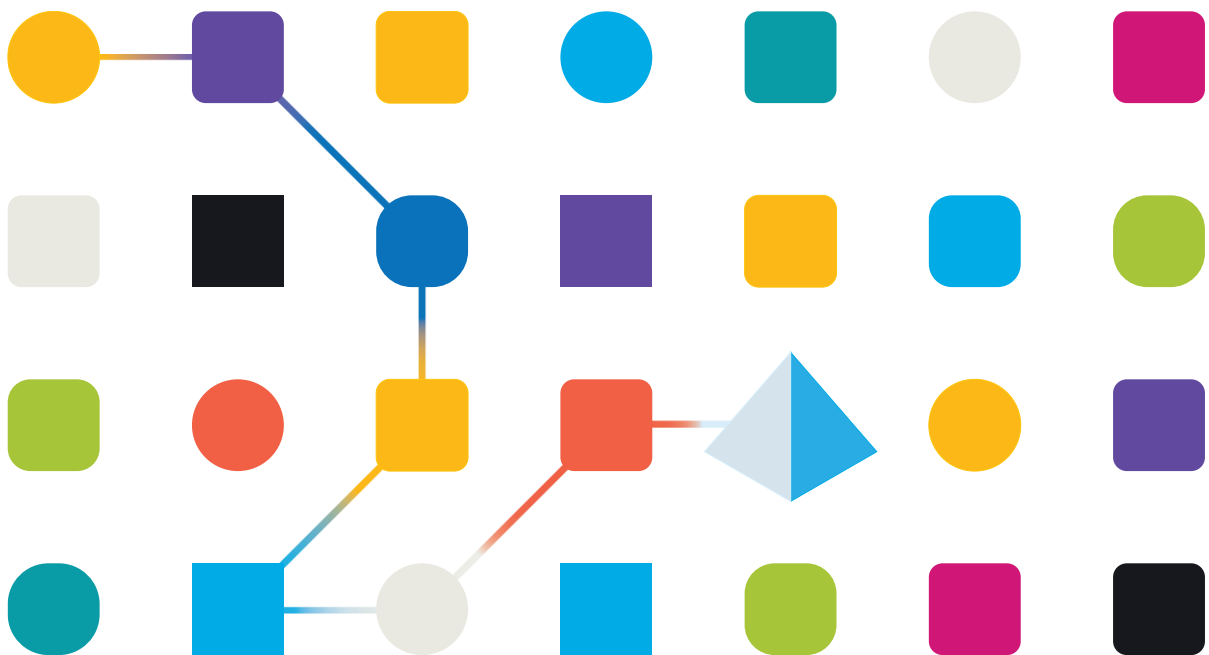


## DocuSign VBO User Guide

Document Revision 1.1



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Blue Prism Limited, 2 Cinnamon Park, Crab Lane, Warrington, WA2 0XP, United Kingdom  
Registered in England: Reg. No. 4260035. Tel: +44 870 879 3000. Web: [www.blueprism.com](http://www.blueprism.com)

# Contents

|                               |    |
|-------------------------------|----|
| Introduction.....             | 2  |
| Prerequisites.....            | 3  |
| Configuration.....            | 4  |
| Using the Asset.....          | 9  |
| Get Envelope Details.....     | 9  |
| List Templates.....           | 9  |
| Get Template Details.....     | 10 |
| Get Envelope Recipients.....  | 10 |
| Add Certified Delivery.....   | 11 |
| Get Users.....                | 11 |
| Edit Signer.....              | 12 |
| Send Envelope.....            | 12 |
| Create Envelope.....          | 13 |
| List Template Recipients..... | 13 |
| Create Signer.....            | 14 |
| Support.....                  | 15 |

## Introduction

This VBO allows you to read, edit and send both template and envelopes in DocuSign automatically. You will use the many functions of this VBO to edit the details of a document and then send it out in seconds. With standardised templates in your company DocuSign Account, this Blue Prism VBO can save countless hours by sending them out to the right people at the click of a button.

## Prerequisites

- A version of Blue Prism that supports REST Web API Services. (6.4 or later).
- A DocuSign Account capable of service integrations using OAuth 2.0 authentication flow.
- The Blue Prism Collections VBO for the Demo Process.

NOTE: DocuSign provides a [free developer sandbox](#) that is used to test this skill and the supporting VBO assets and develop the API connection before deploying to the live account.

# Configuration

## Step 1: Set up your application

Download and import the DocuSign Create Envelope.bpskill in to your Blue Prism environment.

Create and log in to the developer sandbox account.

Go to settings

Follow the DocuSign [Authentication REST API](#) guide and choose the [Authenticate with JWT Grant](#) option and follow the instructions described in "Step 1: Request Application Consent". This will setup the DocuSign account to allow a Blue Prism digital worker(s) to integrate as a service using impersonation to make API calls. The account used can be a designated DocuSign user account or an account specifically assigned to the digital worker(s).

## Step 2: Get User Consent

- Request Consent

This is detailed in the JWT token Step 1 guide and is done by typing a string into the address bar on a browser. You will need:

- The DocuSign Application Integration Key (often called Client ID): This is found on the Apps and Keys page in settings and is in the table featured in the image below

The screenshot displays the 'Apps and Keys' configuration page in the DocuSign eSignature interface. The page is divided into several sections:

- My Account Information:** Contains fields for API Username (0E31...), API Account ID (e4...), and Account's Base URI (https://demo.docusign.net).
- Apps and Integration Keys:** A table listing configured apps. One app is visible: 'BluePrism API Call' with an integration key of '3890...' and a status of 'Live'.
- Quickstart:** A 'NEW' badge and a 'Quickstart' section with a 'ADD APP & INTEGRATION KEY' button.

| App Name           | Integration Key | Status |
|--------------------|-----------------|--------|
| BluePrism API Call | 3890...         | Live   |

- The Redirect URI: This is created by you when you first set up the App and integration key, to find this select your App and it should appear in the details of your app like below

The screenshot displays the 'BluePrism API Call' application details in the DocuSign Admin console. On the left is a navigation menu with categories like ACCOUNT, USERS AND GROUPS, and SIGNING AND SENDING. The main content area shows the application's status as 'Live in production' with a timeline of 'Created app/ integration key', 'Review passed', and 'Live in production' (dated Sep 25, 4:09 pm). Below this, the 'Application Details' section includes fields for App Name, Integration Key, Authentication, and RSA Keypairs (ID). The 'Redirect URIs' field is set to 'https://www.blueprism.com/'.

Create a string setup in the following way:

`https://BASE_URL/oauth/auth?response_type=code&scope=signature%20impersonation&client_id=INTEGRATION_KEY&redirect_uri=REDIRECT_URI`

For the sandbox, when setting up your application, it should look like this:

`https://account-d.docusign.com/oauth/auth?response_type=code&scope=signature%20impersonation&client_id=7c2b8d7e-xxxx-xxxxxxx-cda8a50dd73f&redirect_uri=https://client.example.com/callback`

For the live version when your application is approved, it should now read

`https://account.docusign.com/oauth/auth?response_type=code&scope=signature%20impersonation&client_id=7c2b8d7e-xxxx-xxxxxxx-cda8a50dd73f&redirect_uri=https://client.example.com/callback`

If this is successful, you will be prompted to log into the DocuSign account and then confirm that this application may sign and impersonate on behalf of the account. Once you have agreed to this, you will be sent to your redirect URI.

## WHAT YOU SHOULD HAVE FROM STEP 2:

These are in the API & Keys section of the E-Signature Admin screen of your DocuSign Account.

- The DocuSign Account's Base URI - <https://demo.docusign.net>  
For the live environment production this will be <https://eu.docusign.net>
- The DocuSign User ID - 42cba11e-0f6d-453e-9c9a-a2fc0ad59d62.
- The DocuSign Account ID - 6e54a424-9d95-40b7-9db5-1955fd7aee6c.
- The DocuSign Application Integration ID (often called Client ID) - 7c2b8d7e-xxxx-xxxx-xxxxcda8a50dd73f.

- The DocuSign Application Integration RSA key Pair - This is shown only once when you create the key pair. Copy both, but for our next step we need the RSA PRIVATE KEY.

The key pairs should look like this below:

```
-----BEGIN PUBLIC KEY-----
```

```
MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCqGKukO1De7zhZj6+H0qtjTkVxwT
CpvKe4eCZ0FPqri0cb2JZfXJ/DgYSF6vUpwmJG8wVQZKjeGcjDOL5UlsuusFncCzWBQ7RKNUSesm
QRMSGkVb1/3j+skZ6UtW+5u09IHNsj6tQ51s1SPrCBkedbNf0Tp0GbMJDyR4e9T04ZZwIDAQAB
```

```
-----END PUBLIC KEY-----
```

```
-----BEGIN RSA PRIVATE KEY-----
```

```
MIICXAIBAAKBgQCqGKukO1De7zhZj6+H0qtjTkVxwTCpvKe4eCZ0FPqri0cb2JZfXJ
/DgYSF6vUpwmJG8wVQZKjeGcjDOL5UlsuusFncCzWBQ7RKNUSesmQRMSGkVb1/3j+skZ6UtW+5u0
##### Obfuscated For Security #####
z++xTqHBLh3tx4VgMtrQ+WEGcjhoTwo23KMBAuJGSYnRmoBZM3IMfTKevlkAidPExvYCdm5dYq3X
ToLkkLv5L2plIIVOFMDG+KESnAFV7I2c+cnzRMW0+b6f8mR1CJzZuxVLL6Q02fvLi55/mbSYxECQQ
DeAw6filQXGukBI4eMZZt4nscy2o12KyYner3VpoeE+Np2q+Z3pvAMd/aNzQ/W9Wal+NRfcxUJrm
ebHkTz2epIU9VQQSQzY1oZMVX8i1m5WUTLPz2yLJIBQVdXqhMCQBGoIUsoSjafUhV7i1cEGpb88h
5NBYZzWXGZ37sJ5QsW+sJyoNde3xH8vdXhzU7eT82D6X/scw9RZz+/6rCJ4p0=
```

```
-----END RSA PRIVATE KEY-----
```

### Step 3: Convert Private key to PKCS#8

For this next step DO NOT follow the instructions described in "Step 2: Create a JWT Token".

The private key you have is in the format PCKS#1 and we need it to be in PCKS#8 in order to be compatible with BluePrism software.

The easiest way to do this is to use an online converter to get the correct version. The one used for our testing was:

[https://decoder.link/rsa\\_converter](https://decoder.link/rsa_converter)

Copy the whole of the private key into the submit box and include the

-----BEGIN RSA PRIVATE KEY----- and -----END RSA PRIVATE KEY----- delimiters.

Then hit Convert and you will have the PCKS#8 key available in the collect box.



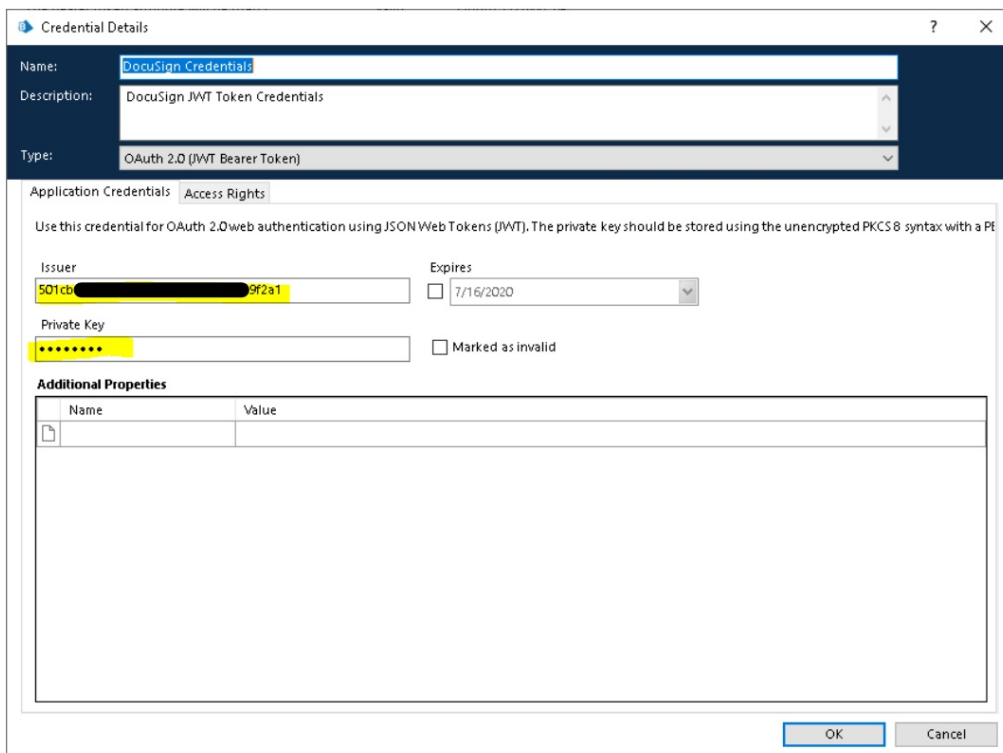
The key should look like this below:

```
-----BEGIN PRIVATE KEY-----
MIIBVgIBADANBgkqhkiG9w0BAQEFAASCAUAWggE8AgEAAKEAq7BFUpkGp3+LQmIQ
Yx2eqzDV+xeG8kx/sQFV18S5JhzGelJNA72wSeukEPjqtUyX2J0CciPBh7eqclQ
2zpAswIDAQABAKAgisq4+zRdrzkW11TV1vpytnkO/NiHcnePQiOW0VUybPyHoGM
/jf75C5xET7ZQpBe5kx5VHsPZj0CBb3b+wSRAiEA2mPWCBBytosIU/ODRfq6EiV04
##### Obfuscated For Security #####
/jf75C5xET7ZQpBe5kx5VHsPZj0CBb3b+wSRAiEA2mPWCBBytosIU/ODRfq6EiV04
lt6waE7I2uSPqIC20LcCIQDJQYIHQII+3YagqMexuuuGx+IDKD6/Fu/JwPb
5QlhAKthiYcYKIL9h8bjDsQhZDUACPasjzdsDEdq8inDyLOFAiEAmCr/tZwA3qeA
ZoBzl10DGPIuoKXBd3nk/eBxPkaxIEECIQCnYmjsol7GldtjVnr1qT+3yedLfHK
srDVjIT3LsvTqw==
-----END PRIVATE KEY-----
```

Save this text somewhere safe you will use it when creating a JWT credential next.

#### Step 4. Configure the Blue Prism Web API Services and Credentials

- Create a Blue Prism Credential (i.e. DocuSign JWT Credentials)
- Enter the Issuer (DocuSign Integration Key/Client ID from step 2)
- Copy and paste the Private Key created in step 3 into the Private Key field, then set the Access Rights for this credential.



Add the new credential to the Web API Service and configure it to use the designated DocuSign account and user.

- Base set the appropriate URI (dev, prod)  
For the developer demo environment, the URI is <https://account-d.docusign.com/oauth/token>  
For the production platform, the URI is <https://account.docusign.com/oauth/token>
- Set the audience to the platform  
For the developer demo environment, the audience is account-d.docusign.com  
For the developer production environment, the audience is account.docusign.com
- Fill in the Subject: = the API Account ID in the apps and keys page
- Select the new credential in the drop-down
- Save the API

### Step 5. Verifying DocuSign Access with the Web API Test process:

1. Using the Utility VBOs:
2. Using the Basic Envelope VBO:
3. Using the Skill Directly.

### Step 6. Go-Live

Once you have successfully used the VBO to make calls to and from your DocuSign account, you are ready to promote your application from sandbox to Go live in production.

To do this, you will need to have a paid DocuSign account and meet the criteria for promotion of an app. Here is a guide of how to [promote your application](#).

Once live you will need to follow steps 2 – 5 again looking for the production setup, make sure that the user that will utilise the DocuSign API has sufficient permissions to read, edit and send envelopes.

## Using the Asset

### Get Envelope Details

Gets detail of an envelope.

#### Input:

| Name       | Description                 | Data Type |
|------------|-----------------------------|-----------|
| accountid  | Your DocuSign account ID.   | Text      |
| envelopeid | ID on the envelope to send. | Text      |

#### Output:

| Name             | Description                     | Data Type  |
|------------------|---------------------------------|------------|
| Envelope Details | The requested envelope details. | Collection |

### List Templates

Lists the templates from an account.

#### Input:

| Name      | Description               | Data Type |
|-----------|---------------------------|-----------|
| accountid | Your DocuSign account ID. | Text      |

#### Output:

| Name      | Description  | Data Type  |
|-----------|--|------------|
| Templates | A set of templates that are available for the supplied account ID. | Collection |

## Get Template Details

Gets the details of a template.

### Input:

| Name       | Description                            | Data Type |
|------------|--|-----------|
| accountid  | Your DocuSign account ID.              | Text      |
| Templateid | ID of template to pull recipients from | Text      |

### Output:

| Name             | Description  | Data Type  |
|------------------|--|------------|
| Template details | The details of the template identified by the supplied templateid. | Collection |

## Get Envelope Recipients

Lists the recipients of an envelope

### Input:

| Name       | Description                 | Data Type |
|------------|-----------------------------|-----------|
| envelopeid | ID on the envelope to send. | Text      |
| Accountid  | Your DocuSign account ID    | Text      |

### Output:

| Name       | Description  | Data Type  |
|------------|--|------------|
| Recipients | A collection of recipients for the matching enveloped. | Collection |

## Add Certified Delivery

Sends an envelope to an individual to view, but not to sign.

### Input:

| Name            | Description   | Data Type |
|-----------------|---|-----------|
| envelopeid      | ID on the envelope to send.   | Text      |
| accountid       | Your DocuSign account ID.   | Text      |
| Recipient ID    | Unique ID of the recipient.   | Text      |
| Recipient Name  | Name of the recipient   | Text      |
| Recipient Email | Email of the recipient  | Text      |
| resend_envelope | If true, DocuSign will resend the envelope to all when sending to a viewer. | Flag      |

### Output:

There are no output parameters to this call.

## Get Users

Gets all users from an account.

### Input:

| Name      | Description               | Data Type |
|-----------|---------------------------|-----------|
| accountid | Your DocuSign account ID. | Text      |

### Output:

| Name  | Description   | Data Type  |
|-------|---|------------|
| Users | A collection of users assigned to the supplied accountid. | Collection |

## Edit Signer

Edits the details of a signer on a template.

### Input:

| Name            | Description                             | Data Type |
|-----------------|---|-----------|
| templateid      | ID of template to pull recipients from. | Text      |
| Recipient ID    | Unique ID of the recipient              | Text      |
| Recipient Name  | Name of the Recipient                   | Text      |
| Recipient Role  | Role of the Recipient                   | Text      |
| Recipient Email | Email of the recipient                  | Text      |

### Output:

There are no output parameters for this call.

## Send Envelope

Sends an envelope with a template from DocuSign.

### Input:

| Name          | Description                          | Data Type |
|---------------|--------------------------------------|-----------|
| accountid     | Your DocuSign account ID.            | Text      |
| Templateid    | ID of the template to send           | Text      |
| Email Subject | Subject of the email when delivered. | Text      |

### Output:

| Name        | Description                      | Data Type |
|-------------|----------------------------------|-----------|
| Envelope ID | The ID of the DocuSign envelope. | Text      |

## Create Envelope

Creates an envelope with a template but does not send it.

### Input:

| Name          | Description                         | Data Type |
|---------------|-------------------------------------|-----------|
| accountid     | Your DocuSign account ID.           | Text      |
| Templateid    | ID of the template to send          | Text      |
| Email Subject | Subject of the email when delivered | Text      |

### Output:

| Name        | Description   | Data Type |
|-------------|---|-----------|
| Envelope Id | Returns an envelope ID for the supplied parameters. | Text      |

## List Template Recipients

Lists the recipients on a template.

### Input:

| Name       | Description                             | Data Type |
|------------|---|-----------|
| accountid  | Your DocuSign account ID.               | Text      |
| templateid | ID of template to pull recipients from. | Text      |

### Output:

| Name       | Description                    | Data Type  |
|------------|--------------------------------|------------|
| Recipients | A resulting set of recipients. | Collection |

## Create Signer

Creates a signer role on a template

### Input:

| Name            | Description                             | Data Type |
|-----------------|---|-----------|
| Recipient Name  | Name of the Recipient                   | Text      |
| Recipient Email | Email of the recipient                  | Text      |
| Recipient ID    | Unique ID of the recipient              | Text      |
| Recipient Role  | Role of the Recipient                   | Text      |
| templateId      | ID of template to pull recipients from. | Text      |

### Output:

There are no output parameters for this call.



## Support

This asset is provided free-of-charge by Blue Prism. Blue Prism does not provide formal support of this asset. Please direct questions you have related to this asset, to the Digital Exchange Community page:

<https://community.blueprism.com/communities/community-home?CommunityKey=1e516cfe-4d1f-4de9-a9eb-58d15bf38c81>