Oracle Primavera Unifier Adobe Sign Configuration Guide

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### **Overview**

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

The Adobe Sign admin must complete steps to assist in the initial setup and configuration of Adobe Sign as a delivery option within the Unifier Stage Environment (also known as the Development Environment).

Specific setup instructions for the Adobe Sign 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 Adobe Sign 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.

# Adobe Sign Setup

This section explains how ot integrate Adobe Sign into the system.

#### Download

Download the Adobe Sign certificate from the echosign URL and import it to all of the Unifier nodes and restart them.

#### Configure

Note: You will need a developer account.

- 1) Log into Adobe Sign.
- 2) Click the Account tab.
- 3) From the left-hand navigator, click **Account Settings** to expand.
- 4) Click Global Settings.
- 5) Deselect the Limited Document Visibility, if checked.
- 6) Click the **Account Setup** tab.
- 7) Enter your company name and hostname.

Adobe Sign	
Home Send Manage Reports	Account
Q Search	Account Setup o
Personal Preferences 🗸 🍵	Step 1: Account Information
Users	Ne need some basic information in order to configure your Adobe Sign account.
Groups	Set company name for all users in account.
Account Settings	fou may also select a personalized hostname for your Adobe Sign installation.
Global Settings	iostname:
Account Setup	step 2: Upload Logo
Signature Preferences	Jploading a logo allows you to personalize your Adobe Sign installation.
Digital Signatures	PG, GIF, or PNG images are supported. To avoid rescaling, please use an image that is exactly 60 pixels tall and up to 200 pixels wide. Upload No logo uploaded, using default logo instead
Report Settings	
Security Settings	itep 3: Create Users
Send Settings	You're now ready to create users in your account. Each user will be able to access Adobe Sign to send, sign, track, and manage documents. Click here to manage the users in your account.
Message Templates	
Bio-Pharma Settings	
Signer Messaging	

# **Note**: Ensure that you record the hostname and URL as this information must be used for Unifier.

- 1) Go to the Adobe Sign API.
- 2) Click API Applications.



0

3) From the right-hand side of the window, click the plus symbol (+).

API Applications o

Q Search				⊕ ≡
View / Edit   Deactivate   Co	onligure OAuth for Application			
Oracletest2	CBICHBCAABAAsMDhs84/Su/SiX9sdB1Uk2-6zyB2u/fL	06/03/2020 04:48	ACTIVE	
Oracletest	CBICHBCAABAAPVupMWLBeiKTEb9i rMsbikuogOBXFZ_	06/03/2020 04:48	DISABLED	
oracletest	CBJCHBCAABAAIpgUIniAiRrsalT9p28bmvieno8BvKj	06/03/2020 04:47	DISABLED	

- 4) In the Create block, enter values for the Name and Display Name fields.
- 5) Click to select **Partner**.
- 6) Click Save.

eate	
Provide a name for your application to issue a set of credentials for use with Adobe	
Sign's API	
Name:	
Display Name:	
Domain:	
O CUSTOMER (This application will only have access to data within your	
account)	

PARTNER (This application will have access to any authorized Adobe Sign account)

Cancel	Save

7) Proceed to configure OAuth.

# **Configuring OAuth**

In the Configure OAuth block, enter the Unifier redirect URL in the Redirect URL field box.

Ensure the following fields are enabled:

- user\_read
- user\_write
- user\_login
- agreement\_read
- agreement\_write
- agreement\_send
- 1) Sign in to Unifier.
- 2) Click the **Company Workspace** tab (**Admin** mode).
- 3) From the left Navigator, click the company name.
- 4) From the toolbar options, click **Open** to open the **Edit Company** window.
- 5) Click the **E-signatures** tab.
- 6) From the **Default E-Signature Type** drop-down, select **Adobe Sign**.
- 7) Click to select, or check, the **Adobe Sign** block.
- 8) Enter values in the URL, Client ID, and Client ID fields.
- 9) Click Generate Token.
- 10) Enter the Adobe Sign login credentials on the pop-up window.
- 11) Click Test Connection and select Active.
- 12) Click **OK**.