

Lesson Blueprint

Lesson: SignNow Integration		SME: Kavita Tengshe
Course: Document Management Workflow	Product: Storyline	ID: Anusuya
		CD: Anirban
Note: Use candidate 'Angelo Myers'		PM: Joyce

Content Outline

- 1) Welcome
- 2) Purpose
- 3) Introduction
- 4) Workflow steps
- 5) Mastery Activity – Locating SignNow Documents
- 6) Mastery Activity – Sending Documents for Signature
- 7) Mastery Activity – Signing the Documents with or without LEAP
- 8) Mastery Activity - Reviewing Signed Documents
- 9) Mastery Activity - Sending Documents to Client Contacts
- 10) Mastery Activity – Notification Preferences for Users
- 11) Key Points
- 12) End

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SLIDE	TEMPLATE SLIDE	ELEMENT		NARRATION
1	Welcome	Placeholder text	SignNow Partner Document Management	
2	Purpose	Heading bar	Purpose	
2-0		text	This lesson provides a workflow for sending Documents from NexusATS to Candidates or Client Contacts using SignNow.	This lesson provides a workflow for sending Documents from NexusATS to Candidates or Client Contacts using SignNow.
3	Introduction	Heading bar	SignNow Document Management	
3-0		Text	Document management is key to organizing, distributing, and tracking SignNow documents for smooth collaboration and accurate record-keeping.	Document management is key to organizing, distributing, and tracking SignNow documents for smooth collaboration and accurate record-keeping.
4	Workflow Steps	Heading bar	Document Management Workflow Steps	
4-0		Table containing a numbered list	Table (List) Heading: Document Management <ol style="list-style-type: none"> 1. Locating SignNow Documents 2. Sending Documents for Signature, 3. Signing the Documents with or without LEAP 4. Reviewing Signed Documents 5. Sending Documents to Client Contacts 6. Notification Preferences for Users 	The Document Management workflow is: <ol style="list-style-type: none"> 1 Locating SignNow Documents, 2 Sending Documents for Signature, 3 Signing the Documents with or without LEAP, 4 Reviewing Signed Documents, 5 Sending Documents to Client Contacts 6 Notification Preferences for Users.

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			<i>Animation:</i> Each line comes in separately in sync with narration	
	Menu	Content Folder Name	Document Management Workflow	
5	Mastery Activity	Heading bar Slide label	Document Management Workflow	
5-0		Step Number	1	No narration
		Step Title	Locating SignNow Documents	
		Text	Documents can be directly sent to a candidate from three locations within their profile in NexusATS. <space for two lines> In this demonstration, SignNow documents are located within a candidate’s profile. <space> <i>button:</i> Proceed to Activity	
5-1	layer	Navigation	<i>Text:</i> NAVIGATION Candidate > Candidate Management > Compliance > Candidate Compliance <i>Screen:</i> Cropped in view (top portion) of Compliance screen showing SignNow logo. <i>Screen pointer:</i> Focus rectangle around ‘Compliance’, ‘Candidate Compliance’ and an arrow pointing towards ‘SignNow’ logo.	The SignNow documents to be sent to the candidate are available in their Compliance tab, under Candidate Compliance. They can be accessed by clicking the SignNow logo.

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5-2	layer	Navigation	<p><i>Text:</i> NAVIGATION Candidate > Candidate Management > Documents</p> <p><i>Screen:</i> Cropped in view (top portion) of 'Documents' screen showing SignNow logo.</p> <p><i>Screen pointer:</i> Focus rectangle around 'Documents', and an arrow pointing towards the 'SignNow' logo.</p>	The SignNow logo can also be accessed from the Documents tab.
5-3	Layer	Navigation	<p><i>Text:</i> NAVIGATION Candidate > Candidate Management > Deal Sheet</p> <p><i>Screen:</i> Cropped in view (top portion) of 'Deal Sheet' screen showing SignNow logo.</p> <p><i>Screen pointer:</i> Focus rectangle around 'Deal Sheet', and an arrow pointing towards 'SignNow' logo.</p>	And it's available in the Deal Sheet section as well.
5-4	layer	Interactive	<p><i>Screen:</i> Compliance tab under Candidate's profile</p> <p><i>Screen pointer:</i> Focus rectangle around 'SignNow' logo.</p> <p><i>Action bubble:</i> Click to open</p>	
5-5	layer	Interactive	<p><i>Screen:</i> SignNow pop-up window open</p> <p><i>Screen pointer:</i> Focus rectangle around one document.</p> <p><i>Action bubble:</i> Click to select</p>	All associated SignNow documents are available in the left panel. Select one or multiple documents to send to the candidates and move them to the right panel.
5-6	layer	Interactive	<p><i>Screen pointer:</i> Focus hotspot around the single right arrow in the middle.</p>	

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			<i>Action bubble:</i> Click to move	
5-7	layer		<p><i>Screen:</i> SignNow pop-up window with options displaying to create a document group for the moved document</p> <p><i>Screen pointer:</i> Arrow pointing to the 'Create' button.</p>	A movement triggers an option to create a document group.
6	Mastery Activity	Heading bar Slide label	Document Management Workflow	
6-0		Step Number	2	No narration
		Step Title	Sending Documents for Signature	
		Text	<p>SignNow documents are shared as email links to candidates or client contacts for signature.</p> <p><space for two lines></p> <p>In this activity, the process of sending and tracking the SignNow documents is shown.</p> <p><space></p> <p><i>button:</i> Proceed to Activity</p>	
6-1	layer		<p><i>Text:</i> On this screen, NexusATS users can see two statuses: "Waiting for Signature" and "Completed".</p> <p><i>Screen:</i> SignNow pop-up window showing envelopes (cropped in view).</p> <p><i>Screen Pointer:</i> Focus rectangles on the status</p>	On this screen, NexusATS users can see two statuses: "Waiting for Signature" and "Completed".

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6-2	layer	Interactive	<p><i>Screen:</i> SignNow pop-up window showing envelopes</p> <p><i>Screen pointer:</i> Focus rectangle around envelope icon in a document row</p> <p><i>Action bubble:</i> Click to send</p>	Click the envelope icon to send the created document group for signature.
6-3	layer		<p><i>Screen:</i> Mail preview window open (must show the signature link in the mail body)</p> <p><i>Screen pointer:</i> Arrow pointing 'Send Email' button.</p>	Preview the email with the filled details. Edit, if necessary, then click 'Send Email'.
7	Mastery Activity	Heading bar Slide label	Document Management Workflow	
7-0		Step Number	3	No narration
		Step Title	Signing the Documents with or without LEAP	
		Text	<p>Once the SignNow email is sent, candidates can sign documents with or without a LEAP account.</p> <p><space for two lines></p> <p>In this demonstration, candidates signing SignNow Documents are displayed.</p> <p><space></p> <p><i>button:</i> Proceed to Activity</p>	
7-1	layer		<p><i>Text:</i> Candidates without LEAP accounts receive the SignNow email at their registered email address.</p> <p><i>Screen:</i> Mail showing SignNow documents to be signed for a candidate.</p>	Candidates without LEAP accounts receive the SignNow email at their registered email address.

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7-2	layer	Navigation	<p><i>Text:</i> NAVIGATION LEAP Profile > Documents > SignNow Documents</p> <p><i>Screen:</i> Cropped in view (top portion) of ‘SignNow Documents’ screen showing SignNow documents. (Download this shot: SignNow LEAP screenshot.png)</p> <p><i>Screen pointer:</i> Focus rectangle around ‘SignNow Documents’, and the documents displayed with SignNow logo.</p>	For candidates with a LEAP profile, the SignNow Documents tab auto-populates with documents requiring signatures.
7-3	layer		<p><i>Text:</i> Once the document is signed, the status changes to 'Pending Review'.</p> <p><i>Screen:</i> Cropped in view (top portion) of ‘SignNow Documents’ screen showing SignNow documents.</p> <p><i>Screen pointer:</i> Focus rectangle around document showing ‘Pending Review’</p>	Once the document is signed, the status changes to 'Pending Review'.
8	Mastery Activity	Heading bar Slide label	Document Management Workflow	
8-0		Step Number	4	No narration
		Step Title	Reviewing Signed Documents	
		Text	<p>Signed SignNow documents are automatically sent back to NexusATS for review and approval.</p> <p><space for two lines></p> <p>In this activity, the process of reviewing a signed document is shown.</p> <p><space></p>	

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			<i>button:</i> Proceed to Activity	
8-1	layer	Navigation	<p><i>Text:</i> NAVIGATION Candidates > Compliance Management > Review</p> <p><i>Screen:</i> Cropped in view of 'Review' tab showing a SignNow document waiting for review.</p> <p><i>Screen pointer:</i> Focus rectangle around 'Review', and 'SIGNNOW' in the document details row.</p>	The signed documents are queued under the 'Review' tab in the candidate's Compliance Management section.
8-2	layer	Interactive	<p><i>Screen pointer:</i> Focus rectangle around 'Document type' dropdown</p> <p><i>Action bubble:</i> Arrow pointing the document type selected</p>	Categorize the document to be reviewed under the appropriate type.
8-3	layer	Interactive	<p><i>Screen pointer:</i> Focus rectangle around the box to select the row</p> <p><i>Action bubble:</i> Click to review</p>	Select the document to access the review options.
8-4	layer	Interactive	<p><i>Screen:</i> Review options enabled</p> <p><i>Screen pointer:</i> Arrows appearing to indicate the review options 'Approve & Verify', 'Approve', and 'Decline'.</p>	The document review options are "Approve & Verify", "Approve", and "Decline".
8-5	layer	Navigation	<p><i>Text:</i> NAVIGATION Candidates > Compliance > Credentials</p> <p><i>Screen:</i> Cropped in view of 'Compliance' tab showing a SignNow document approved and associated (has a green document icon)</p>	<p>Once approved, the document appears in the candidate's Compliance tab under the Credentials section.</p> <p>The green document icon indicates that the signed document is associated and updated in the candidate's profile.</p>

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			<p><i>Screen pointer:</i> Focus rectangle around 'Compliance' tab and 'Credentials'.</p> <p>Focus rectangle around 'Green document icon' in the document details row.</p>	
8-6	layer	Navigation	<p><i>Text:</i> NAVIGATION Candidates > Documents</p> <p><i>Screen:</i> Cropped in view of Candidates 'Documents' tab showing a signed document.</p> <p><i>Screen pointer:</i> Focus rectangle around 'Documents' tab.</p>	The signed document also appears in the candidate's Documents tab under the selected document type category.
9	Mastery Activity	Heading bar Slide label	Document Management Workflow	
9-0		Step Number	5	No narration
		Step Name	Sending Documents to Client Contacts	
		Text	<p>NexusATS profiles allow document sending to clients, mirroring the candidate steps.</p> <p><Space for two lines></p> <p>In this demonstration, the locations of SignNow documents in the Client's profile is shown.</p> <p><i>Action bubble:</i> Proceed to Activity</p>	
9-1	layer	Interactive	<p><i>Screen:</i> Client profile showing Documents tab</p> <p><i>Screen pointer:</i> Focus rectangle around SignNow icon</p> <p><i>Action bubble:</i> Click to open</p>	To access available SignNow documents for sending to a client, first select their Client Contact from the profile.

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9-2	layer	Interactive	<p><i>Screen:</i> Client contact details popup window</p> <p><i>Screen pointer:</i> Dropdown opening in wipe animation – Focus rectangle on a client contact appearing in the dropdown</p> <p><i>Action bubble:</i> Click to add</p>	
9-3	layer	Interactive	<p><i>Screen pointer:</i> Focus hotspot around ‘Next’ button</p> <p><i>Action bubble:</i> Click Next</p>	
9-4	layer		<p><i>Screen:</i> SignNow popup window</p>	The regular SignNow window appears. Mirror the steps followed in a candidate profile to send the documents.
9-5	layer	Interactive	<p><i>Screen:</i> Activity tab on a client profile – Freedom two in FSM</p> <p><i>Screen pointer:</i> Focus rectangle on ‘Activity’ tab, the first row of documents and its action items.</p> <p><i>Action bubble:</i> Hover over action items</p>	Documents can also be sent to the client through SignNow via the Activity tab.
9-6	layer	Interactive	<p><i>Screen:</i> Action items open</p> <p><i>Screen pointer:</i> Focus rectangle on ‘Send Exhibit - SignNow’ option</p> <p><i>Action bubble:</i> Click to open</p>	The ‘Send Exhibit’ feature displays the email containing the documents before they are sent.
9-7	layer		<p><i>Screen:</i> Email preview window opens.</p> <p><i>Screen pointer:</i> Focus rectangle around cc and bcc</p>	Additional recipients can be added to the email, if required.
9-8	layer		<p><i>Screen pointer:</i> Focus rectangle around email body and arrow pointing ‘Send email’ button.</p>	The message content can be edited in the preview before sending the email.

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9-9			<p><i>Screen:</i> Client review tab</p> <p><i>Screen pointer:</i> Focus rectangle around SignNow document waiting for approval.</p>	Signed documents return to the Client Review tab for review and approval.
10	Mastery Activity	Heading bar Slide label	Document Management Workflow	
		Step Number	6	Customize notifications to receive emails when candidates or clients sign SignNow documents.
		Step Title	Notification Preferences for Users	
		Text	Customize notifications to receive emails when candidates/clients sign SignNow documents.	
		Image	<p><i>Screen:</i> Notification preferences panel open in NexusATS home screen, with 'SignNow' entered in search bar, and the notifications available for DocuSign listed in the panel.</p> <p><i>Screen Pointers:</i> Focus Rectangles around 'Email notifications' boxes column, and both sub-category names.</p>	
11	Key Points	Heading orientation bar	Key Points	
11-0			<ol style="list-style-type: none"> 1. Use Ctrl (PC) or Command (Mac) to multi-select documents with a click on the SignNow panel. 2. In addition to using arrows, double-clicking a document moves it between panels. 	Click next to proceed once you have read the key points.

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			<ol style="list-style-type: none"> 3. Only documents with a 'Waiting for Signature' status can be sent via SignNow email. 4. Candidates receive document links via email and in their LEAP account under the SignNow Documents tab. 5. A specific client contact must be selected to access SignNow documents in their profile. <p>Navigation box: Click next to proceed once you have read the key points.</p>	
12	Congratulations			