

**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.

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. 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.

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\icon 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

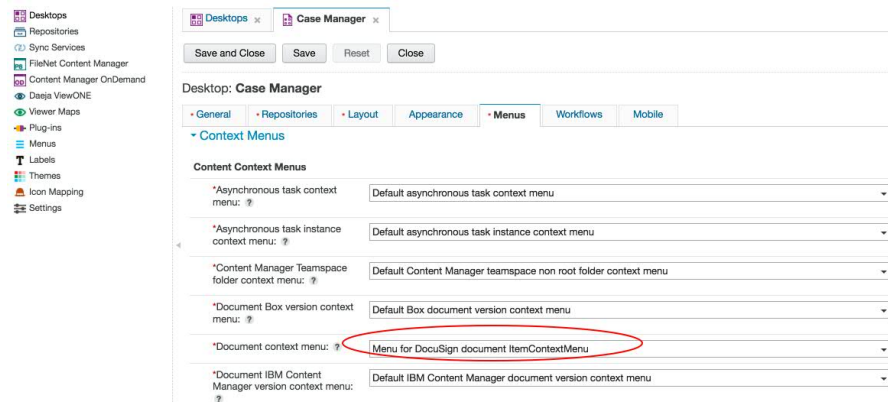
Features: None

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

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.

#### DocuSign Auto Check-in Configuration

* Target Repository	ICMTARGET
* DocuSign User Name	docusignUser1@abc.com
* DocuSign Password	xxxx
* DocuSign Integration Key	xxxx-yyy-yyy-zzzz-xxxx-yyy
* Folder to auto check-in	/ToSignDocs_Folder
* Enable auto check-in	<input checked="" type="checkbox"/>

#### Schedule Information

* Name:	check-in documents async task		
Description:	Task to check-in signed docs from /ToSignDocs_Folder		
<input type="radio"/> Run once			
* Start time:		<input type="radio"/> Start immediately	
<input checked="" type="radio"/> Run on a schedule			
* Repeats:	Daily		
* Start date:	3/16/2017	6:00 PM	<input type="radio"/>
End date:	3/31/2017		

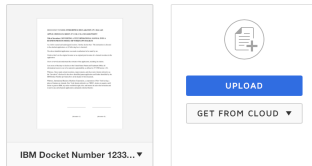


## Additional Reference:

### 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

#### Add Documents



#### Add Recipients

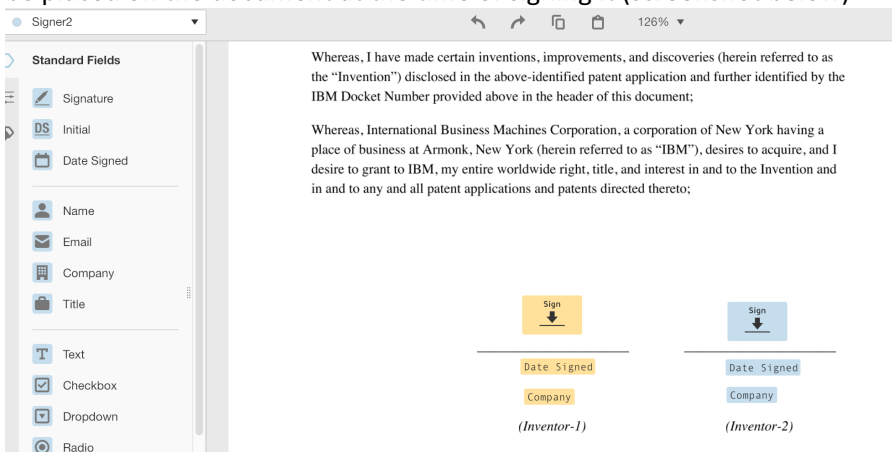
As the sender, you automatically receive a copy of the completed documents.

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