

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 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>

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>

IBM Content Navigator prerequisites:

1. Make sure the ANT is installed.
2. Copy all the dependencies into the lib directory.

navigatorAPI.jar
com.ibm.ws.prereq.commonj-twm.jar
ICNTask.jar
j2ee.jar
log4j.jar
navigatorAPI.jar
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:
Symbolic Name: DSSignatureStatusChoiceList
Type : Integer
Options : None: 0
Draft: 1
Sent: 2
Completed: 3
Checkedin: 4
Voided: 5
- c. Create a property definition called DSSignatureStatus with the following settings:
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.

Setting up the DocuSign Sample plug-in IBM Content Navigator

1. In the IBM Content Navigator, open the administration tool.
2. Configure your repository to show the Signature Status property in the Details View as shown in the following screen capture:

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 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. 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 as part of the configuration as shown in the following screen capture:

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

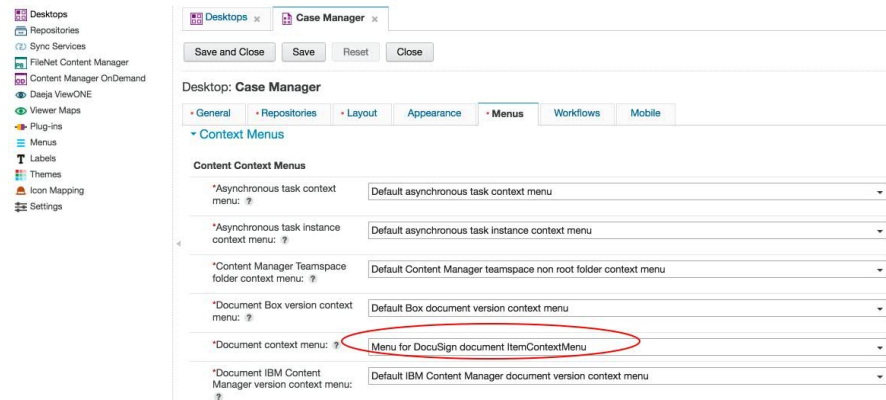
Features: None

Layouts: None

The following configuration parameters are provided by the configuration component of the sample plug-in. You can use the t parameters.

* Integration Key: 6d6fa429-b88f-4ed6-ac3f-0bc682c0380c

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:



6. 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

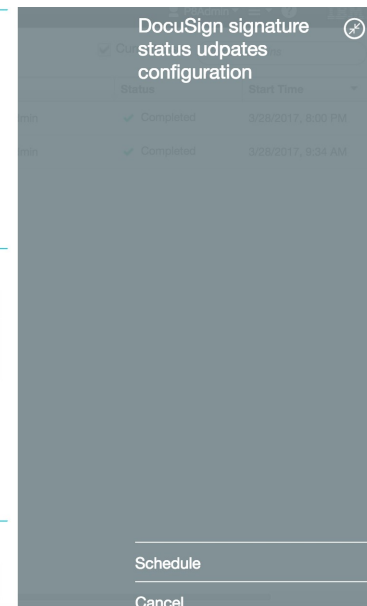
* Target Repository	ICMDESIGN
* DocuSign User Name	docusignUser@abc.com
* DocuSign Password	xxxxxxxxxx
* DocuSign Integration Key	xxxx-yyyy-zzzz-xxxx
* Enable auto check-in	<input checked="" type="checkbox"/>

▼ 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:	
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7. 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.

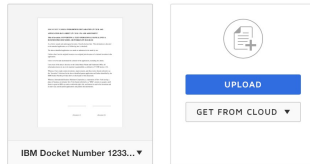
The screenshot shows the IBM Case Manager interface for configuring security policies. On the left, a tree view shows the folder structure, with 'Root Folder' selected. The main panel displays the 'Security Policy' configuration for the 'Root Folder'. The 'Security' tab is active, showing a table of users and groups. The 'intgpeadmin' user is highlighted with a red box, indicating it has 'Full Control' permissions.

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



Add Recipients

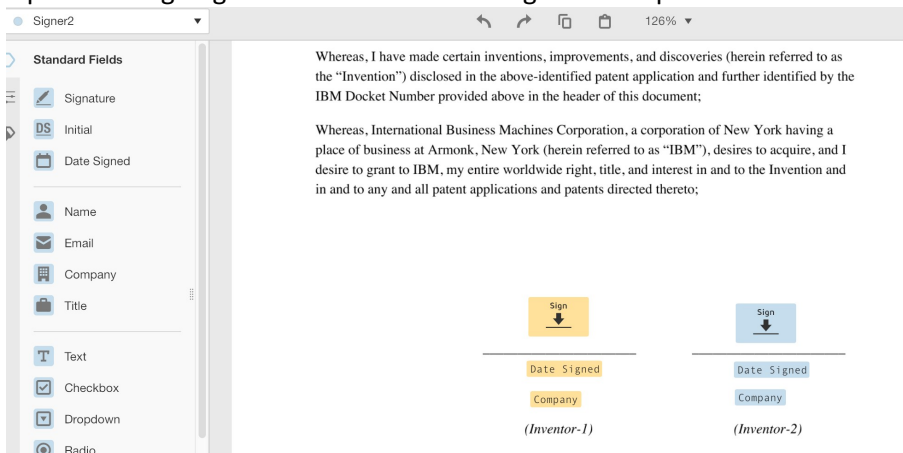
As the sender, you automatically receive a copy of the completed documents.

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 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:



5. Click Save and Close the template