Docusign Addon

Digital signature with Nuxeo & Docusign

⚠️ The screenshots in this doc need to be reworked, Docusign changed a lot. But the values and fundamentals are the same (callback urls, where to put the secret, etc.).

Also, using JSF is likely not necessary, creating a token can be done in the user settings in WebUI..Also see “Trouble shotting”

# Prerequisites

|  |  |
| --- | --- |
| ❗ | You must use a Nuxeo instance with a public IP or domain name to receive the callbacks from DocuSign |

# Setup

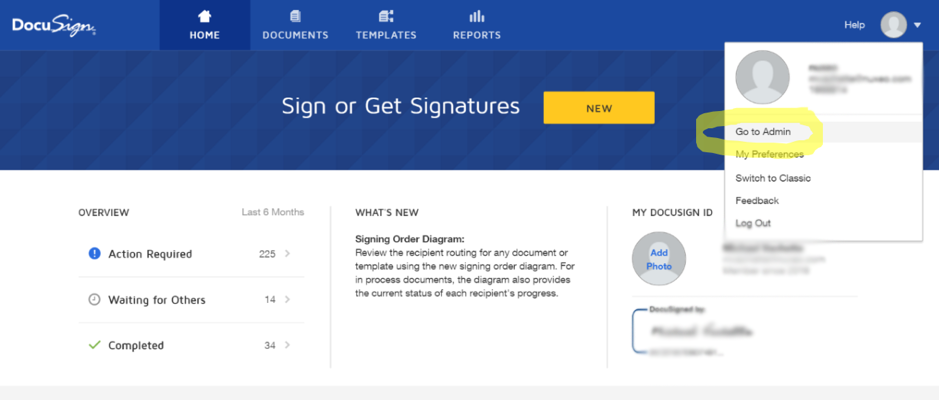
## Sign Up for a Free Docusign Developer Account

Got to <https://secure.docusign.com/signup/developer>

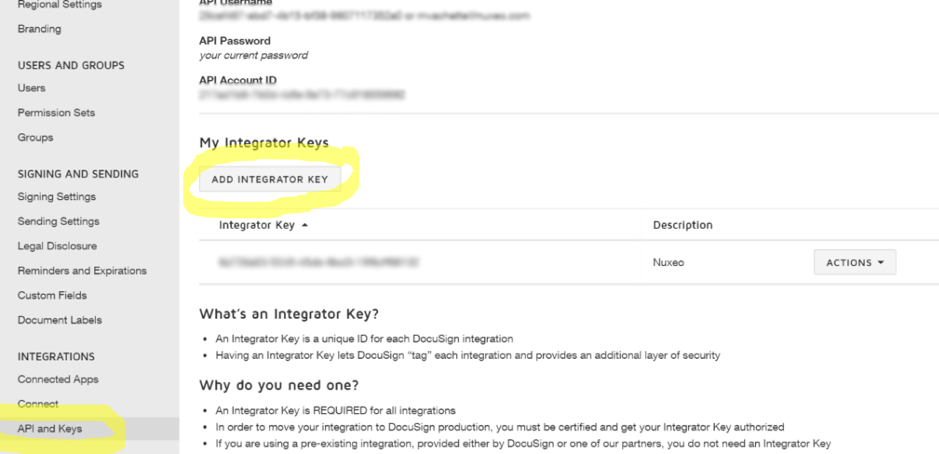
## Configure a Test Application

Once you developer account is activated:

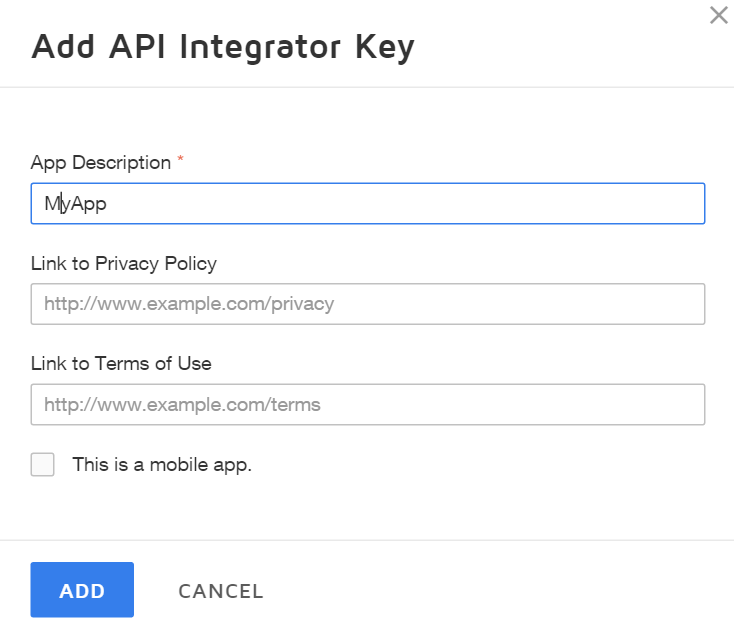
* Go to <https://appdemo.docusign.com/home>
* Switch to the Admin view



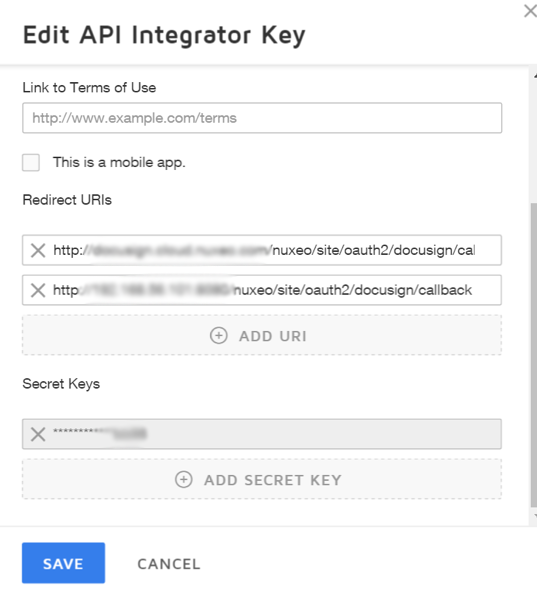
* Add a new Integrator Key



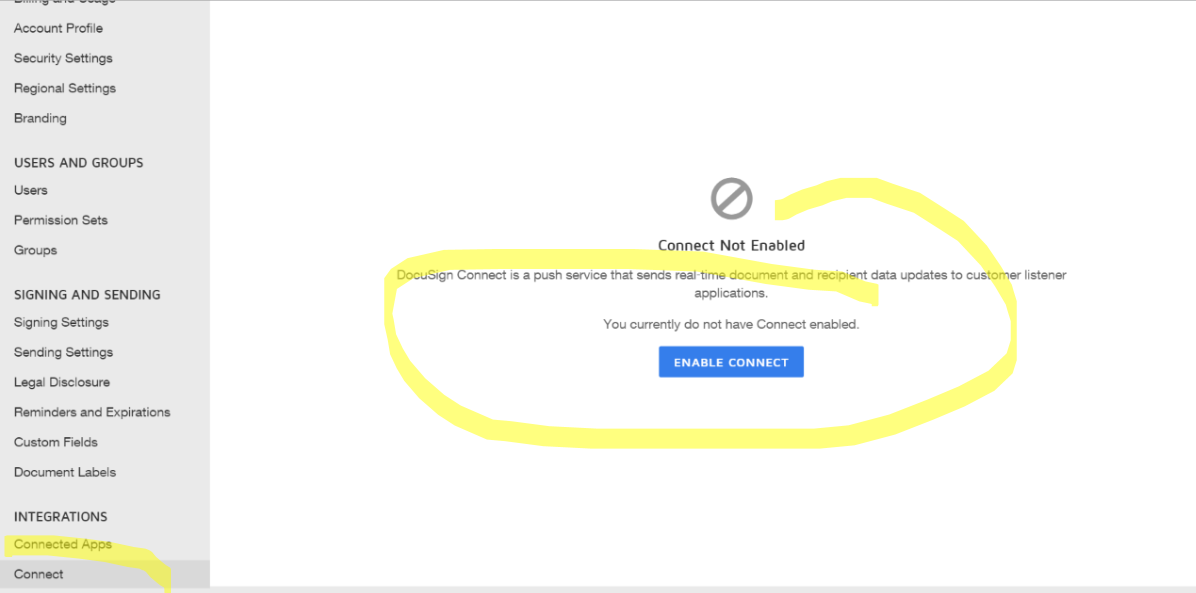
* Add a new Integrator Key



* Set the redirect URI (for oauth2) and generate a secret key
  + Redirect URI is https://myserver:myport/nuxeo/site/oauth2/docusign/callback
  + Copy the key somewhere as soon as it’s generated



## Enable DocuSign Connect

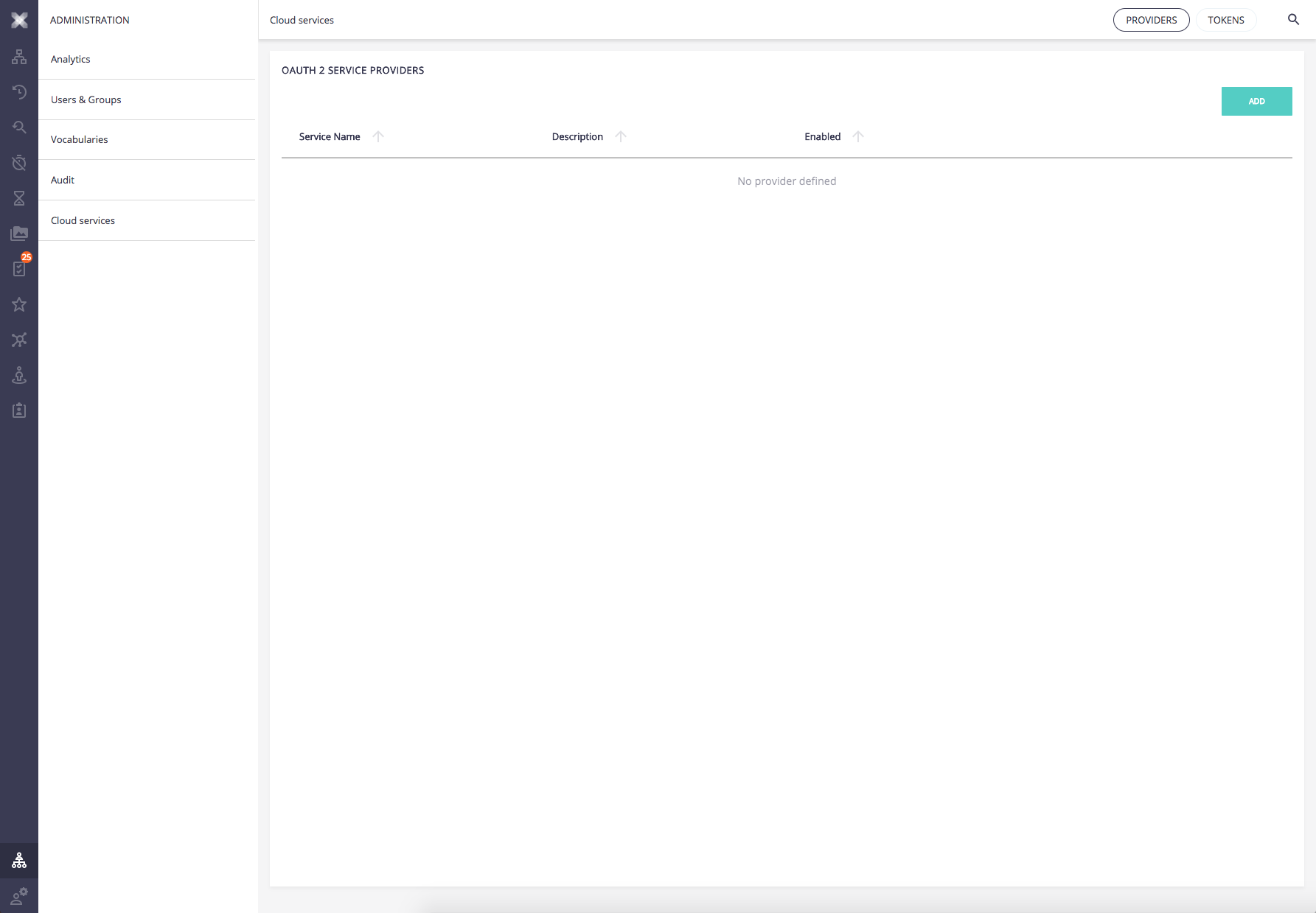


## Install the Package

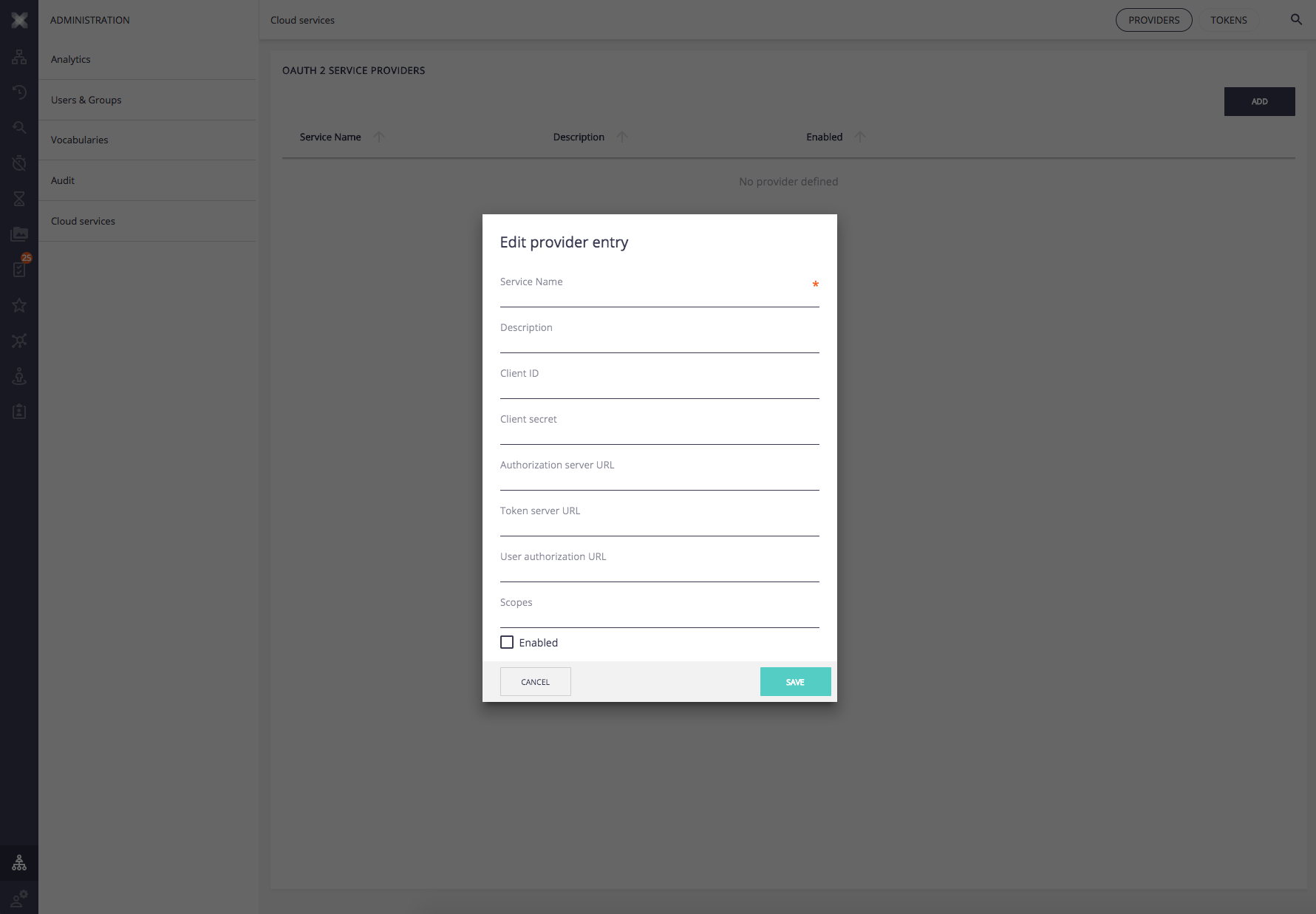
* Install from Marketplace: <https://connect.nuxeo.com/nuxeo/site/marketplace/package/nuxeo-docusign>
* Build from the source <https://github.com/nuxeo-sandbox/nuxeo-docusign>

## Configure the Docusign Oauth Provider

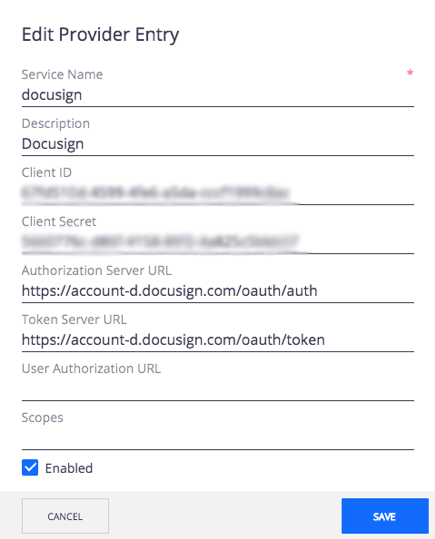
* Click on **Administration > Cloud Services** menu



* Click on **ADD** button



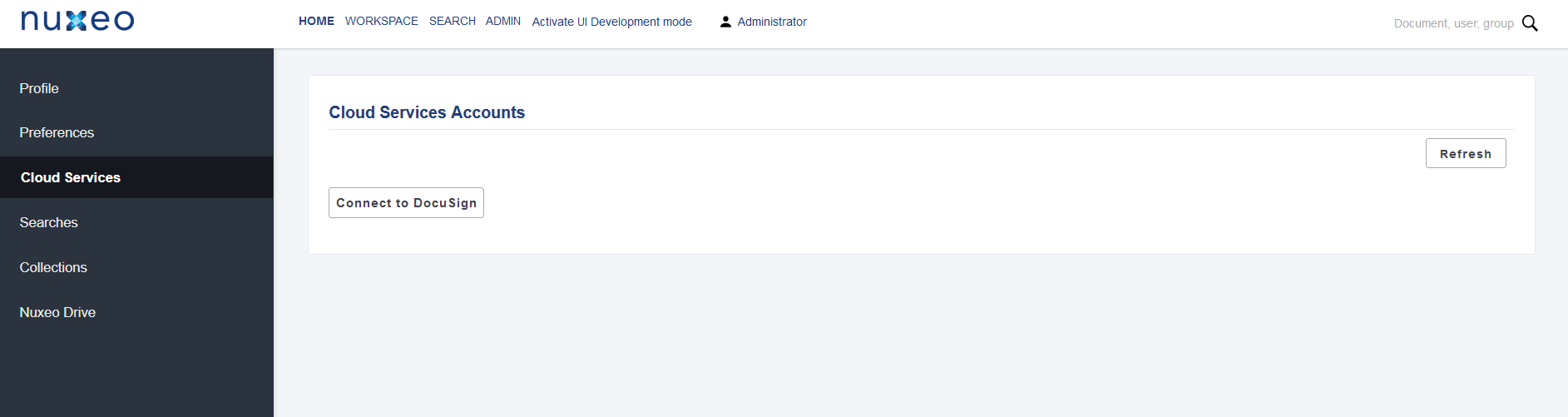
* Provide required information
  + **Service name**: docusign
  + **Description**: Docusign
  + **Client ID**: <*Integrator key*>
  + **Client Secret**: <*Secret key* in Edit API Integrator Key>
  + **Authorization Server URL**: <https://account-d.docusign.com/oauth/auth>
  + **Token Server URL**: <https://account-d.docusign.com/oauth/token>
  + **Enabled**: checked



* Click on **SAVE** button

## Link your DocuSign account to Nuxeo

* Got to **Home > Cloud Services** in JSF (https://NUXEO\_SERVER/nuxeo/nxhome/default@view\_home?tabIds=USER\_CENTER%3AOAuthTokens)
* Click on Connect to DocuSign



## Trouble Shooting

|  |  |
| --- | --- |
| ❗ | Once your environment is properly configured and up & running, you may find this error message in your **server.log** file:  Caused by: com.docusign.esign.client.ApiException: {  "errorCode": "**USER\_AUTHENTICATION\_FAILED**",  "message": "One or both of Username and Password are invalid. Invalid access token" }  You must **regenerate the DocuSign token** following these steps:   * Got to ***Home > Cloud Services*** menu in JSF (https://NUXEO\_SERVER/nuxeo/nxhome/default@view\_home?tabIds=USER\_CENTER%3AOAuthTokens) * Click on ***Delete*** button * Click on ***Connect to DocuSign*** |

Also, if the error is…

Exception: NuxeoException

Caught error: Failed to invoke operation SendToDocuSign, Cannot find DocuSign Credential for system

Caused by: org.nuxeo.ecm.core.api.NuxeoException: Failed to invoke operation SendToDocuSign, **Cannot find DocuSign Credential for syst**em

…it may be because you are trying to send to docusign as another user than the one you used to generate the token. We usually create the token as Administrator. If you have this error then, before calling the SendToDocuSign operation, login as Administrator:

. . .

Auth.LoginAs(input, {'name': "Administrator"});

SendToDocuSign(. . .);

Auth.Logout(input, {});

. . .