Introduction:
The plug-in demonstrates the ability to send a document to DocuSign for obtaining digital signatures from IBM ECM repositories. DocuSign provides a mechanism to send, sign and approve documents digitally from anywhere and on any device. This plug-in demonstrates the ability to send documents that already exist in an ECM repository to DocuSign to obtain a digital signature. It also provides Navigator menu action to get the document signature status from DocuSign systems. This sample also provides creating Navigator Task Manager asynchronous tasks that performs periodic auto signature status updates or auto check-in of signed documents along with signature status updates.

DocuSign pre-requisites:
A user should have a DocuSign account created. 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 on your integrator key, you can login to https://admindemo.docusign.com/api-integrator-key

FileNet P8 pre-requisites:
Before deploying and using the plug-in, below document meta-data changes are required in P8.
a.   Create integer choice list with following options:

       Symbolic Name : DSSignatureStatusChoiceList
       Type   : Integer
       Options   : None: 0
                       Draft: 1
                       Sent: 2
                       Completed: 3
                       Checkedin: 4
                       Voided: 5
b.   Create property definition DSSignatureStatus:
        Display Name   : Signature Status
        Symbolic Name   : DSSignatureStatus
        Type   : Integer
    Associate it to above 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 only DSEnvelopeID as hidden properties for the Document class

Instructions to Setup Navigator DocuSign Plugin

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

2. Login to DocuSign developer account (https://secure.docusign.com/signup/develop)

3. Create a DocuSign template (reference section for details)

4. Install DocuSign plugin as new plugin from Navigator Admin page

5. Provide the plugin configuration values and save the plugin configuration. The DocuSign Integration Key needs to be provided as part of this plugin configuration.

6. Configure Navigator menu actions:
   a. Edit the desktop used and go to Menus tab.
   b. Change the "Document Context Menu" as in the below screenshot
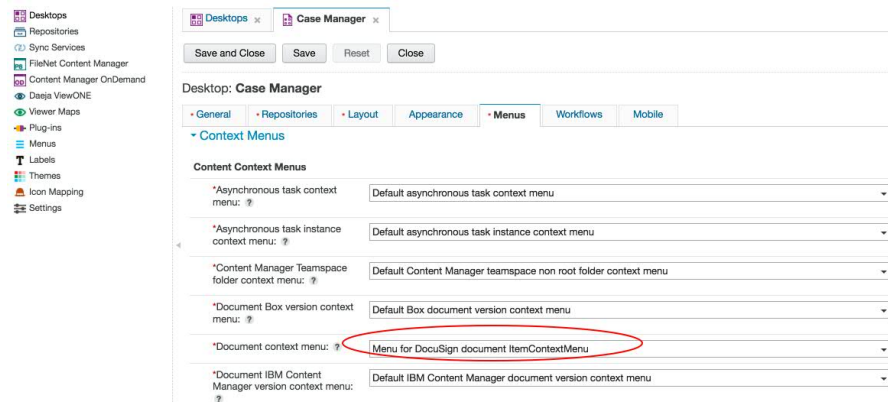
7. Configure Navigator Task Manager task to auto check-in or update of signed documents. The task will be available for creation on the Navigator Admin page. You can create a task and provide the configuration details as in the below screenshot. If you want auto check-in of signed documents, select 'Enable auto check-in' checkbox. Additionally, the task can be scheduled.

Additional Reference:

Create a DocuSign 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
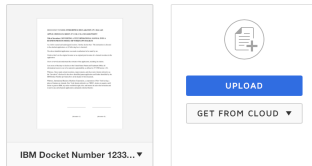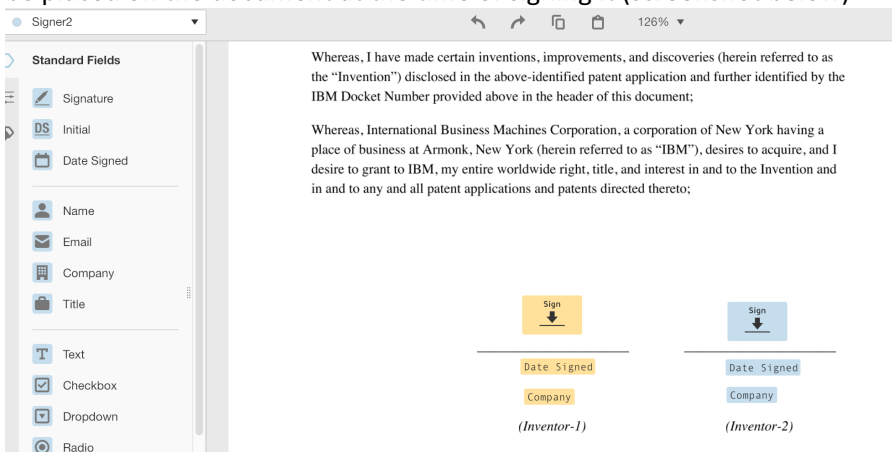

4. Drag and drop required Sign tabs from the left on to the document where the signatures have to be placed on the document at the time of signing it (screenshot below)

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 ⓘ

DETAILS

Last used on 10/24/2016
Owner: b prasad
ID: b73f0bb6-a617-411a-b4c8-714a18d8a687 | Copy ID
Folder: Templates

USE   EDIT   MOVE TO

Recipients

⊞ SIGNING ORDER

👤 **Signer1**   ✎ Needs to Sign

👤 **Signer2**   ✎ Needs to Sign