

DocuSign Integration

K2 New Feature

4.6.10 June 2015

Registering a DocuSign Service Instance

With the release of K2 4.6.10, integration with K2 and DocuSign is now possible. In order to integrate K2 and DocuSign, the creation of a DocuSign Service Instance is required. Once complete, SmartObjects are created for the instance and Wizards are added within the K2 SmartForms Designer.

The following are prerequisites for K2-DocuSign integration:

- 1. DocuSign Enterprise Version. K2 integration requires the DocuSign API and a DocuSign Integrator Key. If you are using a different version of DocuSign, please contact DocuSign to determine whether you will be able to use the API and obtain an Integrator Key in your version of DocuSign.
- 2. DocuSign Developer Account. This account must be created prior to integrating K2 with DocuSign, and the Developer Account must be obtained from DocuSign it is not provided by K2. See the following link for more information on obtaining a developer account: <u>https://www.docusign.com/developer-center.</u>

Required Permissions:

The following are permissions required for DocuSign integration:

- Account-Wide Rights
- Sequential Signing (API)

To set these permissions in DocuSign for a single user, log in with a valid user in the DocuSign site, go to **Preferences**

> Account Administration > Users > [Select Your User] > Permissions, and check the permissions stated above under DocuSign API section.

Docu <i>Sign</i>	He	ome	Manage	0	Send	Dashboards	Reports	s					SourceCode Tr	schnology Holdings 984920	🔳 🔹
▼ Member Profile	8 Ne	w	(New/CSV			Show c	losed users	Look for			Find	Clear		Yannick Pousson SourceCode Tecl 984920	nology Holdings
Personal Info	User D	ata 🗛	tivate	Password	ction Close Use	Ilser Name		Email	Account Admir	Status	Permission	In Group(s)	:	Preferences	
My Account Address	4 Open			Reset Pass	word Close	Yannick Pouss	on)	(annick@k2.com	Yes	Active		Administrators		Help	
Sharing	1			- abit				annongaz.com	1.00	, and		 Everyone 		Logout	
Connected Apps															
Names Available								Done							
Manage Identity															
Electronic Notary Public															
Time Zone															
Change Password															
Change Email															
Member Options															
Parmissions															
Address Book															
Custom Tags															
Template Matching															
2 Account Administration															
Address															
Branding															
Billing															
Connect															
Envelope Custom Fields															
Features															
Reminders & Expirations															
3 Users															
Groups															
Manage Signers															
Permission Profiles															
Envelope Publish															
Locked Out Users															
Electronic Record and Signature Disclosure															
Application Marketplace															
API															

					•	
			Account	Permissions	Address	Sharing
ersonal Info for Yan	nick Pousson					
Email	Yannick@k2.com	*				In Group(s)
Name	Yannick Pousson	*				✓ Everyone
Company	SourceCode Technology Holdings					
Job Title						
Permission Profile	Select 🔻					
Language	English US (en)					
Languago	(* = Required Informa	tion)				
				Save	Cancel	
						-
DocuSign API						
API UserNar	me: 1fab09bd-b97a-452b-9	385-6	a6ea82166	eat		
API Account	ld: bf57b68e-d7f7-49bc-b1	43-d5	184c97bdo	:4		
Account-	Wide Rights 🥝					
🗹 Send On	Behalf Of Rights (API) 🕐					
🕑 Sequentia	al Signing (API) 🕐					
Enable A	PI Request Logging 🕐					

To set these permissions in DocuSign for Profiles, log in with a valid user in the DocuSign site, go to **Preferences** > **Account Administration** > **Permission Profiles** > **[Select Your Permission Profile from the drop down]**, and check the Permissions stated above under **DocuSign API** section.

(0 of 50 used.)

Clear API Request Logs

Download API Request Logs

Docu Sign	Home	Manage	Send	Dashboards	Reports	SourceCode Technology Holdings 94620	📃 🔹 🎆
✓ Member Profile Personal Info My Account Address Bhanng Connected Apps Names Available Manage Identity Electronic Nain Public Manage Email Notifications Time Zone Change Password	4 Permission Pro	files: Select	·			Yamid Pouson geuracide frei 98420 1 Preterance Help Logeut	nology Holdings
Member Options Permissions Address Book Custom Tags Template Matching							
2 Account Administration Address Branding Billing Invoices Connect Envelope Custom Fields							
Features Reminders & Expirations Users Groups Manage Signers 3 Permission Profiles Envelope Publish Locked Out Users							
Electronic Record and Signature Disclosure Application Marketplace API							

DocuSign API
Account-Wide Rights 🥙
🖉 Send On Behalf Of Rights (API) 🥝
🗹 Sequential Signing (API) 🥹
Enable API Request Logging 🕘
Download API Request Logs Clear API Request Logs (0 of 50 used.)

Registering Multiples Service Instances:

When registering multiple DocuSign instances with different user credentials, DocuSign Templates will not be available across all service instances (Service Instance A will be unable to see Service Instances B's templates). To rectify this, Template Sharing is required. To enable Template Sharing, log in to the DocuSign site, click on the **Manage tab** > **My Templates** > **Actions** > **Share**.

Docu Sign	Home 1 Monage Send Dushboards Reports			SourceCode Technology	Holdings 964920
Create 🔻			Current Filter: (none) Search	Envelopes	Q 3 Actions •
▼ Envelopes Add Folder S	ared Auto-Match Name	From	Password Protected	Created +	Delete
inbox Co Sent	Employee Contract	Yannick Pousso	n	4/15/2015 12:41:14 AM PT	New Envelope New Template
Dratt					Open
Deleted					Download Template(s)
					Upload Template(s)
▼ Search Folders				4	Share
+ Awaiting my Signature					Transfer Selected Ownership
Expiring Soon					Always Try Auto-Matching
Campilated					Remove from Auto-Match List
(g) completed					
Templates Add Folder					
2 My Templates (1)					
Ch Shared Templates					
All Account Templates					
PowerForms					

Then the Template Sharing window will open, select the appropriate User(s)/Group(s) to share templates, then click **Save**.

1	Femplate Sharing	
	Groups Members	
	Select All	Search Members
1	☑ Yannick Pousson (Yannick@k2.com) [Admin]	
		-
2		
	Save	

Registering a DocuSign Instance in SmartForms

The following steps below discuss how to register an instance of DocuSign in K2 Designer.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

Step 1:

Open the K2 Designer site and expand the **All Items** node in the Context Browser. Expand the **System**, then **Management**, then **Features**, then **Forms** Nodes and Run the **Features.Main** Form.



If the **System** node is not available, ensure the **System Objects** check box is checked. This can be done by clicking the **Show:(All)** link.



Step 2:

Once the Form is has opened, click on the DocuSign option and click the **New Instance** button.

E Features.Main		
Features 2 Provide the second secon		
Name	Description	Instances
1 DocuSign	A service for integrating with DocuSign.	0
Feature Instances		
Name	Description	
No items to display.		

Next the following window will appear:

Specify the following (details for the integration.	
Name:	DocuSign	
Description:	A service for integrating with DocuSign	
REST API URL:	DocuSign REST API URL {https://{server}}	
Integrator Key:	Type your DocuSign {Integrator Key}	
Account ID:	Type your DocuSign {Account ID}	
User Name:	Type your DocuSign {User Name}	
Password:		
How to enable Docu	ISign for K2 Integration:	ОК
How to enable Docu Before using the Do 1. Sign up for th	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do be developer account at <u>https://www.docusign.com/developer-c</u>	OK cuSign: center
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>htt</u> section of the de	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do he developer account at <u>https://www.docusiqn.com/developer-c</u> t <u>ps://demo.docusiqn.net/Member/MemberViewAPI.aspx</u> eveloper website.	OK cuSign: center
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>htt</u> section of the de 3. Enter a key d	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do ne developer account at <u>https://www.docusign.com/developer-co</u> t <u>ps://demo.docusign.net/Member/MemberViewAPI.aspx</u> eveloper website. escription and click <i>Get Demo Integrator Key.</i>	OK cuSign: center
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>htt</u> section of the de 3. Enter a key d From the API and I	uSign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do ne developer account at <u>https://www.docusign.com/developer-c</u> t <u>ps://demo.docusign.net/Member/MemberViewAPI.aspx</u> eveloper website. escription and click <i>Get Demo Integrator Key.</i> integrator Key Information page:	OK cuSign: tenter
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>ht</u> section of the de 3. Enter a key d From the API and I 1. Enter your Doc	uSign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do ne developer account at <u>https://www.docusign.com/developer-c</u> tps://demo.docusign.net/Member/MemberViewAPI.aspx eveloper website. escription and click <i>Get Demo Integrator Key.</i> integrator Key Information page: pocuSign Developer REST API URL value on this form using the followin	OK cuSign: center g format:
How to enable Docu Before using the Docu 1. Sign up for th 2. Go to the <u>htt</u> section of the de 3. Enter a key d From the API and I 1. Enter your Doc https://{sec	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do ne developer account at <u>https://www.docusign.com/developer-co</u> tps://demo.docusign.net/Member/MemberViewAPI.aspx eveloper website. escription and click <i>Get Demo Integrator Key.</i> integrator Key Information page: ocuSign Developer REST API URL value on this form using the followin rver}	OK cuSign: center
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>htt</u> section of the de 3. Enter a key d From the API and I 1. Enter your Do https://{set For example,	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do the developer account at <u>https://www.docusign.com/developer-o</u> tps://demo.docusign.net/Member/MemberViewAPI.aspx eveloper website. escription and click <i>Get Demo Integrator Key.</i> integrator Key Information page: ocuSign Developer REST API URL value on this form using the followin rver} the DocuSign Developer Sandbox REST API URL is:	OK cuSign: center
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>htt</u> section of the de 3. Enter a key d From the API and I 1. Enter your Do <u>https://{sec</u> For example, <u>https://den</u>	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do ne developer account at <u>https://www.docusiqn.com/developer-c</u> tps://demo.docusign.net/Member/MemberViewAPI.aspx eveloper website. escription and click <i>Get Demo Integrator Key.</i> integrator Key Information page: ocuSign Developer REST API URL value on this form using the followin rver} the DocuSign Developer Sandbox REST API URL is: no.docusign.net	OK cuSign: center g format:
How to enable Docu Before using the Do 1. Sign up for th 2. Go to the <u>htt</u> section of the de 3. Enter a key d From the API and I 1. Enter your Do https://{sec For example, https://den 2. Copy an activ	ISign for K2 Integration: ocuSign integration you will need to create a Developer Account in Do be developer account at <u>https://www.docusign.com/developer-c</u> tps://demo.docusign.net/Member/MemberViewAPI.aspx eveloper website. escription and click <i>Get Demo Integrator Key.</i> Integrator Key Information page: bocuSign Developer REST API URL value on this form using the followin rver} the DocuSign Developer Sandbox REST API URL is: no.docusign.net re Integrator Key value and paste it as the Integrator Key value on thi Account ID uplue and paste it as the Integrator Key value on thi	OK cuSign: center g format: s form.

Next follow the **How to enable DocuSign for K2 Integration** steps discussed on the Form.

Once all the values have been entered click **OK**.

Next the DocuSign **Feature Instance** will be created as shown below:



Click **Done**.

Registering a DocuSign Service Instance in K2 Workspace

The following steps below discuss how to register an instance of DocuSign in K2 Workspace.

Step 1:

Firstly, a DocuSign Developer Account is required, if one is not already set up, use the link below:

https://www.docusign.com/developer-center

Step 2:

Once the account is created, log in to the DocuSign website via the **LOG IN TO SANDBOX** button. Click the Profile options on the top right and select the **Preferences** as shown below:

SourceCode Te	chnology Holdings 984920
	Yannick Pousson SourceCode Technology Holdings 984920
	Preferences
	Help
	Log out

Step 3:

Next, navigate to the API page, by click the **API** link under the **Account Administration** drop down as shown below:

¥	Account Administration
	Address
	Branding
	Billing
	Invoices
	Connect
	Envelope Custom Fields
	Features
	Reminders & Expirations
	Users
	Groups
	Manage Signers
	Permission Profiles
	Envelope Publish
	Locked Out Users
	Electronic Record and Signature Disclosure
	Application Marketplace
	API

Step 4:

Next click the **Get Demo Integrator Key** button to generate a new API Integrator Key.

The values to note here are the **API UserName**, **API Account ID**, and **Active Integrator Key**. These values will used for setting up the DocuSign Service Instance in K2 Workspace.

Step 5:

Next, log in to K2 Workspace and go to the K2 Management Console. Go to the DocuSign Service as shown below:

A DocuSign Service Instance can also be registered in the K2 Designer Site via the Management page inder the Features node.

Click the **ADD** button.

When creating a new DocuSign Service Instance use **Static** Authentication Mode. Use the following value mappings:

- 1. DocuSign URL Address for DocuSign's API. By Default this is set to the demo URL. Production DocuSign instances will most likely require a different URL.
- 2. Account ID DocuSign API Account ID
- 3. Integrator Key DocuSign Active Integrator Key
- 4. Polling Interval

The Polling Interval is set to 15 minutes by default. This can be changed but take note, any value that is set below 15 minutes will return cached values instead of real-time values. To return real-time values it is recommended that the value be set higher that 15 minutes within the Polling Interval.

- 5. Authentication Mode Static
- 6. User Name DocuSign API UserName (either the GUID or user email will suffice)
- 7. Password DocuSign API Password (User's DocuSign account password)

Service Instance Configu	ration 🛛
DocuSign URL:	https://demo.docusign.net
Account Id:	XXXXXXXX-XXXX-XXXX-XXXXXXXXXXXXXXXXXXX
Integrator Key:	XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXXX
Polling Interval:	15
Authentication Mode: Authentication Resource:	Static v
Security Provider:	
User Name:	Bob@denallix.com
Password:	······
Extra:	
0	Next Close

Click Next.

On the next page assign any values as required.

Service Instance Configur	ation	Ø
System Name:	DocuSign	×
Display Name:	DocuSign	
Description:	Services for integrating with DocuSign's digital signature capture and delivery capabilities.	^
		~
0	Back Save	Close

Click Save.

The DocuSign Service Instance has been created.

Important Considerations

- Once the DocuSign Service Instance has been registered and ready to be used in a solution, DocuSign will
 require certification. This certification allows for the Sandbox Integrator Key to be used against DocuSign's Production Service Address. See the following link which discusses in more detail:
 https://www.docusign.com/developer-center/go-live/certification
- If the Service Instance is registered using tooling other than the Features page (Features.Main) such as SmartObject Tester Tool, Workspace or Package and Deployment, the Docusign wizard category will not be added in the web designers in SmartForms and K2 for SharePoint. To enable the wizards that are exposed by feature activation, navigate to the features form (Features.Main) and update the Docusign instance.

DocuSign Wizards

The DocuSign wizards allow for the management of DocuSign envelopes and their collective artifacts for a given DocuSign Instance. Workflows containing these wizards can be built on a development environment, packaged and then deployed to the organizations production environment.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

Important Considerations

The following information is important to know before using the DocuSign wizards in a workflow:

- 1. The Enterprise version of DocuSign is required to integrate with K2.
- 2. An instance of the DocuSign Service needs to be registered before you will be able to make use of the wizards. See the Other Service Types topic for more information on registering the DocuSign Service Instance.
- 3. The Envelope ID is a common identifier that most of these wizards require in order to perform their respective functions. The Envelope ID is returned after the creation of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizards where Envelope ID is required.
- 4. See the <u>How to create a workflow using DocuSign and K2</u> topic if you want to run through a quick scenario on how to use the DocuSign wizards in a workflow.

DocuSign Wizards

The following DocuSign wizards are available:



Icon	Wizard Name	Function
1	Add Document	Adds a document to an envelope
2	Add Recipient	Adds a recipient or template role to an envelope
3	Create Envelope	Creates a new envelope
4	Create Tab	Creates a tab in the document to be signed in an envelope
5	Delete Envelope	Deletes an envelope
6	Move Envelope to Folder	Moves an envelope to a specific folder in DocuSign
7	Remove Document	Removes a document from an envelope
8	Remove Recipient	Removes a recipient from an envelope
9	Resend Envelope	Resend an envelope to recipients
10	Send Envelope	Sends an envelope to recipients
11	Void Envelope	Voids an envelope in DocuSign

To launch a wizard, drag it from the ribbon in the DocuSign Category onto a workflow step on the design canvas.

Add Document

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Add Document** wizard allows for adding documents to a draft envelope to be signed. This draft envelope can be sent for signature using the <u>Send Envelope</u> wizard.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

Making use of an Employee Onboarding type scenario, successful candidates need to sign a contract with the new employer. This wizard is used to add the contract that will need to be signed by the new employee.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the values for the document to be added to an envelope.

Add Docum	ent - Specify Values							
	Specify the values to add a	Specify the values to add a new document; Document ID and Order are optional.						
	DocuSign Service:	DocuSign						
	Envelope ID:	A EnvID						
	File:	The Document						
	Document ID:	Document ID						
	Order:	Document Order						
		Back Next Finish Cancel						

Step 2. Return Properties

Specify mappings for the return properties of the document added to an envelope.

Add Docum	ent - Return	Properties				
	Specify map	pings for the return proper	ties			
3 +	Search:	Field Name Search		Show:	All Fields	Required Fields
	Update 🕶	Name 🔻	Value			
	v	Status	🔒 Env	/Status		
]
				 Bac 	k Next	Finish Cancel

DocuSign Service

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Document ID

An optional field allowing you to specify the ID for the document being added to an envelope using a non negative whole number. Additionally the value must be sequential in nature. If a value of 1 is specified and another document

with the same ID exist in the same envelope, the document will be overwritten. If this value is not specified, the wizard will specify a value sequentially at runtime.

Order

This field can be used in the case where multiple documents are added to an envelope. Use this field to specify the order in which the document needs to be added using a numerical value. If this value is not specified, the wizard will specify a value sequentially at runtime.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

File

Use this required field to specify the location of the document you want to add to the envelope. This value can be specified using an <u>Item Reference</u>, <u>data field</u> or <u>SmartObject</u> created for a document stored in SharePoint.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

Add Recipient

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Add Recipient** wizard allows you to add recipients to a draft envelope. Recipients will receive the envelope and may be requested to perform actions on the document(s) based on the type of recipient. For example, a recipient of type Signer will be able to electronically sign documents.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

Making use of an Employee Onboarding type scenario, the employer needs to request the new employee to sign an employment agreement. This wizard is used to add recipients to the envelope for the contract to be signed.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the values and options for the new recipient.

dd Recipi	ent - Specify Values		
	Specify the values and op	ptions for the new recipient.	
3	DocuSign Instance:	DocuSign	•
	Envelope ID:	h EnvID	
	Add recipient based	on a template role (template-based Envelopes only)	
	Template:	K2 Template 01	*
	Role Name:	{Please select}	*
		Rack Next	Finish Cane
		Back Next	Calic

Caution

The **Add recipient based on a template role** option must only be used with envelopes that are template based. Adding a recipient using a template role only works when the envelope ID provided uses the same template. When this option is not used correctly the following error occurs at runtime: "Service: DocuSign Service Guid: 7b6722f4-3c18-49af-a612-8e6080af4453 Severity: Error. Error Message: The specified recipient could not be found. Recipient ID : '1' InnerException Message:"

Step 2a. Specify Required Values

Specify the required values and options for the new recipient. This step will only be available if the **Add recipient based on a template role** was not selected.

Add Recipie	Add Recipient - Specify Required Values						
	Specify the values and optio	ptions for the new recipient					
S	Routing Order:	1					
	Recipient Type:	Signer	Signer				
		F					
	Name:	Bob					
	Email Address:	bob@denallix.com					
-		Use SMS Authentication:	SMS Number				
			Back Next Finish	Cancel			

Step 2b. Specify Required Values

This page of the wizard will only display when the **Add recipient based on a template role** option was selected on the previous page of the wizard. Specify the required values and options for the new recipient.

Add Recipie	Add Recipient - Specify Required Values						
	Specify the values and options for the new recipient						
S	Name: Email Address:	Bob bob@denallix.com					
		Use SMS Authentication:	SMS Number				
			Back Next Finish	Cancel			

Step 3. Specify Optional Values

Specify the optional values for the new recipient.

Add Recipie	Add Recipient - Specify Optional Values						
	Specify option	pecify optional values for the new recipient					
	Search:	Field Name Search	Field Name Search Show: All Fields Required Fields				
	Update 👻	Name 👻	Value				
		Access Code	Type or drop field here				
		Add Access Code To Email	🗑 🖲 Yes 🔘 No				
		Email Body	Type or drop field here				
		Email Subject	Type or drop field here				
		Email Supported Language	Type or drop field here				
		Embedded Recipient Star	Type or drop field here				
		Inherit Email Notification	🗑 🖲 Yes 🔘 No				
		Note	Type or drop field here				
			Back Next Finish Cancel				

Step 4. Return Properties

Specify mappings for the return properties.

Add Recipie	ent - Return	Properties			
Specify mappings for the return properties					
	Search:	Field Name Search		Show: 🧕 All Fields	Required Fields
	Update 👻	Name 👻	Value		
	~	ID	hec 👔	ID	
		Status	h Env	Status	
				Back Next	Finish Cancel

DocuSign Instance

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Optional Values

Specify any of the optional values. Select the check box in front of a field to enable the field, type a value or drag a <u>data</u> <u>field</u> or <u>SmartObject</u> property from the <u>Context Browser</u>.

Add recipient based on a template role

Select this option if you have created your envelope based on a reusable template that contains predefined roles. Template roles contain some of the recipient information such as *Recipient Type* and *Order*.

Caution

This option must only be used with envelopes that are template based. Adding a recipient using a template role only works when the envelope ID provided uses the same template. When this option is not used correctly the following error occurs at runtime: "Service: DocuSign Service Guid: 7b6722f4-3c18-49af-a612-8e6080af4453 Severity: Error. Error Message: The specified recipient could not be found. Recipient ID : '1' InnerException Message:"

- Template: Select the template from the drop-down list.
- Role Name: Select the role name from the drop-down list.

Recipient Details

Name: Enter the name of the recipient being added.

Email Address: Enter the e-mail address for the recipient being added.

Use SMS Authentication: Select this option if you want to make use of sms authentication and enter the number to be used.

Routing Order and Recipient Type

- Routing Order: Specify the order in which this recipient will receive the document. Use a numerical value.
- Recipient Type: Specify the recipient type such as signer, using the drop-down list provided.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

Additional Options

The Additional Options are all of the options available in DocuSign. One or multiple options can be selected if needed. This is not required when creating a new envelope.

Create Envelope

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Create Envelope** wizard allows for the creation of a new draft envelope that can be assembled over the course of time until it is ready for sending. This wizard is typically the starting point when building a workflow containing DocuSign wizards.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

Making use of an Employee Onboarding type scenario, successful candidates need to sign a contract with the new employer. This wizard is used to create the new envelope, in which the contract requiring the signature, will be included. The contract will be added to the envelope in a later step in the workflow using the <u>Add Document</u> wizard.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the values for the new envelope to be created.

Create Enve	elope - Specify Values Specify the values and optic	ons to create a new envelope
<u>s</u>	DocuSign Service:	DocuSignAS 💌
	Standard Envelope	
	Use Template	{Please select}
	Email Subject: Email Body:	Customize notification Sign attached document for approval Dear Name Please sign the attached document as final approval for the employee contract.
		Back Next Finish Cancel

Step 2. Specify Brand and Other Options

Select whether to use a specific DocuSign Brand as well as any of the additional options available. This step will only be available when the **Standard Envelope** option was selected in **Step 1**.

Create Enve	elope - Specify Brand A	nd Other Options	
	Specify options for the e	envelope	
<u>s</u>	🕑 Use Brand	{Please select}	-
	Additional Options:	✓ Allow Reassign	Allow Markup
		Allow Recipient Recursion	Asynchronous
		Authoritative Copy	Auto Navigation
		Enable Wet Sign	Enforce Signer Visibility
		Envelope ID Stamping	Message Locked
		ОВ	ack Next Finish Cancel

Step 3. Return Properties

Specify mappings for the return properties. When these properties are mapped to data fields for example, these fields can be used in later steps in the workflow.

Specify map	pings for the return propertie	es				
Search:	Field Name Search		Show:	All Fields	Required F	ields
Update 👻	Name 🔻	Value				
~	ID	h Env	1D			
V	Status	h Env	Status			
			Bad	Next	Finish	Cancel
	Search: Update +	Search: Field Name Search Update Name ID Status	Search: Field Name Search Update Name ID Status Status	Search: Field Name Search Show: Update Name Value ID Status Status Bad	Search: Field Name Search Show: All Fields Update Value ID Status Status Back Next	Search: Field Name Search Show: All Fields Required F Update Name Value ID Status Status Back Next Finish

DocuSign Service

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

E-mail Information

The following options are available when configuring the envelope details:

- Customize notification: Select this option if you want to add your own detail for the e-mail subject and body. This option can only be selected when you are creating an envelope based on a template. For the Standard Envelope option this will be selected by default. Select the option to customize the notification details that was created as part of the template in DocuSign. Deselect the option if you want to make use of the details from the template in DocuSign.
- Email Subject: This field can be used only when using the Standard Envelope option or when selecting to customize the notification when the Use Template option was selected. Type the e-mail subject and/or drag fields from the Context Browser.
- Email Body: This field can be used only when using the Standard Envelope option or when selecting to customize the notification when the Use Template option was selected. Type the e-mail body and/or drag fields from the Context Browser.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

Standard Envelope

Select this option if you want to create an envelope with specific values and properties, instead of selecting a template that contains a set of predefined properties.

Use Brand

Select this option if you want to make use of a specific brand that was created in DocuSign. Select the relevant brand from the drop-down list containing all available brands.

Use Template

Select this option if you want to create a new envelope based on a reusable template. This option can be useful when sending multiple envelopes and documents of the same type with subtle differences for each DocuSign envelope instance.

Absolute

Use the absolute positioning values to create a tab on a specific page in the document. Select the radio button, enter the page number and set the X and Y positions in pixels.

Anchored

Use this option to specify an anchored position for the tab in the document.

- Anchor String: This specifies the string searched for to place the tab in the document.
- **Anchor X Offset:** Specifies the tab location as the X offset position, using the anchor units from the anchor string.
- Anchor Y Offset: Specifies the tab location as the Y offset position, using the anchor units from the anchor string.
- Anchor Units: This specifies units of the X and Y offset. Units could be pixels, mms, cms or inches.
- Ignore anchor if not present: Enable this check box to ignore the anchor values if it can't be found.

Create Tab

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Create Tab** wizard allows for the creation of a user interactive DocuSign tab inside the document.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

Creating a tab in the document indicates to the recipient where the document must be signed.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify values for the tab to be created.

Create Tab	Specify Values		
	Specify the values and op	tions to create a new tab	
	DocuSign Instance: Envelope ID: Recipient ID: Document ID: Label:	DocuSign EnVID RecID DocLD Label	
	Tab Type:	Sign Here	·
		Back	Next Finish Cancel

Step 2. Specify Tab Positioning

Specify tab positioning values.

	Specify tab positioning values
5	Anchored
	Anchor String: Signature
	Anchor X Offset: Anchor X Offset Anchor Y Offset: Anchor Y Offset
	Anchor Units: Anchor Units
	Ignore anchor if not present
	Absolute
	Page Number: Page X Position: X Y Position: Y

Step 3. Specify Optional Values

Specify optional values for the new tab.

Create Tab -	Specify Op	tional Values	
	Specify optic	onal values for the new Tab	
5	Search:	Field Name Search	Show: 🥥 All Fields 💿 Required Fields
_	Update 👻	Name 🔹	Value
		Conditional Parent Label	Type or drop field here
		Conditional Parent Value	Type or drop field here
	v	Name	Signature Tab 01
		Optional	🗑 🖲 Yes 🔘 No
		Scale Value	Type or drop field here
		Template Locked	🗑 🖲 Yes 🔘 No
		Template Required	🗑 🖲 Yes 🔘 No
			Back Next Finish Cancel

Step 4. Return Properties

Specify mappings for the return properties.

Create Tab	- Return Pro	perties		_	_			
	Specify mappings for the return properties							
	Search:	Field Name Search		Show:	All Fields	Required Fields	٦	
-	Update 🕶	Name 👻	Value					
		ID	👔 Tab	ID				
				Bac	k Next	Finish Can	icel	

Optional Values

Specify any of the optional values. Select the check box in front of a field to enable the field, type a value or drag a <u>data</u> <u>field</u> or <u>SmartObject</u> property from the <u>Context Browser</u>.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to **Show All Fields** or show only **Required Fields** when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

Tab Values

Specify the following values for the tab to be created:

- **DocuSign Instance:** This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.
- **Envelope ID:** This will be the ID of the envelope containing the document you want to add the tab to. A <u>data</u> <u>field</u> can be used to retrieve this ID.
- **Recipient ID:** The ID of the recipient that will be required to sign the document. A <u>data field</u> can be used to set the value for this field.
- **Document ID:** The ID of the document the tab will be added to. A <u>data field</u> can be used to set the value for this field.
- Label: This will be the name of the tab added to the document.
- Tab Type: Select the type of tab that will be added to the document from the drop-down list provided.

Delete Envelope

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Delete Envelope** wizard allows for the deletion of an envelope created in a DocuSign instance.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

After an envelope completed it's cycle in DocuSign the decision can be made to either keep the envelope or delete the envelope. If there is no need for the envelope to be used or sent again the envelope can be deleted.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the envelope to delete

Delete Enve	lope - Specify Values		_	_	_	_	
	Specify the envelope to de	lete					
	DocuSign Service:	DocuSign				•	
	Envelope ID:	http://www.com/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/a					
			0	Back	Next	Finish	Cancel

Step 2. Return Properties

Specify mappings for the return properties

Delete Enve	lope - Retur	n Properties			
	Specify map	pings for the return propert	ies		
	Search:	Field Name Search		Show: 🧕 All Fie	elds 🔘 Required Fields
	Update 🕶	Name 🔹	Value		
		Status	👔 Env	/Status	
				Back N	ext Finish Cancel

DocuSign Service

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

DocuSign Service

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Folder

The available folders will be listed in this drop-down list. This will include the default DocuSign folders as well as any custom folders created by the user in DocuSign. Select the folder you want to move the envelope to from the drop-down list. The custom folders listed in the drop-down are based on the username that was used when the <u>service instance</u> was registered. This means that if the service instance was registered for DocuSign User A, only the templates created by User A in DocuSign will be listed in the drop-down. If the user creating the workflow is a different user and this user wants to use his or her own templates, a service instance needs to be registered for this user as well.

Move Envelope to Folder

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Move Envelope to Folder** wizard allows you to move an envelope created to a specific folder in DocuSign.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

Similar envelopes can be stored in a folder created in DocuSign. One scenario would be to move an envelope to a folder after the envelope was sent and the document was signed. Let's say all employee contracts signed can be moved to a folder in DocuSign named **Employee Contracts**. This folder will for example be created in the default **Sent** folder in DocuSign.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the envelope to move and the destination folder

Move Envel	lope To Folder - Specify \	Values
	nove and the destination folder	
	DocuSign Instance:	DocuSign
	Envelope ID:	h EnvID
	Folder:	Sent Items 🔻
		Back Next Finish Cancel

Step 2. Return Properties

Specify the envelope to move and the destination folder

Move Envel	ope To Folde	er - Return Properties		_	_		
	Specify map	pings for the return pro	perties				
	Search:	Field Name Search		Show:	All Fields	Required Field	is
	Update +	Name 👻	Value				
		Status	👔 Env	Status			
				1 Back	Next	Finish	ancel

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

DocuSign Service

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Document ID

Type the value of the ID for the document being removed from an envelope using a non negative whole number, or use a <u>data field</u> created in the workflow with the <u>Add Document</u> wizard return property mappings.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within

the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Remove Document

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The **Remove Document** wizard allows you to remove a document from an envelope in a DocuSign instance.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

After a document in an envelope has been signed, you might want to reuse the envelope but with a different document. In such a scenario you can use this wizard to remove the document. Use the <u>Add Document</u> wizard in a later step in the workflow to add a new document to the envelope.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the document to remove.

Remove Do	ocument - Specify Values			_	
	Specify the document to	remove			
SX	DocuSign Service:	DocuSign		•	
	ID:	📰 ID			
	Envelope ID:	http://www.com/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/a			
	L				
			0	ОК	Cancel

DocuSign Instance

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Recipient ID

The recipient ID is used to specify the recipient that will be removed from the envelope. Type a value or use the <u>data</u> field that was created for the return property in the <u>Add Recipient</u> wizard.

Remove Recipient

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

The **Remove Recipient** wizard allows you to remove a recipient from an envelope in a DocuSign instance.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

In the scenario of resending an envelope you might want to send the envelope to a different recipient. For this you can use the Remove Recipient wizard to first remove the current recipients from the envelope before adding the new recipient. Use the Add Recipient wizard to add new recipients.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the recipient to remove.

Remove Re	cipient - Specify Values				
	Specify the recipient to ren	nove			_
	DocuSign Service:	DocuSign		•	
	Recipient ID:	h RecID			
	Envelope ID:	h EnvID			1
	L				1
-					
	L		Back	Next Finish	Cancel

Step 2. Return Properties

Specify mappings for the return properties.

Remove Re	cipient - Ret	um Properties					
	Specify map	pings for the return prope	erties				
SX	Search:	Field Name Search		Show: 🧕 Al	Fields	Required	Fields
	Update 👻	Name 🔹	Value				
		Status	h Env	Status			
				1 Back	Next	Finish	Cancel

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

DocuSign Instance

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Recipient ID

The recipient ID is used to specify the recipient that the envelope will be send to. Type a value or use the <u>data field</u> that was created for the return property in the <u>Add Recipient</u> wizard.

Resend Envelope

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

The **Resend Envelope** wizard allows you to resend an envelope to a recipient in a DocuSign instance.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

In an Employee Onboarding scenario, it might be necessary to first send the employee contract to a manager for approval. If changes are required to the contract, the envelope will have to be resend.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the envelope to resend.

Resend Env	elope - Specify Values	_					
	Specify the envelope to resend						
	DocuSign Service:	DocuSign				•	
	Recipient ID:	h RecID					
	Envelope ID:	h EnvID					
	*		0	Back	Next	Finish	Cancel

Step 2. Return Properties

Specify the envelope to resend.

Resend Env	elope - Retu	Irn Properties								
	Specify map	Specify mappings for the return properties								
5	Search:	Field Name Search		Show: 🧕 All Fields	Required Fields					
	Update 🕶	Name 🔹	Value							
		Status	Drop da	ta field here						
				Back Next	Finish Cancel					

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to **Show All Fields** or show only **Required Fields** when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the

return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

DocuSign Instance

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Send Envelope

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The Send Envelope wizard allows for sending an envelope to the specified recipients to sign the document.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

Sending an envelope ensures that the specified recipients receives the document attached to the envelope. The document can then be opened and signed by the recipients.

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the envelope to send.

Send Envelo	pe - Specify Values		-				
	Specify the envelope to send						
5	DocuSign Service:	DocuSign				•	
	Envelope ID:	http://www.com/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/action/a					
			١	Back	Next	Finish	Cancel

Step 2. Return Properties

Specify mappings for the return properties.

Send Envel	ope - Return	Properties		_	_	_			
	Specify map	Specify mappings for the return properties							
6	Search:	Field Name Search		Show:	All Fields	Required Fi	elds		
-	Update 🕶	Name 👻	Value						
		Status	👔 Env	/Status					
				 Bac 	k Next	Finish	Cancel		

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

DocuSign Instance

This will be the Service Instance that you registered for integrating with K2. Multiple Service Instances can be registered in a scenario where a single DocuSign user wants to register his own service instance. In the case where multiple Service Instances exist and users want to make use of templates in another Service Instance, ensure that the templates created in DocuSign are shared.

Envelope ID

The Envelope ID is a common identifier that is required in order to perform the functions for this wizard at runtime. The Envelope ID is returned after the <u>creation</u> of a new envelope or can be retrieved by executing the List method of the envelope service object. It is recommended that you store the Envelope ID in a <u>data field</u> and use that data field within the wizard to retrieve the correct Envelope ID. This data field can be used in any of the DocuSign wizards, where the Envelope ID is required, in the same workflow.

Search for Fields

Use the Search functionality to find fields to set values:

- Select an option to Show All Fields or show only Required Fields when searching fields.
- Type the name of the field to search for.
- Results are returned as you type.

Specify Mappings

The return properties listed here can be mapped to a <u>data field</u>. Mapping these return properties allows you to make use of these values in other wizards in this workflow. Create a field and dragged it from the <u>Context Browser</u> to the return property. The value of this property is stored in the <u>data field</u> at runtime. This <u>data field</u> can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the <u>data field</u> from the <u>Context</u> <u>Browser</u> to the relevant field in the wizard.

Void Envelope

This wizard is found on the **DocuSign** Workflow Steps category.

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

What does it do?

The Void Envelope wizard allows you to void an envelope that is no longer needed in a DocuSign instance.

Note

The **DocuSign Service Instance** needs to be registered before using this wizard.

The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

How is it used?

This wizard will be used in the following type of scenarios (not limited to the scenarios mentioned below):

- When an envelope was sent to the wrong recipient(s)
- When a recipient indicates that the document is incorrect such as the amount in a contract or a specific paragraph
- When a document contains invalid information in general

Drag the wizard from the DocuSign category to a workflow step on the design canvas.



Note

In the following images, click a field or control to get more information, such as what the field or control is used for and how to configure the field or use the control.

Wizards can be edited. For more information see Edit Wizards.

Step 1. Specify Values

Specify the envelope to void.

Void Envelo	pe - Specify Values		
	Specify the envelope to voi	id	_
	DocuSign Service:	DocuSign	
	Envelope ID:	http://www.com/com/com/com/com/com/com/com/com/com/	
	Void Reason:	h Void Reason A	
			J
		Back Next Finish	Cancel

Step 2. Return Properties

Specify mappings for the return properties.

Void Envelo	pe - Return	Properties			_			
	Specify map	Specify mappings for the return properties						
50	Search:	Field Name Search		Show: 🥥 All	Fields	Required	Fields	
	Update 🕶	Name 🔹	Value					
		Status	🚹 Env	Status				
				1 Back	Next	Finish	Cancel	

Void Reason

Type a value for the void reason or drag a <u>data field</u> or <u>SmartObject</u> property from the <u>Context Browser</u> to set the void reason.

How To: Create a Workflow with DocuSign Events

DocuSign integration allows you to create a K2 workflow with DocuSign functionality. In this How To guide you will learn how to create an end-to-end solution using DocuSign functionality to automate the signing of a document stored in SharePoint.

Note

This tutorial assumes that you are familiar with DocuSign and K2 for SharePoint.

Before you begin you should have the K2 for SharePoint 4.6.10 app installed on the target SharePoint site and have activated the <u>DocuSign feature</u>. At the end of this How To document you will have a workflow that looks similar to the following and assigns a signing task to user:



Once the workflow is complete and the solution started, a tab will be added to the document. This is determined by an anchor string, which in the case of the example below is the word 'Signature'. The signature tab will be added to 'Signature' anchor during the signing process.

	To whom it may concern,		
	The following document requi	ires signing to approve your Purchase Order.	
	Please sign below.		
SIGN	Signature	4/21/2015 Date	

Note

Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at <u>https://www.docusign.com/</u>. The documentation below assumes you are familiar with DocuSign as well as <u>K2 SmartObjects</u>.

Step 1: Create a Document Library and Add the K2 App

In this step you create a document library with two custom columns. Then you create a K2 app for this library.

- Add two columns to the document library called Customer and Total. Ensure that the Customer column is a Single line of text type and the Total column is a Number type.
- 2. Click the **Library** tab from the ribbon and select the **K2 Application** option.



3. Next click the **Create New Application** option.



4. On the **Create K2 Application** page, ensure the following options are selected.



5. Next ensure the **Workflow** settings are set as shown.

	Create Workflow K2 Workflows can be cr – automatically or manu	eated for the list/library. This includes a number of ways in which the workflow can be starte Jally. These workflows can also leverage any forms that have been created.				
Workflow						
	Workflow Name:	Purchase Order Workflow				
	Specify how the workflc	w gets started				
	When a SmartForm	When a SmartForm is submitted				
	Form:	Edit Document 🔹				
	When the following	events occur				
	Event:	 Workflow is manually started An item was added An item was updated An item was deleted An item was checked in An item was checked out An item check out was discarded An attachment was added to the item 				

6. Click **OK.**

The K2 Application has been created for the Purchase Order Document Library.

Step 2: Design the Workflow

In this step you will design the K2 workflow containing the DocuSign wizards.

If you are not taken automatically to the workflow design, click **Edit** after selecting the **Purchase Order Workflow** and then double-click on the **Start** shape to open the workflow properties.

⊕ New 🕞 🕑 Edit 🛞 Delete 適 Delete	All 🕞 Run 🕑 F	Form Settings 😩 Package 👻		
Name	Data Type	Status		
Purchase Order	SmartObject			
🤨 Display Document	View			
🧧 Edit Document	View			
📑 New Document	View			
亘 Display Document	Form			
亘 Edit Document	Form			
🔲 New Document	Form			
A Purchase Order Workflow	Workflow	Deployed		

1. On the **Workflow Settings - Workflow Name** ensure the screen is set as shown below.

Workflo	w Settings - Work	flow Name		
	Specify the w	orkflow details	Search	
	Name:	Purchase Order Workflow	Context Browser	
t – 19	Description:	Type Here	SmartForms Edit Document Edit Document E Controls E Purchase Order	
	Category:	Purchase Order	Form Parameters	
	Specify the F	orm that will start the workflow	SubsiteRelativeUrl	Ī
	• Form:	Edit Document	Source	
			IsDlg	
	Specify the fo	lio field (used to identify the workflow instances)	List	\cup
	Folio:	Name	FolderCTID	- //.
		Back Next Finish Cancel		

- 2. Click **Next**.
- 3. On the **Workflow Settings Data Fields** page click the **Add** button and add the following Data Fields as string types:
 - **EnvID** (This field will be used to store the Envelope ID)
 - **RecID** (This field will be used to store the Recipient ID)
 - Status (This field will be used to store the Status of workflow, for example 'In Progress')

- **TabID** (This field will be used to store the Tab ID)
- **DocID** (This field will be used to store a unique Document ID)

Workflow Settings - Data Fields						
Define additional workflow data fields						
	🕂 Add 🛛 📝 Edi	t 🛛 🗙 Remove 🚽 Remove All				
	Name	Туре				
_	EnvID	String				
	RecID	String				
	Status	String				
	TabID	String				
	DocID	String				
L I						
		Back Next Finish Cancel				

- 4. Click Next until the Workflow Settings Workflow Rights page, then click Finish.
- 5. Drag a **User Task (SmartForms)** wizard onto the canvas.
- 6. Name the User Task **Purchase Order Review** and add to two actions called **Approve** and **Decline**.

Purchase O	rder Review - User Task						
	Specify the name and instruction for this workflow step						
	Name: Purchase Order Review						
	Instruction: Type Here						
	Type each action that participants can perform on a separate line:						
d	Approve Decline						
	Allow user to action the task without opening the Form						
	✓ Automatically generate Outcomes for the above Actions						
	Back Next Finish Cancel						

- 7. Click **Next**.
- 8. On the **Workflow Step Outcomes** screen ensure the following is setup.

Configure the possible Outco	mes for this workflow step	Search
🗧 🛛 🕂 Add 🖓 Edit 🛛 🗙 Rem	Outcome Templates	
Outcome	Linked To	
Approve	Rew Workflow Step}	Approve - Decline - Review
Decline	New Workflow Step}	Approve - Decline - Rewor
		⊷ Back ⊶ High Low Approval ♀ Retry - Close

9. Click **Next**. On the following page ensure the **Edit Document** Form is selected:

Purchase Or	rder Review - User Form					
	Specify the Form for this User Ta	Search	0			
	Form: Edit Documen	t		Context Browser	1	
	Vise Item Reference:			E Item References	-	
	Item Reference: 📑 Purch	ase Order		⊞ Data Fields		
	Create a new State	Type here		Workflow Context SmartForms		
	Use an existing State	Workflow Task	•	Edit Document		
	Specify the Form parameter values:					h
	Form Parameter	Form Parameter Value				4
	RootWebUrl	Type or drop field here				-
	SubsiteRelativeUrl	Type or drop field here	٦UI			
	Source	Type or drop field here	i II			
	IsDlg	Type or drop field here	11			
	List	Tune or dron field here	i-			
		Action Settings Data Bindin	gs	•	• • //;	
	Back	Next Finish Car	ncel			

- 10. Click **Next** until the **Participants** screen appears.
- 11. Drag the **Originator** into the **Task Group** section.

Purchase 0	order Review - Participa Cearch for participants	nts and assign them to this step	SEARCH CON	TEXT BROWSER
	🕂 Add Task Group	🖌 Edit Task Group 🛛 🗙 Remove Task Group	Search 🚨	People 🔎
	Name	Туре	Name	
	Task Group	(Always send to these participants	- 🙎 Originato	r
	Soriginator	Originator	Manager	-
	Add participants to Fa Notify participants wh This task is routed to us	avorites hen they receive a work item ers: • All at once • One at a time		
		() Back Next Finish	Cancel	

- 12. Click Finish.
- 13. Drag the **Placeholder** event into the **Decline** outcome.

Step 3: Add and Configure the Create Envelope wizard

In this step you will use the Create Envelope wizard to start the DocuSign automation.

1. From the DocuSign category, drag the **Create Envelope** wizard from the ribbon in to the **Approve** outcome.

€ YP									
BROWSE									
File Workflow	Steps SmartObjects	Favorites							
DocuSign - « 4	Add Document Add	d Recipient	Create Tab Delete Envelope	Move Envelope To Folder	Remove Document	Remove Recipient	Resend Envelope	Send Envelope	Void Envelope
St I	art. Purchase Order Revi (Originator) De	prove Drag or Duble Clock to Configure Placeholder							

- 2. Configure the first screen of the Create Envelope wizard as follows. See the screenshot at the end of these substeps for an example of what the first screen of the wizard should look like.
 - a. On the **Create Envelope Specify Values** page, select the appropriate DocuSign Service Instance from the **DocuSign Service** dropdown.

- b. Check the **Customize notification** check box.
- c. In the Email Subject section type Purchase Order.
- d. In the Email Body section type **Approve the Purchase Order for.**
- e. Drag the **Customer** field from the Purchase Order Item Reference in the context browser into the **Email Body** section.

DocuSign Service: Standard Envelope Use Template Email Subject: Email Subject: Email Body: Approve the Purchase Order for Customer	Context Browser	
	 ☐ Item References ☐ Purchase Order ☑ Document ▲ Name ▲ Title ▲ Customer 0.2 Total ☑ ID ▲ Content Type ▲ Content Type Id ☑ Created ☑ A Created By ☑ Modified 	

3. Click **Next** until you get to the **Return Properties** page, drag the **EnvID** and **Status** data fields from the context browser to the **ID** and **Status** fields, and then click **Finish**.

Create Enve	lope - Retu	rn Properties		
	Specify map	ppings for the return prop	perties Search	\sim
	Search:	Field Name Search	Show: All Fields Required Fields	1
	Update 👻	Name 👻	Value I Item References	Â
	~	ID		
	✓	Status	Status	
			TabID	•
			Workflow Context	
			Inline Functions Environment Fields	
			E Favorites	
				• • //
			Back Next Finish Cancel	

Step 4: Add and Configure the Add Document wizard

In this step you will add and configure the Add Document wizard.

- 1. Hover the cursor over the **Create Envelope** wizard and click the **Workflow Step Outcomes** option.
- 2. On the **Workflow Step Outcomes** page add a new outcome called **Add Document**.
- 3. Drag the **Add Document** wizard in to the new step that was added to the workflow.

«YP								
BROWSE								
File Workflow Steps SmartObjects Favorites								
DocuSign Add Document Add Recipient	Create Envelope Create Tab	Delete Envelope	Move Envelope To Folder	Remove Document	Remove Recipient	Resend Envelope	Send Envelope	Void Envelope
Approve, Create Er	Add Document, Double-Click Document, Double-Click Document, Document, Document							
Purchase Order Revi (Onginator) Decline	older							

- 4. Configure the first screen of the Add Document wizard as follows:
 - a. On the **Specify Values** page select the appropriate DocuSign Service Instance form the **DocuSign Service** dropdown.
 - b. Expand the Data Fields node in the context browser and drag the **EnvID** data field in to the **Envelope ID** field.

Add Docum	nent - Specify Values		
	Specify the values to ad	d a new document; Document ID and Order are optional.	Search
	DocuSign Service:	DocuSign	Context Browser
	File:	Drop field here	EnvID
	Order:	Document Order	TabID
			Workflow Context SmartObjects SmartForms Using Supplies
			Environment Fields Favorites
		Back Next Finish Cancel	

c. Expand the Item References node in the context browser and drag the **Document** property in to the File

field.

Specify the values to ad	d a new document; Docume	nt ID and Order are option	onal.	 Search	
DocuSign Service:	DocuSign		•	Context Browser Item References Purchase Order	
File:	Document 🗲			Image: Barrier Bar	
Order:	Document ID Document Order			A Customer 0.2 Total	
				ID	
				A Content Type Id	
					0

d. Drag the **ID** property from the Purchase Order node in context browser to the **Document ID** field. Take note the **ID** property is used to capture a unique ID of the document which is to be signed. This same ID property will used when adding the tab to the document for signing.

Specify the values to ad	d a new document; Document ID and Order are optional.	Search
DocuSign Service:	DocuSign 👻	Context Browser
Envelope ID:	http://www.com/com/com/com/com/com/com/com/com/com/	Purchase Order Curchase Order
File:	Comment Comment	A Name
Document ID:	₩ ID <	A Title
Order:	Document Order	A Customer 0.2 Total
		A Content Type
		A Content Type Id
		Created By
		Modified
		A Modified By

5. Click **Next.** On the **Return Properties** page, drag the **Status** property from the Data Fields node in the context browser to the **Status** field, and click **Finish**.

Add Document - Return Properties		
Specify mappings for the return properties	Search	\mathcal{P}
Search: Field Name Search Show: All Fields Required Fields	Context Browser	* 4
Update - Name - Value		Ô
Status 🚔 Status	EnvID	
	- Gratus	
	TabID	•
	Workflow Context	
	 	
	Inline Functions Environment Fields	
	•	▼) ► //.
Back Next Finish Cancel		

Step 5: Add and Configure the Add Recipient wizard

In this step you will add a DocuSign recipient to the envelope using the Add Recipient wizard.

- 1. Hover the cursor over the Add Document wizard and click the Workflow Step Outcomes option.
- 2. On the **Workflow Step Outcomes** screen add a new step called **Add Recipient**.
- 3. Drag the **Add Recipient** wizard in to the new step that was added to the workflow.



- 4. Configure the first screen of the Add Recipient wizard as follows:
 - a. On the **Specify Values** page, select the appropriate DocuSign Service Instance from the **DocuSign Instance** dropdown.
 - b. Expand the Data Fields node in the context browser and drag the EnvID data field in to the Envelope

ID option.

Specify the values and o	ptions for the new recipient		Search
DocuSign Instance: Envelope ID:	DocuSign	•	Context Browser
Template:	Add recipient based on a template role Employee Contract Colore celect 3	Y	For the second s
			DocID Workflow Context SmartObjects SmartForms Inline Functions
			Environment Fields Favorites

5. Click Next.

- 6. Configure the second screen of the Add Recipient wizard as follows:
 - a. On the **Specify Required Values** screen, insert a **1** into the **Routing Order** field.
 - b. Select the **Signer** option from the **Recipient Type** dropdown.
 - c. Type the name of user who will be used to sign the document in the **Name** field.
 - d. In the **Email Address** field, enter the user's email address who will be signing the document. For the purpose of this lesson, *Bob* and *Bob@denallix.com* will be used as placeholders. Ensure that the actual user's information is inserted here when building this solution in your environment.

Add Recipi	ent - Specify Required Val	ues		
	Specify the values and opt	ions for the new recipient	Search	\mathbf{P}
		.	Context Browser	~
	Routing Order:	1	E Item References	
	Recipient Type:	Signer	Data Fields Workflow Context	
			Environment Fields	4
	Name:	Bob	E Favorites	
	Email Address:	Bob@denallix.com		
		Use SMS Authentication: SMS Number		
				-
				• ///
		Back Next Finish Cancel		

7. Click Next until the Return Properties page.

8. Expand the Data Fields node in the context browser and drag the **RecID** and **Status** data fields in to the fields:

Add Recipier	nt - Return	Properties						
	Specify map	pings for the return	properties				Search	\mathbf{P}
	Search: Field Name Search Show: All Fields Required Fields					Context Browser	1	
	Update 👻	Name 👻	Value	,			 	
	~	ID	heci 👔				EnvID	
	~	Status	hat Stat	tus			Status	
							TabID	•
							i DocID Workflow Context	
							SmartObjects SmartForms	
							Inline Functions	
							 	
								\mathbf{v}
) • //:
				Back Next	Finish	Cancel	J	

9. Click Finish.

Step 6: Add and Configure the Create Tab wizard

In this step you use the Create Tab wizard to configure where the user will sign the document.

- 1. Hover the cursor over the Add Recipient wizard and click the Workflow Step Outcomes option.
- 2. On the Workflow Step Outcomes screen add a new step called Create Tab.
- 3. Drag the **Create Tab** wizard in to the new workflow step that was added.

∢YP		
BROWSE		
🔡 File 🔻 🛛	Workflow Steps SmartObjects Favorites	
DocuSign	Add Document Add Recipient Create Envelope Create Tab Delete Envelope Move Envelope To Remove Document Remove Document Resolution Resolution Send Envelope S	Void Envelope
0	Approve Add Document Creat Recipient Creat Tab Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio Double-Gio	

4. Configure the first screen of the wizard as follows:

- a. On the **Specify Values** page, select the appropriate DocuSign Service Instance from the **DocuSign Instance** dropdown.
- b. Expand the Data Fields node in the context browser and drag the **EnvID** and **RecID** data fields into the fields as shown below:

Create Tab	- Specify Values				
	Specify the values and opt	ons to create a new tab		Search	\mathbf{P}
	DocuSign Instance:	DocuSign 🔹		Context Browser	~
-	Envelope ID:	here and the second sec		 Item References □ Data Fields 	
	Recipient ID:	RecID		RecID	
	Document ID:	Document ID		Status	
	Label:	Label		DocID	4
	Tab Type:	Sign Here		 Workflow Context SmartObjects SmartForms Inline Functions Environment Fields Favorites 	•
	L	Back Next Finish	Cancel		

c. Expand the Item References then the Purchase Order nodes in the context browser and drag the **ID** property in to the **Document ID** field (Make sure that you use the same ID field that you had used for the Document ID in the Add Document Step).

Create Tab	- Specify Values			
	Specify the values and opt	ons to create a new tab	ch	\mathbf{P}
	Den Gine Testanov	Cont	ext Browser	~
	Docusign Instance:	Docusign	m References Purchase Order	
	Envelope ID:		E Document	
	Recipient ID:	RecID	A Name	
	Document ID:		A Customer	l In
	Label:	Label	0.2 Total	
	Tab Type:	Sign Here	ID A Content Type	
			A Content Type Id	
			Created	
			⊡ A Created By ⊡ Modified ■	
		10	A Modified By	-
		Back Next Finish Cancel		

- d. Enter **Signature** in the **Label** field. The purpose of this field is that wherever the field **Signature** is present in the document the DocuSign Tab will be added. In the **Tab Type** dropdown select the **Sign Here** option.
- 5. Click Next.

6. On the Specify Tab Positioning screen, enter the field Signature in to the Anchor String field.

Create Tab	- Specify	Tab Positioning				
	Specify t	ab positioning valu	25	Search	\mathcal{P}	
				Context Browser	1	L
	Ancr	nored		Item References		L
		Anchor String:	Signature	⊞ Data Fields		L
		Anchor X Offset:	Anchor X Offset Anchor Y Offset: Anchor Y Offset	Workflow Context SmartObjects		L
		Anghan Uniter		E SmartForms		L
		Anchor Units:	Anchor Onits	Inline Functions		
			Ignore anchor if not present	Environment Fields		٩
	C Abso	olute		Favorites		۳
		Page Number:	Page X Position: Y V Position: V			L
		Fage Number.				L
						L
						L
					¥	L
				•) • //.	L
			Back Next Finish Cancel			

- 7. Click **Next** until you reach the **Return Properties** page.
- 8. Next expand the Data Fields node in the context browser and drag the **TabID** into the **ID** field as shown below:

Create Tab	- Return Properties	
	Specify mappings for the return properties	Search
	Search: Field Name Search Show: All Fields Required Fields	Context Browser
	Update • Name • Value ID ID ID	Item References Data Fields Fields RecID Status TabID
		DocID Workflow Context SmartObjects SmartForms Inline Functions Environment Fields Favorites
	Back Next Finish Cancel	

9. Click Finish.

Step 7: Adding the Send Envelope Wizard

In this step you will configure the Send Envelope Wizard to send the item to the recipient to sign.

- 1. Hover the cursor over the Create Tab wizard and click the **Workflow Step Outcomes** option.
- 2. On the **Workflow Step Outcomes** screen add a new outcome called **Send Envelope**.

- 3. Drag the **Send Envelope** Wizard in to the new step.
- 4. Configure the first screen of the wizard as follows:
 - a. On the **Specify Values** screen, select the appropriate DocuSign Service Instance from the **DocuSign Service** dropdown.
 - b. Expand the Data Fields node in the context browser and drag the **EnvID** data field in to the **Envelope ID** field.

Send Envel	ope - Specify Values			
	Specify the envelope to send		Search	\mathbf{P}
	DocuSign Service:		Context Browser Context Browser Later References Cata Fields Fields FacID TabID CocID Workflow Context SmartObjects SmartOrms Inline Functions Favorites Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context Context	
	Back Next Fi	nish Cancel		

- 5. Click **Next**.
- 6. On the **Return Properties** screen, expand the Data Fields node and drag the **Status** data field in to the **Status** field.

Send Envelo	pe - Return Properties		
	Specify mappings for the return properties	Search	\mathbf{P}
	Search: Field Name Search Show: All Fields Required Fields	Context Browser	~
	Update - Name - Value	 	
	🗹 Status 🚰 Status	EnvID	
		Status	
		DocID	•
		 	
		SmartForms	
		Environment Fields	
		⊕ Favorites	
		•	
	Back Next Finish Cancel		

7. Click **Finish**.

Step 8: Save, Deploy and Testing the Workflow

In this step you will save, deploy and test the workflow you have designed.

- 1. Click **File** and **Save** the workflow.
- 2. Click File again and Deploy the workflow.
- 3. Once the workflow has been deployed successfully, click **Close and Exit**.
- 4. Browse to the **Purchase Order** Document Library.
- 5. Click on the **new document** button, to add a new document to the library and start the workflow.

SharePoint	
BROWSE FILES LIBRARY	
S	LG redit links Purchase Order
Home	new document or drag files here
Documents	All Documents ···· Find a file
Recent	
Purchase Order	 Name Modified Modified By Customer Total
K2 blackpearl for SharePoint	There are no files in the view "All Documents".
Pirchase Order	
Site Contents	
🖋 EDIT LINKS	

- 6. On the **Add Document** page click **Browse** and select the Document to be added to the document library.
- 7. Click **OK.**

Add a document		×	1
Choose a file	C:\Users\Dennis\Desktop\Purchase Order.docx	Browse	1
	Upload files using Windows Explorer instead Coverwrite existing files	Cancel	

8. Enter the following information as shown below and click **Start Workflow**.

LG		×
Edit Document		
Name	Purchase Order.docx]
Title	Purchase Order	
Customer	Builders Warehouse]
Total	10,000.00]
Document *	Purchase Order.docx	
	Created on Monday, April 20, 2015 11:24:27 PM by Dennis Parker Last modified on Monday, April 20, 2015 11:24:27 PM by Dennis Parker	
	Start Workflow Save Cancel	

- 9. Go to the K2 Worklist App on the Site Collection or Sub Site and there will be a new task available.
- 10. Click on the task and select the **Approve** option.

K2 Worklist					
				© @ 🖲 🕈 🕄	
	Activity Name	Folio	Task Start Date	Workflow Name	
•	Purchase Order Review	Purchase Order.docx	11:42 PM	Pu	
				ot View Flow	

11. The specified user that was added to the Add Recipient wizard will receive an email from DocuSign informing

them there is a document to be signed. Log in as that User.

- 12. Click the **Review Document** link within the DocuSign Email.
- 13. When the DocuSign web page opens click the **Continue** option on the page.
- 14. Click the **Start** button then the **Sign** option which signs the document.

To whom it may concern,	
The following document req Please sign below.	uires signing to approve your Purchase Order.
DocuSigned by: Hat uick Signature 1FAB098DB97A452	4/21/2015 Date

Additional Information

For the Decline option, replace the placeholder event with an E-mail event and configure it to inform the user that their document has been declined.

If you do not see the DocuSign wizards in your workflow designer, the feature has not been activated or you are not on the correct version of K2. Check with your K2 administrator

When setting up DocuSign you will typically activate it using a developer account. If you or your company already has a DocuSign account you may use that instead. Check with your DocuSign representative for more information about configuring the K2 DocuSign feature or follow the link below:

Configure the DocuSign Feature

Once you created your K2 workflow you can deploy the process to a production environment, see the following Knowledge Base article for the necessary steps. <u>KB001689</u> - <u>How To: Deploy a DocuSign integrated workflow</u>

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