

Quick Guide

1. Pre-requisites:
 - a. DocuSign admin user.
 - b. ADFS admin user.
2. Go into DocuSign Admin Portal and open the Identity Provider menu option.
 - a. Demo: <https://admindemo.docusign.com/authenticate>
 - b. Production: <https://admin.docusign.com/authenticate>
3. Find the Identity Provider configuration created, and open that up (DocuSign has to initially configure this in order to set the NAMEID format to unspecified).
 - a. Set the login URL to the ADFS login URL (usually <https://adfs.companyname.com/adfs/ls/>).
 - b. Set the Issuer to the entity ID in the metadata (usually <http://adfs.companyname.com/services/trust>).
 - c. Upload the x509 certificate from ADFS, and then save the configuration.
4. Click on 'Endpoints' for the Identity Provider (either inside the IDP configuration, or in the Actions dropdown for the identity provider row). Copy the metadata URL. This will be used in ADFS.
5. Open ADFS
 - a. Create a new relying party trust in ADFS.
 - b. Enter the metadata URL you got from DocuSign in the Federation Metadata address.
 - c. Set the display name to DocuSign Demo or DocuSign Production.
 - d. Use the default settings and finish the relying party trust setup. Then add 2 claim rules:
 - i. Send LDAP attributes as claims:

Add Transform Claim Rule Wizard

Configure Rule

Steps

- Choose Rule Type
- Configure Claim Rule

You can configure this rule to send the values of LDAP attributes as claims. Select an attribute store from which to extract LDAP attributes. Specify how the attributes will map to the outgoing claim types that will be issued from the rule.

Claim rule name: DocuSign Attributes

Rule template: Send LDAP Attributes as Claims

Attribute store: Select an attribute store...

Mapping of LDAP attributes to outgoing claim types:

LDAP Attribute (Select or type to add more)	Outgoing Claim Type (Select or type to add more)
E-Mail-Addresses	emailaddress
Given-Name	givenname
Surname	Surname
SAM-Account-Name	employeeid
*	

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- Surname -> surname. Given-name -> givenname. E-Mail Addresses -> emailaddress.
Unique identifier (Employee-ID or SAM Account Name, etc) -> employeeid.
- ii. Transform LDAP attributes as claim:

Add Transform Claim Rule Wizard

Configure Rule

Steps

- Choose Rule Type
- Configure Claim Rule

You can configure this rule to map an incoming claim type to an outgoing claim type. As an option, you can also map an incoming claim value to an outgoing claim value. Specify the incoming claim type to map to the outgoing claim type and whether the claim value should be mapped to a new claim value.

Claim rule name: NameID

Rule template: Transform an Incoming Claim

Incoming claim type: employeeid

Incoming name ID format: Unspecified

Outgoing claim type: NameID

Outgoing name ID format: Unspecified

☒ Pass through all claim values

☐ Replace an incoming claim value with a different outgoing claim value

Incoming claim value:

Outgoing claim value:

☐ Replace incoming e-mail suffix claims with a new e-mail suffix

New e-mail suffix:

Example: fabrikam.com

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employeeid -> NameID (the NameID format should be unspecified).

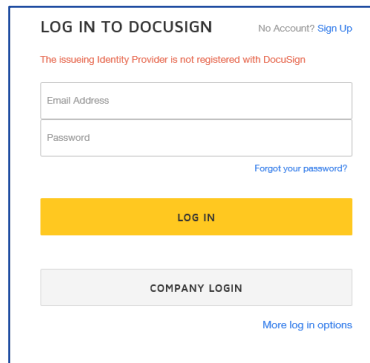
- e. Go to the properties for the Relying Party Trust:
 - i. Go to Advanced tab and set algorithm to SHA1.
 - ii. Go to Encryption tab and remove the encryption.
 - iii. Go to Monitoring tab and remove 'automatically update relying party'.
 - iv. Save.

6. In DocuSign Admin panel, go back to the Identity Provider you set up, click on Endpoints and get the SAML 2.0 SP Initiated Login URL. This URL can be used for testing the login process.

FAQs

Q: I get the error “The issuing Identity Provider is not registered with DocuSign”.

A: Make sure to add Transform Claim Rule to map employeeid to nameID.



The screenshot shows the DocuSign login interface. At the top, it says "LOG IN TO DOCUSIGN" with a link "No Account? Sign Up". Below this, a red error message states: "The issuing Identity Provider is not registered with DocuSign". There are two input fields: "Email Address" and "Password". A link "Forgot your password?" is positioned below the password field. A prominent yellow "LOG IN" button is centered below the inputs. At the bottom, there is a grey "COMPANY LOGIN" button and a link "More log in options".