

Creating DocuSign App

- 1. Login to Demo DocuSign website.

DocuSign®

Log In

Email *

Enter email

NEXT

[No account? Sign up for free](#)

- 2. Open Settings.

DocuSign eSignature

Home

Manage

Templates

Reports

Settings

- 3. Open App and Keys.

INTEGRATIONS

Connect

Apps and Keys

API Usage Center

Payments

- 4. Click Add App and Integration Key.

Apps and Integration Keys

ADD APP AND INTEGRATION KEY

No Integration Keys found

- 5. Enter App Name.
- 6. Click Create App.

Settings

×

Add Integration Key

App Name *

K2

CREATE APP

CANCEL

- 7. Click Generate RSA under Authentication section.

Authentication

Not sure which settings to use? [Learn more](#)



User Application

- ☒ Authorization Code Grant
☐ Implicit Grant

Secret Keys

+ ADD SECRET KEY



Service Integration

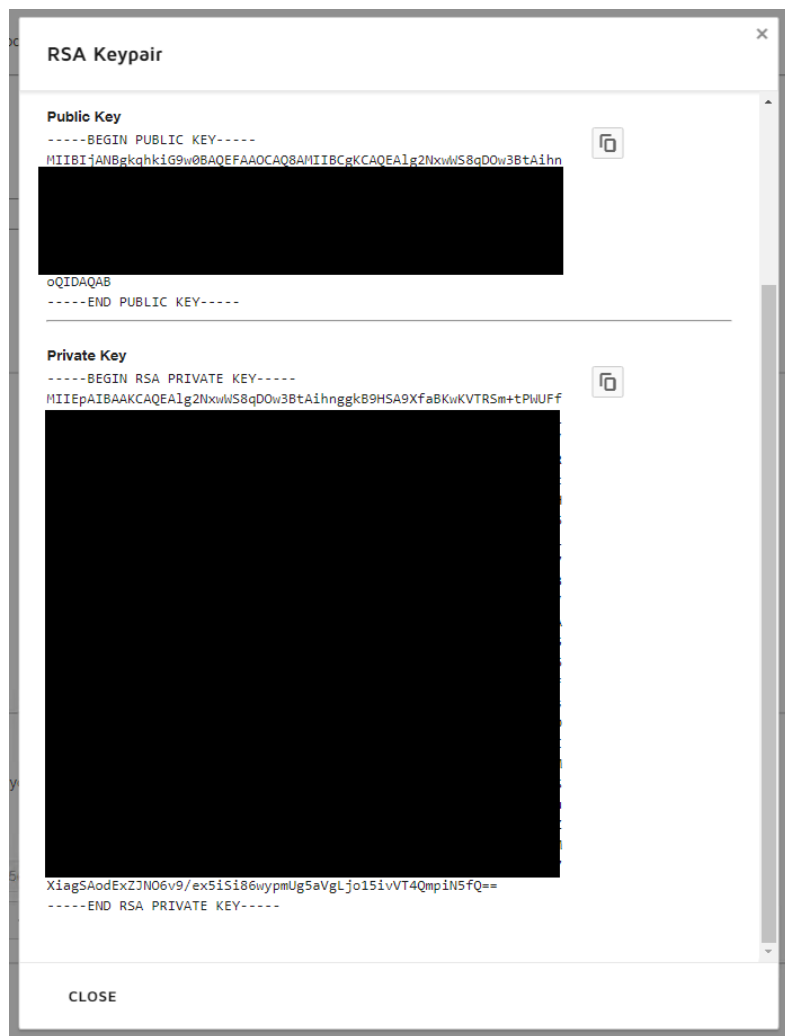
DocuSign can generate a keypair for you or you can upload your own public key.

RSA Keypairs (ID)

+ GENERATE RSA

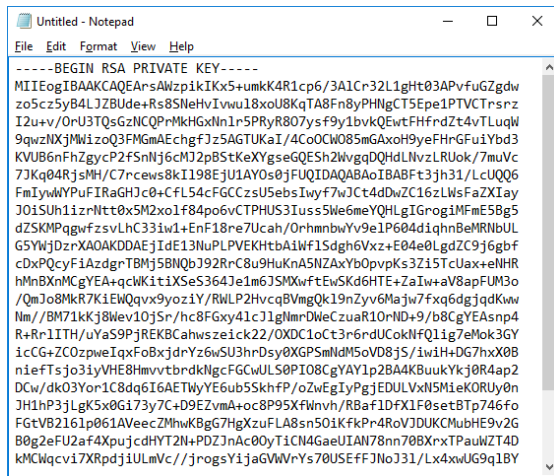
+ UPLOAD RSA

8. Once RSA Keypair is generated, copy RSA Private Key.

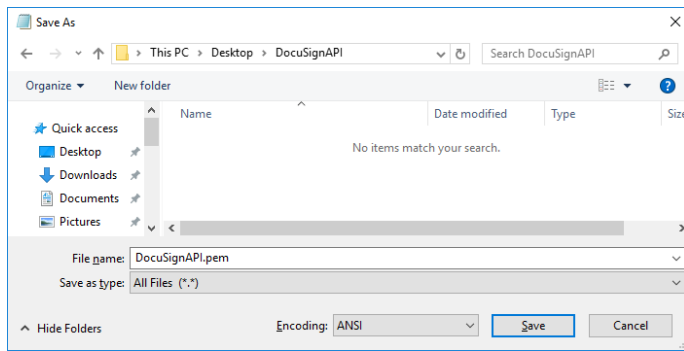


NOTE! Copied RSA Private Key should contain “-----BEGIN RSA PRIVATE KEY-----” and “-----END RSA PRIVATE KEY-----” rows too.

9. Paste RSA Private Key to Notepad.



10. Save file with ".pem" extension.



11. Click Add URI under Additional Settings section.

12. Set URI to <https://localhost>.

13. Click Save.

Additional settings

Redirect URIs

Link to Privacy Policy

Link to Terms of Use

14. Browse the link:

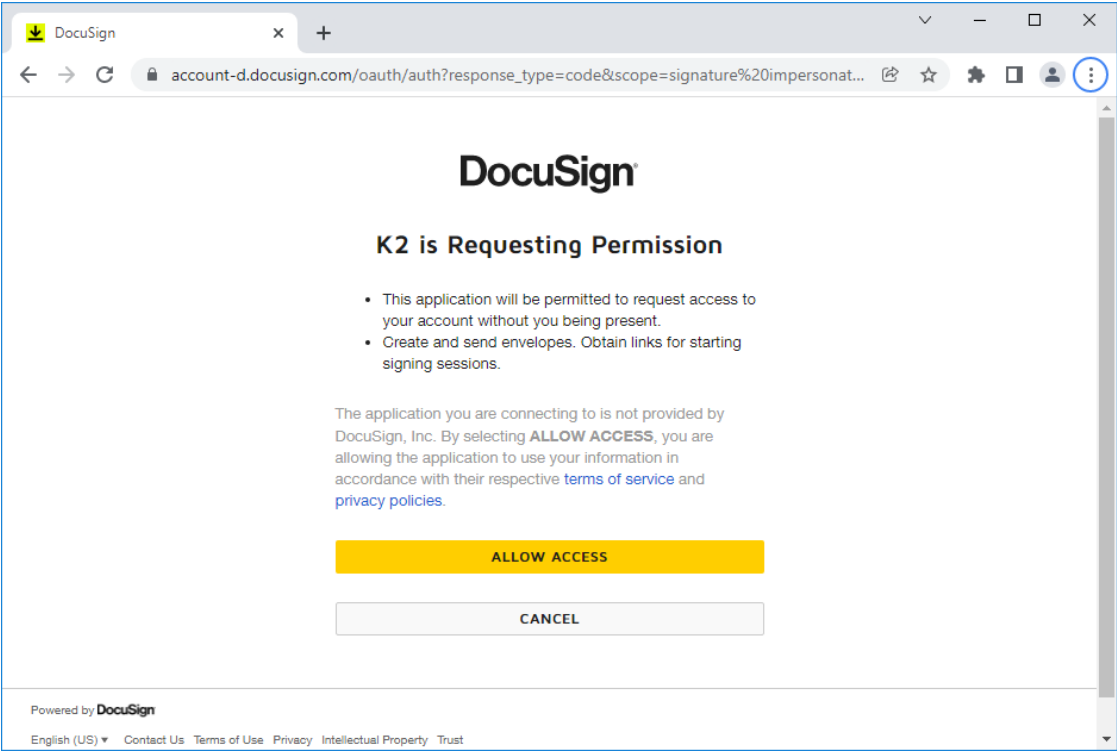
<https://account->

[d.docusign.com/oauth/auth?response_type=code&scope=signature+impersonation&client_id=XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX&redirect_uri=https://localhost](https://account-d.docusign.com/oauth/auth?response_type=code&scope=signature+impersonation&client_id=XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX&redirect_uri=https://localhost)

NOTE!

- Replace XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX by your Integration Key.
- Use <https://account-d.docusign.com> on development environment.
- Use <https://account.docusign.com> on production environment.

15. Click Allow Access.



Installing DocuSignAPI Service Broker

1. Download the zip file.
2. Right click and choose Properties.
3. Unblock the file.
4. Click Apply.
5. Click OK.
6. Right click the zip file and choose **Extract All**.

Note: The installation will fail if the zip file is opened windows explorer and files copied from there without extracting.

7. Open the extracted folder.
8. Select **DocuSignAPI.zip**.
9. Right click and choose Properties.
10. Unblock the file.
11. Click Apply.
12. Click OK.
13. Right click the zip file and choose **Extract All**.

Note: The installation will fail if the zip file is opened windows explorer and files copied from there without extracting.

14. Copy 7 DLLs to the K2 Service Broker folder.

Bytezoom.Services.DocuSignAPI.dll
Bytezoom.Services.DocuSignAPIHelper.dll
Microsoft.IdentityModel.dll
Microsoft.IdentityModel.JsonWebTokens.dll
Microsoft.IdentityModel.Logging.dll
Microsoft.IdentityModel.Tokens.dll
Newtonsoft.Json.dll

To:

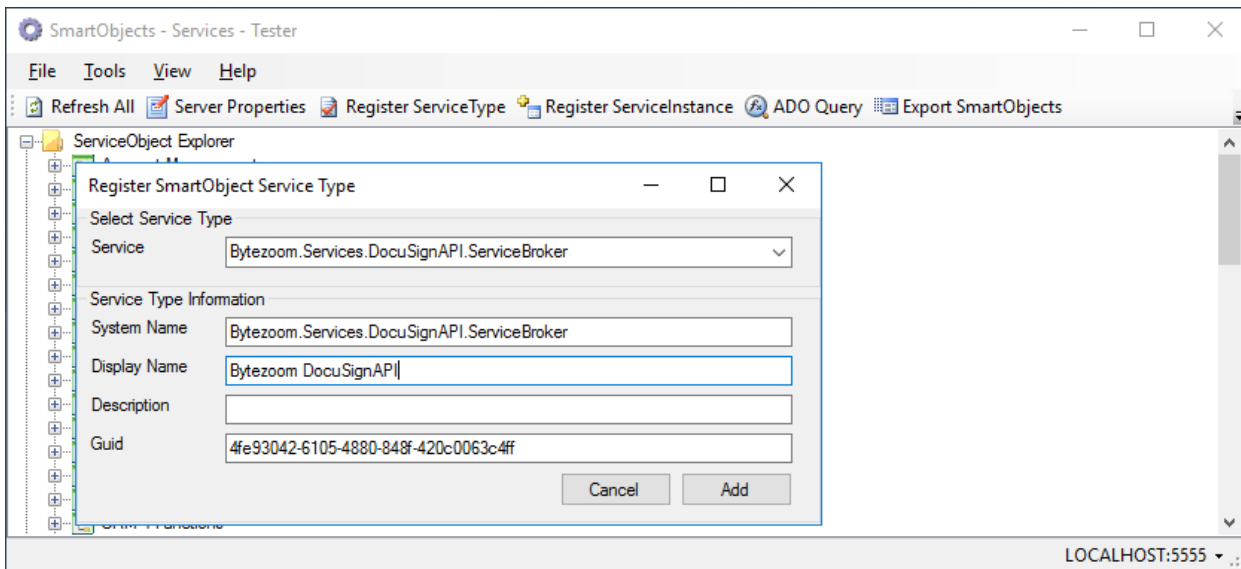
C:\Program Files (x86)\K2 blackpearl\ServiceBroker
Or

C:\Program Files (x86)\K2\ServiceBroker

15. Restart K2 Service.
16. Use SmartObject Service Tester Tool to Register a Service Type.

Service: Bytezoom.Services.DocuSignAPI.ServiceBroker

Display Name: Bytezoom DocuSignAPI

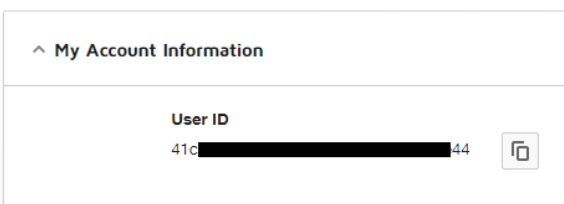


17. In SmartObject Service Tester, select Bytezoom DocuSignAPI and register new ServiceInstance.
18. Set Authentication Mode to ServiceAccount.
19. Set DocuSign URL to <https://www.docusign.net/> or <https://demo.docusign.net/>.
20. Set Integration Key to [Your Integration Key].
 - a. Browse Admin Panel of your DocuSign account.
 - b. Click API and Keys.
 - c. Copy Integration Key.

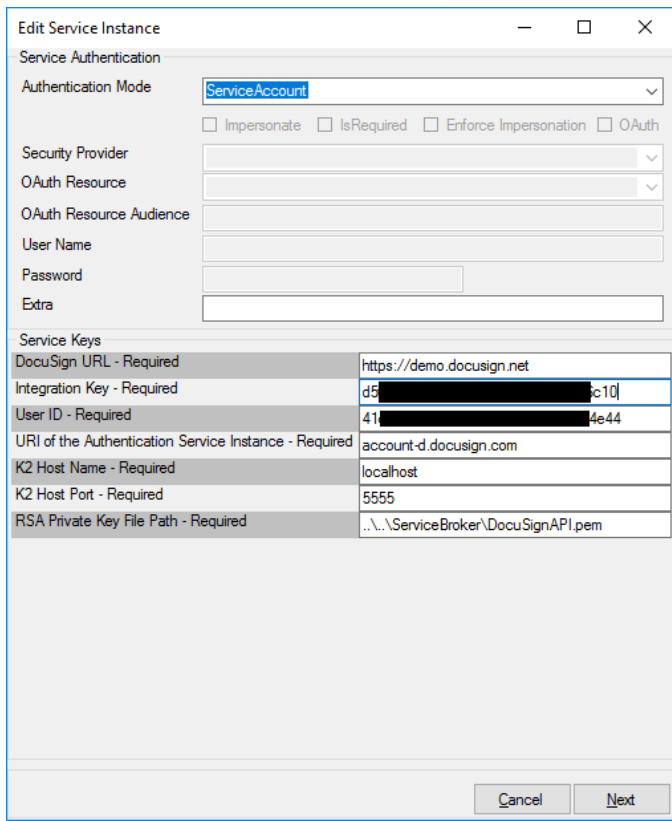
Apps and Integration Keys

App Name	Integration Key	Environment
K2	d5[REDACTED]3c10	Development

- d. Paste Integration Key into SmartObject Service Tester.
21. Set User ID to [Your User ID].
 - a. Browse Admin Panel of your DocuSign account.
 - b. Click API and Keys.
 - c. Copy your User ID.



- d. Paste User ID into SmartObject Service Tester.
22. Set K2 Host Name to [Your K2 Host Name].
23. Set K2 Host Port to [Your K2 Host Port].
24. Set RSA Private Key File Path to [Your RSA Private Key File Path].
25. Set URI of the Authentication Service Instance to account-d.docusign.com or account.docusign.com/oauth/auth
26. Click Next.



Edit Service Instance

Service Authentication

Authentication Mode: ServiceAccount

☐ Impersonate ☐ IsRequired ☐ Enforce Impersonation ☐ OAuth

Security Provider: [Empty]

OAuth Resource: [Empty]

OAuth Resource Audience: [Empty]

User Name: [Empty]

Password: [Empty]

Extra: [Empty]

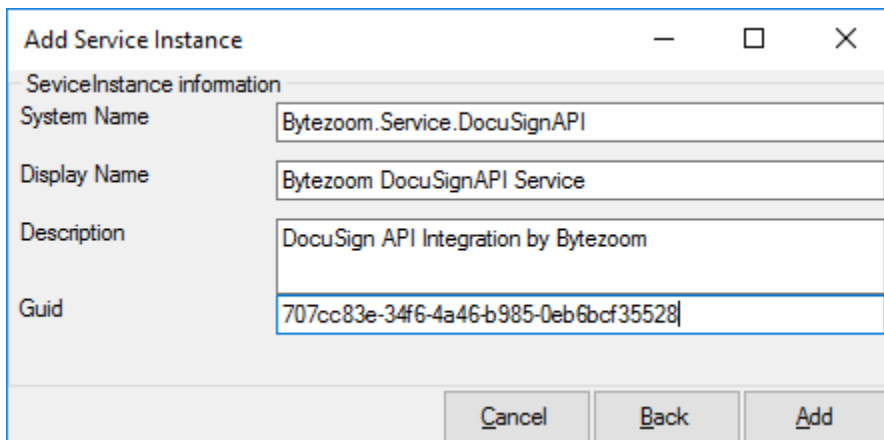
Service Keys

DocuSign URL - Required	https://demo.docusign.net
Integration Key - Required	d5[Redacted]c10
User ID - Required	41[Redacted]4e44
URI of the Authentication Service Instance - Required	account-d.docusign.com
K2 Host Name - Required	localhost
K2 Host Port - Required	5555
RSA Private Key File Path - Required	..\..\ServiceBroker\DocuSignAPI.pem

Cancel Next

27. In the Add Service Instance dialog:

- Set System and Display Name to: Bytezoom.Service.DocuSignAPI.
- Set the GUID to: 707cc83e-34f6-4a46-b985-0eb6bcf35528.



Add Service Instance

ServiceInstance information

System Name: Bytezoom.Service.DocuSignAPI

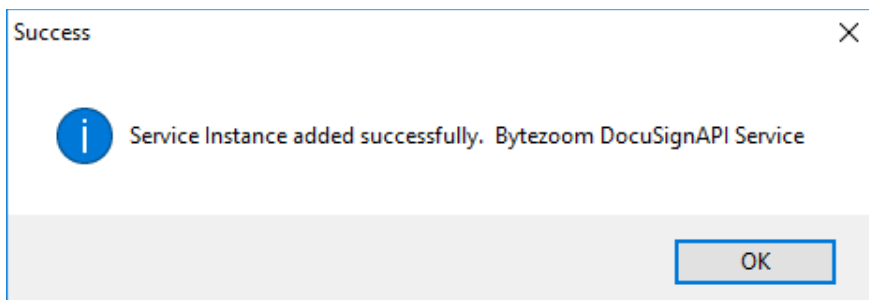
Display Name: Bytezoom DocuSignAPI Service

Description: DocuSign API Integration by Bytezoom


Guid: 707cc83e-34f6-4a46-b985-0eb6bcf35528

Cancel Back Add

28. Click Add.



Success

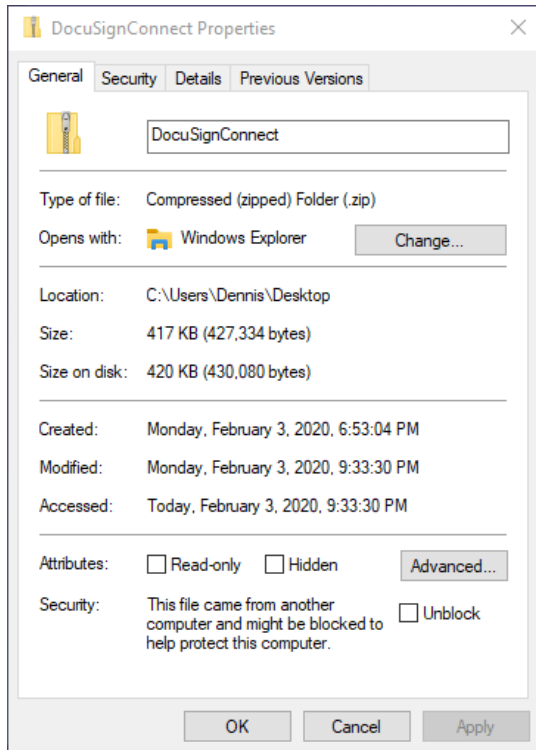
 Service Instance added successfully. Bytezoom DocuSignAPI Service

OK

29. Click OK on the Success message.

Installing DocuSign Web Service

1. Select **DocuSignConnect.zip**.
2. Right click and choose Properties.
3. Unblock the file.
4. Click Apply.
5. Click OK.



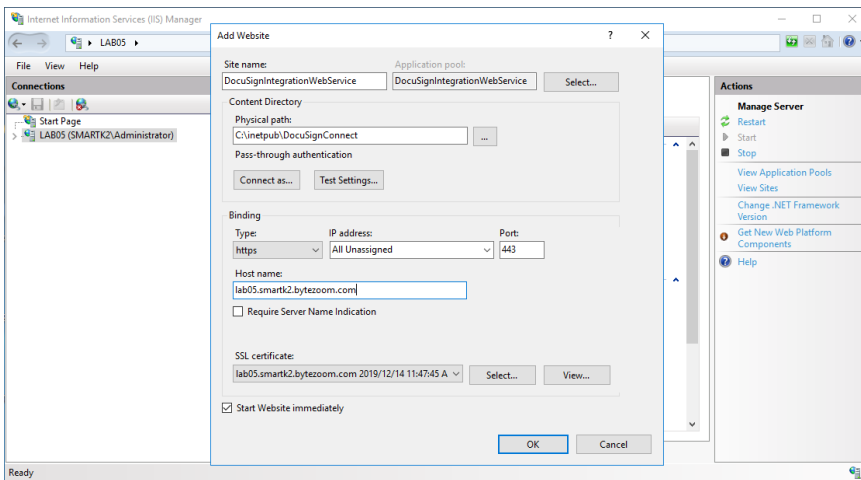
6. Right click the zip file and choose **Extract All**.

Note: The installation will fail if the zip file is opened windows explorer and files copied from there without extracting.

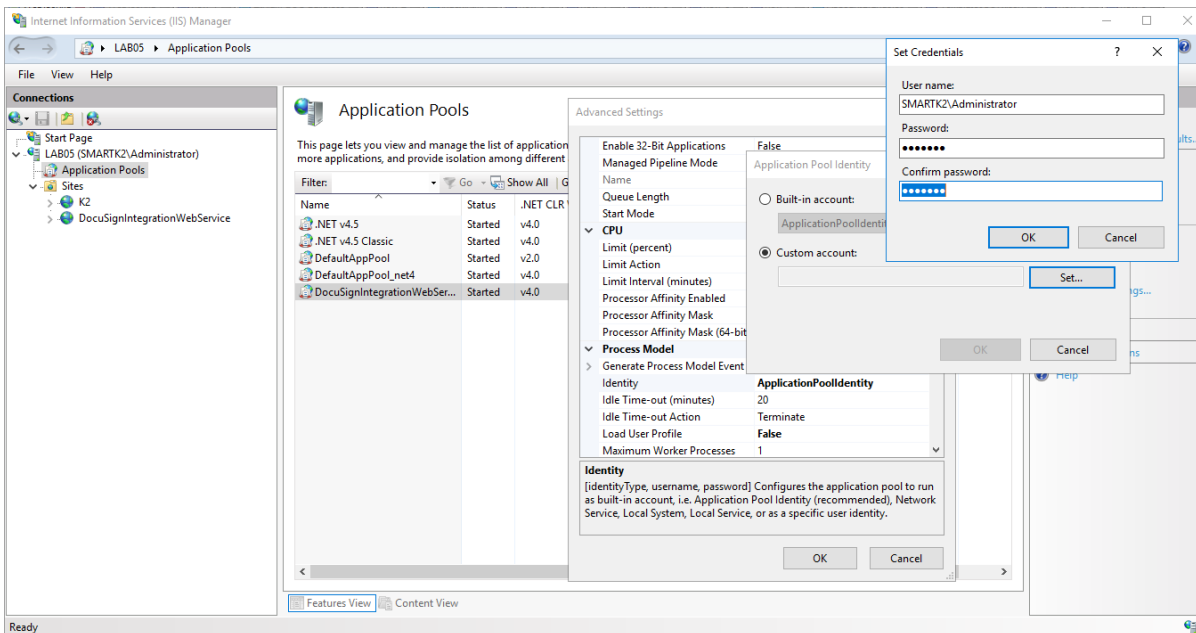
7. Open the extracted folder.
8. Copy contents to Web applications folder.

Example: C:\inetpub\DocuSignConnect

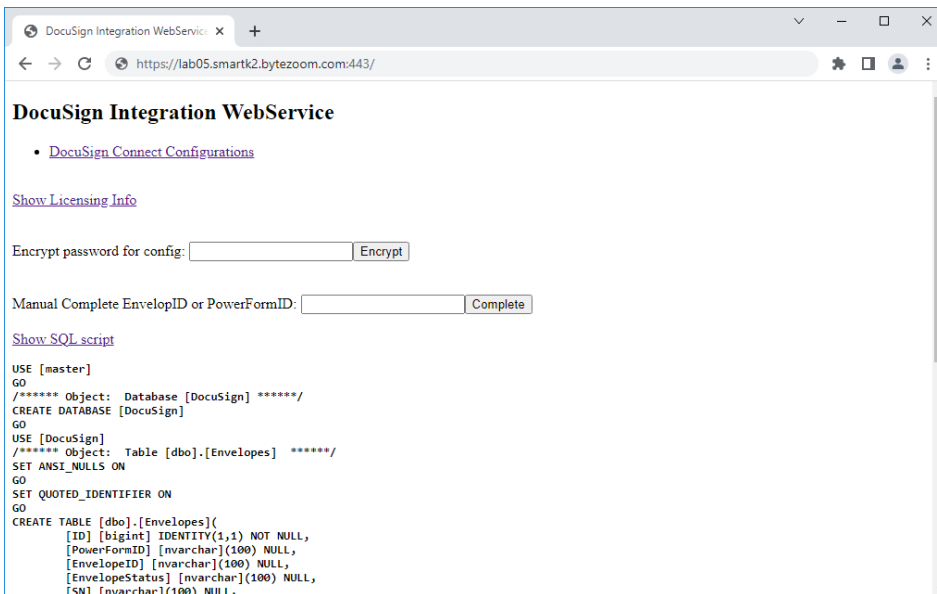
9. Open IIS Manager.
10. Select current connection.
11. Right click and choose Add Site.
12. Set Site name to DocuSignIntegrationWebService.
13. Set Physical path to C:\inetpub\DocuSignConnect.
14. Set Type to https.
15. Set Host name to [Your Host name].
16. Set SSL certificate to [Your SSL certificate].
17. Click OK.



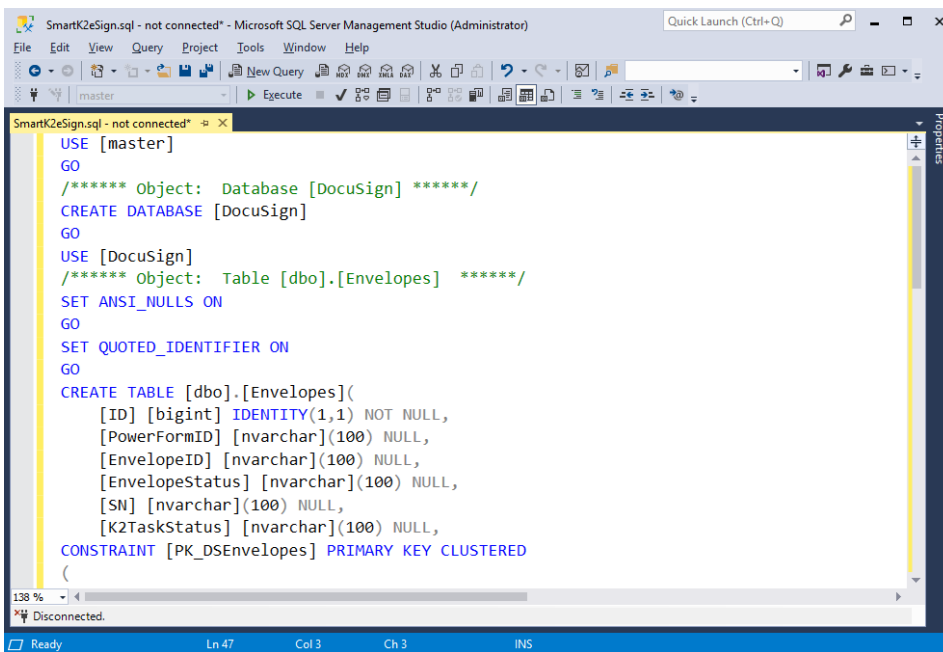
18. Select Application Pools under your connection.
19. Select DocuSignIntegrationWebService application pool.
20. Right click and choose Advanced Settings.
21. Configure Identity.
22. Select Custom account.
23. Click Set.
24. Set Credentials for user that will have access to the DocuSign database.
25. Click OK.
26. Click OK.
27. Click OK.



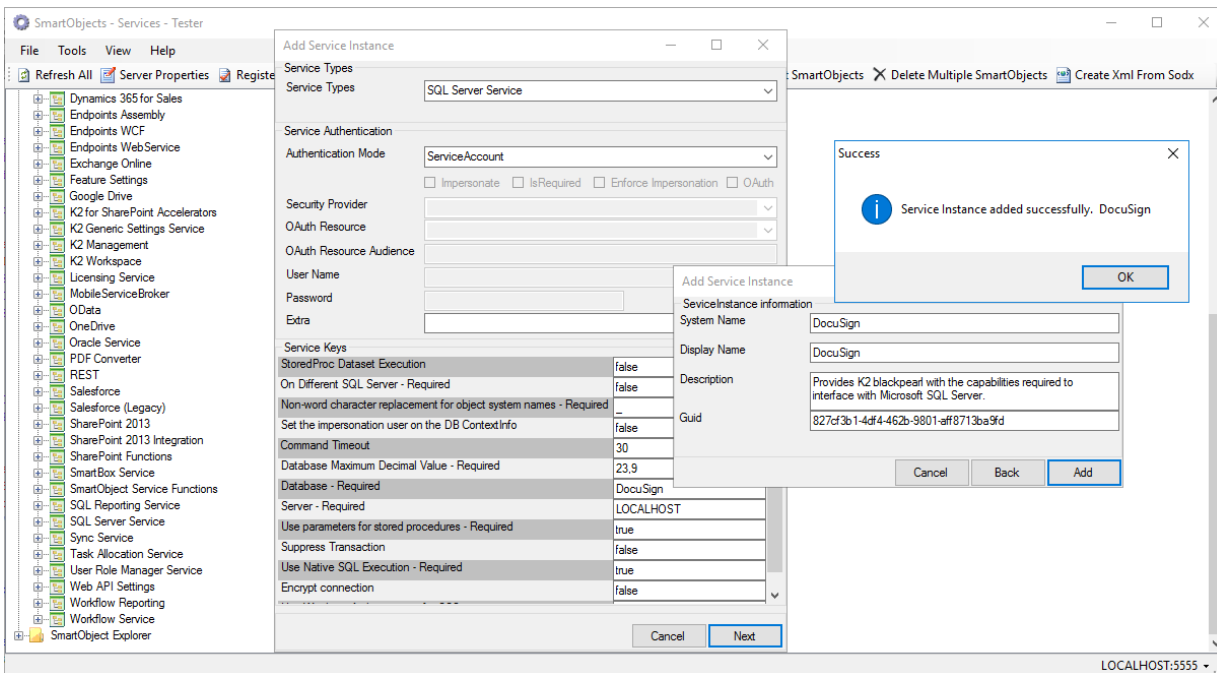
28. Browse the website.
29. Click Show SQL script.
30. Copy script.



31. Open SQL Server Management Studio and connect to your SQL server.
32. Click New Query.
33. Past copied script.
34. Click Execute.



35. In SmartObject Service Tester, select SQL Server Service and register new ServiceInstance.
36. Set Authentication Mode to ServiceAccount.
37. Set Database to DocuSign.
38. Set Server to [Your Server].
39. Click Next.
40. Set System Name to DocuSign.
41. Set Display Name to DocuSign.
42. Click Add.
43. Click OK.



44. Open Web.config file located at the DocuSignConnect folder.

Example: C:\inetpub\DocuSignConnect\Web.config

45. Set k2ConnectionString to [Your k2ConnectionString].

Example:

Integrated=False;IsPrimaryLogin=True;Authenticate=True;EncryptedPassword=False;CachePassword=True;Host=localhost;Port=5555;

46. Set k2ConnectionStringForTask to [Your k2ConnectionStringForTask].

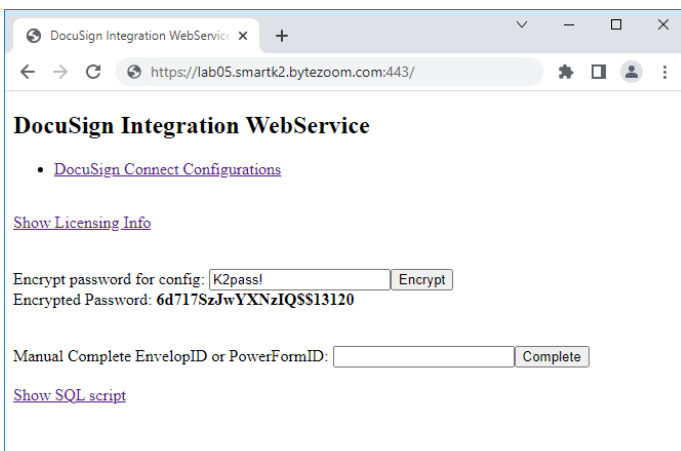
Example:

Integrated=False;IsPrimaryLogin=True;Authenticate=True;EncryptedPassword=False;CachePassword=True;Host=localhost;Port=5252;SecurityLabelName=K2;

47. Set k2UserID to K2 Service user.

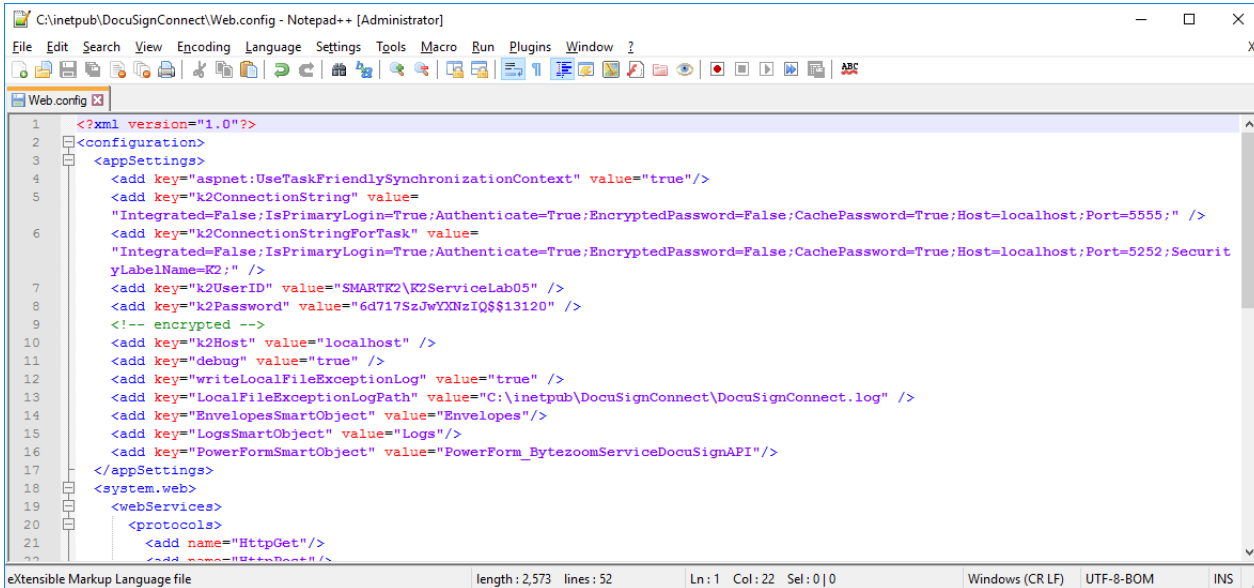
48. Set k2Password to [Your K2 Service Password].

- Browse https://[Your Host]:443/.
- Enter [Your K2 Service Password].
- Click Encrypt.
- Copy Encrypted Password.



e. Past Encrypted Password to Web.config.

49. Set k2Host to [Your k2Host].
50. Set debug to True.
51. Set EnvelopesSmartObject to Envelopes.
52. Set LogsSmartObject to Logs.
53. Set PowerFormSmartObject to DocuSignAPIPowerForm.
54. Save changes of Web.config file.



```
<?xml version="1.0"?>
<configuration>
  <appSettings>
    <add key="aspnet:UseTaskFriendlySynchronizationContext" value="true"/>
    <add key="k2ConnectionString" value=
      "Integrated=False;IsPrimaryLogin=True;Authenticate=True;EncryptedPassword=False;CachePassword=True;Host=localhost;Port=5555;" />
    <add key="k2ConnectionStringForTask" value=
      "Integrated=False;IsPrimaryLogin=True;Authenticate=True;EncryptedPassword=False;CachePassword=True;Host=localhost;Port=5252;SecurityLabelName=K2;" />
    <add key="k2UserID" value="SMARTK2\K2ServiceLab05" />
    <add key="k2Password" value="6d717SzJwYXNzIQ$$13120" />
    <!-- encrypted -->
    <add key="k2Host" value="localhost" />
    <add key="debug" value="true" />
    <add key="writeLocalFileExceptionLog" value="true" />
    <add key="LocalFileExceptionLogPath" value="C:\inetpub\DocuSignConnect\DocuSignConnect.log" />
    <add key="EnvelopesSmartObject" value="Envelopes"/>
    <add key="LogsSmartObject" value="Logs"/>
    <add key="PowerFormSmartObject" value="PowerForm_BytezoomServiceDocuSignAPI"/>
  </appSettings>
  <system.web>
    <webServices>
      <protocols>
        <add name="HttpGet"/>
        <add name="HttpPost"/>
      </protocols>
    </webServices>
  </system.web>
</configuration>
```

Extensible Markup Language file length: 2,573 lines: 52 Ln: 1 Col: 22 Sel: 0 | 0 Windows (CR LF) UTF-8-BOM INS

Configuring DocuSign Connect

- 1. Login to DocuSign website.

DocuSign®

Log In

Email *

Enter email

NEXT

No account? Sign up for free

- 2. Open Settings.

DocuSign eSignature

Home

Manage

Templates

Reports

Settings

- 3. Open Connect.

INTEGRATIONS

Connect

Apps and Keys

API Usage Center

Payments

- 4. Click Add Configuration.

Connect

DocuSign Connect is a push service that sends real-time data updates to external applications.

APPLICATIONS

CONNECT KEYS

PUBLISH

LOGS

FAILURES

ADD CONFIGURATION ▼

- 5. Click Custom.

Connect

DocuSign Connect is a push service that sends real-time data updates to external applications.

APPLICATIONS

CONNECT KEYS

PUBLISH

LOGS

FAILURES

ADD CONFIGURATION ▼



Custom



Custom Recipient

- Set Name to K2.
- Set URL to Publish to [https://\[HostName\]/DocuSignProcessing.asmx/DocuSignConnectUpdate](https://[HostName]/DocuSignProcessing.asmx/DocuSignConnectUpdate).

NOTE! Replace HostName by your DocuSign web service URL.

[Connect Configurations List](#) > Add Custom Configuration

Add Custom Configuration

Listener Settings

Status

Active Connection ▼

Name *

K2

URL to Publish *

<https://lab05.smartk2.bytezoom.com:443/DocuSignProce>

HTTPS required



Enable Log (maximum 100)



Require Acknowledgement

- Set Data Format to REST v2.1.

9. Set Event Message Delivery Mode to Aggregate.

Event Settings

Data Format

REST v2.1 ▼

This cannot be changed once the configuration is saved.

Event Message Delivery Mode

Aggregate ▼

This cannot be changed once the configuration is saved.

10. Check all of Envelope Status.

Trigger Events

Envelope Events:

- ☒ Envelope Sent
- ☒ Envelope Delivered
- ☒ Envelope Signed/Completed
- ☒ Envelope Declined
- ☒ Envelope Voided

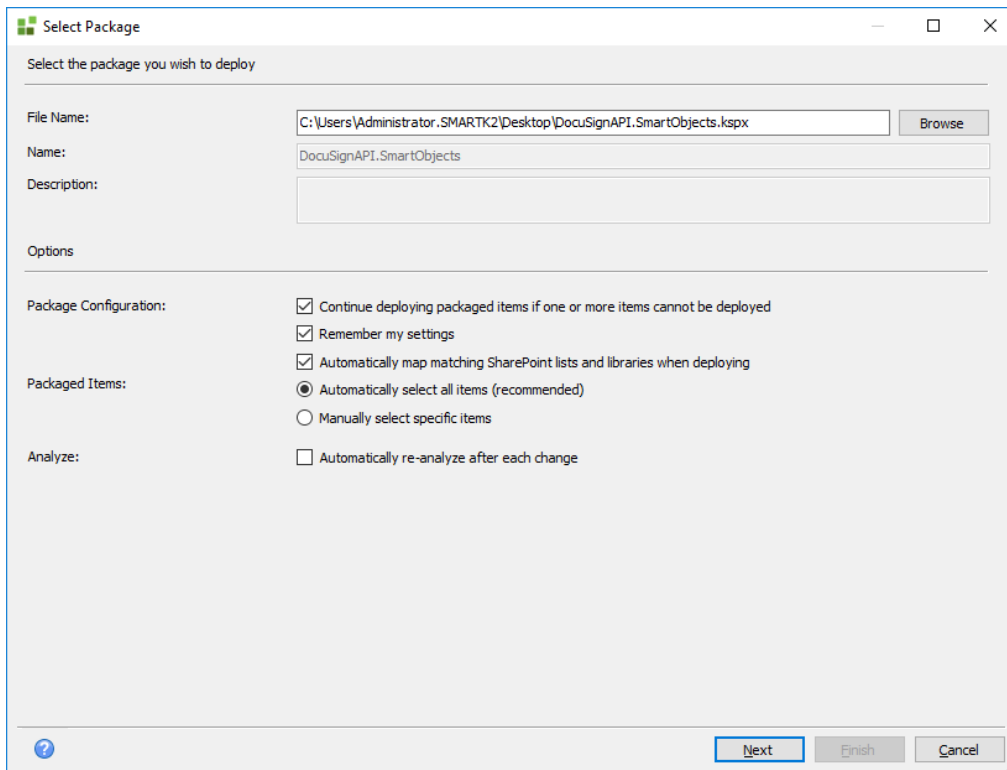
11. Click Add.

ADD CONFIGURATION

CANCEL

Deploying the SmartObjects

1. Select the deployment package **DocuSignAPI.SmartObjects.kspix**.
2. Right click on the selected file and choose Deploy from the context menu.
3. Click Next.



Select Package

Select the package you wish to deploy

File Name: C:\Users\Administrator\SMARTK2\Desktop\DocuSignAPI.SmartObjects.kspix Browse

Name: DocuSignAPI.SmartObjects

Description:

Options

Package Configuration:

- ☒ Continue deploying packaged items if one or more items cannot be deployed
- ☒ Remember my settings
- ☒ Automatically map matching SharePoint lists and libraries when deploying

Packaged Items:

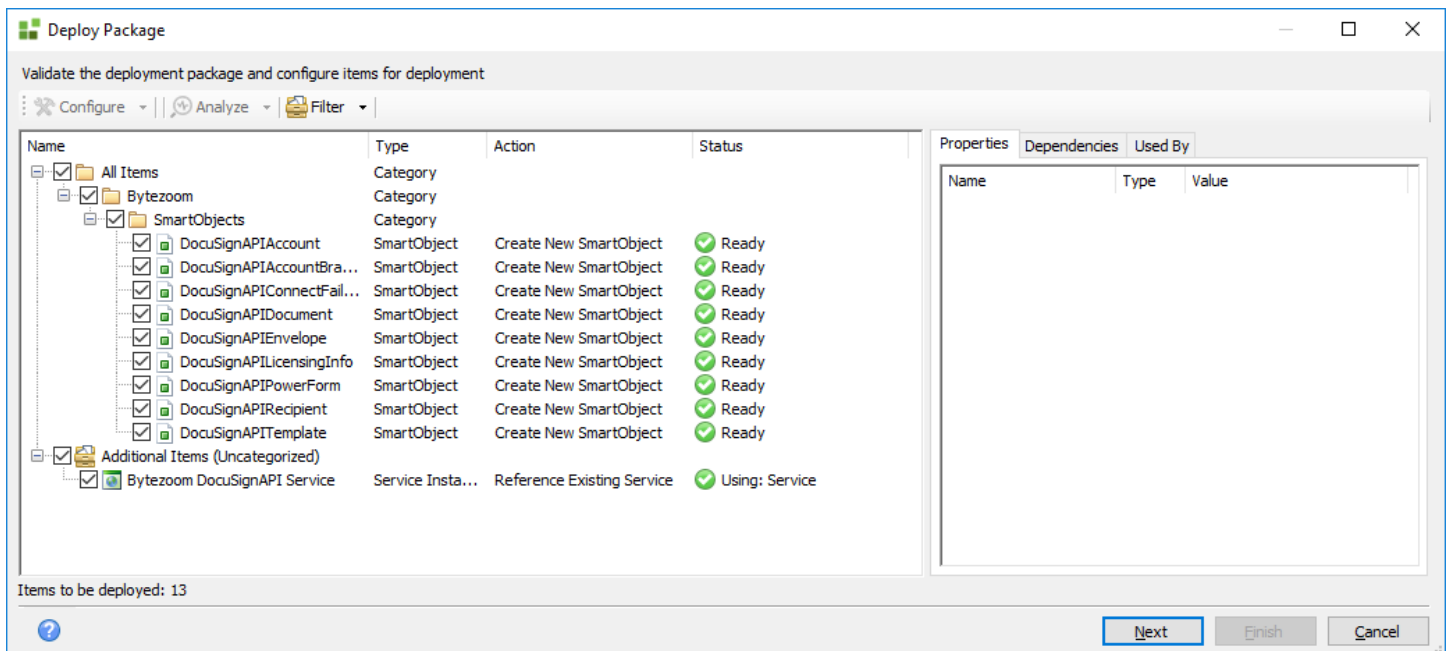
- ☒ Automatically select all items (recommended)
- ☐ Manually select specific items

Analyze:

- ☐ Automatically re-analyze after each change

Next Finish Cancel

4. Click Next.



Deploy Package

Validate the deployment package and configure items for deployment

Configure Analyze Filter

Name	Type	Action	Status
All Items	Category		
Bytezoom	Category		
SmartObjects	Category		
DocuSignAPIAccount	SmartObject	Create New SmartObject	Ready
DocuSignAPIAccountBra...	SmartObject	Create New SmartObject	Ready
DocuSignAPIConnectFail...	SmartObject	Create New SmartObject	Ready
DocuSignAPIDocument	SmartObject	Create New SmartObject	Ready
DocuSignAPIEnvelope	SmartObject	Create New SmartObject	Ready
DocuSignAPILicensingInfo	SmartObject	Create New SmartObject	Ready
DocuSignAPIPowerForm	SmartObject	Create New SmartObject	Ready
DocuSignAPIRecipient	SmartObject	Create New SmartObject	Ready
DocuSignAPITemplate	SmartObject	Create New SmartObject	Ready
Additional Items (Uncategorized)			
Bytezoom DocuSignAPI Service	Service Insta...	Reference Existing Service	Using: Service

Items to be deployed: 13

Next Finish Cancel

5. Click Finish.

Deploy Package - Deploying DocuSignAPI.SmartObjects.kspk	
Description	Duration
✓ DocuSignAPI.SmartObjects.kspk	1 s
✓ DocuSignAPITemplate SmartObject	303 ms
✓ DocuSignAPIRecipient SmartObject	109 ms
✓ DocuSignAPIPowerForm SmartObject	107 ms
✓ DocuSignAPILicensingInfo SmartObject	109 ms
✓ DocuSignAPIEnvelope SmartObject	106 ms
✓ DocuSignAPIDocument SmartObject	102 ms
✓ DocuSignAPIAccountBrands SmartObject	114 ms
✓ DocuSignAPIAccount SmartObject	100 ms
✓ DocuSignAPIConnectFailures SmartObject	103 ms
✓ All Items Category	19 ms
✓ Bytezoom Category	41 ms
✓ SmartObjects Category	113 ms
✓ Post-Deployment	1 s
Save Log	
? Next Finish Cancel	

DocuSign App Go-Live Process

To promote your DocuSign app to the production environment, you should have done **20 successful API calls** per last **30 days**. If you don't have those calls done, your DocuSign app will displaying the next statuses under the **Go-Live Status**:

Not started

Apps and Integration Keys

ADD APP AND INTEGRATION KEY

App Name	Integration Key	Environment	Go Live Status	
K2		Development	<div>● Not started</div> <div>Make 20 successful API calls</div>	ACTIONS ▾

or Not enough API calls

Apps and Integration Keys

ADD APP AND INTEGRATION KEY

App Name	Integration Key	Environment	Go Live Status	
K2		Development	<div>● Not enough API calls</div> <div>Make 19 successful API calls</div>	ACTIONS ▾

To make all required API calls done, you can use method “**Make API Calls For Go-Live**” of **Account** SmartObject.

NOTE! You should have deployed DocuSignAPIAccount SmartObject or generated SmartObject from **Account** service object of DocuSignAPI service broker.

Once SmartObjects of DocuSignAPI service broker are deployed/generated on your environment. Do following steps:

1. Open SmartObject Service Tester.
2. Find DocuSignAPIAccount SmartObject.
3. Right click on DocuSignAPIAccount SmartObject.
4. Select Execute SmartObject.
5. Set Method to Execute to Make API Calls For Go-Live.
6. Click Execute.

Execute SmartObject: 'DocuSignAPIAccount' Method: 'Make API Calls For Go-Live'

FileView

Execute

View Xml

Refresh SmartObject

Information

SmartObject Name: DocuSignAPIAccount

Method to Execute: Make API Calls For Go-Live

Execute

Input Properties

Clear Values

Generate Data

List Method Options

Paging

Enable Paging

Page Number: 1

Page Size: 10

Filter

Set

Order By

Set

Results

List Results

1 of 20

Total Records: 20

APICallID	APIReference	HTTPRequestMethod	HTTPRequestURL	Status	StatusCo
1	Envelope:create	POST	/restapi/v2.1/accounts/{accountId}/envelopes	success	201
2	Envelope:update	PUT	/restapi/v2.1/accounts/{accountId}/envelopes/{envelopeId}	success	201
3	Envelope:create	POST	/restapi/v2.1/accounts/{accountId}/envelopes	success	201
4	Envelope:update	PUT	/restapi/v2.1/accounts/{accountId}/envelopes/{envelopeId}	success	201
5	Envelope:create	POST	/restapi/v2.1/accounts/{accountId}/envelopes	success	201
6	Envelope:update	PUT	/restapi/v2.1/accounts/{accountId}/envelopes/{envelopeId}	success	201

Execution Time: 30.309276 seconds

Result of **Make API Calls For Go-Live** method displays a list of executed API calls and their statuses. If all of API calls were done successfully, you can submit your DocuSign app for review:

1. Login to Demo DocuSign website.

DocuSign

Log In

Email *

Enter email

NEXT

No account? Sign up for free

2. Open Settings.

DocuSign eSignature

Home

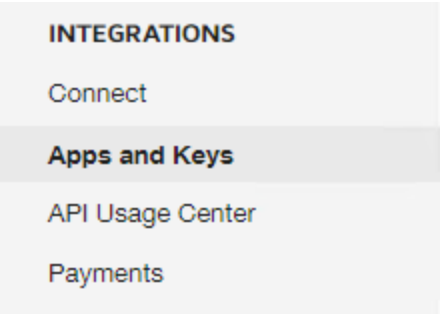
Manage

Templates

Reports

Settings

3. Open App and Keys.

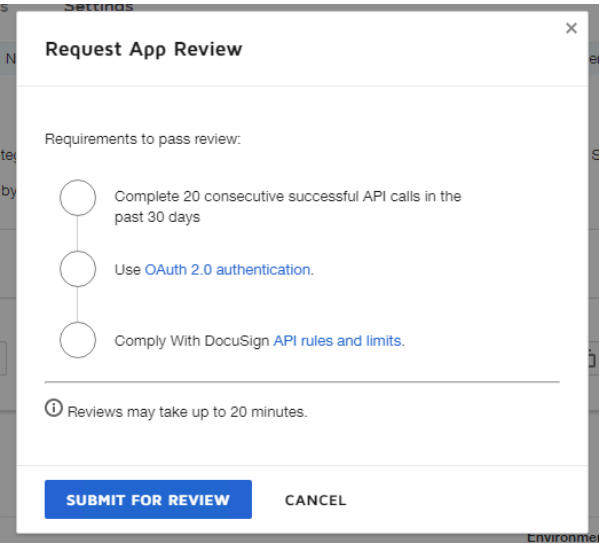


- 4. Find your App.
- 5. Click Submit for review.

Apps and Integration Keys ADD APP AND INTEGRATION KEY

App Name	Integration Key	Environment	Go Live Status	
K2		Development	Submit for review	ACTIONS ▾

- 6. Click Submit for Review.



- 7. Wait until review is done.

Licensing DocuSignAPI SmartObjects

Bytezoom DocuSignAPI Service Broker Trial includes a free 30 days trial license. To continue using DocuSignAPI beyond the initial 30 days, you need to purchase a permanent license. You can purchase a permanent license at:

<https://www.bytezoom.com/product/docusignapi-service-broker/>

After purchasing a license:

1. Run LicenseInfo Smartobject.GetInfo in SmartObject Service tester.

Execute SmartObject: 'LicensingInfo' Method: 'GetInfo'

File View

Execute View Xml Refresh SmartObject

Information

SmartObject Name: LicensingInfo

Method to Execute: GetInfo Execute

Input Properties

Clear Values Generate Data

List Method Options

Paging

☐ Enable Paging

Page Number: 1

Page Size: 10

Filter

Set

Order By

Set

Results

List Results

1 of 11 Total Records: 11

Parameter	Value
Product Name	Bytezoom.Services.DocuSignAPI
Product Version	1.0.2.5
Vendor	https://www.bytezoom.com
Hardware ID	92A4-CD2D-749F-D998-BE70-9EC5
License Status	Licensed
[AssemblyVersion]	1.0.*.*
Company	Bytezoom
Licensed Hardware ID	92A4-CD2D-749F-D998-BE70-9EC5
Start Date	12/27/2019
Subscription	DocuSignAPI
Subscription ID	4e57c3e5-ac1e0030-170601f0-969...

Execution Time: 1.5797437 seconds

2. Send the Machine Name and Hardware ID by email to info@bytezoom.com.
3. Receive a DocuSignAPI.bzlic license file by email.
4. Copy DocuSignAPI.bzlic file to K2 Service Broker folder and Restart K2 Service.

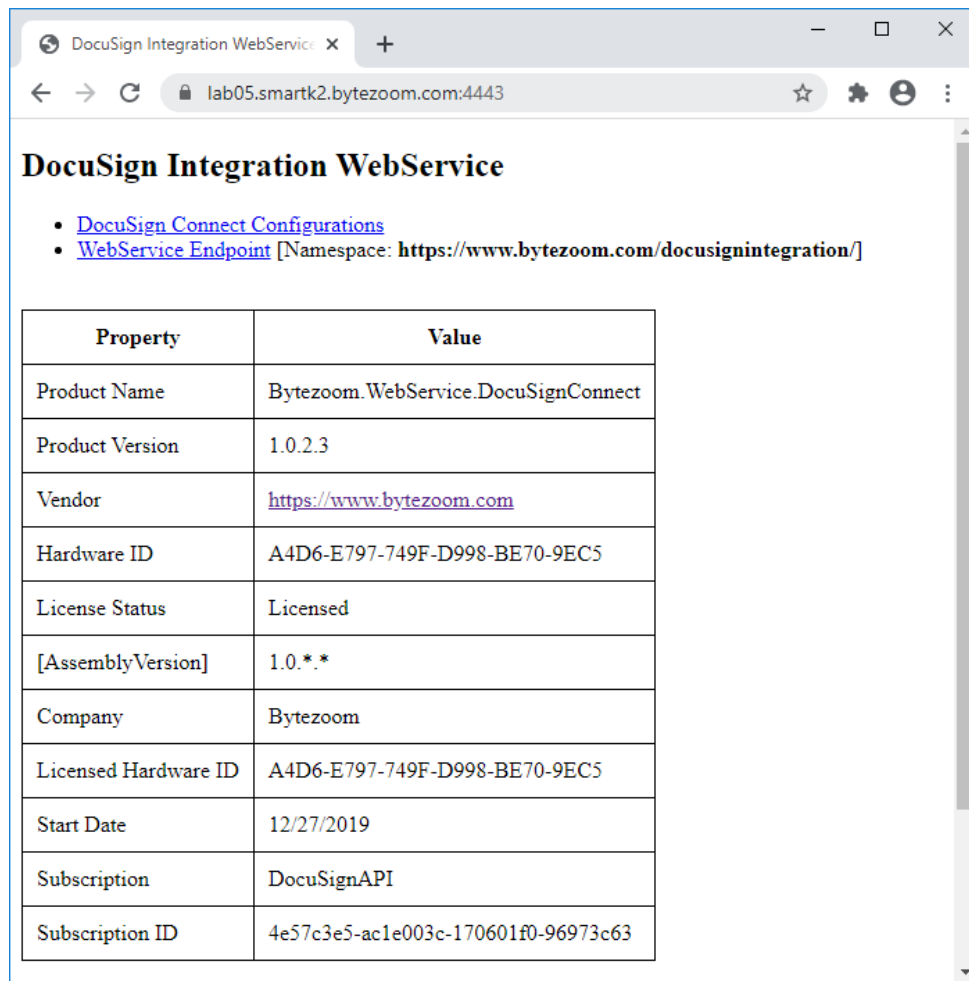
Licensing DocuSignConnect Web Service

Bytezoom DocuSignConnect Web Service Trial includes a free 30 days trial license. To continue using Bytezoom DocuSignConnect Web Service beyond the initial 30 days, you need to purchase a permanent license. You can purchase a permanent license at:

<https://www.bytezoom.com/product/docusignapi-service-broker/>

After purchasing a license:

1. Browse [https://\[Your Host\]:443/](https://[Your Host]:443/).
2. Click Show License Info.
3. Send the Hardware ID by email to info@bytezoom.com.



The screenshot shows a web browser window with the address bar displaying lab05.smartk2.bytezoom.com:4443. The page title is "DocuSign Integration WebService". Below the title, there are two links: "DocuSign Connect Configurations" and "WebService Endpoint [Namespace: https://www.bytezoom.com/docusignintegration/]". A table displays the following license details:

Property	Value
Product Name	Bytezoom.WebService.DocuSignConnect
Product Version	1.0.2.3
Vendor	https://www.bytezoom.com
Hardware ID	A4D6-E797-749F-D998-BE70-9EC5
License Status	Licensed
[AssemblyVersion]	1.0.*.*
Company	Bytezoom
Licensed Hardware ID	A4D6-E797-749F-D998-BE70-9EC5
Start Date	12/27/2019
Subscription	DocuSignAPI
Subscription ID	4e57c3e5-ac1e003c-170601f0-96973c63

4. Receive a DocuSignAPI.bzlic license file by email.
5. Copy DocuSignAPI.bzlic file to C:\inetpub\DocuSignConnect\bin\ folder and reset IIS.

Bytezoom LLC

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