Docusign Addon

Digital signature with Nuxeo & Docusign

# Prerequisites

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

# Setup: Docusign

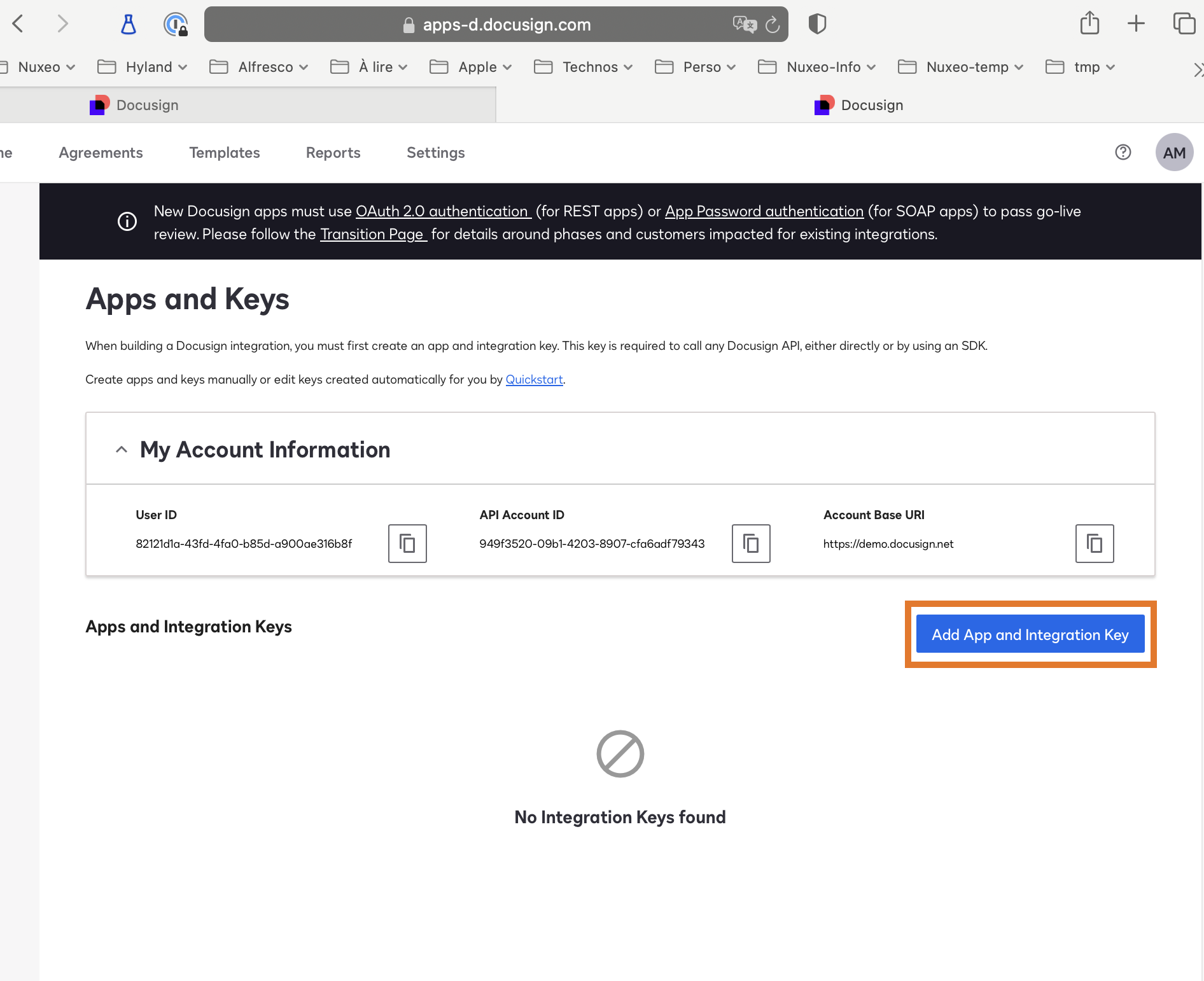
## Sign Up for a Free Docusign Developer Account

Got to <https://developers.docusign.com>, and create a developer account.

## Configure a Test Application

Once you developer account is activated:

* Go to <https://apps-d.docusign.com/>
* Try this link directly: <https://apps-d.docusign.com/admin/apps-and-keys>
  + If this link does not work (Docusign changed and not this doc), then find where are the applications and Key
* Click Add App and Integration Key:



* Give a name to your app

A screenshot of a login page

Description automatically generated

* Copy and save your Integration key

A screenshot of a computer

Description automatically generated

* In “Authentication”, let default values, and click “Add Secret Key”

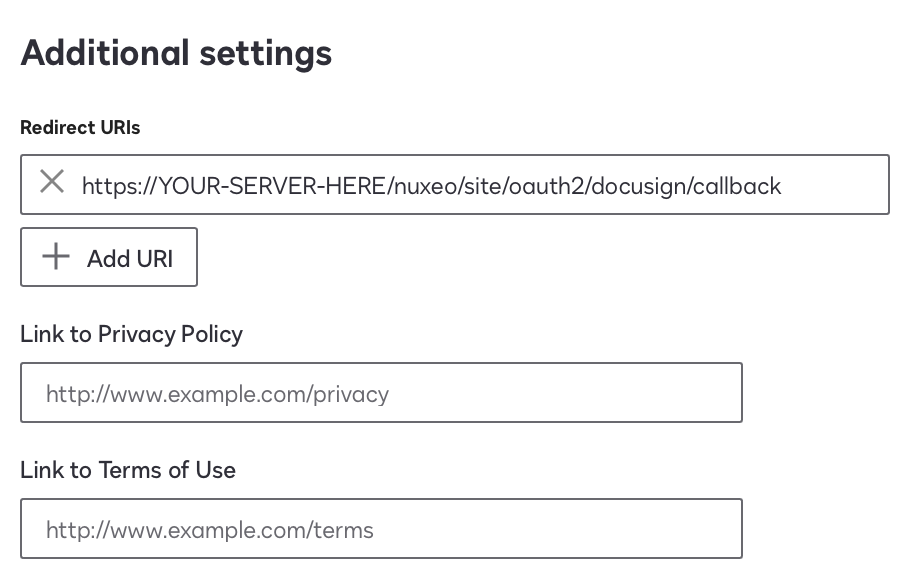
A screenshot of a screen

Description automatically generated

* ⚠️ Copy it in a safe place *now*.
* In “Additional settings”, add a redirect URI (for oauth2). You can add several if you have several servers.

Redirect URI is:

https://<SERVERT{:PORT}>/nuxeo/site/oauth2/docusign/callback



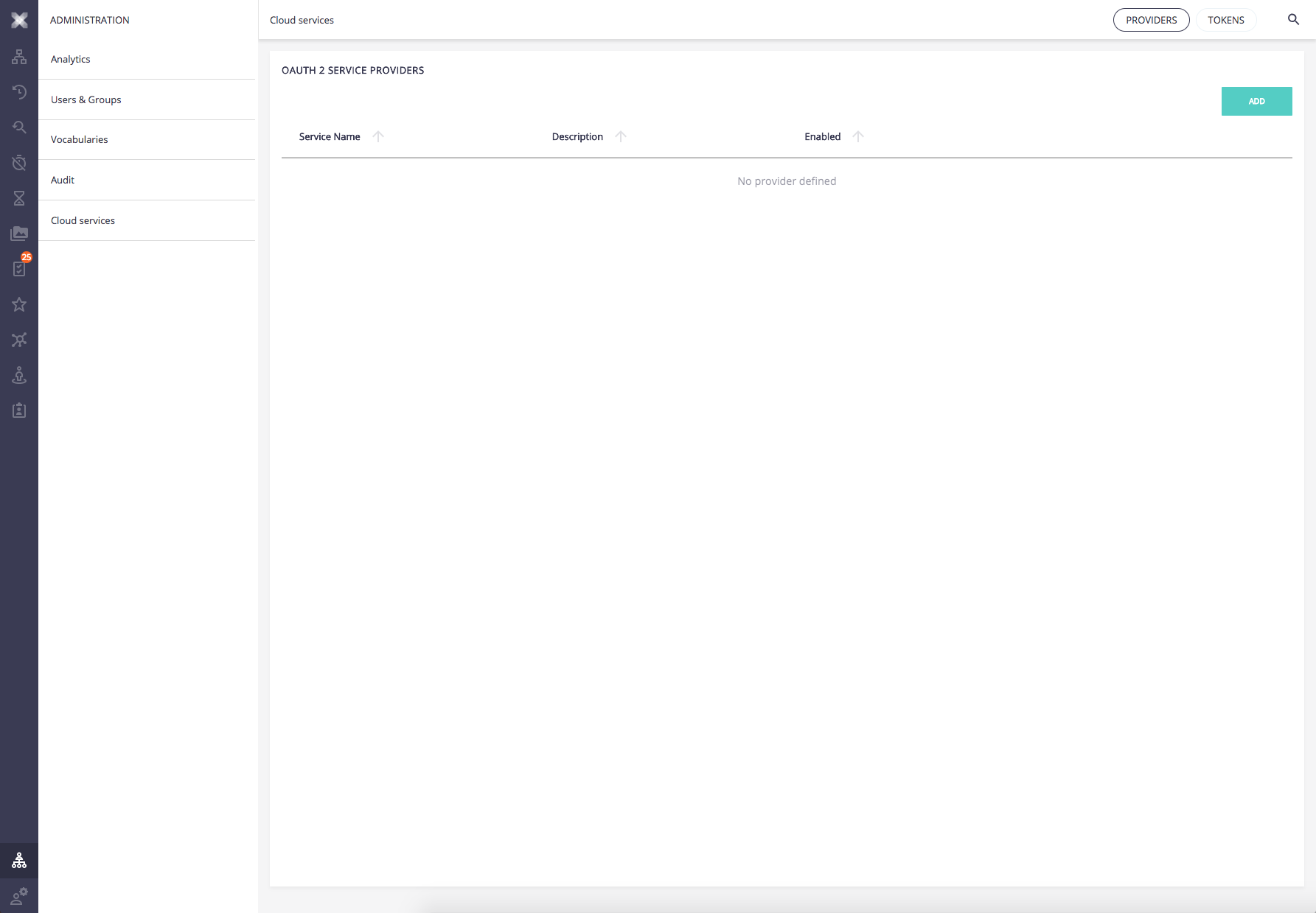
# Setup: Nuxeo

## 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>

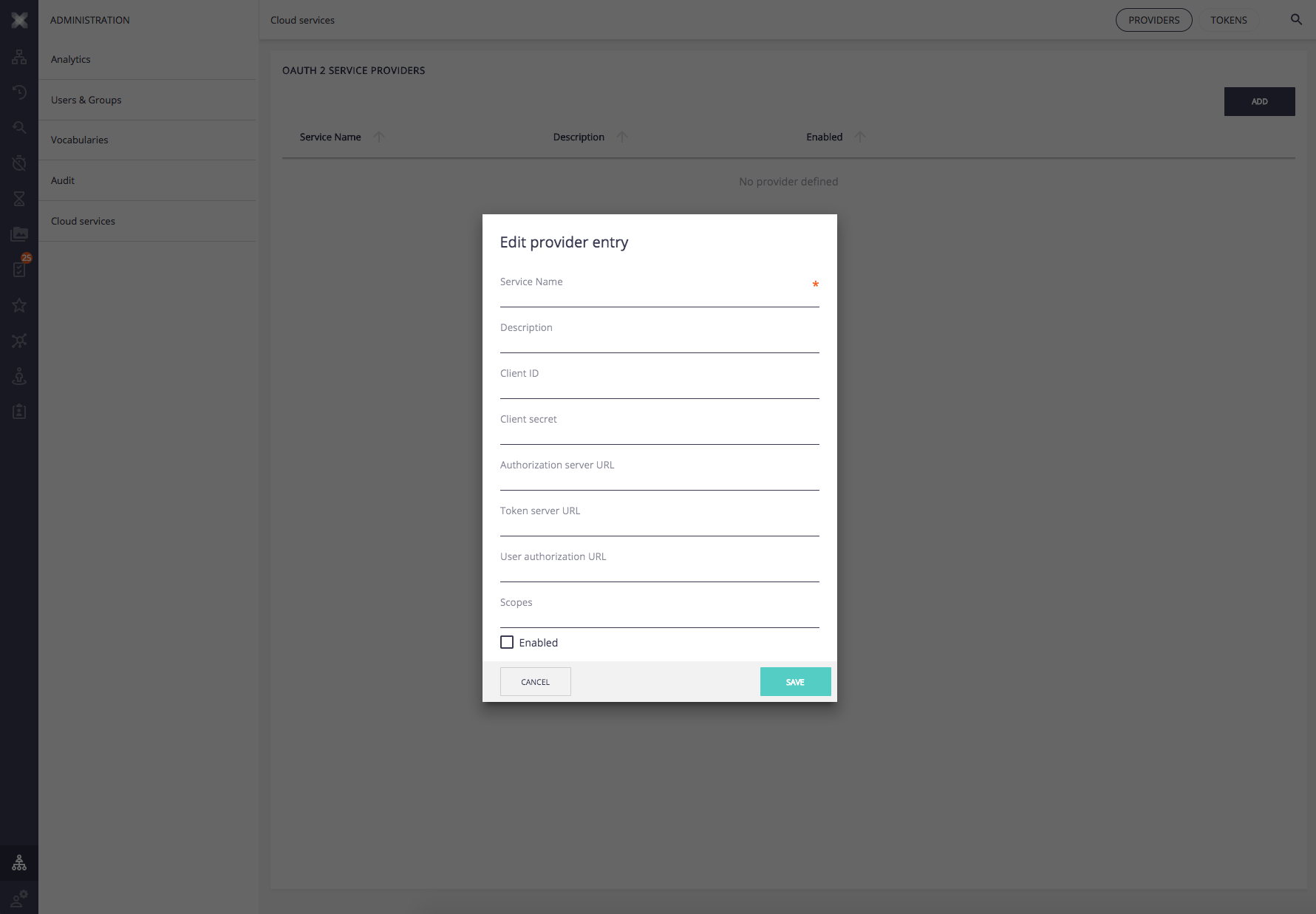
## Configure the Docusign Oauth Provider

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

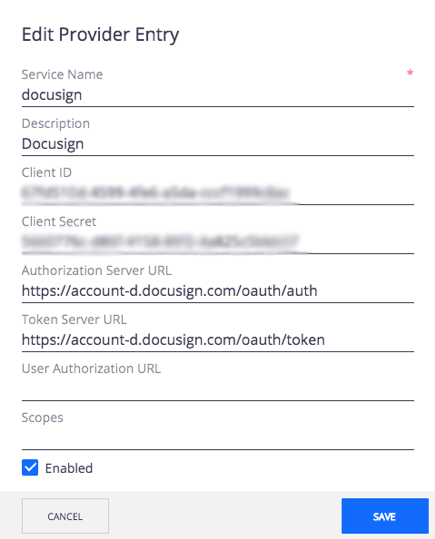


* Click on **ADD** button

ℹ️ At startup the docusign plugin may have already created the entry for you



* Provide required information
  + **Service name**: docusign
  + **Description**: Docusign
  + **Client ID**: <*Integraion key*>
  + **Client Secret**: <*The* *Secret key copied above*>
  + **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

⚠️ See “Trouble shooting” below, especially if you connect

to Docusign as Administrator, then run as a different user.

* **First, try in WebUI, without JSF**
  + Go to User Settings (last icon bottom left) > Cloud Services
  + Click “Connect to DocuSign”, enter your credentials
* **If it does not work, then try with using JSF**
  + Stop server
  + Install nuxeo-jsf-ui
  + Start server
  + Got to **Home > Cloud Services** in JSF (https://NUXEO\_SERVER/nuxeo/nxhome/default@view\_home?tabIds=USER\_CENTER%3AOAuthTokens)
  + Click on Connect to DocuSign
  + You can then stop server and uninstall nuxeo-jsf-ui

# Trouble Shooting

### Authentication error (in server.log)

|  |  |
| --- | --- |
| ❗ | 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:   * Go to User Settings (last icon bottom left) > Cloud Services * Click on ***Delete*** button for the Docusign entry * Click on ***Connect to DocuSign***   As above, if this is not enough, install JSF, then:   * Go to User Settings (last icon bottom left) > Cloud Services * 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, {});

. . .