

Oracle
Primavera Unifier
Adobe Sign Configuration Guide

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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 to integrate Adobe Sign into the system.

Download (On-Premises Only)

If you are using an on-premises deployment and encounter an SSL Handshake Error when you try to configure Adobe Sign for use with Unifier, download the Adobe Sign certificate from the Adobe Acrobat Sign (formerly EchoSign, eSign & Adobe Sign) URL and import it to all the Unifier nodes and restart them.

Configure

Note: You will need a developer account.

- 1) Log on to **Adobe Sign**.
- 2) Click the **Account** tab.
- 3) In the left Navigator, click **Account Settings > Global Settings**.
- 4) Deselect the **Limited Document Visibility** option, if it is selected.
- 5) Click **Account Setup**.
- 6) Enter your company name and hostname.


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




The screenshot shows the Adobe Sign web interface. At the top, there's a navigation bar with 'Home', 'Send', 'Manage', 'Reports', and 'Account'. Below this is a search bar and a sidebar menu. The sidebar menu includes 'Personal Preferences', 'Users', 'Groups', and 'Account Settings'. Under 'Account Settings', there's a list of options: 'Global Settings', 'Account Setup' (which is highlighted), 'Signature Preferences', 'Digital Signatures', 'Report Settings', 'Security Settings', 'Send Settings', 'Message Templates', 'Bio-Pharma Settings', and 'Signer Messaging'. The main content area is titled 'Account Setup' and contains three steps: 'Step 1: Account Information', 'Step 2: Upload Logo', and 'Step 3: Create Users'. Step 1 includes fields for 'Company Name' and 'Hostname' (with a dropdown showing '.na2.echosign.com'). Step 2 includes an 'Upload' button and a message 'No logo uploaded, using default logo instead'. Step 3 includes a message '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.' and a link 'Click here to manage the users in your account.'

7) Go to the **Adobe Sign API**, and select **API Applications**.

The screenshot shows a dropdown menu for 'Adobe Sign API'. The menu is open, showing three options: 'API Information', 'API Request Log', and 'API Applications' (which is highlighted in blue).

- 8) On the right side of the window, click the plus symbol (+).

API Applications 


 Search  

[View](#) / [Edit](#) | [Deactivate](#) | [Configure OAuth for Application](#)

Oracletest2	CBjCHCAABAAAdMDhs840uXSiKPs8BRUQ-6zyt0uVL	06/03/2020 04:48	ACTIVE
Oracletest1	CBjCHCAABAAAPVupMWLBeKTEb9i-rh5bikuogOBKZ_	06/03/2020 04:48	DISABLED
oracletest	CBjCHCAABAAIggUtnAIRsaIT9p2l8xnvleno8Bvkj	06/03/2020 04:47	DISABLED

- 9) In the **Create** block, enter values for the **Name** and **Display Name** fields.

- 10) Select **Partner**, and click **Save**.

Create 

Provide a name for your application to issue a set of credentials for use with Adobe Sign's API

Name:

Display Name:

Domain:

☐ CUSTOMER (This application will only have access to data within your account)

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

- 11) 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**

To configure OAuth

- 1) Sign in to Unifier.
- 2) Go to the **Company Workspace** tab and switch to **Admin** mode.
- 3) In 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**.