

## Instructions to Setup Navigator DocuSign Plugin

This document assumes that a DocuSign sandbox for the user is already created.  
If you don't have the developer account already, create it from this page -  
<https://secure.docusign.com/signup/develop>

1. Document meta-data changes:
  - a. Create integer choice list with following options:  
Symbolic Name: DSSignatureStatusChoiceList  
Type: Integer  
Options:  
None: 0  
Draft: 1  
Sent: 2  
Completed: 3  
Voided: 4
  - b. Create property definition DSSignatureStatus:  
Display Name: Signature Status  
Symbolic Name: DSSignatureStatus  
Type: Integer  
Associate it to choice list DSSignatureStatusChoiceList with default value: 0
  - c. Create property definition DSEnvelopeID:  
Display Name: Envelope ID  
Symbolic Name: DSEnvelopeID  
Type: String
  - d. Add property definitions DSSignatureStatus, DSEnvelopeID to Document class
  - e. Make DSEnvelopeID as hidden property for the Document class

2. Make configuration setting to repository using ICN admin console as shown below.

Repositories x ICMDESIGN x

Save and Close Save Reset Close

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
Application Name
Cc
Class
Classification Status*
Commit Status
Content Retention Date*
Creator (Added By)*
Current State*
Date Checked In*
Date Content Last Accessed*

Selected Properties	Show in Details View	Show in Magazi View
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Signature Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content Size (Size)*	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modifier (Modified By)*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date Last Modified (Modified On)*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Major Version Number (Major Version)*	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Login to DocuSign developer account (<https://secure.docusign.com/signup/develop>)
4. Create a DocuSign template (reference section for details)
5. Install DocuSign plugin as new plugin from Navigator Admin page
6. Provide the plugin configuration values and save the plugin configuration.

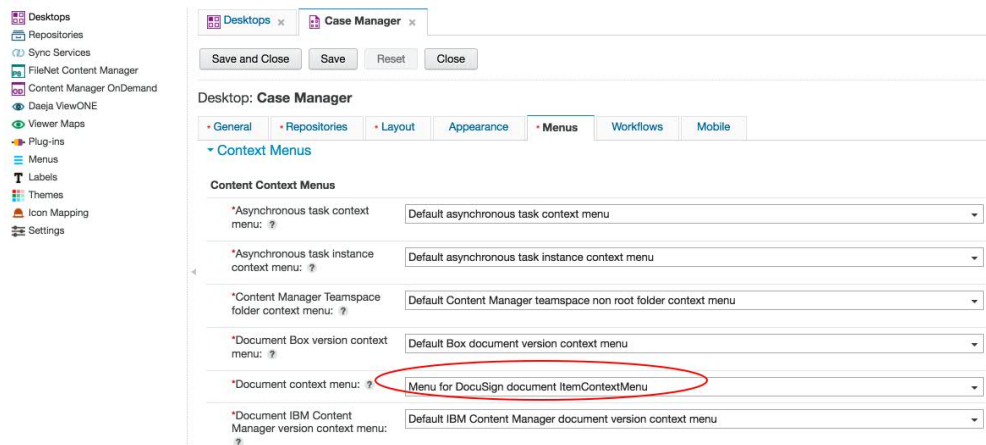
#### Plug-in: DocuSign Plugin

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.

* DocuSign user ID:	<input type="text" value="balunaini@in.ibm.com"/>
* DocuSign Password:	<input type="text" value="l2@sahasra"/>
* Integration Key:	<input type="text" value="6d6fa429-b88f-4ed6-ac3f-0bc682c0380c"/>
* DocuSign Template Id:	<input type="text" value="c0736a6e-51d4-4097-b383-61a71233824c"/>
* Auto Check-in Enabled:	<input checked="" type="checkbox"/>

7. Configure menu actions:
  - a. Edit the desktop used and go to Menus tab.
  - b. Change the “Document Context Menu” as in the below screenshot



#### Additional Reference:

1. The DocuSign Account email id, DocuSign Account Password and the Integrator Key from your DocuSign sandbox account. DocuSign credentials to be provided for the Plugin configuration are from the below screenshot

The API Explorer uses a Bearer token that is generated from the **Demo** authentication credentials you provide below. [Read more about auth in our docs.](#)

Account Email	<input type="text" value="balunaini@in.ibm.com"/>
Account Password	<input type="password" value="....."/>
Integrator Key <sup>?</sup>	<input type="text" value="6d6fa429-b88f-4ed6-ac3f-0bc682c0380c"/>

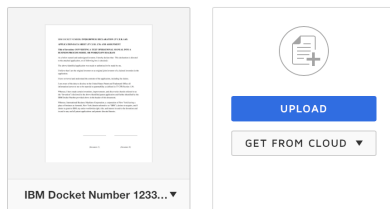
**AUTHENTICATE USING SANDBOX ACCOUNT**

Create a [free Sandbox Account](#) if you don't have one yet. A Sandbox account gives you complete access to DocuSign's Demo environment.

## Create a template:

1. Go to 'TEMPLATES' tab and on New menu option to create a new template.
2. Provide a template name and upload a sample document. The sample document that can be used is attached as "IBM Docket Number 123344 Assignment Declaration.pdf" in Box share folder.
3. Provide a placeholder Signer1 and Signer2 as in the below screenshot. Then click Next

### Add Documents



### Add Recipients

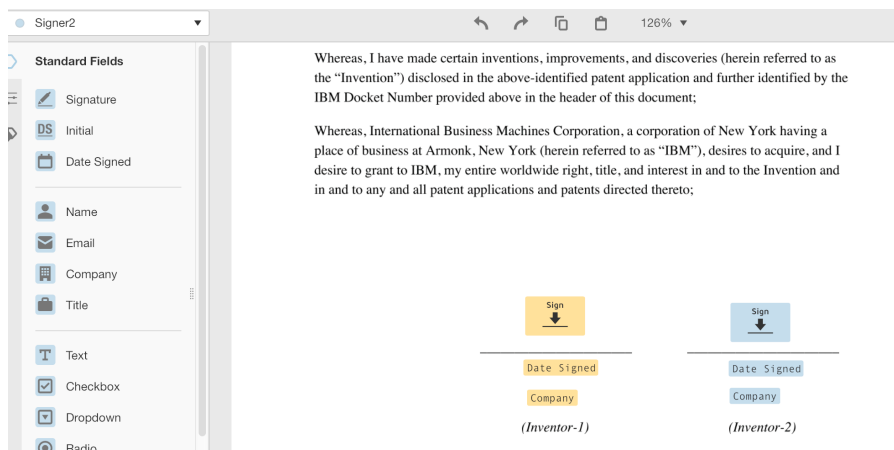
As the sender, you automatically receive a copy of the completed documents.

IMPORT BULK LIST ADD FROM CONTACTS SIGNING ORDER

☐ Set signing order

Signer1	Name	Email	Needs to Sign	
Signer2	Name	Email	Needs to Sign	

4. Drag and drop required Sign tabs from the left on to the document where the signatures have to be placed on the document at the time of signing it (screenshot below)



5. Click Save and Close the template
6. Open the template and click the information icon as shown below. You can get the template Id from here. Copy and use it as the template Id at plugin configuration pane.

[Template List](#) > [Template Details](#)

## Test Tempate1



USEEDITMOVE TO

### DETAILS

Last used on 10/24/2016

**Owner:** b prasad

**ID:** b73f0bb6-a617-411a-b4c8-714a18d8a687 | [Copy ID](#)

**Folder:** [Templates](#)

### Recipients

**SIGNING ORDER**



Signer1



Needs to Sign



Signer2



Needs to Sign