Oracle
Primavera
Unifier DocuSign Configuration Guide

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Overview

> **Note**: The information provided in this document are subject to change.

The DocuSign admin must complete steps to assist in the initial setup and configuration of DocuSign as a delivery option within Unifier Stage Environment. These steps include the DocuSign admin taking the following actions in DocuSign:

- Creating an integrator app.
- Collecting the **Account ID**, **Client Secret**, and **Integrator Key** for the integration user to provide to the Technical Support, or to the Unifier Production Environment administrator.
- Logging in as the integration user to accept the permission for that user to create and send envelopes.

> **Note**: DocuSign documentation is the most accurate reflection of the DocuSign software. The DocuSign searchable knowledge base is available by way of the following link: https://support.docusign.com/ and includes resources like the New DocuSign Experience – API & Keys article.

Specific setup instructions for the DocuSign integration with Unifier Stage Environment are provided in this document and are subject to change. Contact your Unifier Production Environment administrator or Technical Support with any questions about the DocuSign and Unifier Stage Environment integration.

> **Note**: Documents sent to DocuSign or Adobe Sign are done over SSL (Secured Socket Layer) which is an encryption-based Internet security protocol.

DocuSign Setup

The DocuSign setup process includes three stages:

1) Creating an integrator app in your demo DocuSign site
2) Promoting the integrator app to your production DocuSign site
3) Collecting updated integrator app information from your production site

Creating an Integrator App in a Demo DocuSign Site

To collect the information needed to set up a demo integration between DocuSign and Unifier, the admin must create and activate an integrator app within the demo DocuSign site.

To create an integrator app and collect the information that Unifier will need to set up the integration within Unifier, follow the directions below.

1) Log in to the DocuSign admin demo site: `https://admindemo.docusign.com`
2) Click the portrait icon in the top right corner of the page, then click **Go to Admin**.
3) Depending on your account type in DocuSign, you may see a page with a number of different options displayed as boxes, or you may see the organization overview page including **Organization Name** and **Description**.
   a. If you see options displayed as boxes, click **Accounts**, then click the **Account Name** of your account, then proceed to the next step.
   b. If you see the organization overview page, proceed to the next step.
4) To retrieve the **Account ID** and set up the **Integrator Key**, follow the directions below:
   a. Click the profile image on the upper-right corner of the console. The **Account ID** will be under Name, or Organization name, on the drop-down menu.
   b. On the left side menu, locate the Integrations section, then click **API and Keys**.
   c. Under the **My Apps / Integrator Keys** heading, click **Add App / Integrator Key**, then add a name for the key in the **App Description** field and click **Add**. The popup automatically refreshes and provides additional options.
   d. Under the **Authentication** section, select the **Authorization Code Grant** option, click **ADD SECRET KEY**.
   e. Copy the generated secret key, and enter it in the **Client Secret** field of the Unifier company home.
   f. Under the **Redirect URIs** section, click **Add URI**.
   g. Enter the Unifier stage environment return URL: `https://<stage-serverhost>/bluedoor/esign/redirect`
   h. Click **OK**.
   i. Click **Save**.
   j. Copy the **Integrator Key** from the **Information** page, and enter it in the Unifier Stage Environment.
   k. Log out of DocuSign.
5) Sign in to the Unifier Stage Environment as company administrator.
6) Navigate to the **E-Signatures** tab of the Unifier company home (**Edit Company** window > **E-Signatures** tab).
7) Enter the DocuSign demo URL (`https://demo.docusign.net`), **Account ID**, **Integrator Key**, and **Client Secret**.
8) Click **Generate Token** to open a new DocuSign login window.

9) Log in using DocuSign demo account credentials. The window closes after successful login and a new token will be generated. The generated token will be automatically copied to **Unifier Token** field.
10) Click **Test Connection**. If testing connection is successful, then DocuSign Configuration, in Unifier Stage Environment, is done, and everything is ready for sending E-Signature requests.

Promoting an Integrator App from a Demo DocuSign Site to a Production Site

After the demo integration between DocuSign and Unifier Stage Environment has been set up, the integration must be tested within Unifier. DocuSign requires users to make at least 20 API calls with an integrator app / integrator key to promote the integrator app from a demo DocuSign account to a production DocuSign account. Once required testing has been completed, the integrator app can be promoted to your production DocuSign site.

To complete testing and submit your integrator app for promotion to your production DocuSign site, follow the directions below:

1) Once your DocuSign integration has been set up, make 20 API calls (Signing Requests) in one day by sending 20 test offers through DocuSign via Unifier Stage Environment. Ensure that any testing is done with your DocuSign demo account. Do not test with your production DocuSign account, as this may incur costs on the DocuSign side.
2) Log in to the DocuSign admin demo site: `https://admindemo.docusign.com`
3) Click the portrait icon in the top right corner of the page, then click **Go to Admin**.
4) Depending on your account type in DocuSign, you may see a page with a number of different options displayed as boxes, or you may see the organization overview page including **Organization Name** and **Description**.
   a. If you see options displayed as boxes, click **Accounts**, click the **Account Name** of your account, and then proceed to the next step.
   b. If you see the organization overview page, proceed to the next step.
5) To request a review and to promote the integrator app from demo to production, follow the directions below:
   a. On the left side menu, locate the **Integrations** section, then click **API and Keys**.
   b. Locate the **App Description** for the integrator app you are using with Unifier Stage Environment.
   c. To the right side of the app description row, click the **Actions** drop-down list, then click **Review Transactions**.
   d. A popup (**Review API Transactions**) displays describing the rules to promote this integrator app.

      Use the date field to specify the date when you ran at least 20 API calls with your demo account, then click **Review**. The popup closes and a success message displays to indicate that the integrator app has been submitted for review.
   e. Wait for approximately 20 minutes for your API calls to pass review, then return to the page. When the page refreshes, the status updates to indicate that the integrator app is still under review, or that the review passed or did not pass.

      If the review does not pass, the **Actions** drop-down list for the integrator app will provide the options to **Review Results** and **Resubmit for Review**. Click **Review Results** to determine why the review did not pass (in the **API Transaction Review Results** window).

Review the reason that the review did not pass and determine how to address the issue. Once you have made any additional API calls or other necessary actions, return to the **API and Keys** page, locate the correct app, and select the **Actions** drop-down list, then select **Resubmit for Review** and wait approximately 20 minutes for your API calls to pass review.

f. If the status displayed is **Review Passed**, select the **Actions** drop-down list and select **Go Live**.

g. A **Terms and Conditions** popup displays. Review the terms, then check the checkbox and select **Submit**.

h. A popup displays prompting you to log in to your production DocuSign site using the following URL: `https://account.docusign.com`

- If the popup does not display, review your popup blocker settings.
- If you do not have access to the production DocuSign site, contact your DocuSign user admin for assistance.

Note: Once Integrator Key is Promoted to DocuSign production account, it can be used only in the Unifier Production Environment.

Collecting Updated Integrator App Information for the Production Site

Some information about your integrator app changes when you promote the app to your production DocuSign site. The DocuSign admin must also set up a new keypair and activate the app, then send updated information to the Unifier Production Environment.

To review your integrator app information and activate the app, follow the directions below:

1) If you are not already logged in, log in to the DocuSign admin production site: `https://account.docusign.com`
2) Click the portrait icon in the top right corner of the page, then click **Go to Admin**.
3) Depending on your account type in DocuSign, you may see a page with a number of different options displayed as boxes, or you may see the organization overview page including **Organization Name** and **Description**.
   - If you see options displayed as boxes, click **Accounts**, then click the **Account Name** of your account, then proceed to the next step.
   - If you see the organization overview page, proceed to the next step.
4) To review information for the **API Account ID**, **Integrator Key**, and **Client Secret** in production, follow the directions below:
   a. On the left side menu of the production DocuSign site, locate the **Integrations** section, then click **API and Keys**.
   b. Under the **My Account Information** heading, review the **API Account ID**. If the value has changed, copy the **API Account ID** to send to your Unifier Production Environment.
   c. Locate the **App Description** for the integrator app you are using with Unifier Stage Environment.
   d. Review the **Integrator Key** in the app description row. If the value has changed, copy the **Integrator Key** to send to your Unifier Production Environment.
   e. To the right side of the app description row, click the **Actions** drop-down, then click **Edit**.
   f. Review the **Redirect URIs** field. Add the Unifier Production Environment redirect URL: `https://<production-serverhost>/bluedoor/esign/redirect`
5) Generate DocuSign Production Account URL using steps mentioned in: `https://developers.docusign.com/esign-rest-api/guides/authentication/user-info-endpoints`.
6) Log out of DocuSign.
7) Sign in to Unifier Production Environment.
8) Navigate to the **E-Signatures** tab of the Unifier company home (**Edit Company** window > **E-Signatures** tab).
9) Enter the generated DocuSign production account URL, **Account ID**, **Integrator Key**, and **Client Secret**.
10) Click **Generate Token** to open a new DocuSign login window.

11) Lon in using DocuSign production account credentials. The window closes after successful login and a new token will be generated. The generated token will be automatically copied to **Unifier Token** field.
12) Click **Test Connection**. If testing connection is successful, then DocuSign Configuration, in Unifier Production Environment, is done.

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