

DOCUSIGN PLUGIN -ESIGNATURE API

Introduction:

The DocuSign Sample plug-in demonstrates how you can send documents from an IBM Enterprise Content Management (ECM) repository DocuSign. Users can then use DocuSign to sign and approve the documents digitally from anywhere and on any device. The JWT Auth grant flow is implemented in the sample.

The plug-in provides an IBM Content Navigator menu action to get the document signature status from DocuSign systems. In addition, the plug-in uses IBM Content Navigator task manager to create asynchronous tasks that periodically update signature status automatically updates or automatically check-in signed documents and update signature status.

DocuSign prerequisites:

To use the DocuSign Sample plug-in, you must have a DocuSign developer account. If you don't have a developer account already, you can create it at <https://secure.docusign.com/signup/develop>. Please follow the instructions to setup up a docusign App. Store the following in a safe location, as it will be required in later steps:

- IntegrationKey
- UserID of user/admin to be impersonated
- Account ID: Can be gotten from the Admin Icon expanded view (#xxxxxxx)
- Generate RSA Key pairs, Store them in a file, namely; privateKey.txt, publicKey.txt

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 about your integrator key, log in to <https://admindemo.docusign.com/api-integrator-key>

For JWT Authorization Grant prerequisites:

- Follow the instructions in
 - <https://www.docusign.com/blog/developers/oauth-jwt-granting-consent>

IBM Content Navigator prerequisites:

1. Make sure Maven is installed.
2. Copy all the dependencies into a lib directory.
 - a. navigatorAPI.jar
 - b. com.ibm.ws.prereq.commonj-twm.jar
 - c. ICNTask.jar
 - d. log4j.jar
 - e. taskManagerAPI.jar taskServiceClient.jar

FileNet P8 prerequisites:

Before you deploy and use the plug-in, make the following changes to the document metadata in FileNet P8 using Administrative Console for Content Engine (ACCE):

- a. Copy the following JAR file into the lib directory Jace.jar
- b. Create an integer choice list with following settings:
 - i. Symbolic Name: DSSignatureStatusChoiceList
 - ii. Type : Integer
 - iii. Options :
 - a. None: 0
 - b. Draft: 1
 - c. Sent: 2
 - d. Completed: 3
 - e. Checkedin: 4
 - f. Voided: 5
- c. Create a property definition called DSSignatureStatus with the following settings:
 - i. Display Name : Signature Status

Symbolic Name : DSSignatureStatus

Type : Integer

Associate the DSSignatureStatus property definition with the DSSignatureStatusChoiceList choice list and set the default value to 0.

- d. Create a property definition called DSEnvelopeID with the following settings:

Display Name : Envelope ID

Symbolic Name : DSEnvelopeID

Type : String

- e. Add the DSSignatureStatus property definition to the Document class.

- f. Add the DSEnvelopeID property definition to the Document class as a hidden property.

- g. Copy DocuSignPlugin.jar to

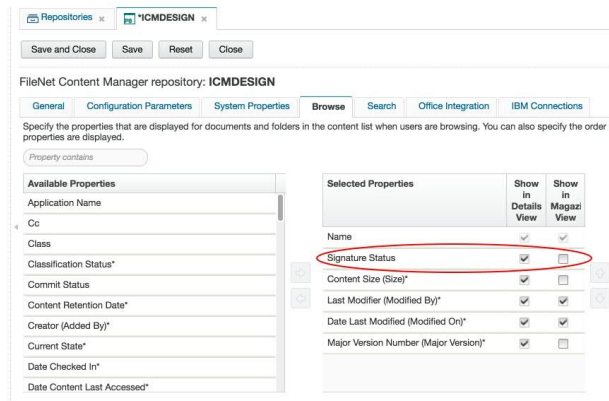
/opt/IBM/ECMClient/configure/explodedformat/taskManager/taskManagerWeb/WEB-INF/dropins

The above mentioned path will be different for Windows.

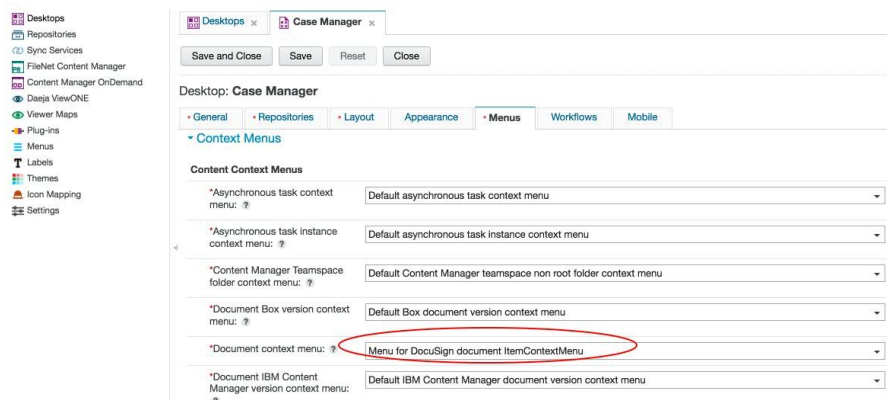
- h. Restart WebSphere.
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Building the JAR & Setting up the DocuSign Sample plug-in IBM Content Navigator

1. Download the Docusign repository
2. In the directory containing the pom.xml, run "mvn clean package"
3. Upon successful build, you can find the docuSignPlugin.jar
4. In the IBM Content Navigator, open the administration tool.
5. Configure your repository to show the Signature Status property in the Details View as shown in the following screen capture:



2. Log in to your DocuSign developer account (<https://secure.docusign.com/signup/develop>).
3. Create a DocuSign template as described in [Creating a DocuSign template](#).
4. In the IBM Content Navigator administration tool, register and configure DocuSign Sample plug-in. You must provide the DocuSign Integration Key, UserID, AccountID and location of the private key file as part of the configuration.
5. Configure the IBM Content Navigator menu actions:
 - a. In the IBM Content Navigator administration tool, open the desktop that you want to configure.
 - b. On the Menus tab, change the value for the Document Context Menu field to "Menu for DocuSign document itemContextMenu" as in the following screen capture:



- Click 'Open Asynchronous Tasks View' on Navigator features pane and create a new task 'DocuSign signature status updates configuration' from 'Schedule Task' drop down list. You can schedule this task by providing the following details. If you want auto check-in of signed documents, select 'Enable auto check-in' checkbox. If you want only the signature status to be updated, then do not 'Enable auto check-in' checkbox.

DocuSign signature status updates configuration

* Target Repository: ICMDESIGN

* DocuSign User Name: docusignUser@abc.com

* DocuSign Password: xxxxxxxxxxxx

* DocuSign Integration Key: xxxx-yyy-xxxx-xxxx

* Enable auto check-in: ☒

Schedule Information

* Name: check-in documents asynchronous task

Description: Task to check-in signed documents based on a schedule

☒ Run on a schedule

* Repeats: Daily

* Start date: 3/30/2017 6:00 PM

End date: 4/30/2017

Notification

Email address:

- Provide appropriate security access to the hidden "DocuSignFolder" folder that the plugin creates for staging the documents. Provide Full Control (or File-in/Un-file) security access permissions on root folder level using ACCE for all the users who would be sending the signature requests to DocuSign. Below snapshot shows the security configuration to add "intgpeadmin" user.

Folder: Root Folder

Contents General Properties Annotations Security Policy **Security** Retention Tasks Subscriptions Audit History

You can allow or deny permissions to a user or group. Each permission group contains one or more access rights.

Predefined permissions are collections of access rights that grant varying degrees of access to the object. When you select a predefined permission group, the are selected. You can customize a predefined permission as needed. [Learn more...](#)

Users and Groups


Add... Edit... Remove


Name	Source	Permission Type	Permission Group	Apply To
#AUTHENTICATED-USERS	Direct	Allow	Modify properties	This object only
CEAdmin	Direct	Allow	Full Control	This object only
intgpeadmin	Direct	Allow	Full Control	This object and all children

Creating a DocuSign template:

1. On the TEMPLATES tab, select the New option to create a new template.
2. Provide a template name and upload the sample document IBM Docket Number 123344 Assignment Declaration.pdf from the Box share folder for the sample plug-in.
3. Provide a placeholder Signer1 and Signer2 as shown in the following screen capture and click Next:

Add Documents




UPLOAD
GET FROM CLOUD ▾

IBM Docket Number 1233... ▾

Add Recipients

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

☐ Set signing order

IMPORT BULK LIST ADD FROM CONTACTS SIGNING ORDER

	Name	Email		Needs to Sign	
Signer1					
Signer2					

4. Drag and drop the required Sign tabs from the palette onto the document where the signatures are to be placed at signing as shown in the following screen capture:

Signer2

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Whereas, I have made certain inventions, improvements, and discoveries (herein referred to as the "Invention") disclosed in the above-identified patent application and further identified by the IBM Docket Number provided above in the header of this document;

Whereas, International Business Machines Corporation, a corporation of New York having a place of business at Armonk, New York (herein referred to as "IBM"), desires to acquire, and I desire to grant to IBM, my entire worldwide right, title, and interest in and to the Invention and in and to any and all patent applications and patents directed thereto;

Sign
Date Signed
Company
(Inventor-1)

Sign
Date Signed
Company
(Inventor-2)

5. Click Save and Close the template