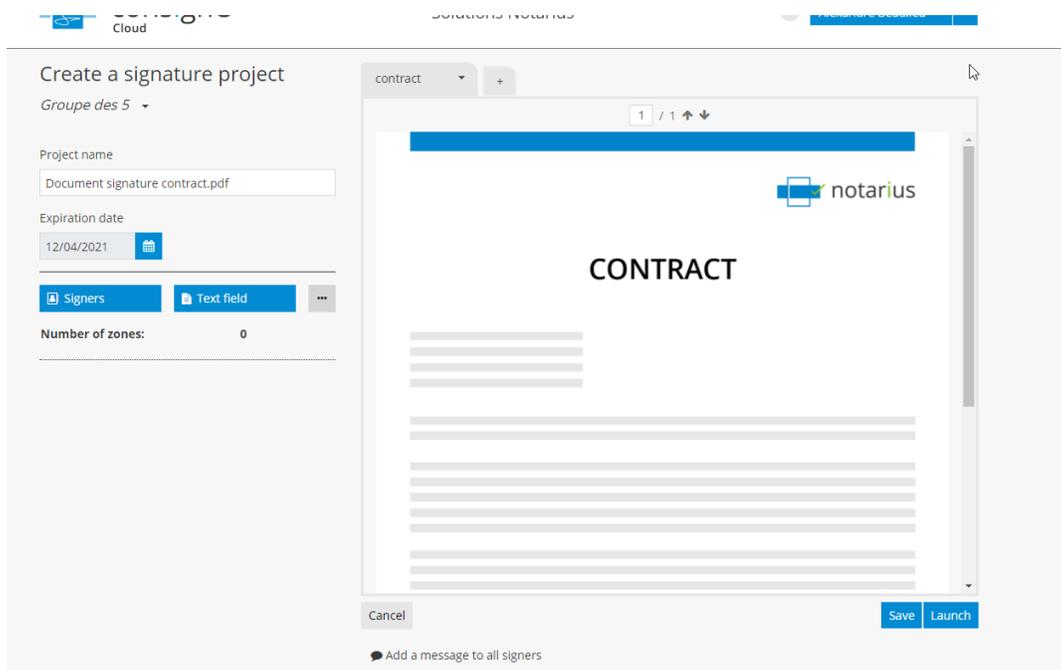
- Select one or multiple files, then from the **ConsignO Cloud** menu, chose **Create Project**.



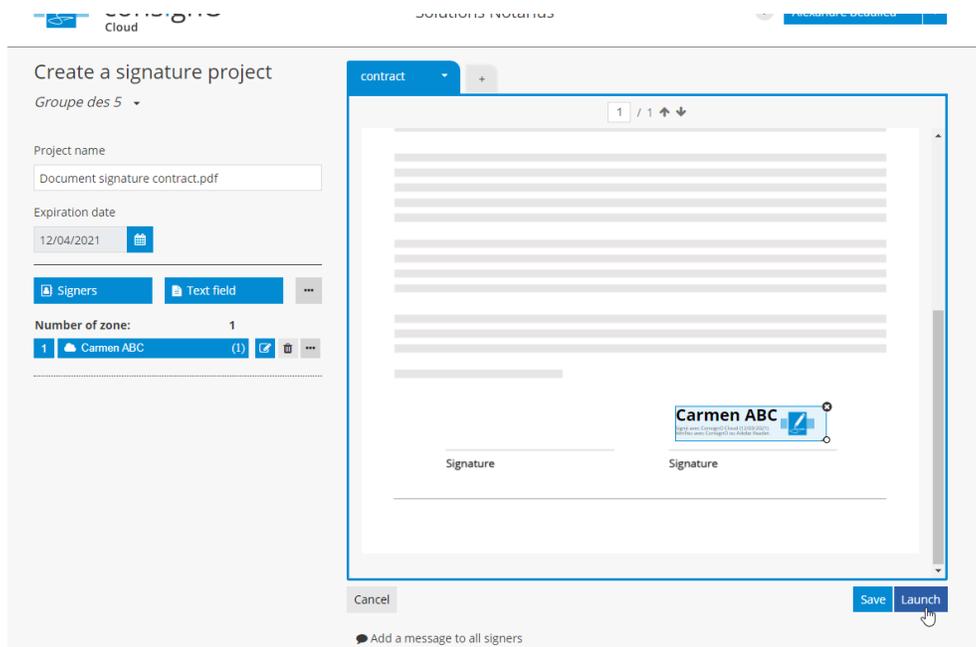
- Or, from the **Option button** (vertical ...) on the right side of the file, select the option **ConsignO Cloud - Create Project**



- The user should then be redirected to the signature project creation page as it would be normally shown when creating a project directly through the ConsignO Cloud interface.



- It will then be possible to define signers and set the signature zones on the document before launching the project.



- Once the project is launched, the user should be redirected automatically back to SharePoint.

Synchronizing and downloading signed documents (Synchronize)

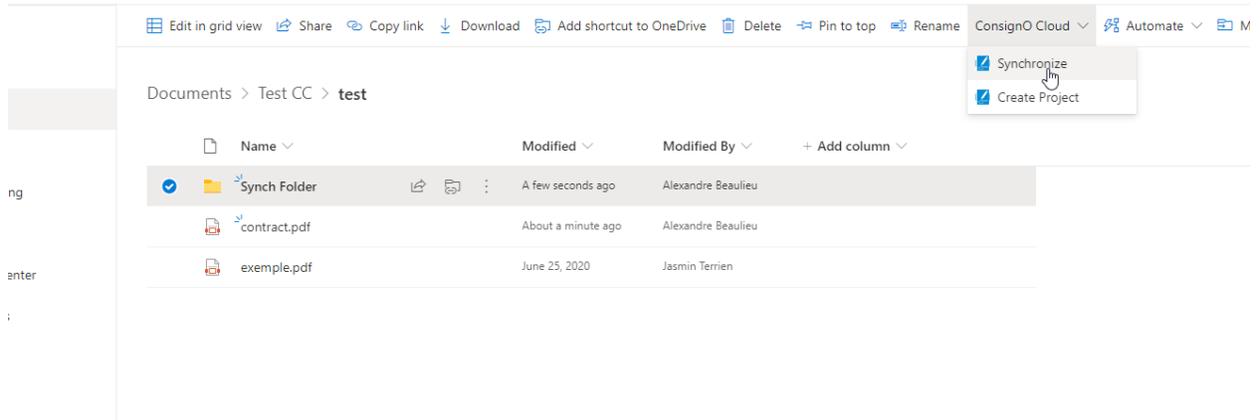
There is no automatic download of documents back into the SharePoint directory. Project initiator will receive notification via email once a project is completed and should then log into SharePoint to download and save the signed project.

A specific folder should be selected first. This step is mandatory and has been favoured to give more flexibility to the end-user to save completed projects in a distinct folder if needed, and to make sure not to overwrite the original document.

To download a completed project:

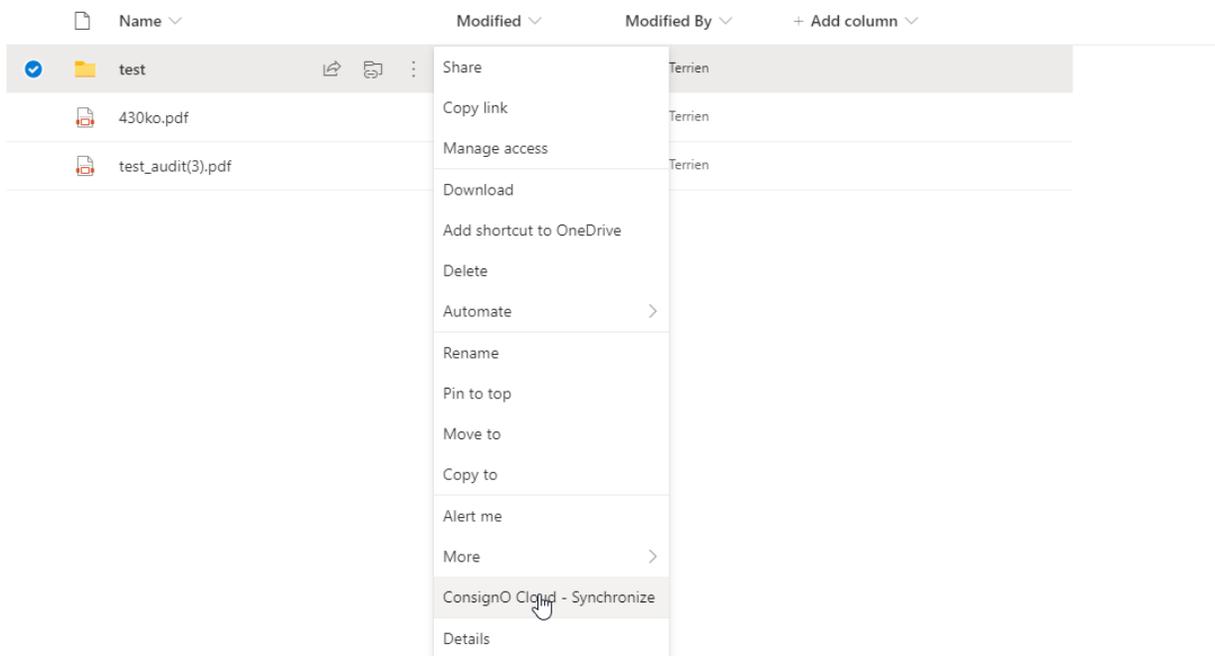
- Through the **Documents** section, simply select a folder where you would like to save the signed documents. Then using the **Consigno Cloud** menu, select the option to **Synchronize**.

demo



- You can also select this step from the option menu (vertical ...) next to the selected folder.

Documents > Test CC



- You should then be redirected to a dashboard where you can see all **completed projects** available for download.

Search... Synchronize 1 / 1 10

<input type="checkbox"/>	Name	Status
<input checked="" type="checkbox"/>	Contrats services Notarius 2021	Completed
<input type="checkbox"/>	Contrats services Notarius Victo	Completed
<input checked="" type="checkbox"/>	Contract 20210311	Completed
<input type="checkbox"/>	Contract 20210311	Completed
<input type="checkbox"/>	Contrat services Notarius 2021	Completed

- Select the projects you want to synchronise and download back to SharePoint and click on the **Synchronize** button.
- A new folder will be created for each project. This folder contains the signed document as well as the audit trail document.

+ New Upload Edit in grid view Share Copy link Sync Download Add shortcut to OneDrive Export to Excel Consign

Documents > Test CC > test > Synch Folder

<input type="checkbox"/>	Name	Modified	Modified By	+ Add column
<input checked="" type="checkbox"/>	Contract 20210311	A few seconds ago	Alexandre Beaulieu	
<input type="checkbox"/>	Contrats services Notarius 2021	A few seconds ago	Alexandre Beaulieu	

Management and Troubleshooting

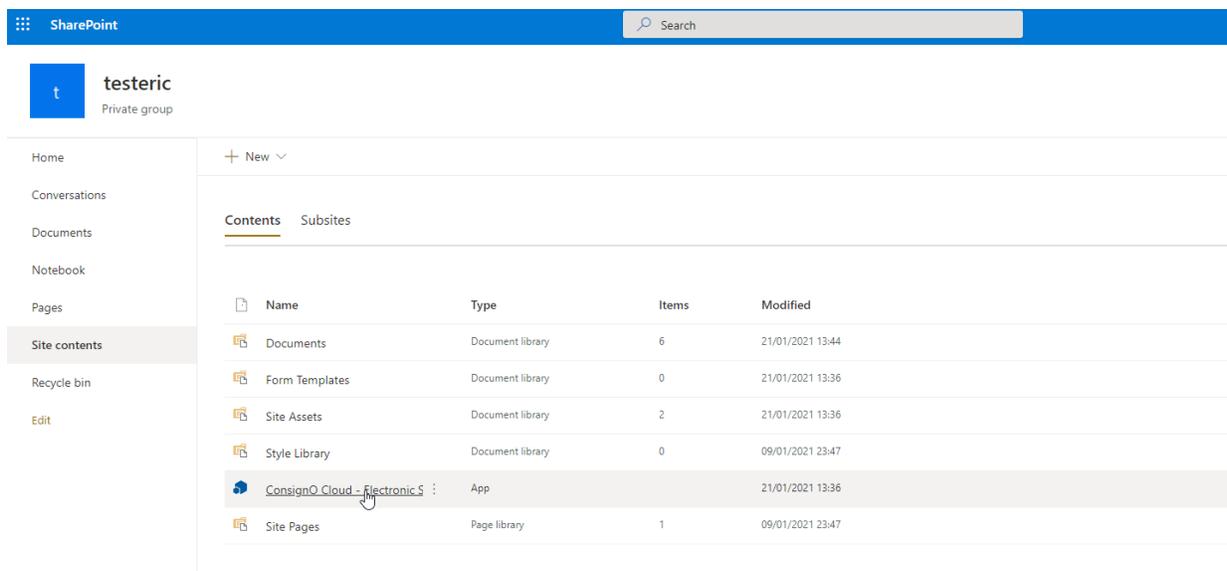
It may happen that some configurations are lost when ConsignO Cloud or SharePoint updates are performed.

Here are some troubleshooting tips.

Validate the account

The first step should always be to check and link the accounts again, if needed.

- Through the desired SharePoint account (in classic experience mode) go under **Site contents** and choose **ConsignO Cloud – Electronic Signature**.



The screenshot shows the SharePoint interface for a site named 'testeric'. The left sidebar shows the navigation menu with 'Site contents' selected. The main area displays a table of site contents under the 'Contents' tab. The table has columns for Name, Type, Items, and Modified. The 'ConsignO Cloud - Electronic Signature' app is highlighted in the list.

Name	Type	Items	Modified
Documents	Document library	6	21/01/2021 13:44
Form Templates	Document library	0	21/01/2021 13:36
Site Assets	Document library	2	21/01/2021 13:36
Style Library	Document library	0	09/01/2021 23:47
ConsignO Cloud - Electronic Signature	APP		21/01/2021 13:36
Site Pages	Page library	1	09/01/2021 23:47

- You will then be taken to the **ConsignO Cloud info** page where you can access the **Account Information**.

SharePoint Add-in for ConsignO Cloud

With ConsignO Cloud for SharePoint, you are a click away from signing or requesting signatures on documents stored in your SharePoint Document Library.

- Digitally sign document or send a signature project to other signers.
- Synchronize back signed projects into one of your SharePoint folder.

Simply connect your ConsignO Cloud account by adding your authentication information and you will be ready to create signature projects directly from your documents stored in SharePoint.

New to ConsignO Cloud? [Create an account.](#)

 Account information

 Return to SharePoint

- From here, users **Modify** the account and link a new account to SharePoint or simply **Delete** an account from SharePoint altogether.

Authentication information configuration

Current Information

 eric.sanschagrin@notarius.com

 demo-sac

Modify

Delete

Back

When an account is configured within SharePoint, a reference to it can be viewed within the ConsignO Cloud account. Go to the **Preference** menu in ConsignO Cloud then **Third Application password**.

You should see an entry **ConsignO Cloud SharePoint** like the one illustrated below: If there are none or multiple, it may be a good idea to delete them all and start from scratch from SharePoint directly.

1 week

1 month

3 months

PDF/A policy

Preferred



Third party application password

Name

Password

Actions

ConsignO Cloud Sharepoint



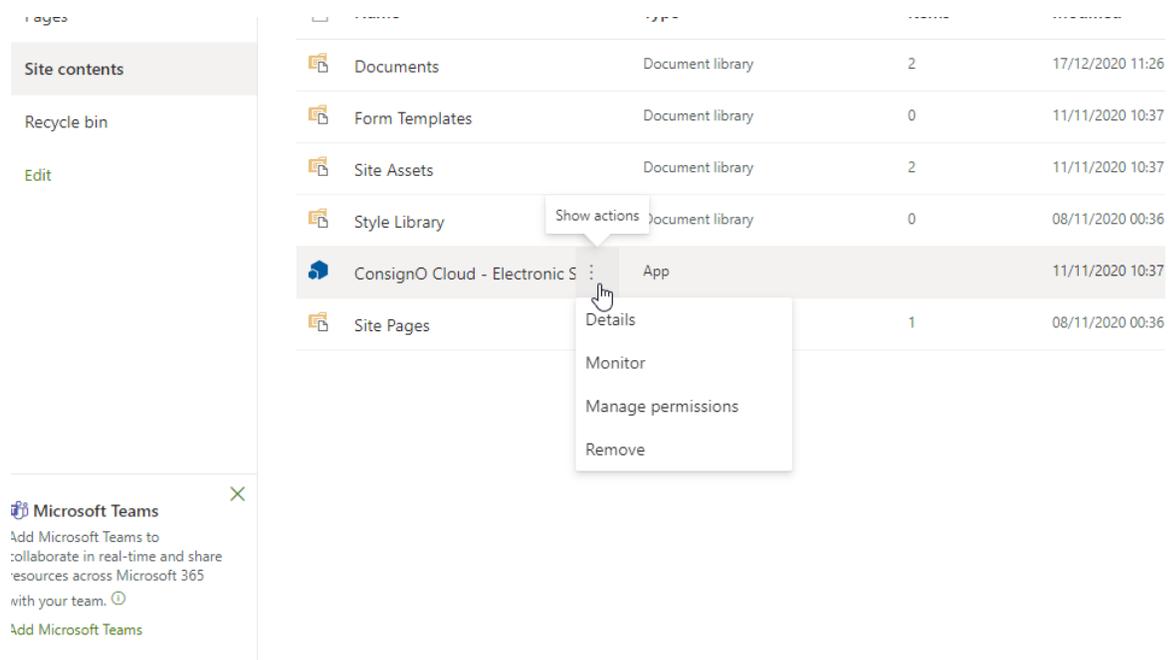
Generate a password

Cancel

Manage permissions

It may happen that permissions between both applications are lost. You can always authorize them again by following these steps:

- In SharePoint, go to **Site Content**, then click on the Show actions option (vertical ...) next to the **ConsignO Cloud** menu.



- Select **Manage permissions** and click on the [here](#) hyperlink to set the trust between both.



"cloud.consigno.com" uses the following permissions

Let it create or delete document libraries and lists in this site.

Let it access basic information about the users of this site.



cloud.consigno.com

cloud -
signature

If there's something wrong with the app's permissions, click [here](#) to trust it again

OK

Delete the connector

From the same menu, you can also remove the application and then install it again. This should be your last resort.

Site contents	Documents	Document library	2	17/12/2020 11:26
Recycle bin	Form Templates	Document library	0	11/11/2020 10:37
Edit	Site Assets	Document library	2	11/11/2020 10:37
	Style Library	Document library	0	08/11/2020 00:36
	ConsignO Cloud - Electronic S	App		11/11/2020 10:37
	Site Pages		1	08/11/2020 00:36

Microsoft Teams
Add Microsoft Teams to

- Details
- Monitor
- Manage permissions
- Remove