DocuSign Setup Guide

FireLight

DOCUSIGN SETUP GUIDE

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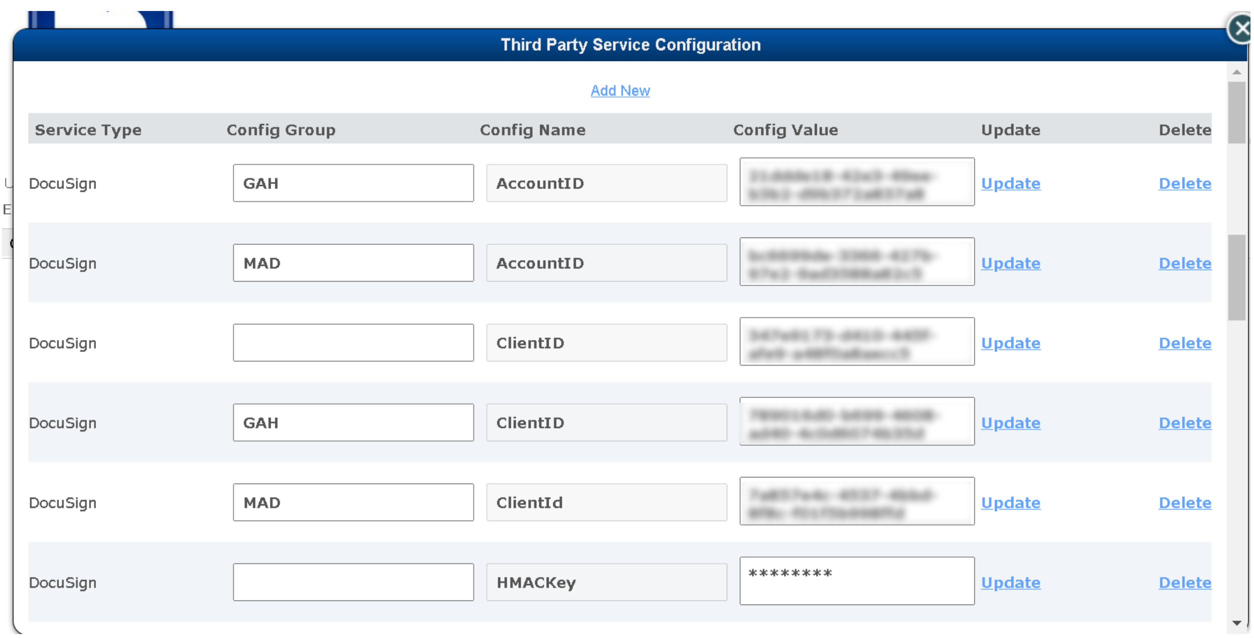
DocuSign Setup Guide

The following document will go through the step-by-step process in setting up and configuring the DocuSign integration. Each step will need to be taken in order to ensure that your account is set up correctly with FireLight®.

1. Third Party Configuration

To utilize DocuSign within FireLight, each client will need several pieces of information that will be added to the Third Party Configuration Table. This will ensure that all of the proper information will be added to the DocuSign envelope in order for each signer to show up appropriately within DocuSign.

Under the Organization Settings, in the Admin tab, select the Third Party Configuration hyperlink. A table will appear with any third party configurations that are set up.



To add a new config value click "Add New"

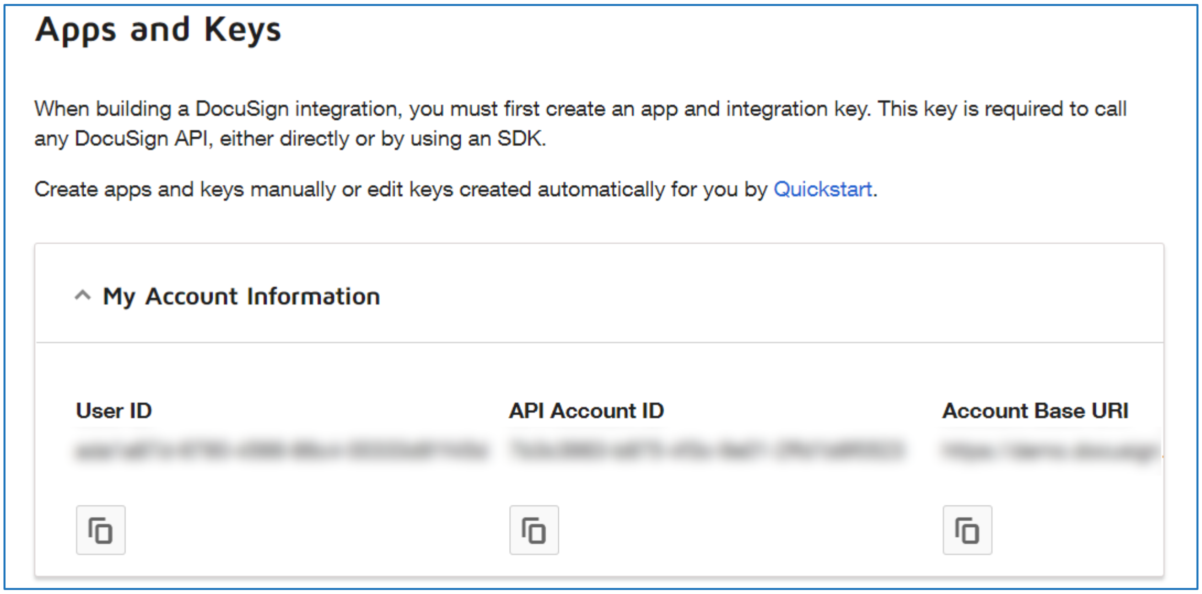
The table will expand for the user to enter the new credentials.

The user will need to add config values for “AccountID” “ClientID” “HMACKey” and “RSAPrivateKey”. These listed Names will go in the Config Name field. The values will be pulled from the DocuSign’s admin page.

The Config Group will allow the user to have multiple DocuSign accounts attached, which will be determined by the DataItem “FLI_THIRDPARTY_CONFIG_GROUP”. This dataitem is an optional field, and defaults as blank. The service type for all DocuSign services, will be “DocuSign”.

2. Apps and Keys

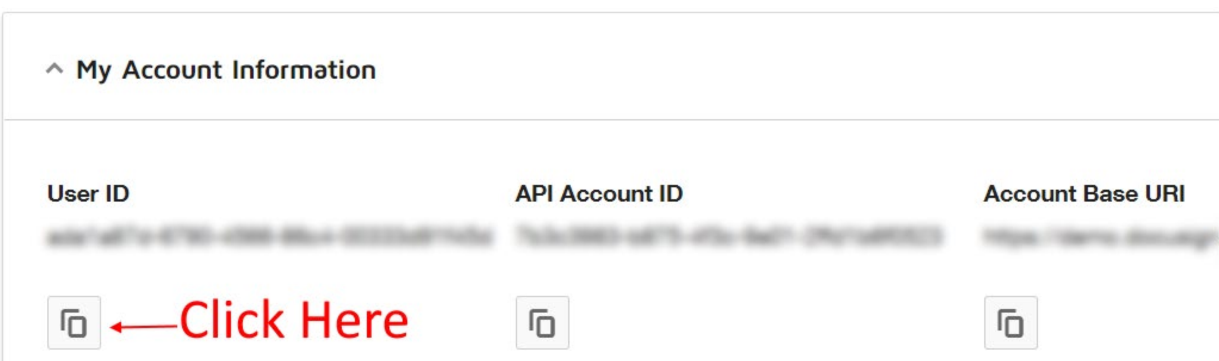
In the DocuSign Admin, the user will need to locate integrations/App and Keys.



Within the Apps and Keys section, the user will be able to find 2 of the 5 config values needed to use the DocuSign service. They are listed below:

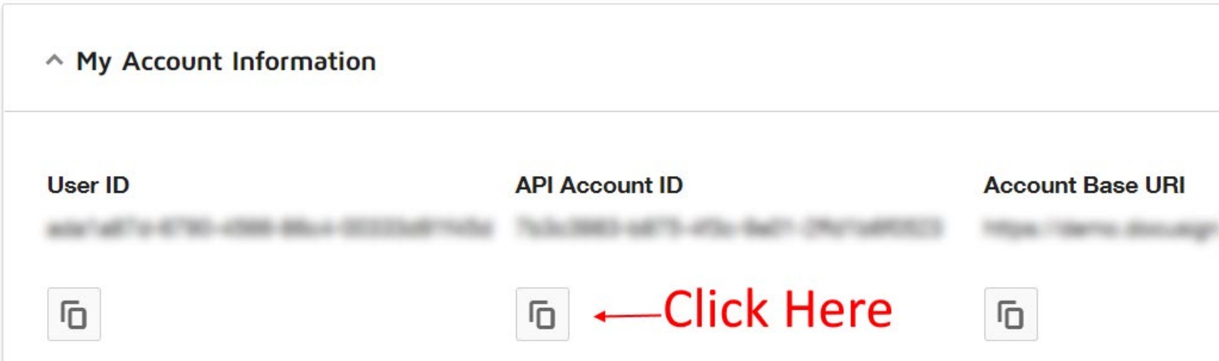
2.1 UserId

The UserID will go into the config name “UserId”. You can select the copy button below to copy to the userID section in the Third Party Configuration Table.



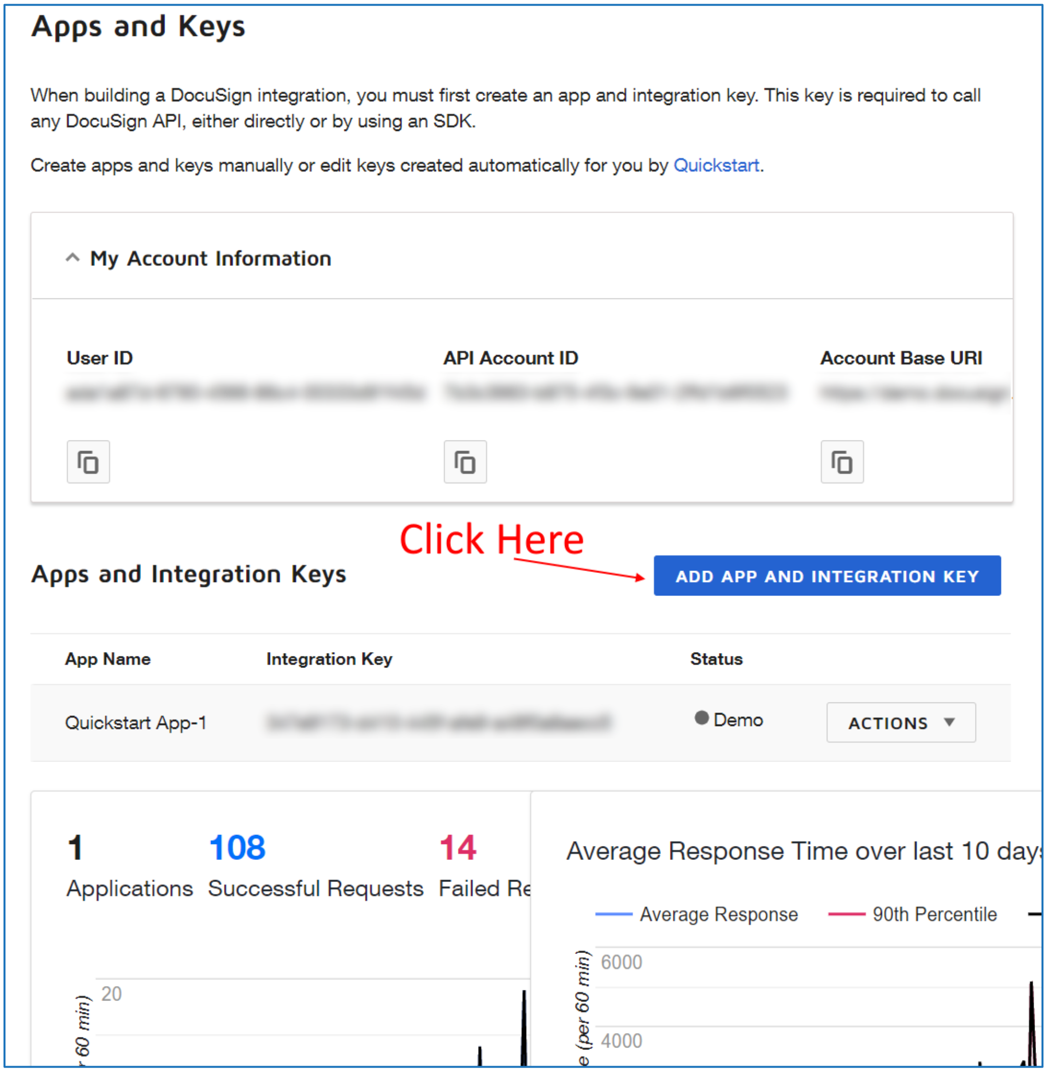
2.2 AccountID

The API Account ID will go into the config name “AccountID”. You can select the copy button below to copy to the API Account ID section in the Third Party Configuration Table.

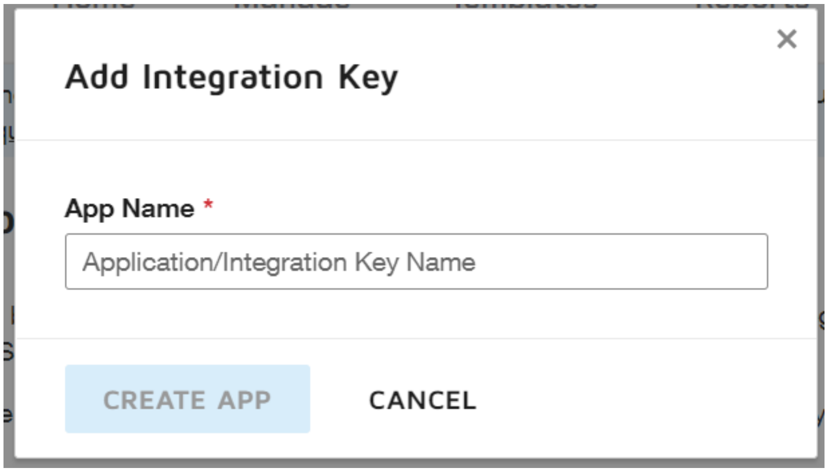


3. Add App and Integration Key

In the DocuSign Admin, go to “integrations/App and Keys” and click the Add App and Integration Key.

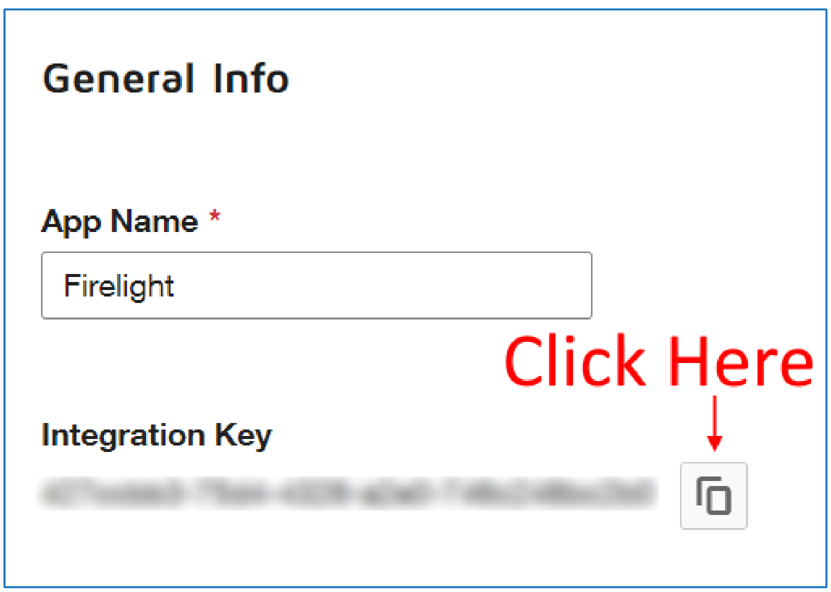


Add in “Firelight” for the App Name.



3.1 ClientID

After the Integration Key has been created, the user will be able to view it. This will need to be copied in order to add to the third party configuration table.

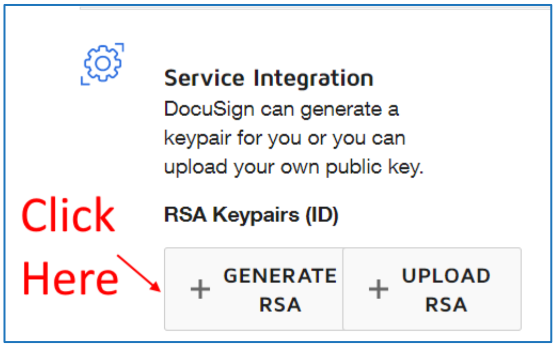


This value will be “ClientID” in the third party config, which can be added to the Third Party Configuration table.

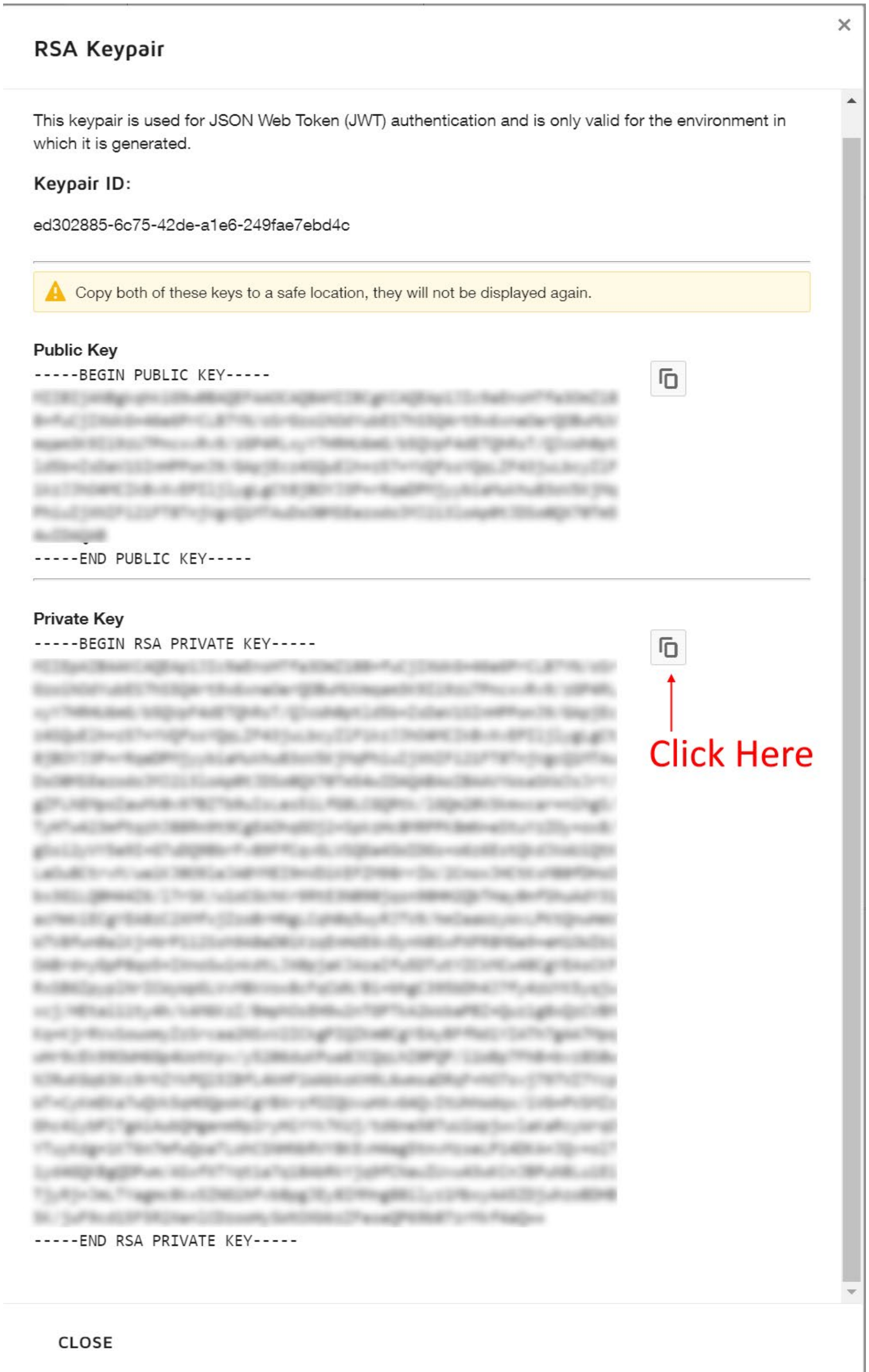
3.2 RSAPrivateKey

To access the RSAPrivateKey, there are two options; the user can upload their own key or create a new one.

To generate a new key, click “Generate RSA”.



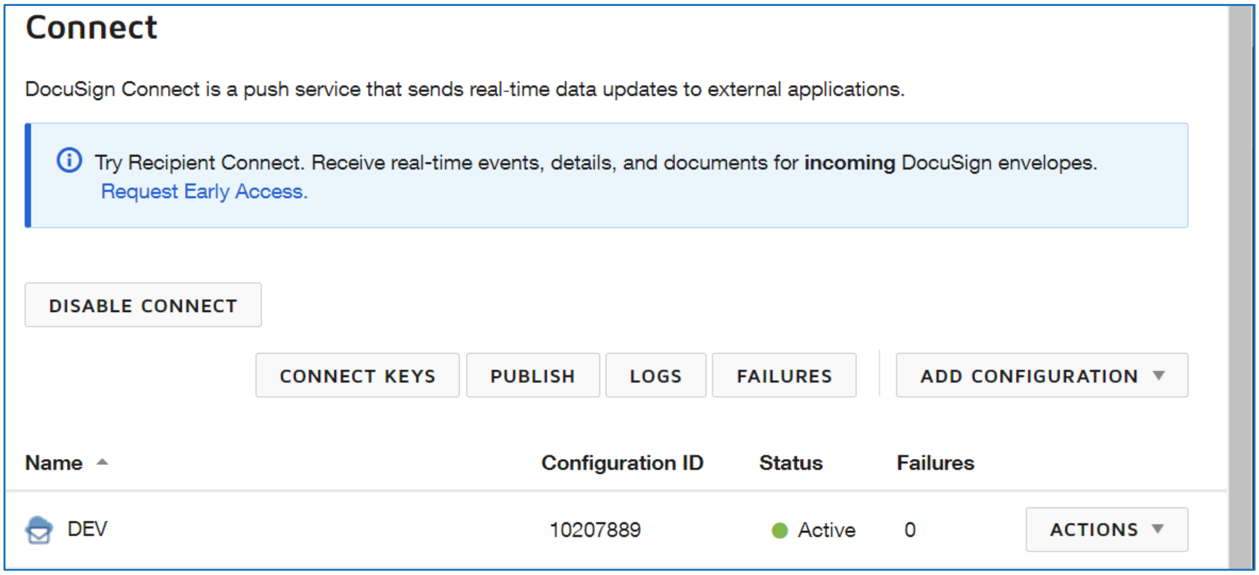
Click the copy button for the private key:



This can be added to the FireLight third party configuration with the Config name: “RSAPrivateKey”.

4. Connect

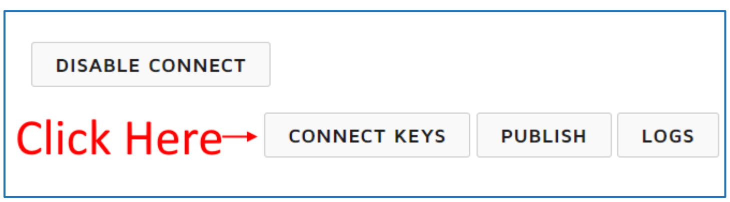
In the DocuSign Admin, navigate to Integrations/Connect:



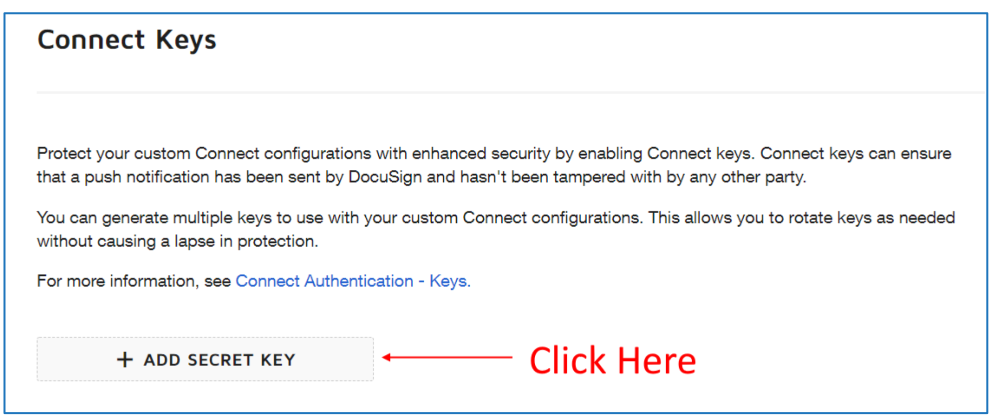
If Connect is not enabled, click Enable Connect.

4.1 HMACKey

To get the HMACKey, click the Connect Keys Button.

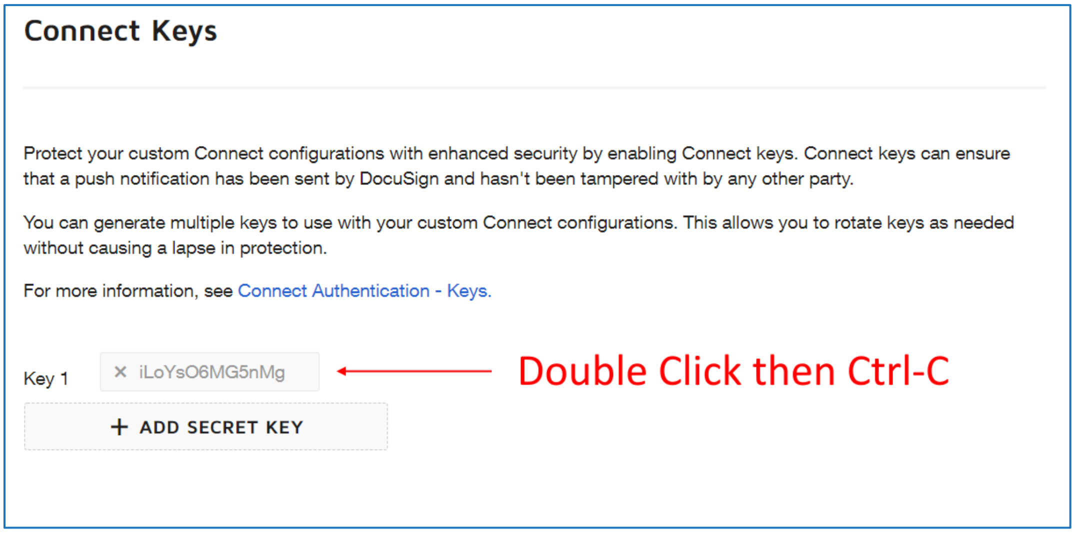


The only available access to the HMAC key is to generate a new one. To generate, click “Add Secret Key”.



Upon clicking, the HMAC key will appear. You will need to double click on the key to highlight it, and then press Ctrl C to copy it into the clipboard.

NOTE: If you navigate away from this screen before copying the key, you will need to generate a new key in order to copy it.



This value can be added to the third party config table with the name “HMACKey”.

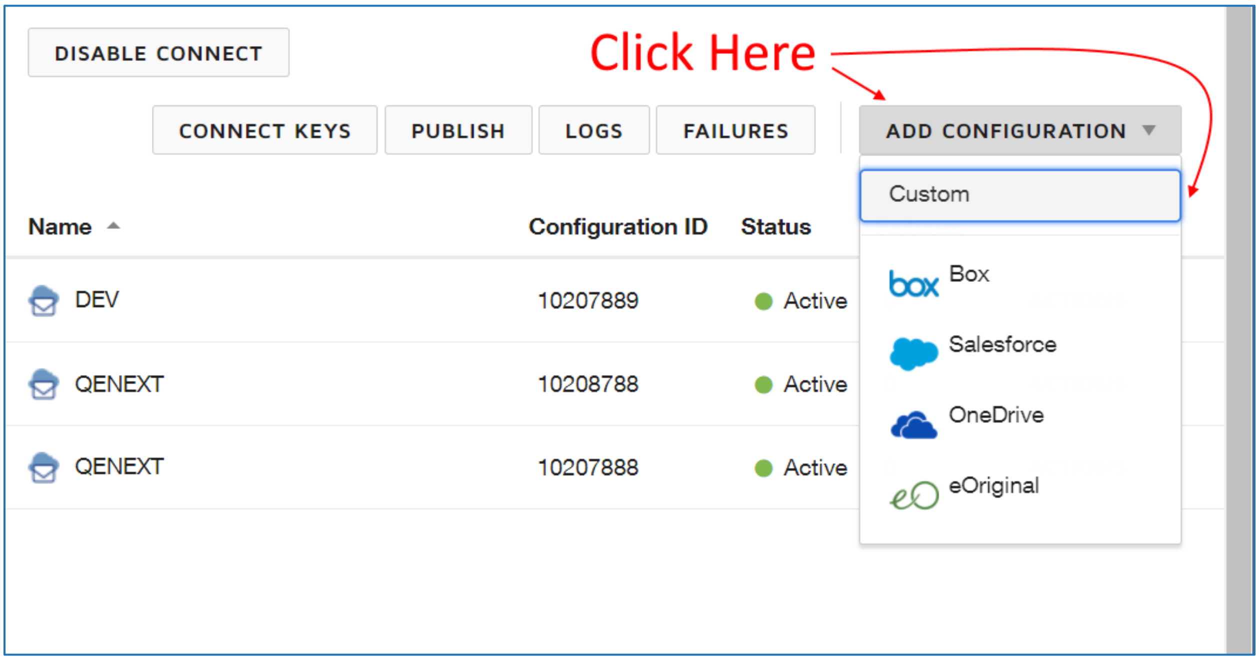
4.2 Connect Config

The user will need to return to the Integrations/Connect so the configuration can be connected.

The Connect Configuration is needed to allow DocuSign to call back to FireLight when an envelope has been completed.

NOTE: A configuration will need to be added for each environment that will be conducting testing.

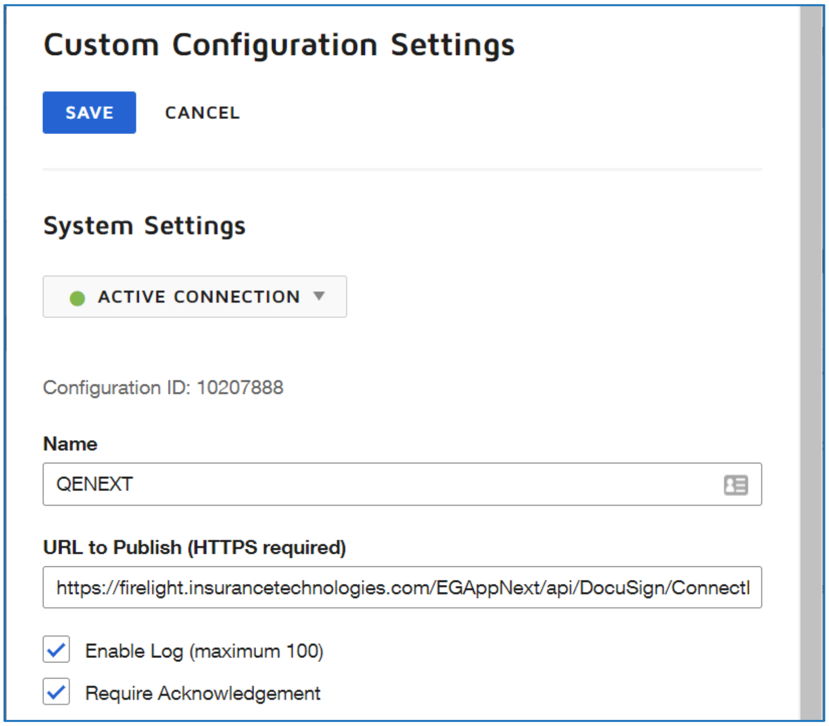
To add this configuration, click ADD CONFIGURATION, then click Custom:



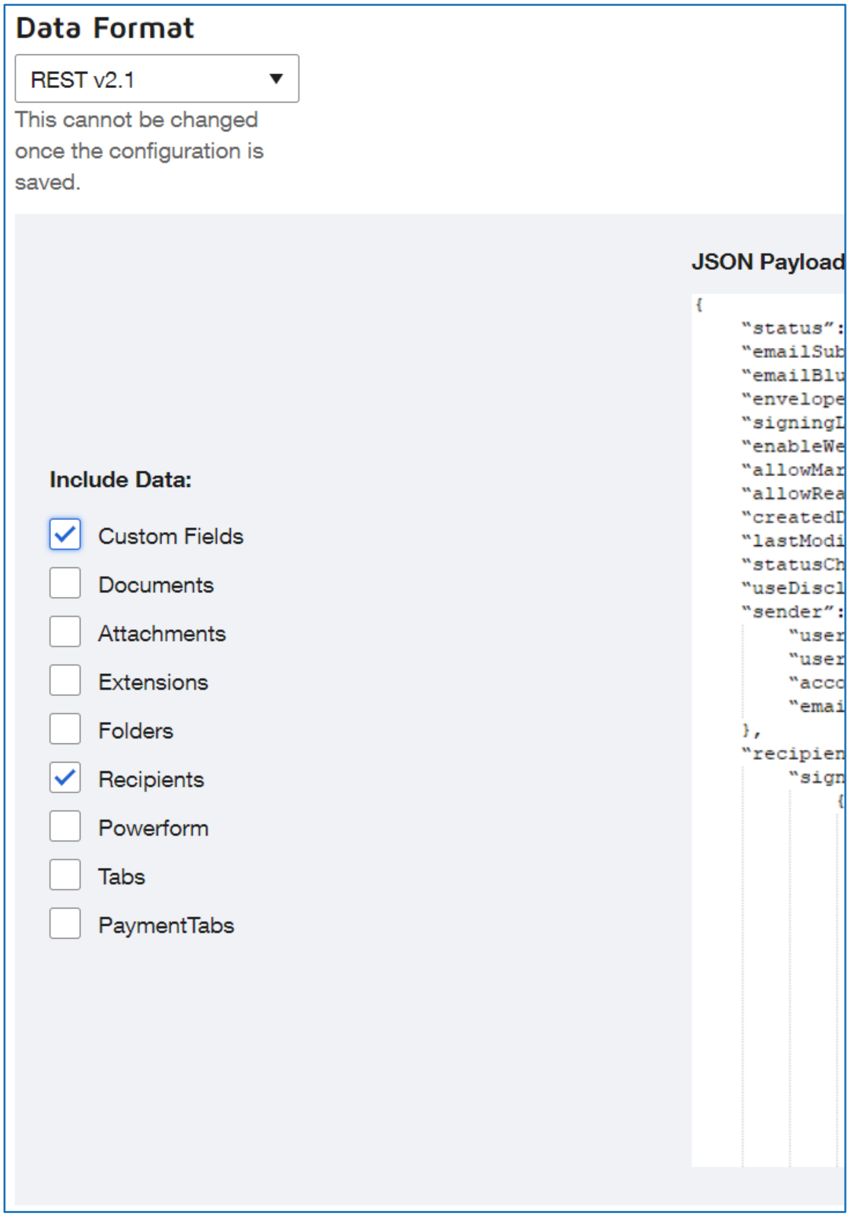
The settings will need to be changed in the Configuration to associate it with FireLight.

- The Name is the environment it will be pointing to. (i.e., QE Next, QE, UAT, etc.)
- The URL to Publish (HTTPS required) will have to be the path to the connect API in FireLight, which are listed below:
  - **QE NEXT:** https://firelight.insurancetechnologies.com/EGAppNext/api/DocuSign/ConnectHook
  - **QE**: https://firelight.insurancetechnologies.com/EGApp/api/DocuSign/ConnectHook
  - **UAT NEXT**: https://uat.firelighteapp.com/EGAppNext/api/DocuSign/ConnectHook

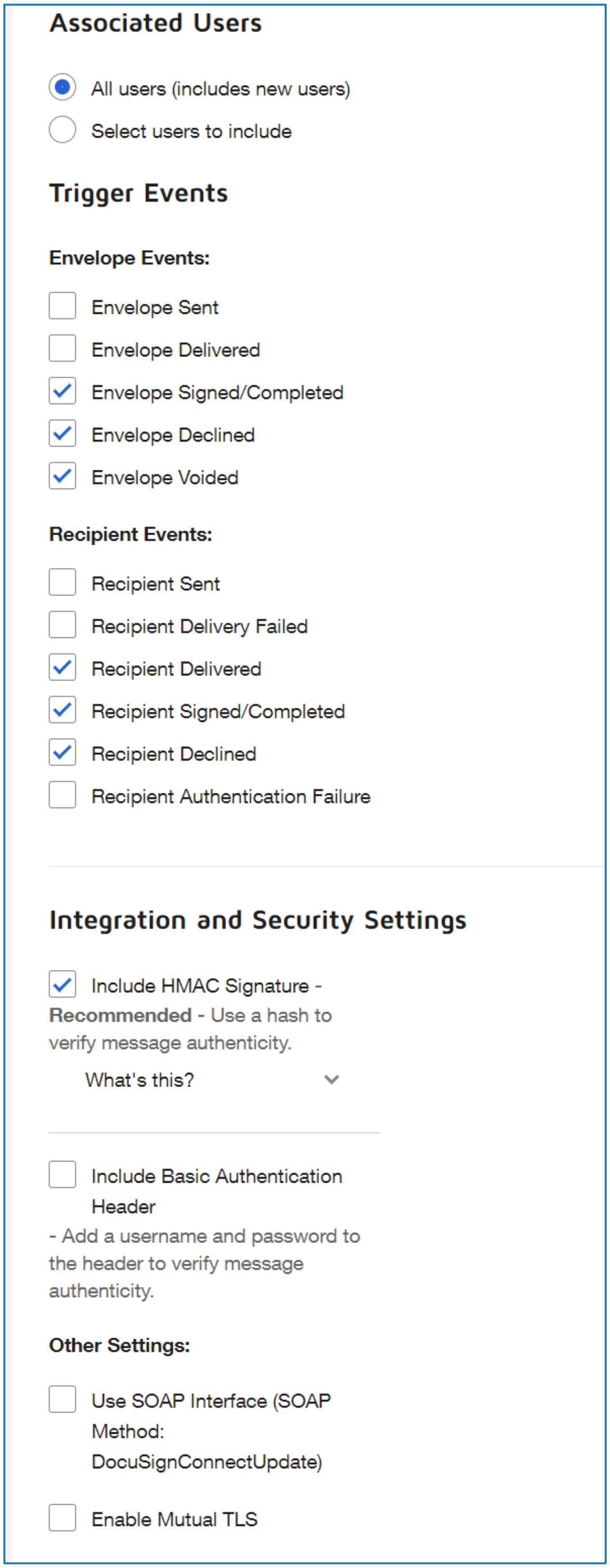
- **UAT:** https://uat.firelighteapp.com/EGApp/api/DocuSign/ConnectHook
- **Prod:** https://www.firelighteapp.com/EGApp/api/DocuSign/ConnectHook



Next, verify the following settings are as shown below:



Additionally, verify these settings are set the same as well:



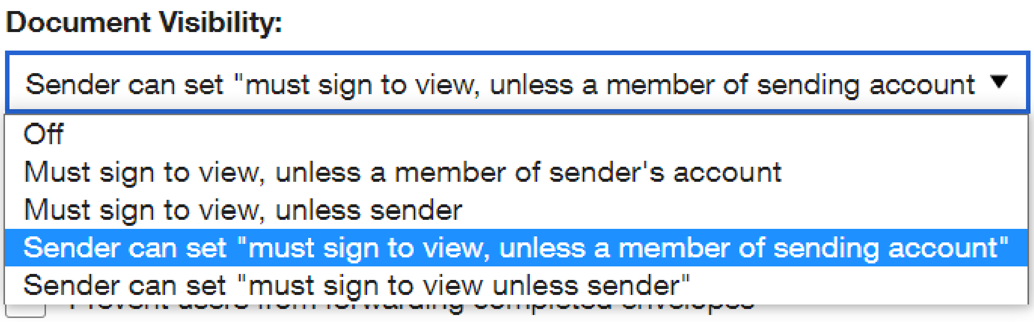
Then Save.

5. Document Visibility

To ensure that FireLight's rules for form protection are honored, please set the following setting below:

In "Signing and Settings/Sending Settings", find "Document Visibility" and set it to:

> "Sender can set "must sign to view, unless a member of sending account"



Then click Save on the top or bottom of the page.