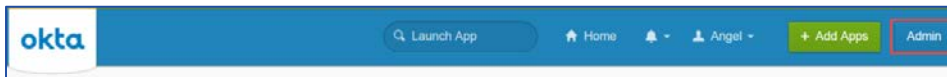
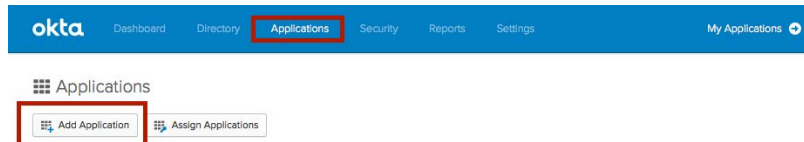


Quick Guide

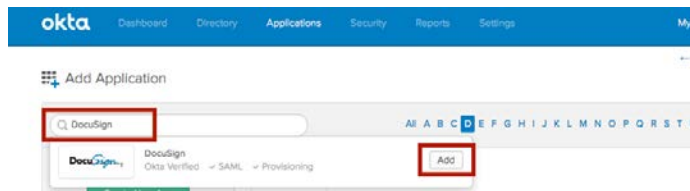
1. Pre-requisites:
 - a. DocuSign admin user.
 - b. Okta admin user.
 - c. DNS admin user.
2. Login to Okta and go to **Admin**.



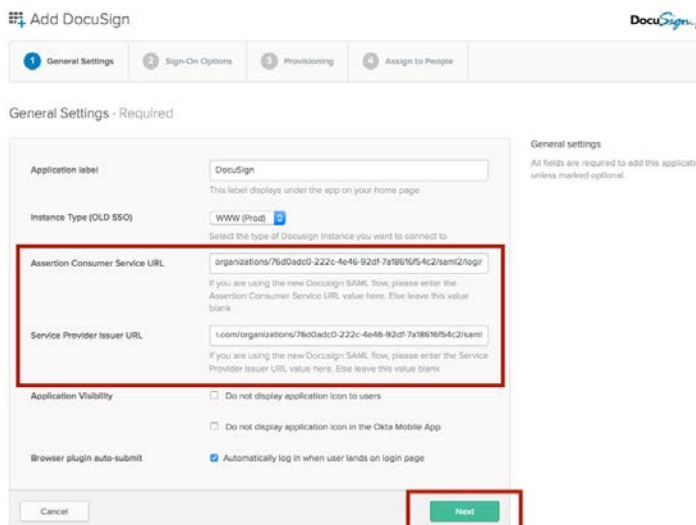
3. Go to **Applications** and click **Add Application**



4. Search for the **DocuSign** app in the App Gallery, and click **Add**



5. In the General Settings tab, enter the Assertion Consumer Service URL (this ends with **/saml2/login**) and Service Provider Issuer URL (this ends with **/saml2**) provided by DocuSign. Click **Next**.



Add DocuSign

1 General Settings 2 Sign-On Options 3 Provisioning 4 Assign to People

General Settings - Required

Application label: DocuSign
This label displays under the app on your home page.

Instance Type (OLD SSO): WWW (Prod) [S]
Select the type of DocuSign instance you want to connect to.

Assertion Consumer Service URL: organizations/76d0ad0-222c-4e46-92df-7a18f6f54c2/saml2/login
If you are using the new DocuSign SAML flow, please enter the Assertion Consumer Service URL value here. Else leave this value blank.

Service Provider Issuer URL: s.com/organizations/76d0ad0-222c-4e46-92df-7a18f6f54c2/saml
If you are using the new DocuSign SAML flow, please enter the Service Provider Issuer URL value here. Else leave this value blank.

Application Visibility:

- ☐ Do not display application icon to users
- ☐ Do not display application icon in the Okta Mobile App

Browser plugin auto-submit: ☒ Automatically log in when user lands on login page

Cancel Next

General settings
All fields are required to add this application unless marked optional.

6. In the **Sign-On Options** tab, select **SAML 2.0** for the Sign On Method, and click the **View Setup Instructions** button

Add DocuSign

1 General Settings 2 **Sign-On Options** 3 Provisioning 4 Assign to People

Sign-On Options - Required

SIGN ON METHODS

The sign-on method determines how a user signs into and manages their credentials for an application. Some sign-on methods require additional configuration in the 3rd party application.

☐ Secure Web Authentication

☐ SAML 1.1

☒ **SAML 2.0**

Default Relay State

All IDP-initiated requests will include this RelayState

SAML 2.0 is not configured until you complete the setup instructions.

View Setup Instructions

Identity Provider metadata is available if this application supports dynamic configuration.

CREDENTIALS DETAILS

Application username format

Password reveal ☐ Allow users to securely see their password (Recommended)

Information Password reveal is disabled, since this app is using SAML with no password.

Previous Cancel Next

About

SAML 2.0 streamlines the end user experience by not requiring the user to know their credentials. Users cannot edit their credentials when SAML 2.0 is configured for this application. Additional configuration in the 3rd party application may be required to complete the integration with Okta.

Application Username

Choose a format to use as the default username value when assigning the application to users.

If you select None you will be prompted to enter the username manually when assigning an application with password or profile push provisioning features.

7. Follow instructions on the page that opens up to setup the Identity Provider section in DocuSign. This will require logging into the DocuSign Admin Portal.
- Demo: <https://admindemo.docusign.com>
 - Production: <https://admin.docusign.com>

Okta

How to Configure SAML 2.0 for DocuSign

The DocuSign Enterprise Edition is required to use SAML. In addition, DocuSign charges a one-time activation fee for SAML. Contact your DocuSign sales representative for pricing details.

We have two sets of instructions, one for older DocuSign tenants, one for newer tenants. It should be clear when you log in to DocuSign what functionality is available for you.

- [New DocuSign Tenants](#)
- [Old DocuSign Tenants](#)

New DocuSign Tenants

If you have a new DocuSign tenant, follow the steps below to set up SAML:

- Log into your DocuSign Tenant's admin section as a user with administrator privileges.
- Navigate to the Identity Providers section:

DocuSign Admin Portal Screenshot:

The screenshot shows the DocuSign Admin Portal with the 'Identity Providers' section highlighted in the left sidebar. The main content area shows 'Billing and Usage' information, including a usage bar and a plan selection button.

8. After following instructions from Okta to setup the Identity Provider, go back to the Okta Sign-On Options tab and click **Next**
9. On the Provisioning tab, you can leave the checkbox to **Enable provisioning features** unchecked because DocuSign's new SSO has automatic just-in-time provisioning. Click **Next**.

Add DocuSign

1 General Settings 2 Sign-On Options 3 Provisioning 4 Assign to People

Provisioning Settings - Optional

☐ Enable provisioning features

Previous Cancel **Next**

10. On the **Assign to People** tab, assign to the users that you want to have access, and click **Next** to complete setup in Okta.

Add DocuSign

1 General Settings 2 Sign-On Options 3 Provisioning 4 Assign to People

Assign DocuSign to People - Optional

Previous Cancel **Next**

Assigning this application

If this app is configured with SAML Federated sign-on option or has provisioning enabled, you will be asked to enter additional information for each user assigned.

Need to assign this app to more than 500 people?

There is no limit to the total number of people who can be assigned an app, but you are limited to 500 assignments per transaction. We recommend using [Groups](#) for managing assignments for large sets of people.

People

Search: mshadocsign-docuSign (mshadocsign) Select All

Person & Username	Status
mshadocsign-docuSign (mshadocsign@gmail.com)	Active

First Previous 1 Next Last

Previous Cancel **Next**

11. In the DocuSign Admin Portal, click the **Domains** menu option.
 - a. Hit **CLAIM DOMAIN**.
 - b. Fill in your domain name (without **http://**, for example, **docusign.com**) and hit **CLAIM**.
 - c. Update your DNS entry to include the TXT token that is returned.
 - d. Once your DNS entry is created, hit **ACTIONS** and then **Validate**.

DocuSign ADMIN

Go to DocuSign Help

ORGANIZATION

Domains

Control email domains and define how users are created, managed, and authenticated. Manage a domain by claiming and verifying it below.

CLAIM DOMAIN

ACCOUNT

Billing and Usage

Account Profile

Security Settings

Domain Name	Status
com	Active

ACTIONS

Domains admin console

- e. Hit **EDIT** and mark the options that you need.

☐ Always require login when opening envelopes

☐ Prevent unmanaged signups

☐ Require all users to authenticate with Identity Provider

Domain options