

Introduction:

The DocuSign Sample plug-in demonstrates how you can send documents from an IBM Enterprise Content Management (ECM) repository DocuSign. Users can then use DocuSign to sign and approve the documents digitally from anywhere and on any device.

The plug-in provides an IBM Content Navigator menu action to get the document signature status from DocuSign systems. In addition, the plug-in uses IBM Content Navigator task manager to create asynchronous tasks that periodically update signature status automatically updates or automatically check-in signed documents and update signature status.

DocuSign prerequisites:

To use the DocuSign Sample plug-in, you must have a DocuSign developer account. If you don't have a developer account already, you can create it at <https://secure.docusign.com/signup/develop>

From the sandbox, you can find the integrator key or application key that is used to connect to your DocuSign account from any application. For information about your integrator key, log in to <https://admindemo.docusign.com/api-integrator-key>

FileNet P8 prerequisites:

Before you deploy and use the plug-in, make the following changes to the document metadata in FileNet P8 using Administrative Console for Content Engine (ACCE):

- a. Create an integer choice list with following settings:
 - Symbolic Name: DSSignatureStatusChoiceList
 - Type : Integer
 - Options : None: 0
 - Draft: 1
 - Sent: 2
 - Completed: 3
 - Checkedin: 4
 - Voided: 5
- b. Create a property definition called DSSignatureStatus with the following settings:
 - Display Name : Signature Status
 - Symbolic Name : DSSignatureStatus
 - Type : IntegerAssociate the DSSignatureStatus property definition with the DSSignatureStatusChoiceList choice list and set the default value to 0.
- c. Create a property definition called DSEnvelopeID with the following settings:
 - Display Name : Envelope ID
 - Symbolic Name : DSEnvelopeID
 - Type : String
- d. Add the DSSignatureStatus property definition to the Document class.
- e. Add the DSEnvelopeID property definition to the Document class as a hidden property.
- f. Copy DocuSignPlugin.jar to
/opt/IBM/ECMClient/configure/explodedformat/taskManager/taskManagerWeb/WEB-INF/dropins
The above mentioned path will be different for Windows.
- g. Restart WebSphere.

Setting up the DocuSign Sample plug-in IBM Content Navigator

1. In the IBM Content Navigator, open the administration tool.
2. Configure your repository to show the Signature Status property in the Details View as shown in the following screen capture:

FileNet Content Manager repository: ICMDESIGN

General Configuration Parameters System Properties **Browse** Search Office Integration IBM Connections

Specify the properties that are displayed for documents and folders in the content list when users are browsing. You can also specify the order in which properties are displayed.

Property contains

| Available Properties | Selected Properties | Show in Details View | Show in Magazi View |
|-----------------------------|---------------------------------------|-------------------------------------|-------------------------------------|
| Application Name | Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Cc | Signature Status | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Class | Content Size (Size)* | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Classification Status* | Last Modifier (Modified By)* | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Commit Status | Date Last Modified (Modified On)* | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Content Retention Date* | Major Version Number (Major Version)* | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Creator (Added By)* | | | |
| Current State* | | | |
| Date Checked In* | | | |
| Date Content Last Accessed* | | | |

2. Log in to your DocuSign developer account (<https://secure.docusign.com/signup/develop>).
3. Create a DocuSign template as described in [Creating a DocuSign template](#).
4. In the IBM Content Navigator administration tool, register and configure DocuSign Sample plug-in. You must provide the DocuSign Integration Key as part of the configuration as shown in the following screen capture:

Desktops Plug-ins **IBM Content Navigator DocuSign Sample Plugin**

Save and Close Save Reset Close

Plug-in: IBM Content Navigator DocuSign Sample Plugin

A plug-in can be either a JAR file or a compiled class file.

Important: The IBM Content Navigator web application server must be able to access the plug-in file on the local file system or through a URL.

☒ JAR file path: C:\Program Files (x86)\IBM\CaseManagement\con Load

☐ Class file path: Load

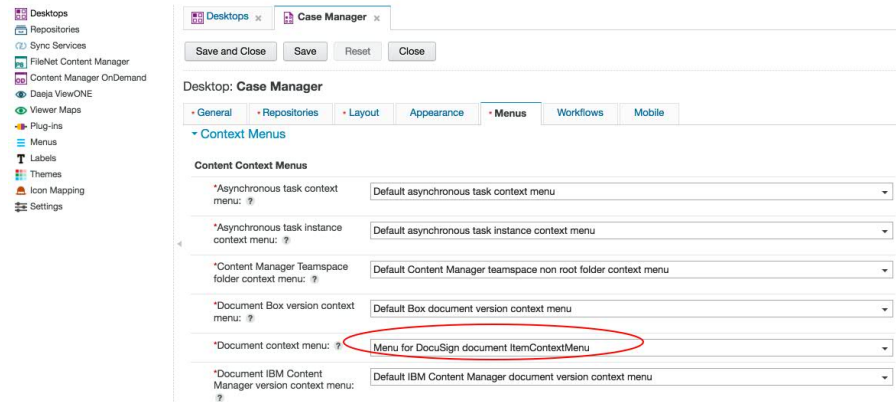
Class name:

| | |
|-------------------|----------------------------------------------|
| Name: | IBM Content Navigator DocuSign Sample Plugin |
| Version: | 1.0.0.0 |
| Repository types: | None |
| Actions: | Digitally Sign, Get Sign Status |
| Open Actions: | None |
| Viewers: | None |
| Features: | None |
| Layouts: | None |

The following configuration parameters are provided by the configuration component of the sample plug-in. You can use the parameters.

* Integration Key: 6d6fa429-b88f-4ed6-ac3f-0bc682c0380c

5. Configure the IBM Content Navigator menu actions:
 - a. In the IBM Content Navigator administration tool, open the desktop that you want to configure.
 - b. On the Menus tab, change the value for the Document Context Menu field to “Menu for DocuSign document itemContextMenu” as in the following screen capture:



6. Click ‘Open Asynchronous Tasks View’ on Navigator features pane and create a new task ‘DocuSign signature status updates configuration’ from ‘Schedule Task’ drop down list. You can schedule this task by providing the following details. If you want auto check-in of signed documents, select ‘Enable auto check-in’ checkbox. If you want only the signature status to be updated on documents, then do not ‘Enable auto check-in’ checkbox.

DocuSign signature status updates configuration

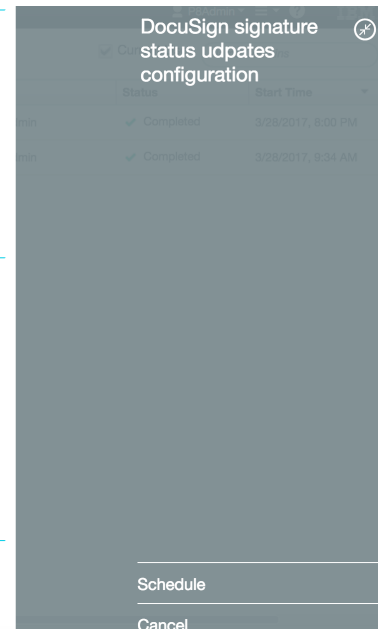
| | |
|----------------------------|-------------------------------------|
| * Target Repository | ICMDESIGN |
| * DocuSign User Name | docusignUser@abc.com |
| * DocuSign Password | xxxxxxxxxx |
| * DocuSign Integration Key | xxxx-yyyy-zzzz-xxxx |
| * Enable auto check-in | <input checked="" type="checkbox"/> |

Schedule Information

| | | | |
|----------------------------------------------------|-------------------------------------------------------|---------|--|
| * Name: | check-in documents asynchronous task | | |
| Description: | Task to check-in signed documents based on a schedule | | |
| <input checked="" type="radio"/> Run on a schedule | | | |
| * Repeats: | Daily | | |
| * Start date: | 3/30/2017 | 6:00 PM | |
| End date: | 4/30/2017 | | |

Notification

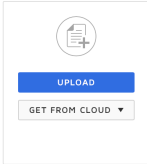

| | |
|----------------|--|
| Email address: | |
|----------------|--|



Creating a DocuSign template:

1. On the TEMPLATES tab, select the New option to create a new template.
2. Provide a template name and upload the sample document IBM Docket Number 123344 Assignment Declaration.pdf from the Box share folder for the sample plug-in.
3. Provide a placeholder Signer1 and Signer2 as shown in the following screen capture and click Next:

Add Documents



Add Recipients

As the sender, you automatically receive a copy of the completed documents.

☐ Set signing order

≡ IMPORT BULK LIST ADD FROM CONTACTS SIGNING ORDER

| | | | | |
|---------|------|-------|-----------------|---|
| Signer1 | Name | Email | ✍ Needs to Sign | ⋮ |
| Signer2 | Name | Email | ✍ Needs to Sign | ⋮ |

4. Drag and drop the required Sign tabs from the palette onto the document where the signatures are to be placed as shown in the following screen capture:

Signer2

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Whereas, I have made certain inventions, improvements, and discoveries (herein referred to as the "Invention") disclosed in the above-identified patent application and further identified by the IBM Docket Number provided above in the header of this document;

Whereas, International Business Machines Corporation, a corporation of New York having a place of business at Armonk, New York (herein referred to as "IBM"), desires to acquire, and I desire to grant to IBM, my entire worldwide right, title, and interest in and to the Invention and in and to any and all patent applications and patents directed thereto;

Sign

Date Signed

Company

(Inventor-1)

Sign

Date Signed

Company

(Inventor-2)

5. Click Save and Close the template