Oracle
Primavera Unifier
DocuSign Configuration Guide

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Oracle Primavera Unifier DocuSign Configuration Guide

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Overview

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

The DocuSign admin must complete steps to assist in the initial setup and configuration of DocuSign as a delivery option within the Unifier Stage Environment (also known as the Development 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 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 at ***https://support.docusign.com/ https://support.docusign.com/***. It includes resources like the New DocuSign Experience - API & Keys article.

Specific setup instructions for the DocuSign integration with the 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 (Secured Socket Layer (SSL), 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, complete the following steps.

1) Sign in to the DocuSign admin demo site at ***https://admindemo.docusign.com https://admindemo.docusign.com***.
2) Click the portrait icon in the upper-right corner, and then click **Go to Admin**.

   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**, click the **Account Name** of your account, and proceed to the next step.
   - If you see the organization overview page, proceed to the next step.
3) To retrieve the **Account ID** and set up the **Integrator Key**, complete the following steps:
   a. Click the profile image in 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, and click **API and Keys**.
   c. Under the **My Apps / Integrator Keys** heading, click **Add App / Integrator Key**, add a name for the key in the **App Description** field, and click **Add**.

      The pop-up window automatically refreshes and provides additional options.
   d. Under the **Authentication** section, select the **Authorization Code Grant** option, and click **ADD SECRET KEY**.
   e. Copy the generated secret key, and enter it in the **Client Secret** field of the company home page.
   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.
4) Sign in to the Unifier Stage Environment as company administrator.
5) Navigate to the **E-Signatures** tab of the company home page (**Edit Company** window > **E-Signatures** tab).
6) Enter the DocuSign demo URL (`https://demo.docusign.net`), **Account ID**, **Integrator Key**, and **Client Secret**.

7) To open a new DocuSign login window, click **Generate Token**.
8) Sign in using the 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.
9) Click **Test Connection**.

   If testing connection is successful, configuration of DocuSign in the 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. After 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, complete the following steps:

1) After 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) Sign in to the DocuSign admin demo site at ***https://admindemo.docusign.com https://admindemo.docusign.com***.

3) Click the portrait icon in the upper-right corner, and then click **Go to Admin**.

   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**, click the **Account Name** of your account, and proceed to the next step.
   - If you see the organization overview page, proceed to the next step.

4) To request a review and to promote the integrator app from demo to production, complete the following steps:

   a. On the left side menu, locate the **Integrations** section, and click **API and Keys**.

   b. Locate the **App Description** for the integrator app you are using with the Unifier Stage Environment.

   c. To the right side of the app description row, click the **Actions** drop-down list, and then click **Review Transactions**.

      A **Review API Transactions** pop-up window appears that describes the rules to promote this integrator app.

   d. Use the date field to specify the date when you ran at least 20 API calls with your demo account, and then click **Review**.

      The pop-up window 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, and 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. After you have made any additional API calls or other necessary actions, return to the **API and Keys** page, locate the correct app, select the **Actions** drop-down list, 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. When the **Terms and Conditions** pop-up window displays, review the terms, select the checkbox, and select **Submit**.

A pop-up window displays that prompts you to sign in to your production DocuSign site at ***https://account.docusign.com https://account.docusign.com***.

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

Note: After the Integrator Key is promoted to the 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, and then send updated information to the Unifier Production Environment.

To review your integrator app information and activate the app, complete the following steps:

1) If you are not signed in, sign in to the DocuSign admin production site at ***https://account.docusign.com https://account.docusign.com***.
2) Click the portrait icon in the upper-right corner, and then click **Go to Admin**.

   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**, click the **Account Name** of your account, and proceed to the next step.
   - If you see the organization overview page, proceed to the next step.
3) To review information for the **API Account ID**, **Integrator Key**, and **Client Secret** in production, complete the following steps:
   a. On the left side menu of the production DocuSign site, locate the **Integrations** section, and 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 it to your Unifier Production Environment.
   e. To the right side of the app description row, click the **Actions** drop-down, and then click **Edit**.
   f. Review the **Redirect URIs** field. Add the Unifier Production Environment redirect URL: `https://<production-serverhost>/bluedoor/esign/redirect`
4) Generate DocuSign Production Account URL using steps mentioned in: `https://developers.docusign.com/esign-rest-api/guides/authentication/user-info-endpoints`.
5) Log out of DocuSign.
6) Sign in to the Unifier Production Environment.
7) Navigate to the **E-Signatures** tab of the company home page (**Edit Company** window > **E-Signatures** tab).
8) Enter the generated DocuSign production account URL, **Account ID**, **Integrator Key**, and **Client Secret**.
9) To open a new DocuSign login window, click **Generate Token**.

10) 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.

11) Click **Test Connection**.

    If testing connection is successful, configuration of DocuSign in the Unifier Production Environment is done.

Using DocuSign Envelope Email settings

Unifier users can use e-signature requests when sending documents to other Unifier users or to external users. Other Unifier users receive a request that lets them complete the e-signature request within Unifier, while external users receive an email with a link that lets them sign the document in DocuSign. After the document is signed, it is revised in the Document Manager for the applicable Business Process, and the updated status is visible in the E-Signature Requests log (**Home > E-Signatures** or [**project/shell] > E-Signatures**) of Unifier.

The Unifier user who initiates the request for an e-signature can receive notifications from DocuSign after an e-signature task is completed in Unifier if the envelop email settings are enabled in DocuSign for the initiator. (E-signature tasks can also be completed outside Unifier by external users.) For detailed information on configuring DocuSign envelope email settings, refer to your DocuSign documentation. The following steps provide a high-level explanation of how to enable notifications.

1) Sign in to your DocuSign account.
2) In the upper-right corner, click your user icon, and select **My Preferences**.
3) In the **SIGNING AND SENDING** section, select **Notifications**.
4) In the **Notify me when I am the sender and** section, select the **An envelope is complete** option, and click **SAVE**.