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:

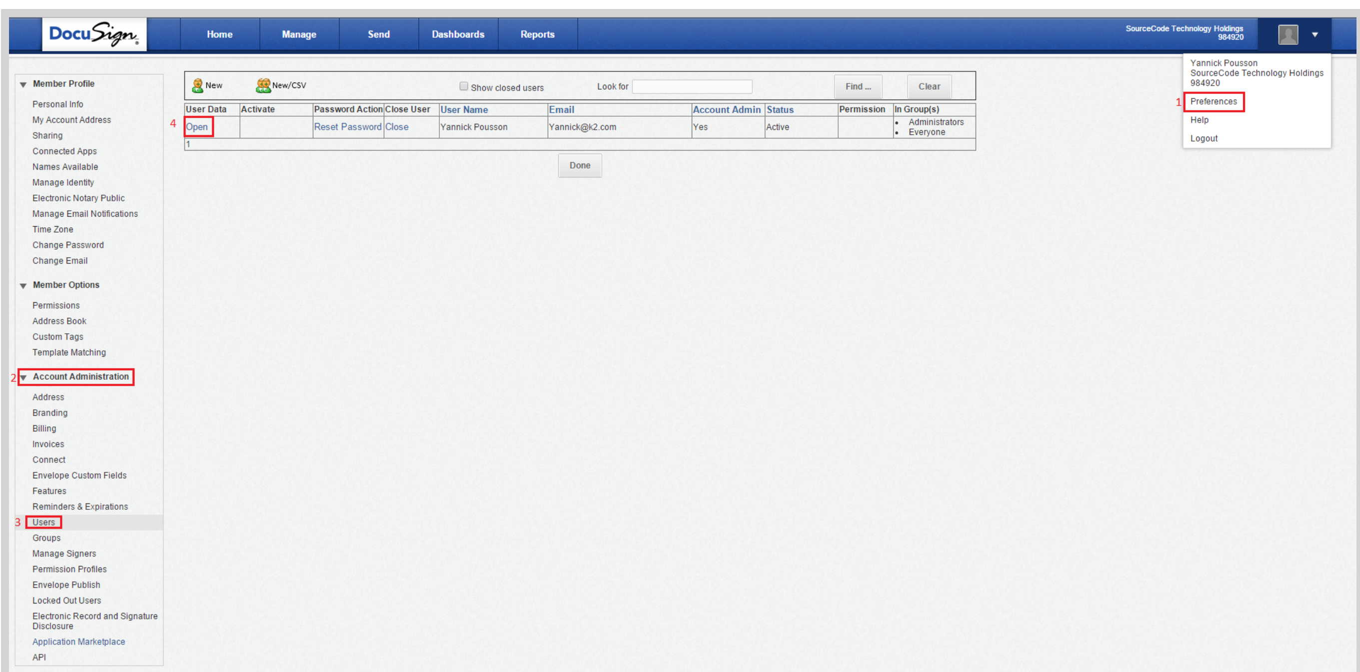
1. DocuSign Enterprise Version. K2 integration requires the DocuSign API and a DocuSign Integrator Key. If you are using a different version of DocuSign, please contact DocuSign to determine whether you will be able to use the API and obtain an Integrator Key in your version of DocuSign.
2. DocuSign 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: https://www.docusign.com/developer-center.

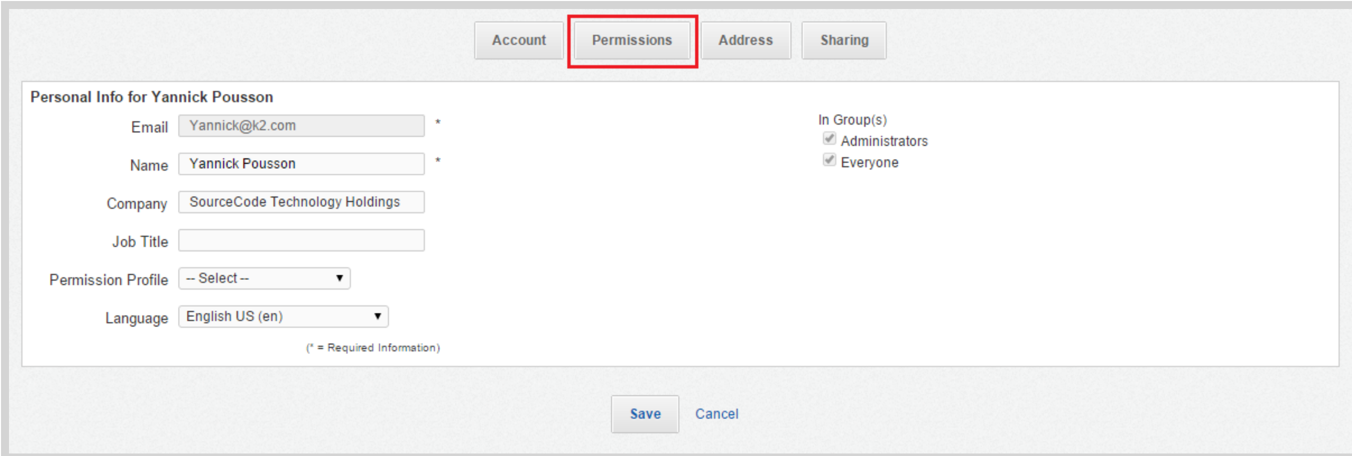
Required Permissions:

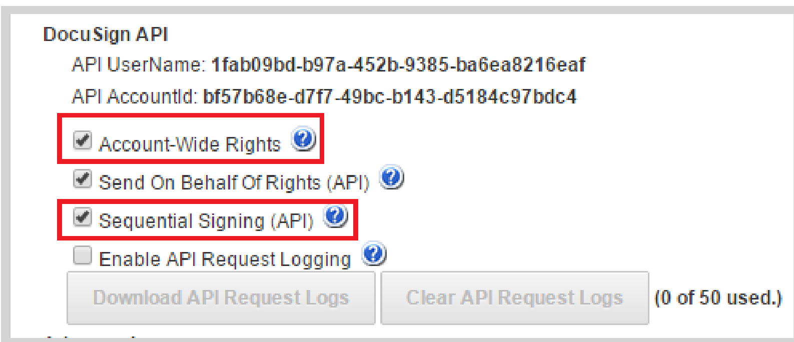
The following are permissions required for DocuSign integration:

- Account-Wide Rights
- Sequential Signing (API)

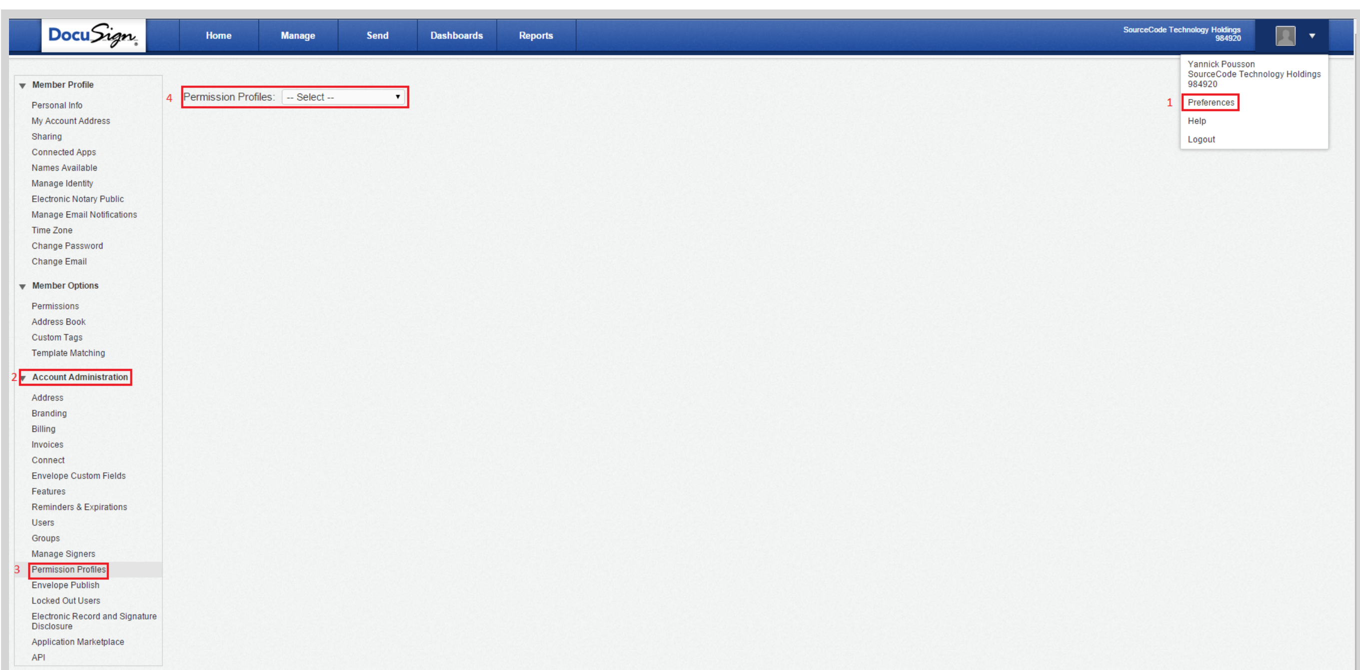
To set these permissions in DocuSign for a single user, log in with a valid user in the DocuSign site, go to **Preferences** > **Account Administration** > **Users** > **[Select Your User]** > **Permissions**, and check the permissions stated above under **DocuSign API** section.

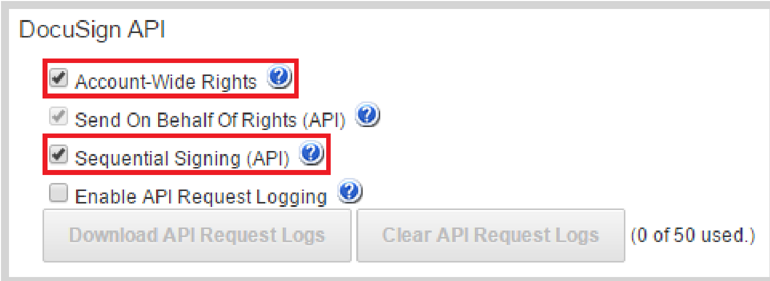






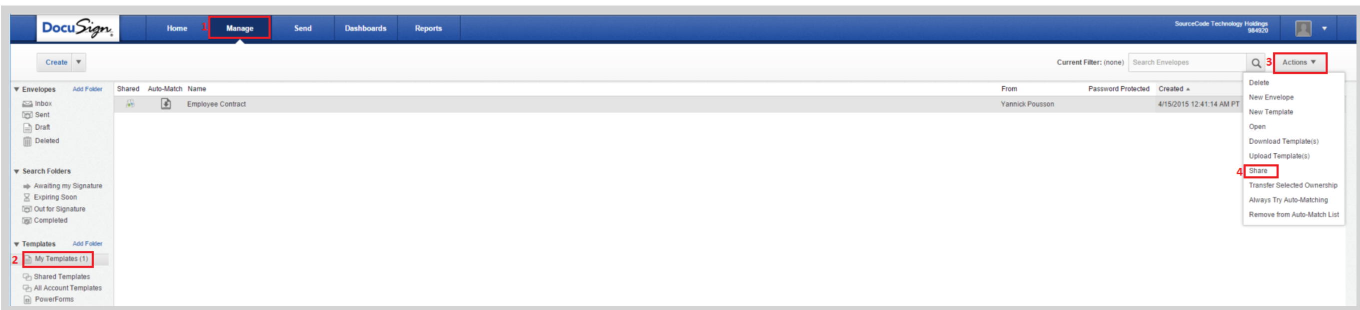
To set these permissions in DocuSign for Profiles, log in with a valid user in the DocuSign site, go to **Preferences** > **Account Administration** > **Permission Profiles** > **[Select Your Permission Profile from the drop down]**, and check the Permissions stated above under **DocuSign API** section.



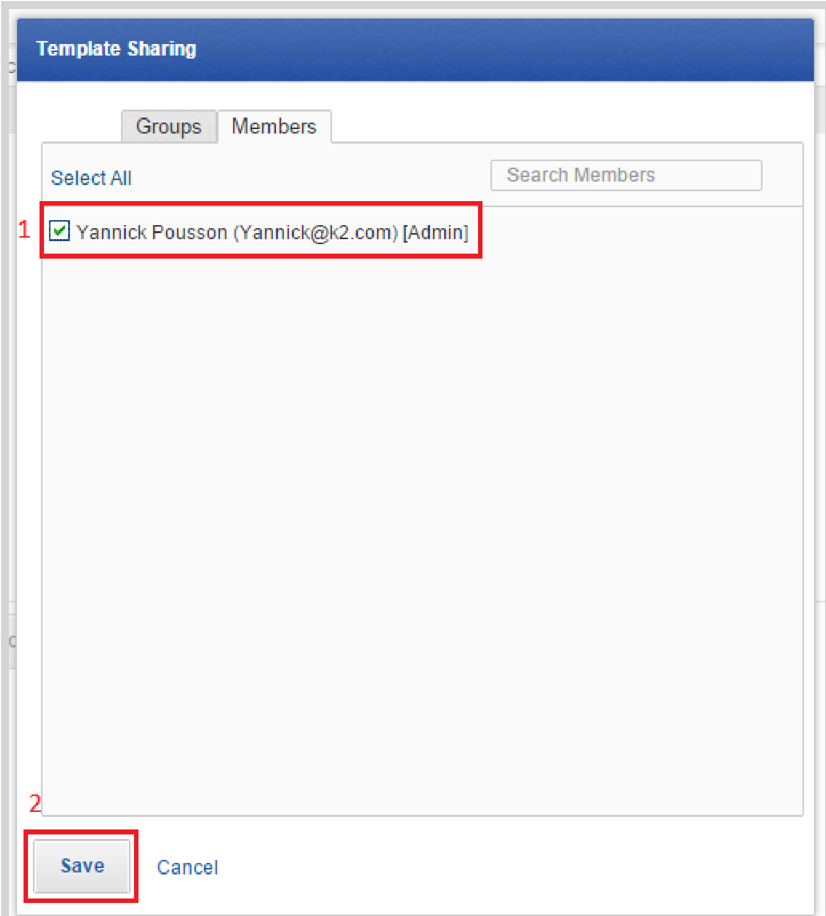


Registering Multiples Service Instances:

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**.



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



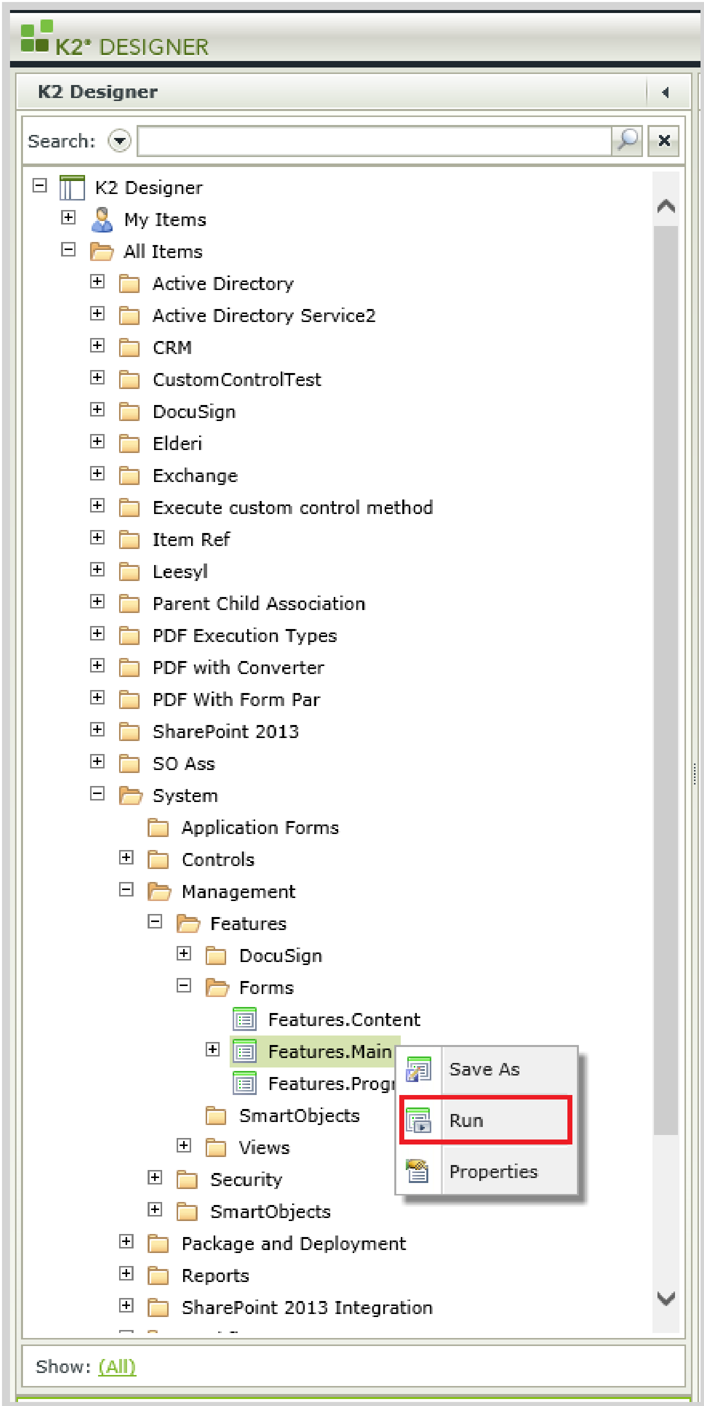
Registering a DocuSign Instance in SmartForms

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

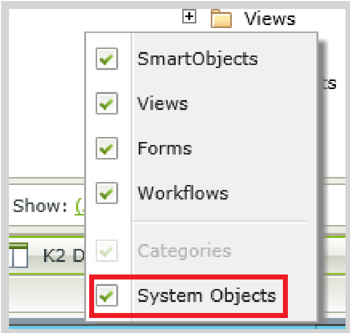
Note
Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

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.

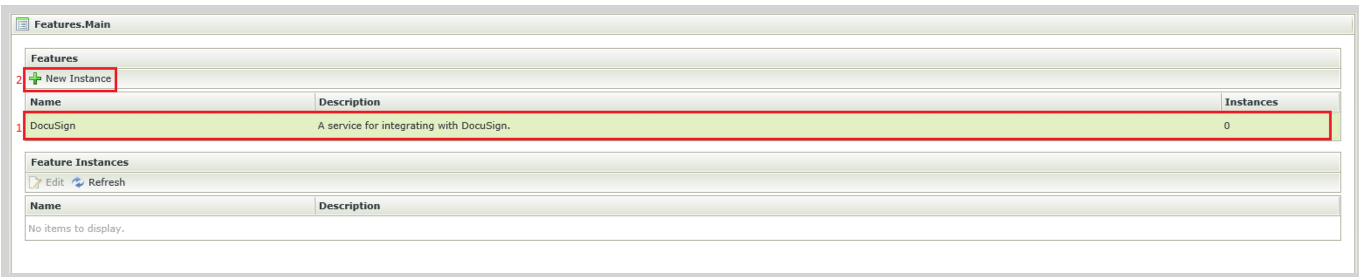


If the **System** node is not available, ensure the **System Objects** check box is checked. This can be done by clicking the **Show:(All)** link.



Step 2:

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

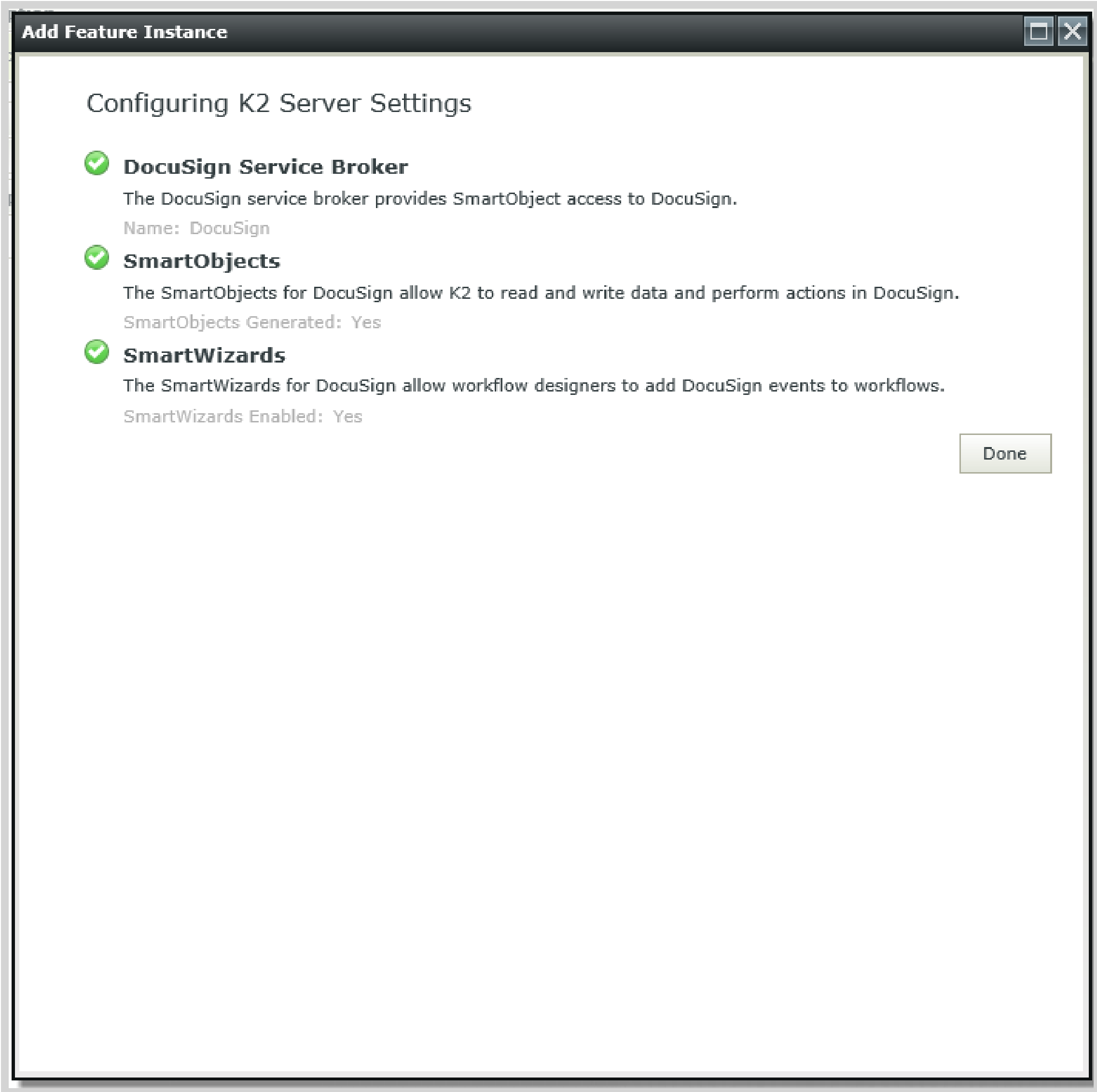


Next the following window will appear:

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.

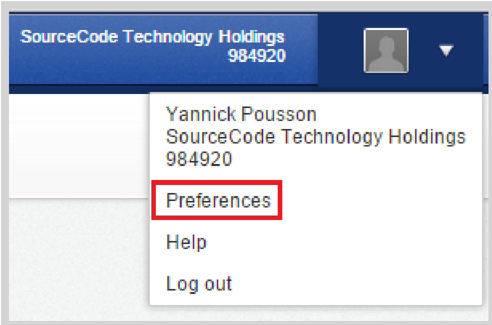
Step 1:

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:

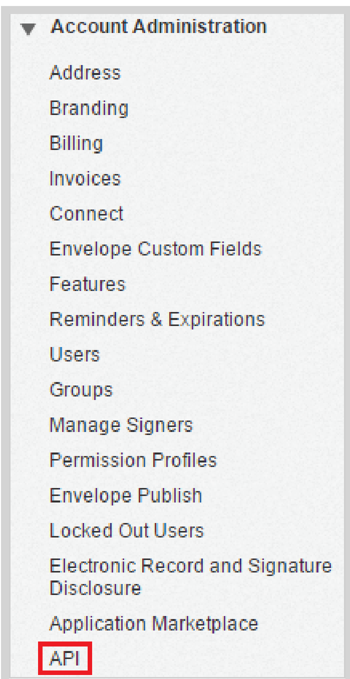
Once the account is created, log in to the DocuSign website via the **LOG IN TO SANDBOX** button. Click the Profile options on the top right and select the **Preferences** as shown below:



;

Step 3:

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



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.

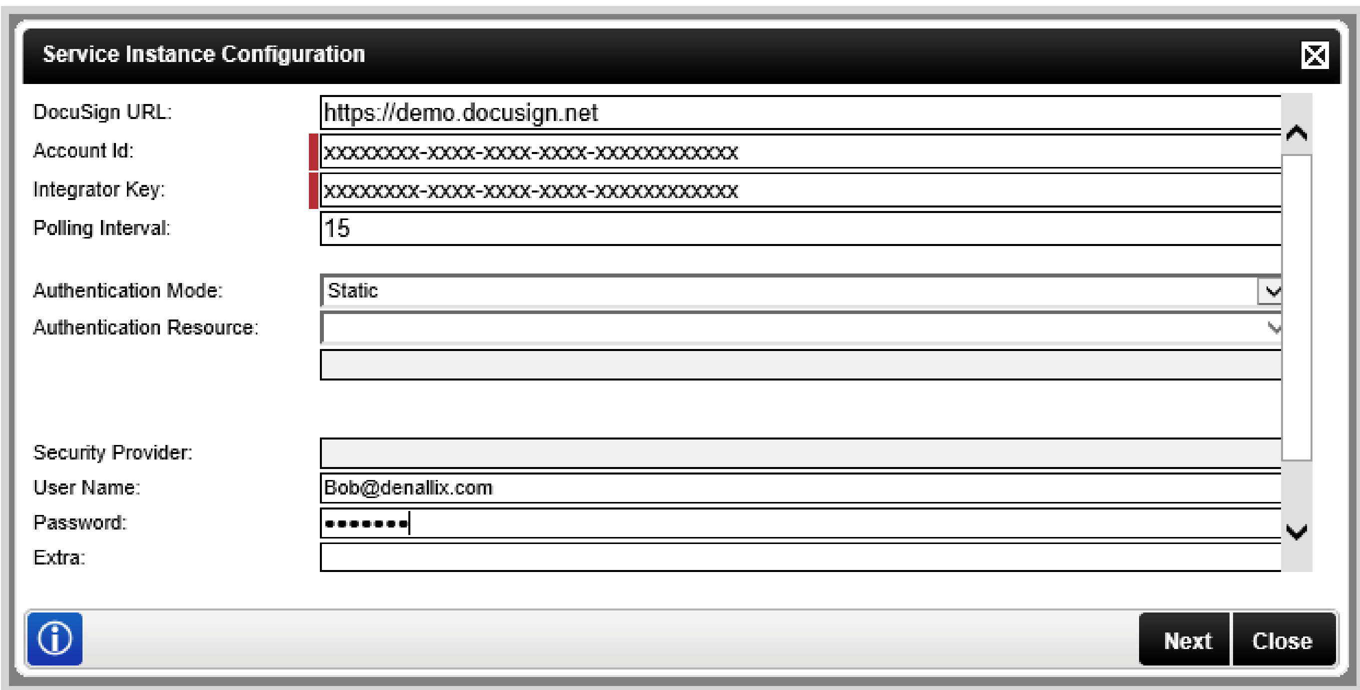
Click the **ADD** button.

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

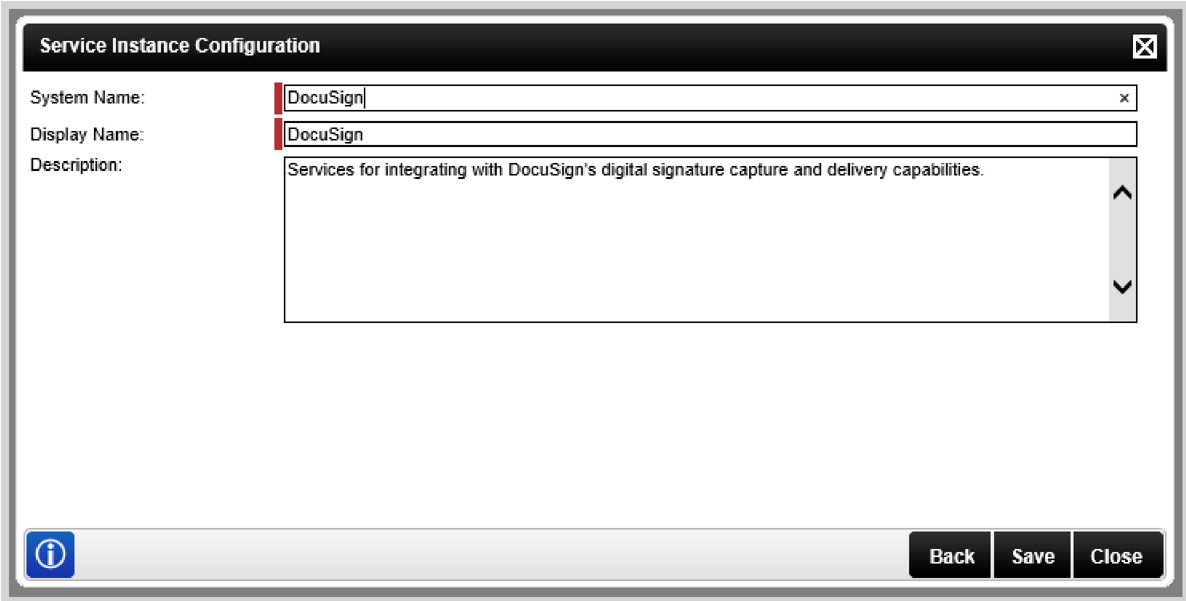
   The Polling Interval is set to 15 minutes by default. This can be changed but take note, any value that is set below 15 minutes will return cached values instead of real-time values. To return real-time values it is recommended that the value be set higher that 15 minutes within the Polling Interval.

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)



Click **Next.**

On the next page assign any values as required.



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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

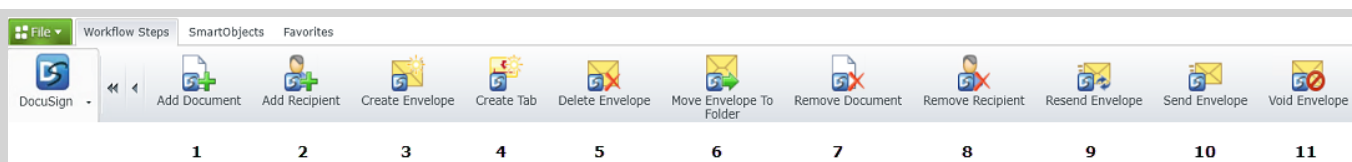
Important Considerations

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 data field and use that data field within the wizards where Envelope ID is required.
4. See the How to create a workflow using DocuSign and K2 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

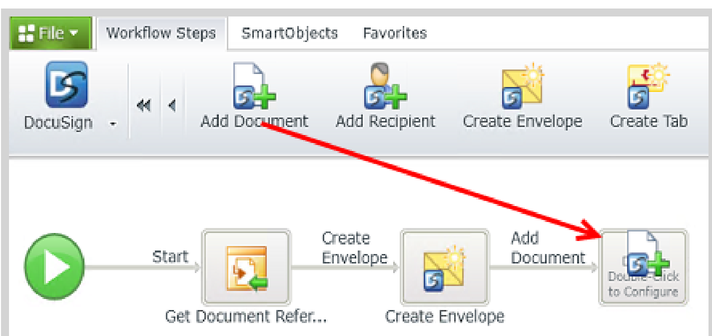
The **Add Document** wizard allows for adding documents to a draft envelope to be signed. This draft envelope can be sent for signature using the Send Envelope wizard.

> **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.

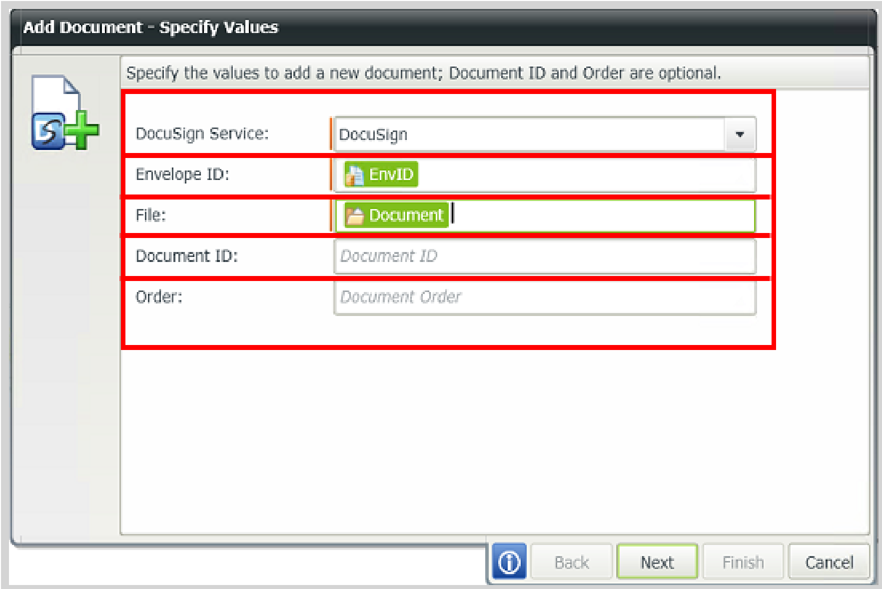
Drag the wizard from the DocuSign category to a workflow step on the design canvas.



> **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.

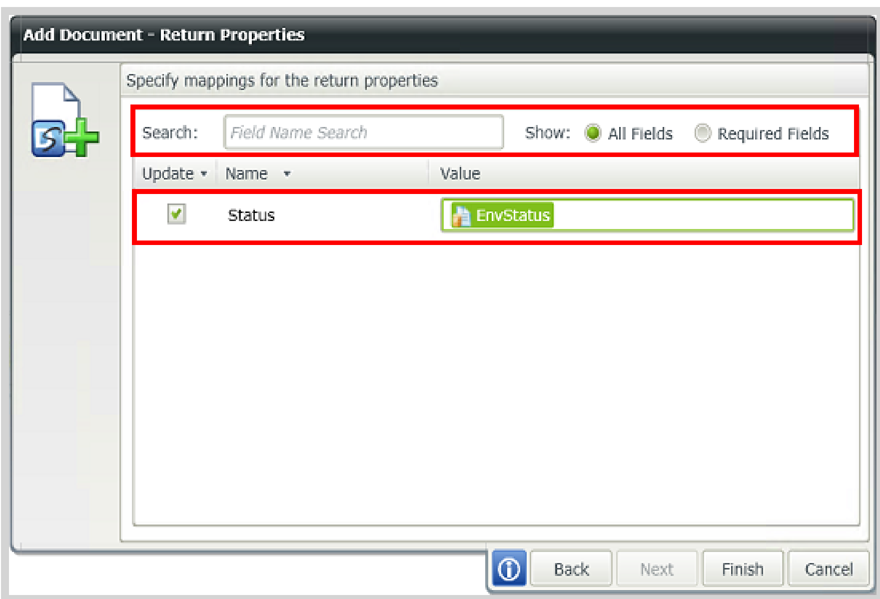
Step 1. Specify Values

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



Step 2. Return Properties

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



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 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 data field 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 Item Reference, data field or SmartObject 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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

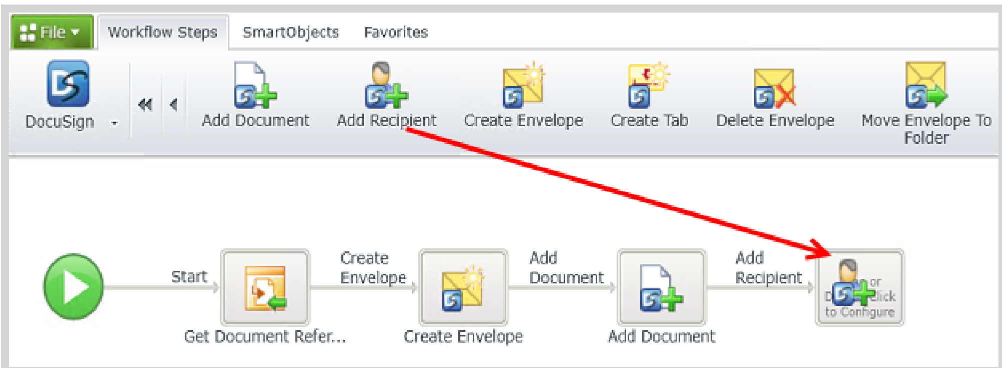
The **Add Recipient** wizard allows you to add recipients to a draft envelope. Recipients will receive the envelope and may be requested to perform actions on the document(s) based on the type of recipient. For example, a recipient of type Signer will be able to electronically sign documents.

> **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.

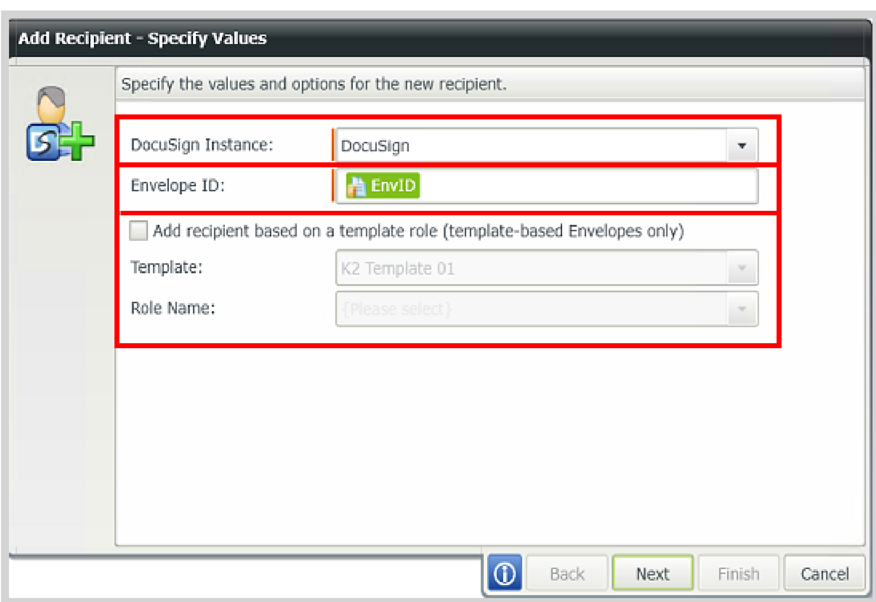
Drag the wizard from the DocuSign category to a workflow step on the design canvas.



> **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.

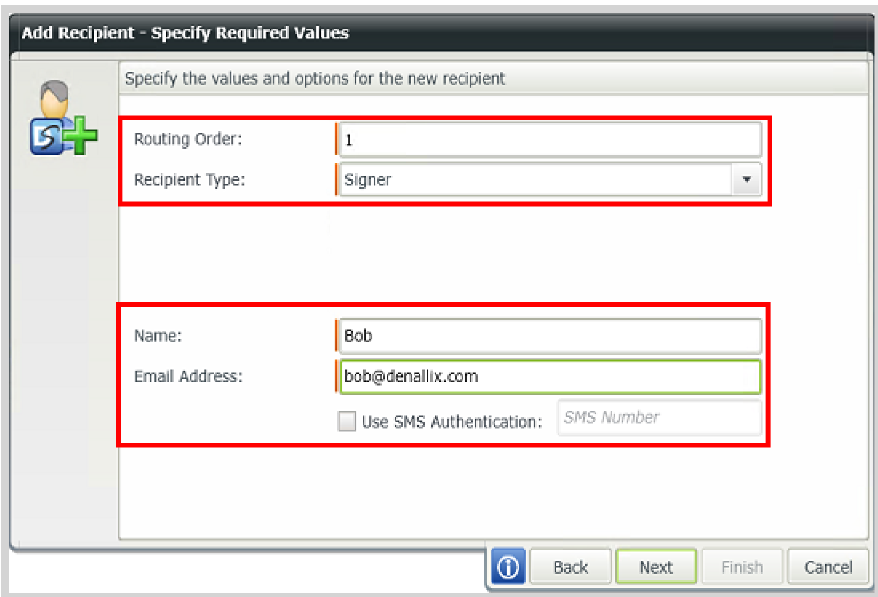


Caution

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:"

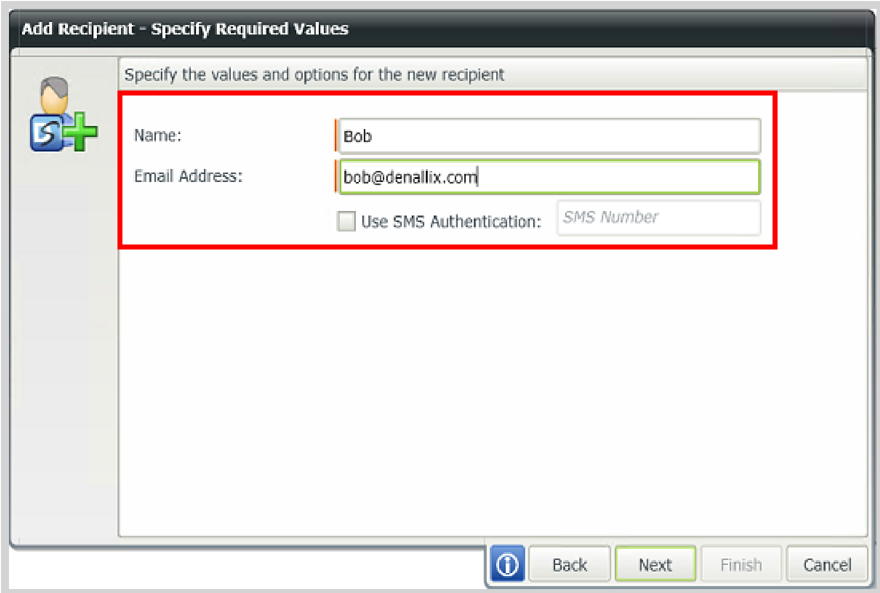
Step 2a. Specify Required Values

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.



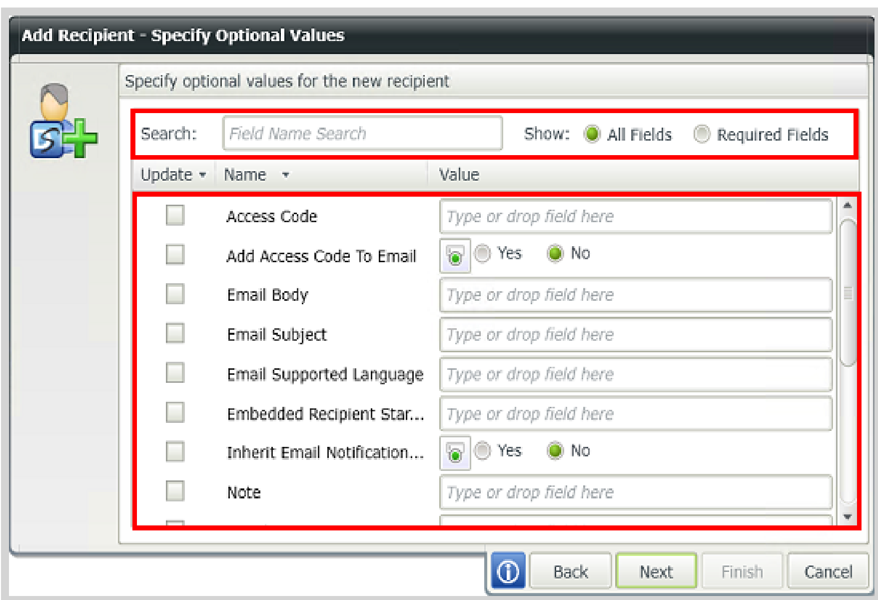
Step 2b. Specify Required Values

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.



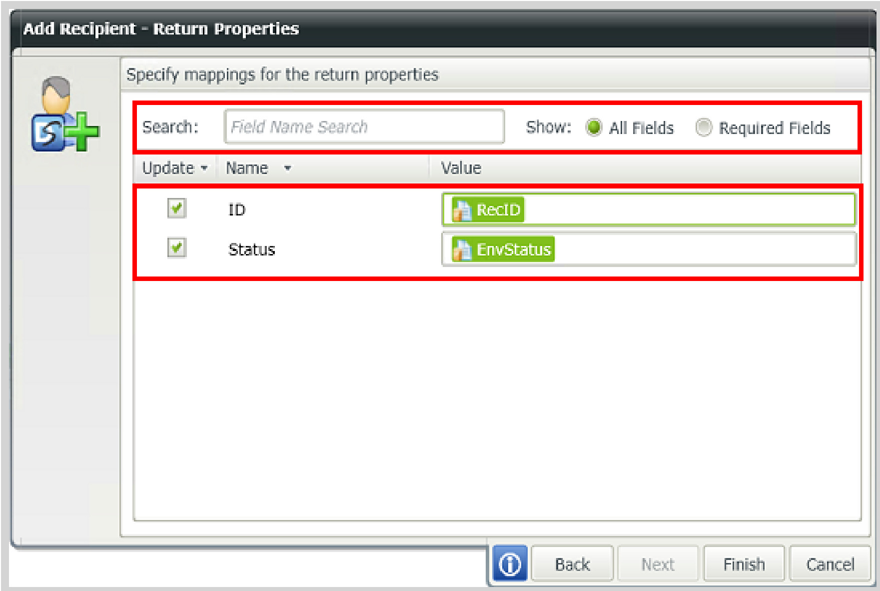
Step 3. Specify Optional Values

Specify the optional values for the new recipient.



Step 4. Return Properties

Specify mappings for the return properties.



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 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 data field 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 data field or SmartObject property from the Context Browser.

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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

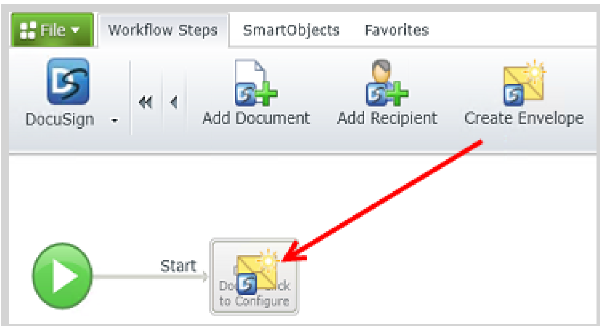
The **Create Envelope** wizard allows for the creation of a new draft envelope that can be assembled over the course of time until it is ready for sending. This wizard is typically the starting point when building a workflow containing DocuSign wizards.

> **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 Add Document wizard.

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



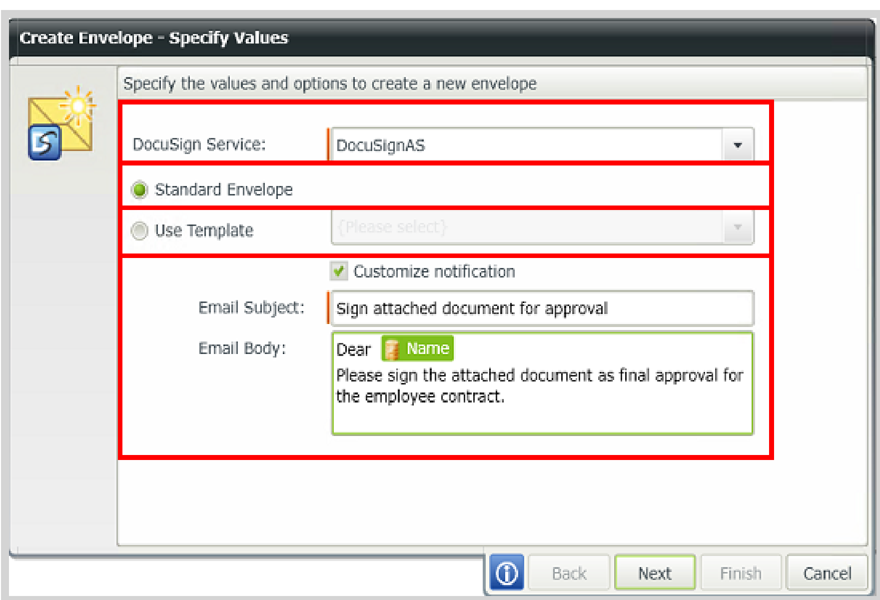
Note

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.

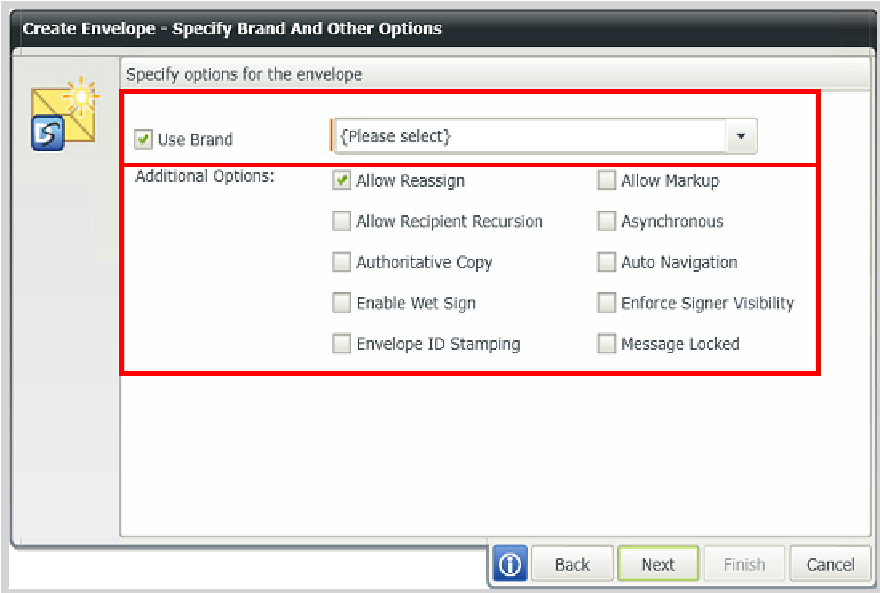
Step 1. Specify Values

Specify the values for the new envelope to be created.



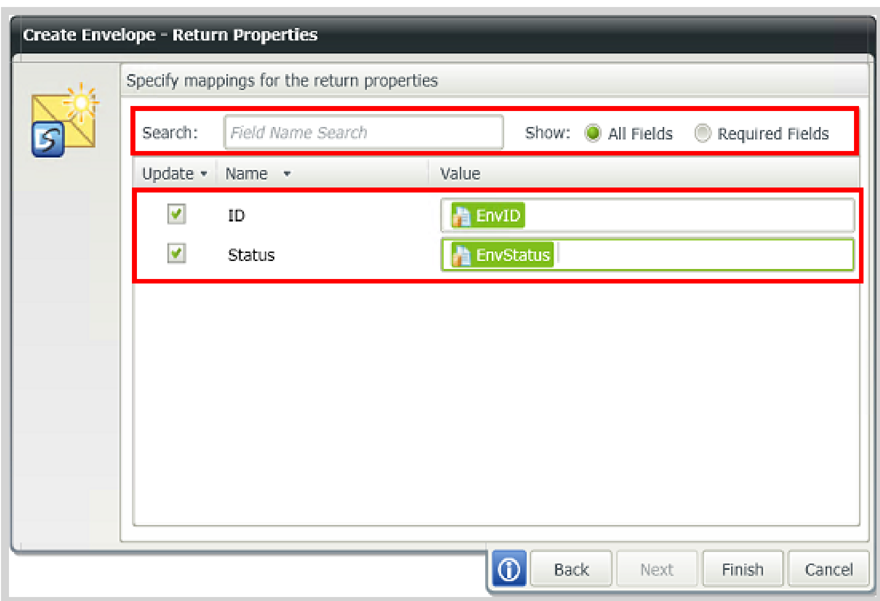
Step 2. Specify Brand and Other Options

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**.



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.



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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

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

Note

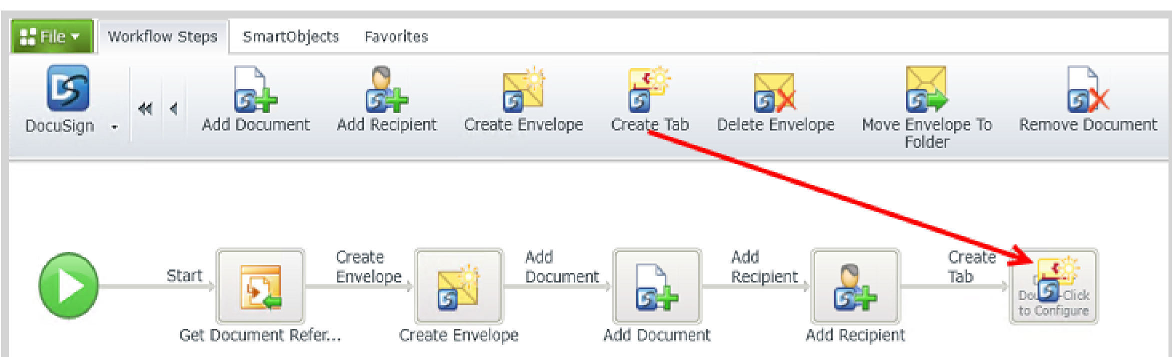
The DocuSign Service Instance needs to be registered before using this wizard.

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.



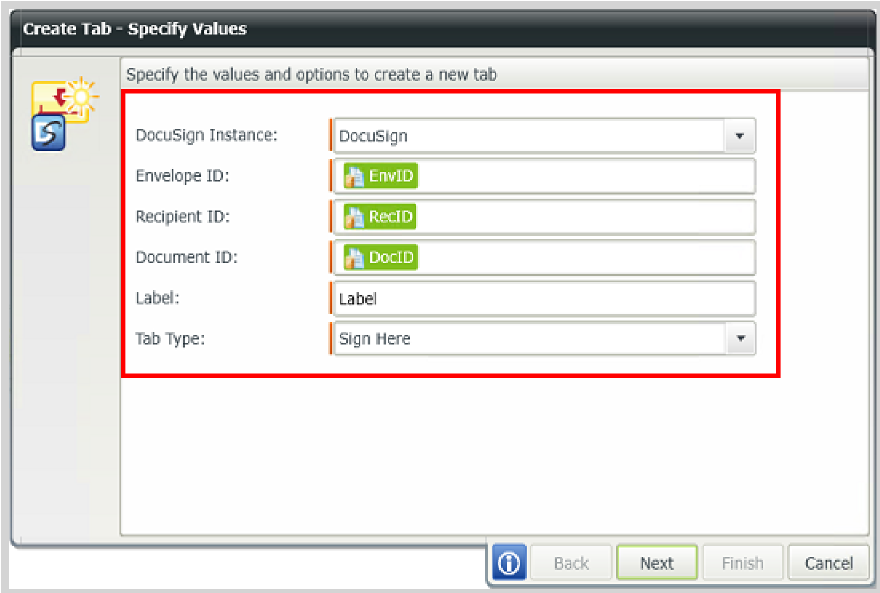
Note

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.

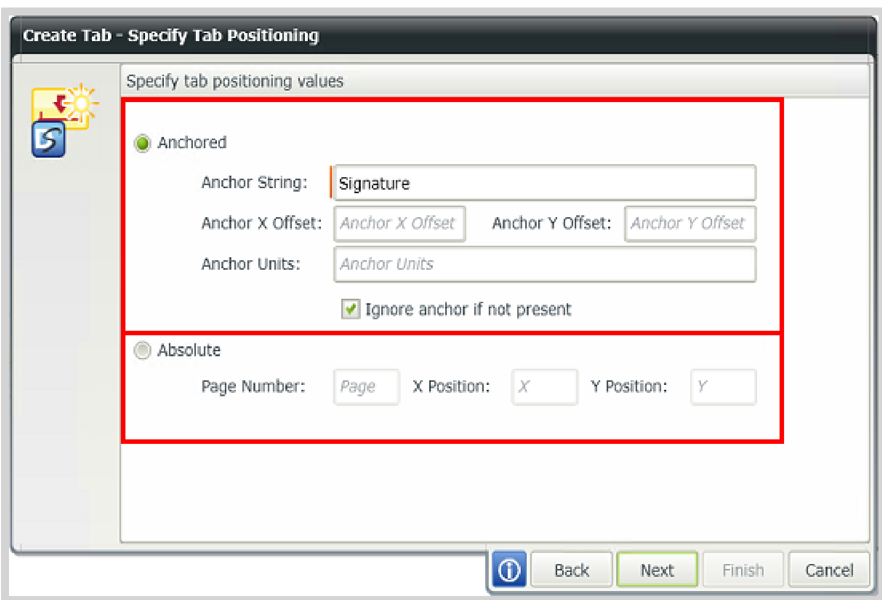
Step 1. Specify Values

Specify values for the tab to be created.



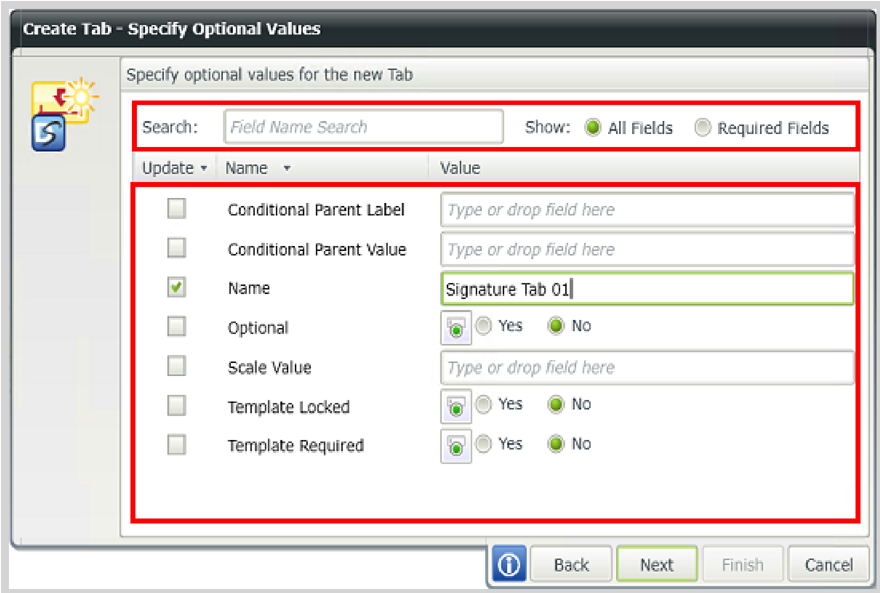
Step 2. Specify Tab Positioning

Specify tab positioning values.



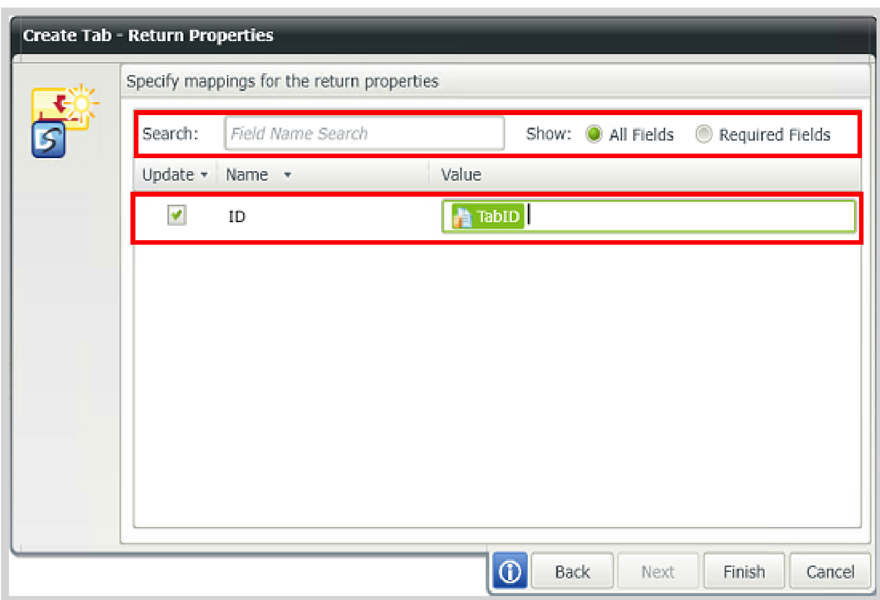
Step 3. Specify Optional Values

Specify optional values for the new tab.



Step 4. Return Properties

Specify mappings for the return properties.



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 data field or SmartObject property 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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 data field can be used to retrieve this ID.
- **Recipient ID:** The ID of the recipient that will be required to sign the document. A data field can be used to set the value for this field.
- **Document ID:** The ID of the document the tab will be added to. A data field 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

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

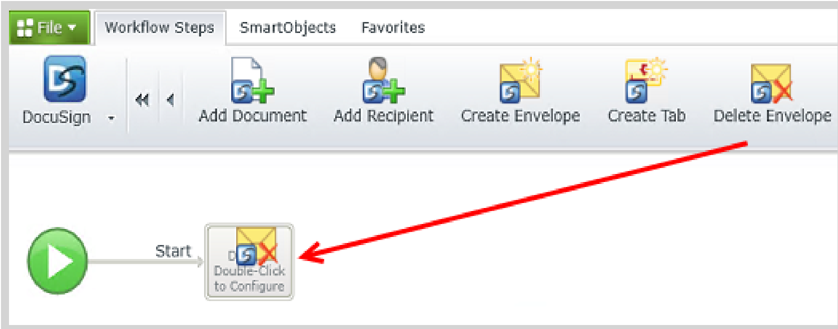
Note

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.

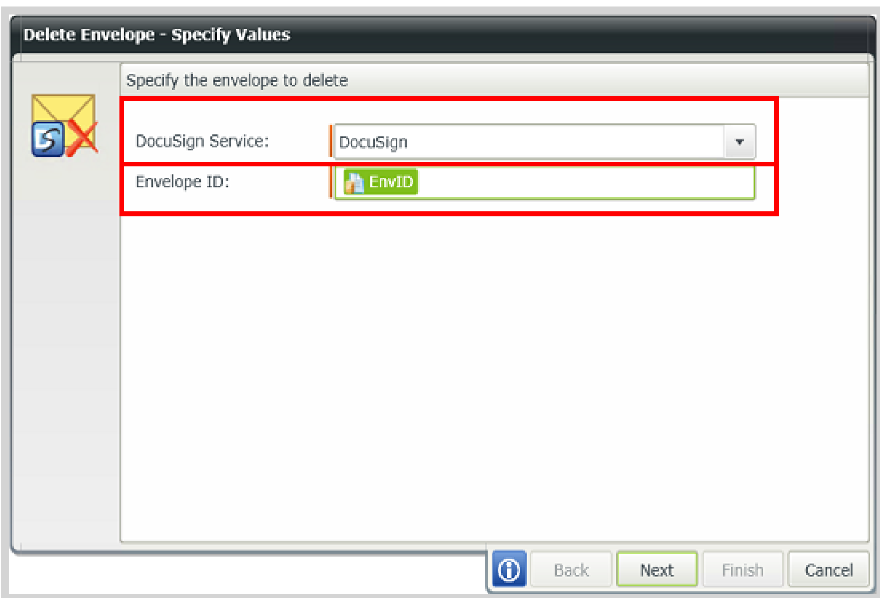
Drag the wizard from the DocuSign category to a workflow step on the design canvas.



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.

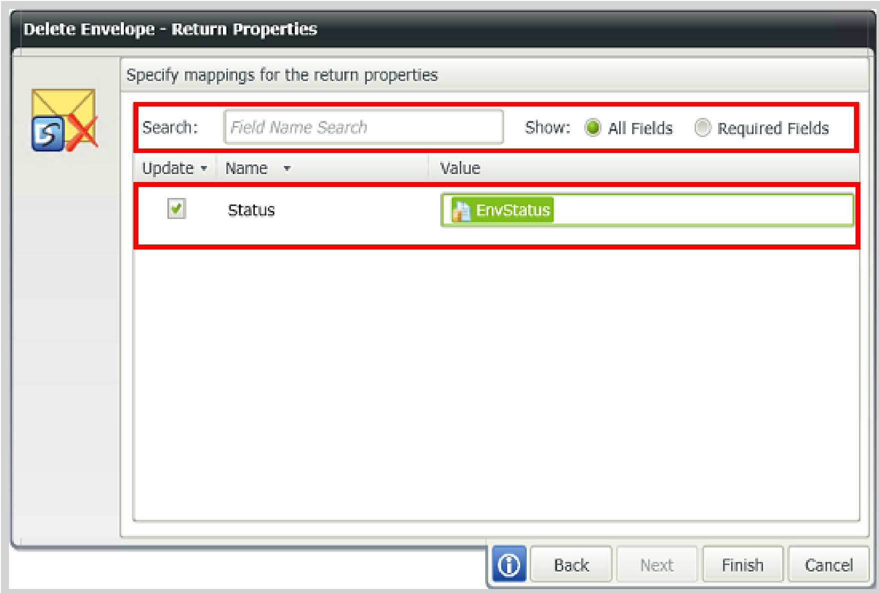
Step 1. Specify Values

Specify the envelope to delete



Step 2. Return Properties

Specify mappings for the return properties



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 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 data field 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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 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 data field 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 service instance 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

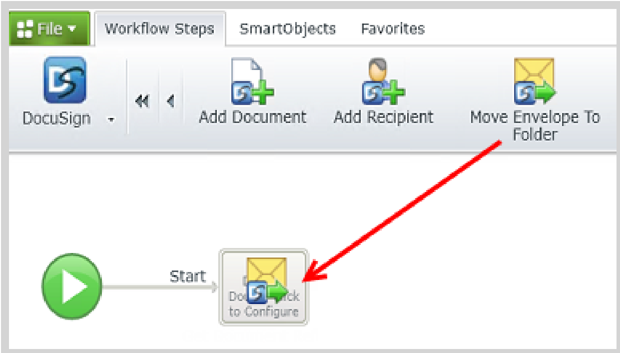
The **Move Envelope to Folder** wizard allows you to move an envelope created to a specific folder in DocuSign.

> **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.

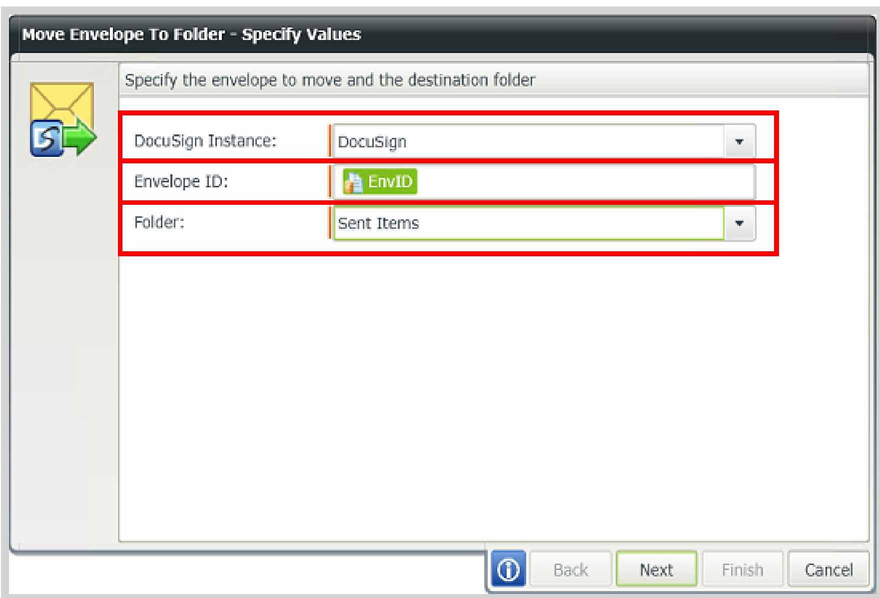
Drag the wizard from the DocuSign category to a workflow step on the design canvas.



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.

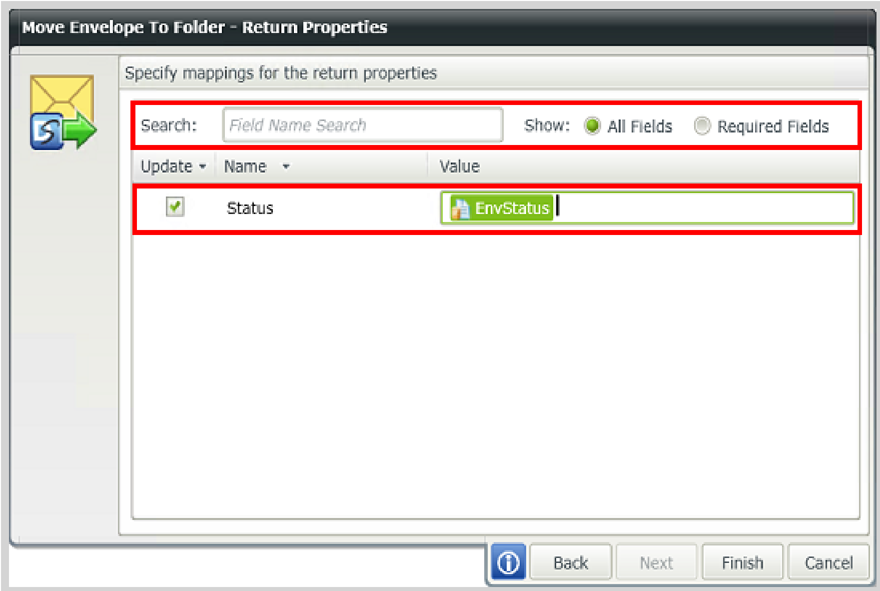
Step 1. Specify Values

Specify the envelope to move and the destination folder



Step 2. Return Properties

Specify the envelope to move and the destination folder



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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 data field created in the workflow with the Add Document 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 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 data field 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

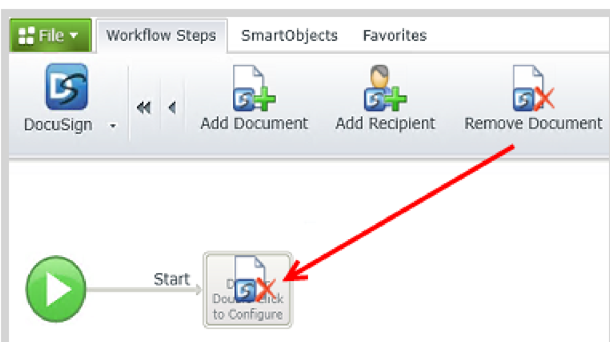
The **Remove Document** wizard allows you to remove a document from an envelope in a DocuSign instance.

> **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 Add Document wizard in a later step in the workflow to add a new document to the envelope.

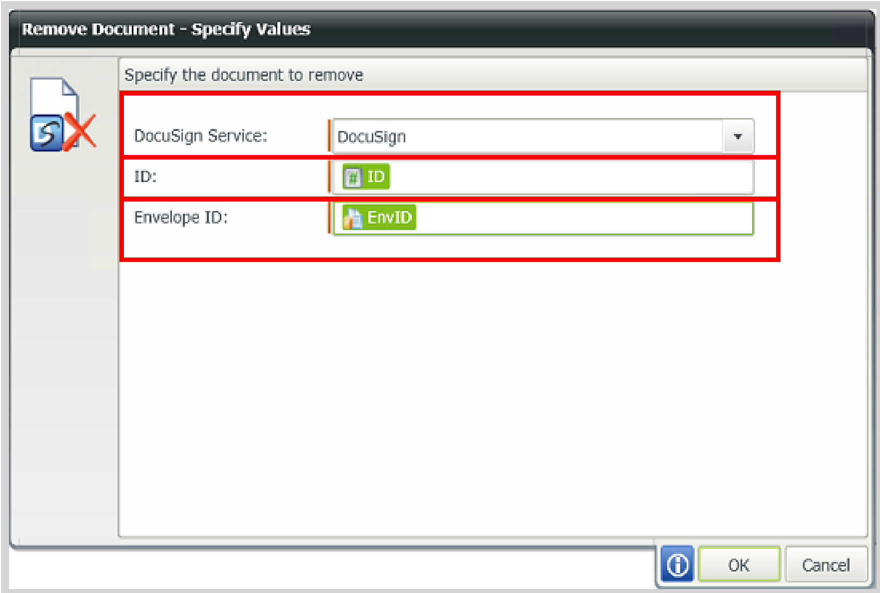
Drag the wizard from the DocuSign category to a workflow step on the design canvas.



> **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.



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 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 data field 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 data field that was created for the return property in the Add Recipient 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 https://www.docusign.com/. 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.

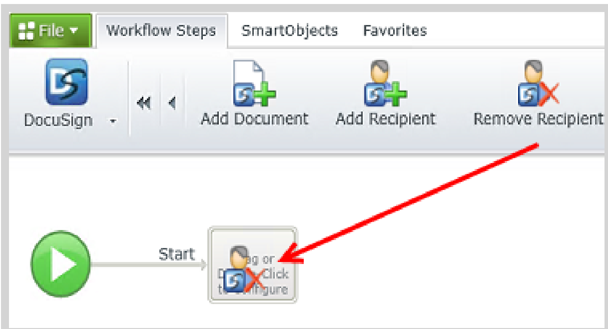
> **Note**
> The DocuSign Service Instance needs to be registered before using this wizard.

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.



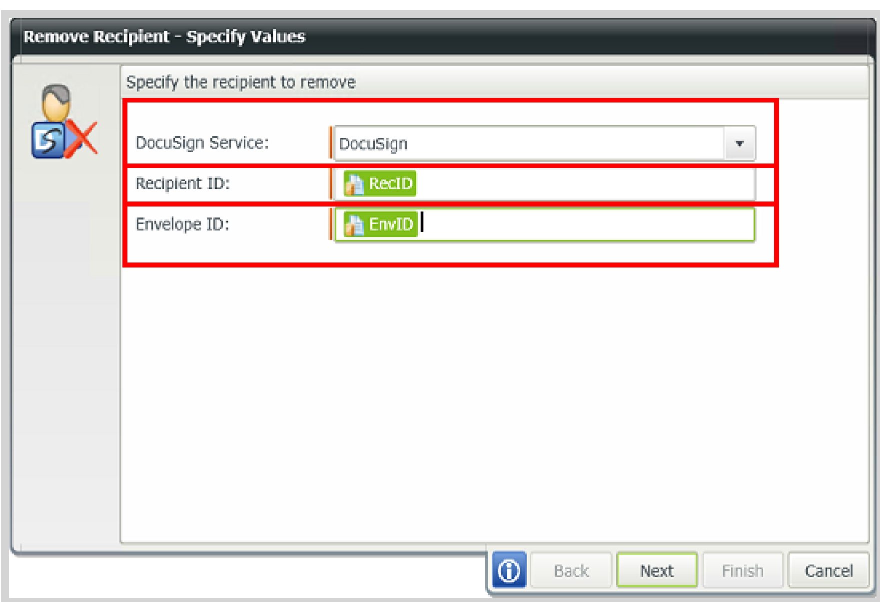
Note

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.

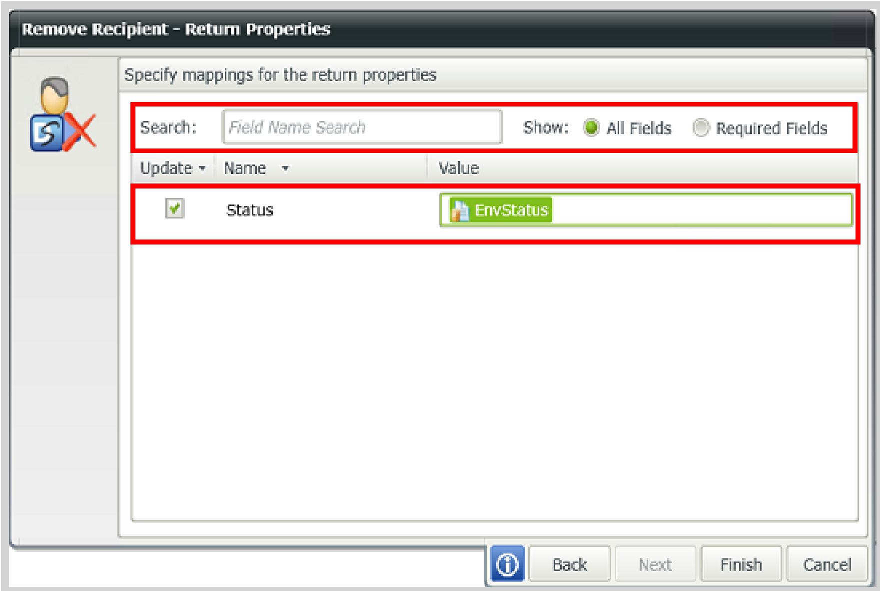
Step 1. Specify Values

Specify the recipient to remove.



Step 2. Return Properties

Specify mappings for the return properties.



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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 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 data field 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 data field that was created for the return property in the Add Recipient 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 https://www.docusign.com/. 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

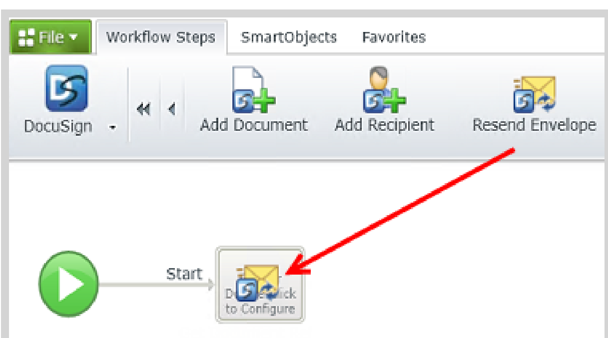
The DocuSign Service Instance needs to be registered before using this wizard.

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.



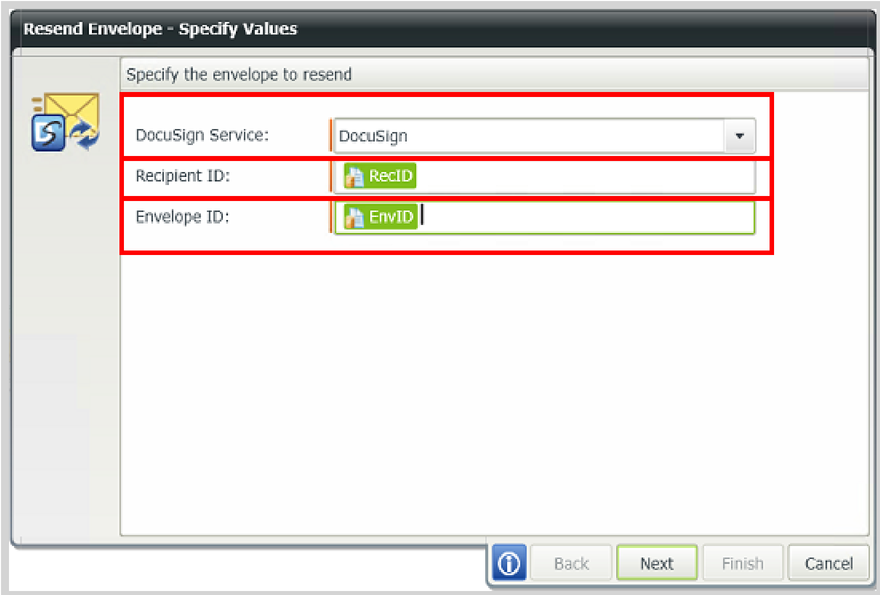
Note

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.

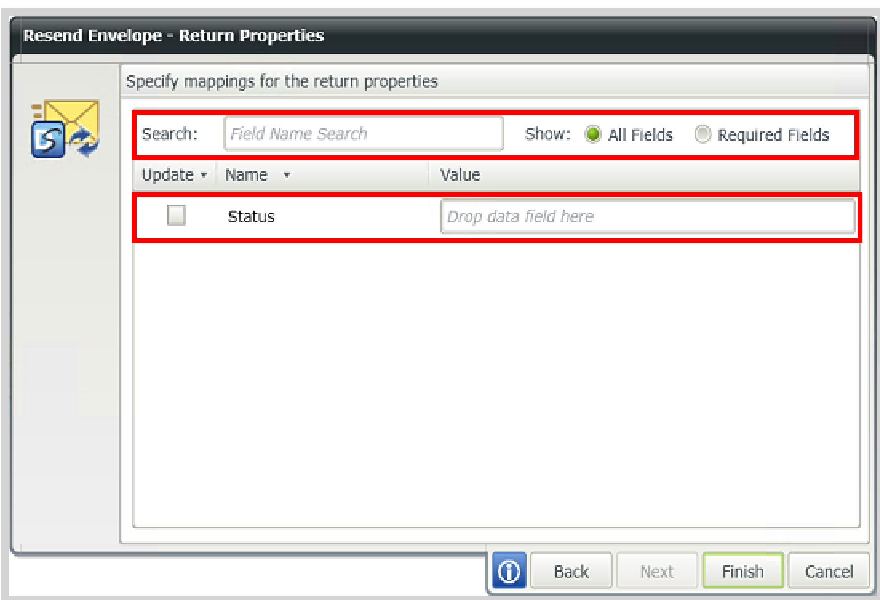
Step 1. Specify Values

Specify the envelope to resend.



Step 2. Return Properties

Specify the envelope to resend.



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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 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 data field 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

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

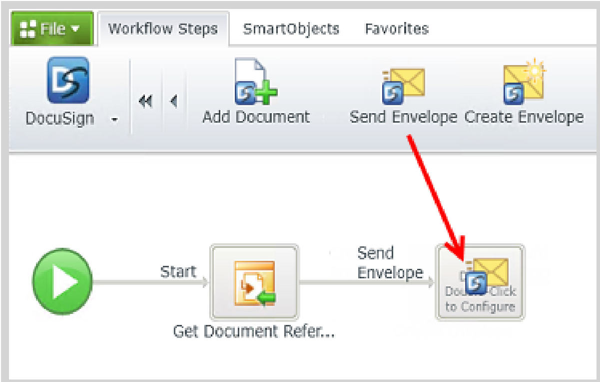
Note

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.

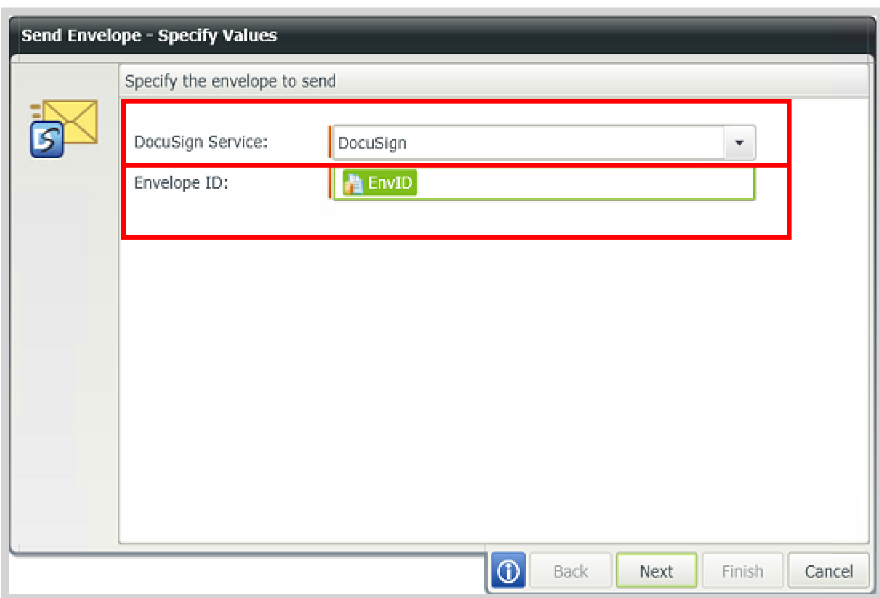


Note

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.

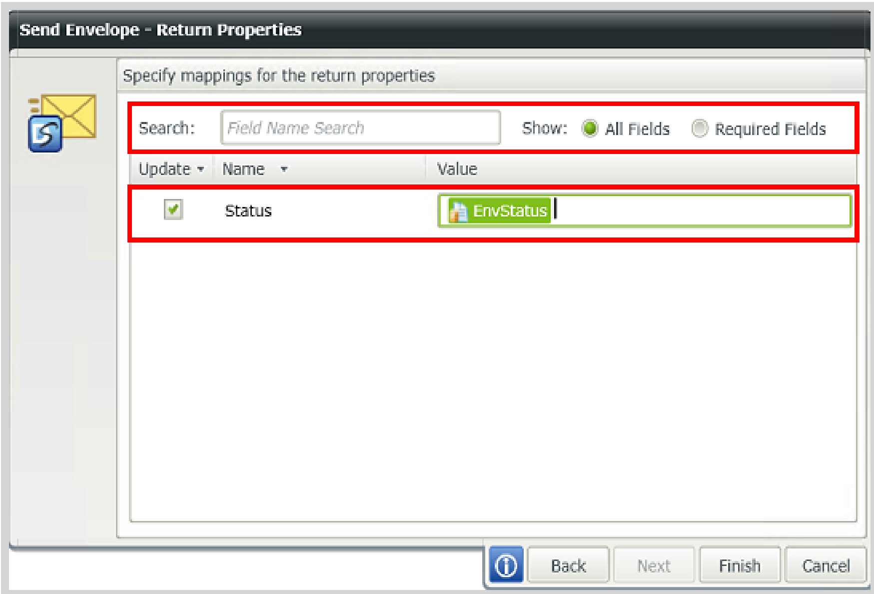
Step 1. Specify Values

Specify the envelope to send.



Step 2. Return Properties

Specify mappings for the return properties.



Specify Mappings

The return properties listed here can be mapped to a data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 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 data field 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 data field. 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 Context Browser to the return property. The value of this property is stored in the data field at runtime. This data field can be used in other DocuSign wizards to specify the specific property value, where required, by dragging the data field from the Context Browser 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 https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

What does it do?

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

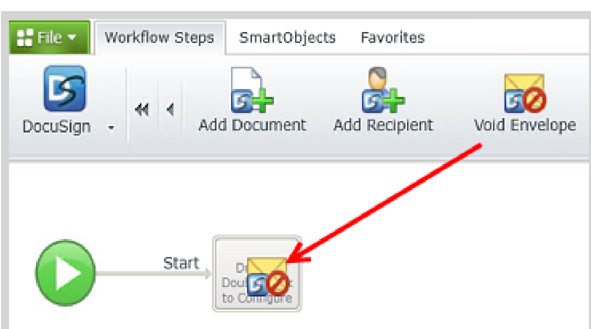
> **Note**
> The DocuSign Service Instance needs to be registered before using this wizard.
> The **Create Envelope** wizard will mostly be the starting point when building a workflow containing DocuSign wizards.

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

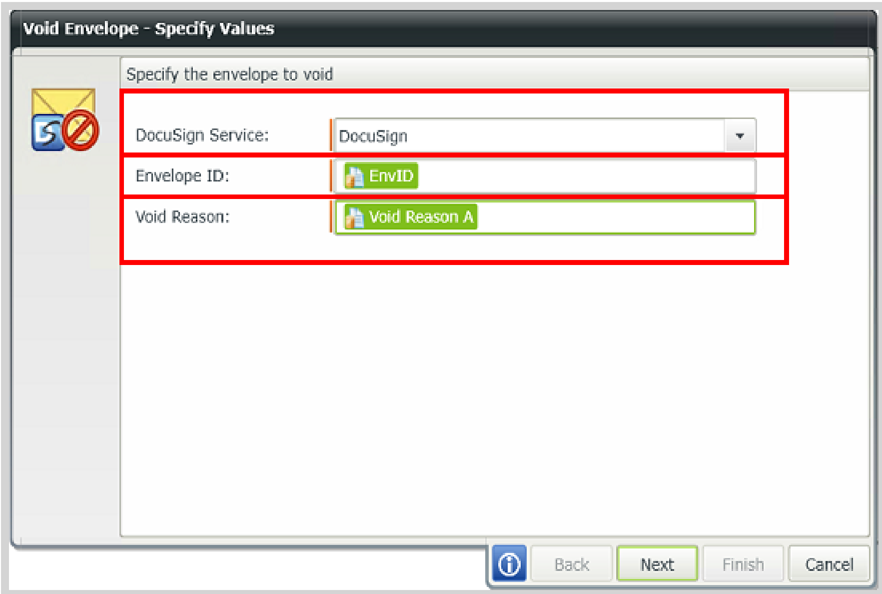
Drag the wizard from the DocuSign category to a workflow step on the design canvas.



> **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.

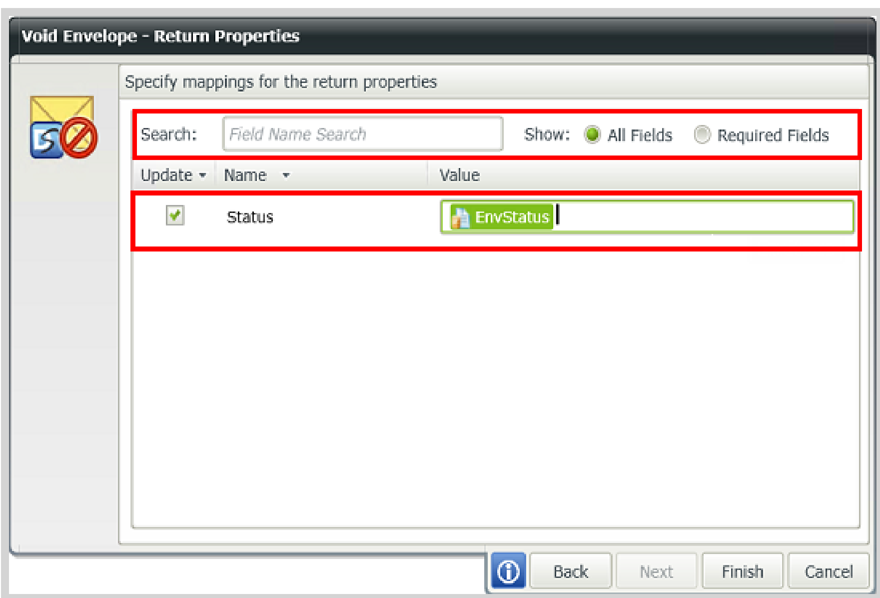
Step 1. Specify Values

Specify the envelope to void.



Step 2. Return Properties

Specify mappings for the return properties.



Void Reason

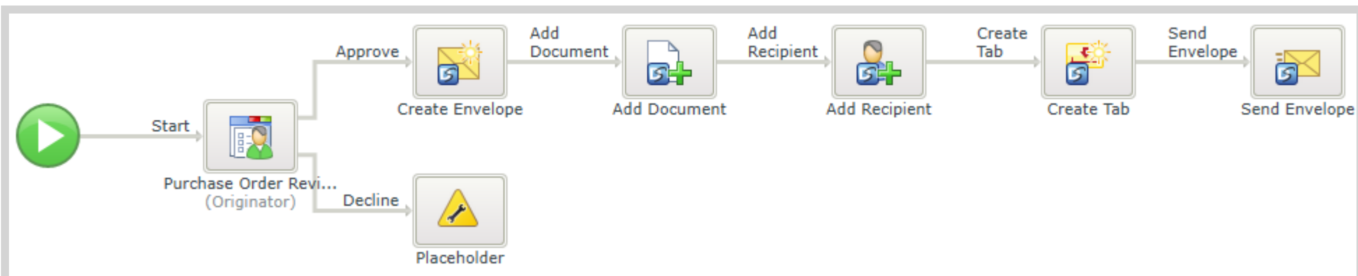
Type a value for the void reason or drag a data field or SmartObject property from the Context Browser to set the void reason.

How To: Create a Workflow with DocuSign Events

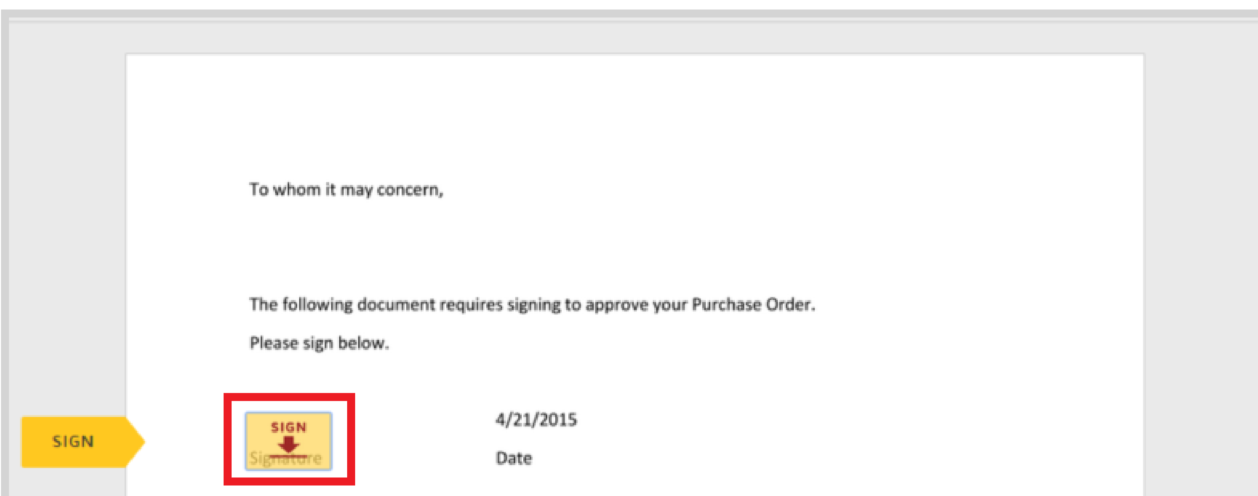
DocuSign integration allows you to create a K2 workflow with DocuSign functionality. In this How To guide you will learn how to create an end-to-end solution using DocuSign functionality to automate the signing of a document stored in SharePoint.

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 DocuSign feature. 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.

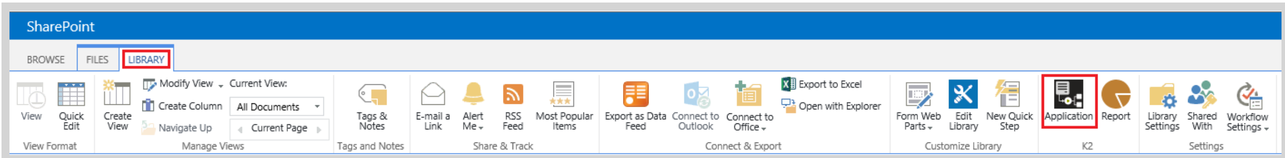


Note
Theoretical and functional knowledge of DocuSign is required to use the DocuSign integration provided by K2. You may learn more about DocuSign from the DocuSign website at https://www.docusign.com/. The documentation below assumes you are familiar with DocuSign as well as K2 SmartObjects.

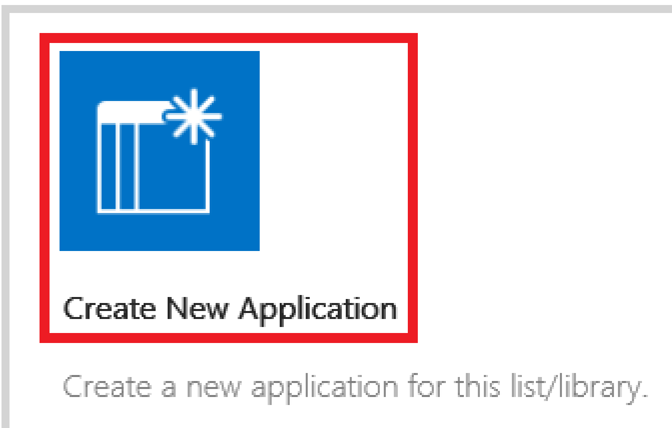
Step 1: Create a Document Library and Add the K2 App

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

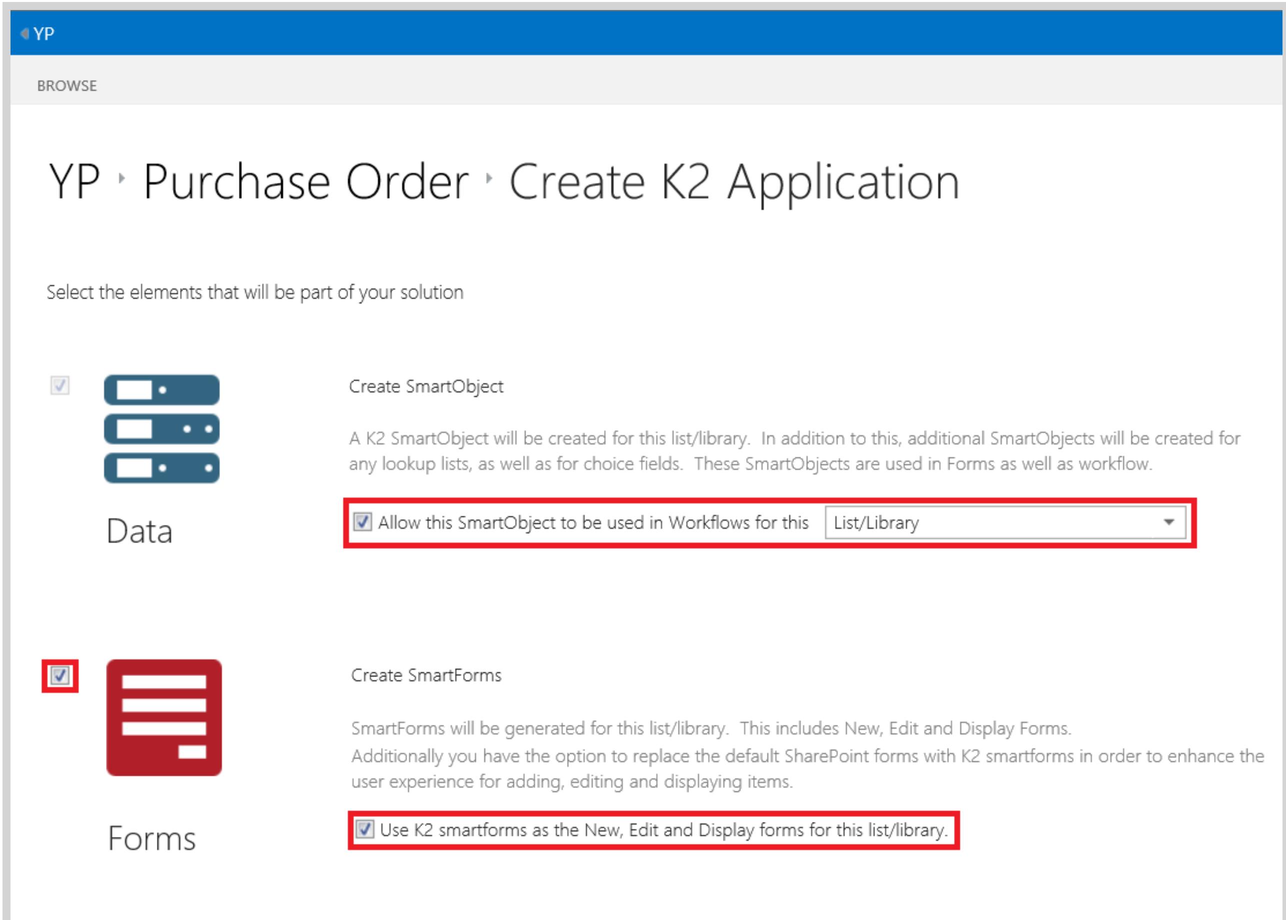
1. Add two columns to the document library called **Customer** and **Total**. Ensure that the **Customer** column is a **Single line of text** type and the **Total** column is a **Number** type.
2. Click the **Library** tab from the ribbon and select the **K2 Application** option.



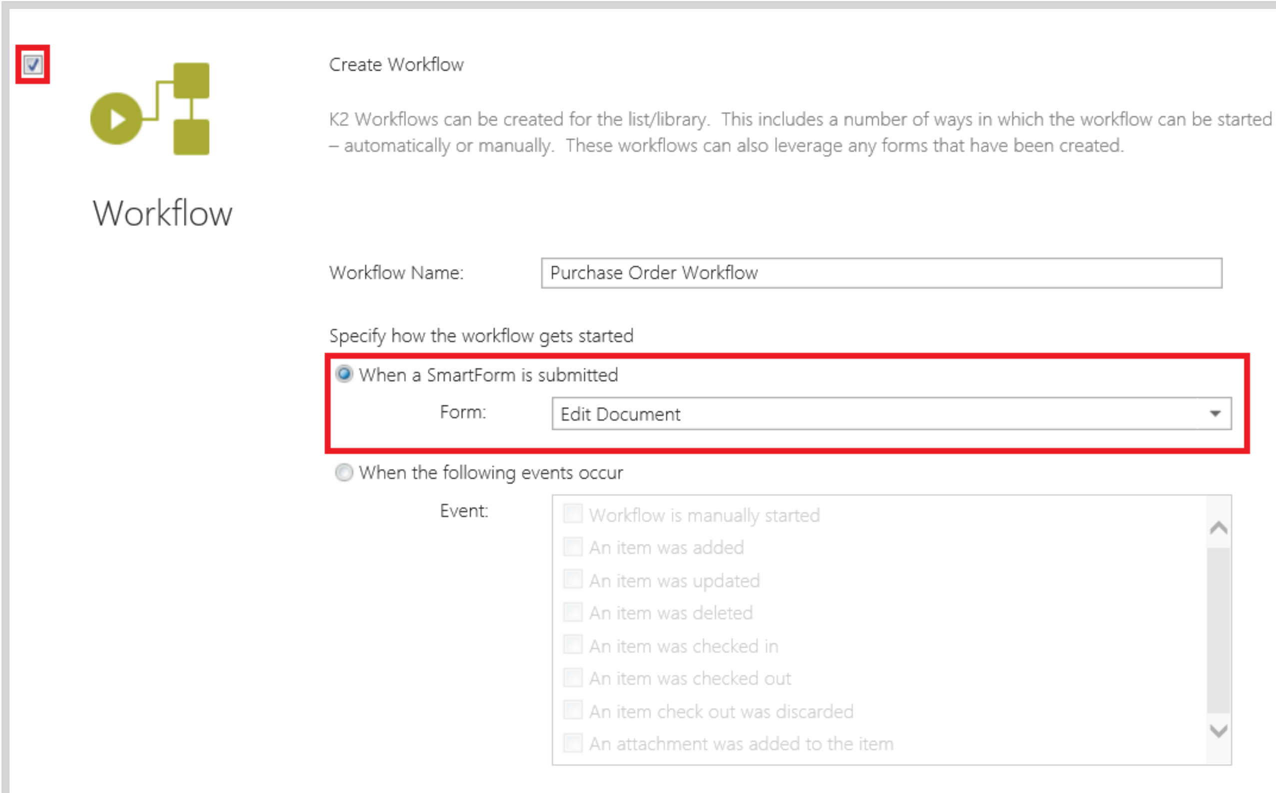
3. Next click the **Create New Application** option.



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



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



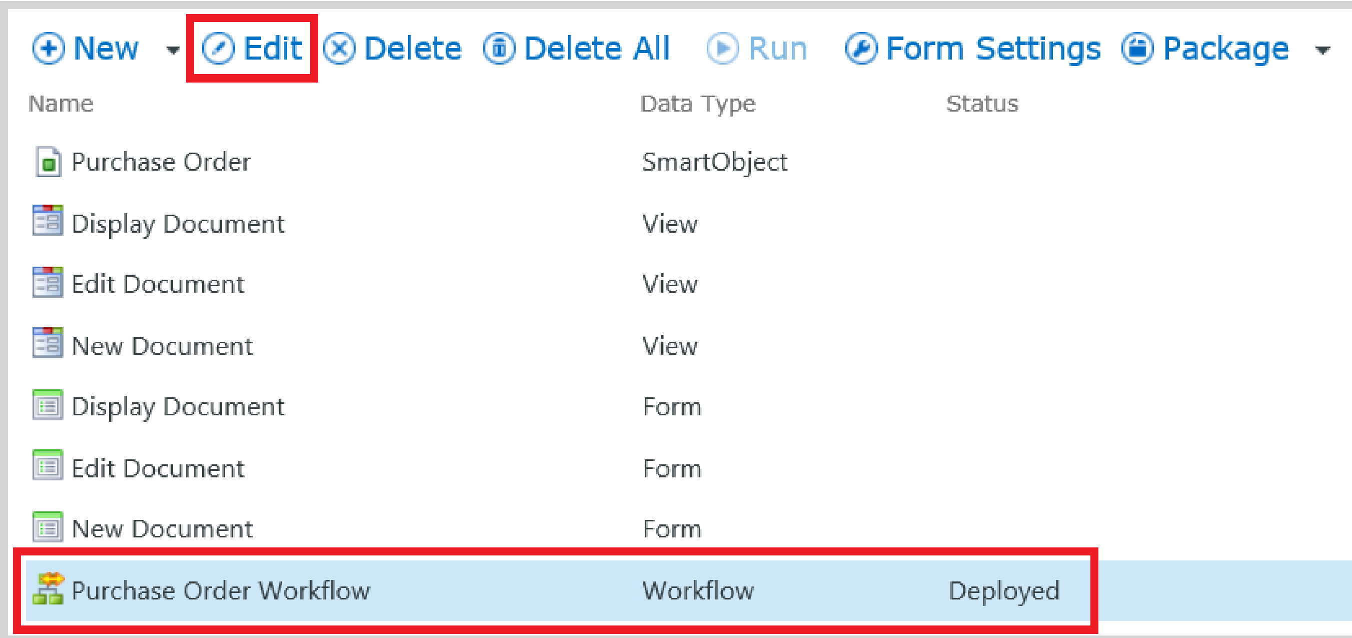
6. Click **OK.**

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

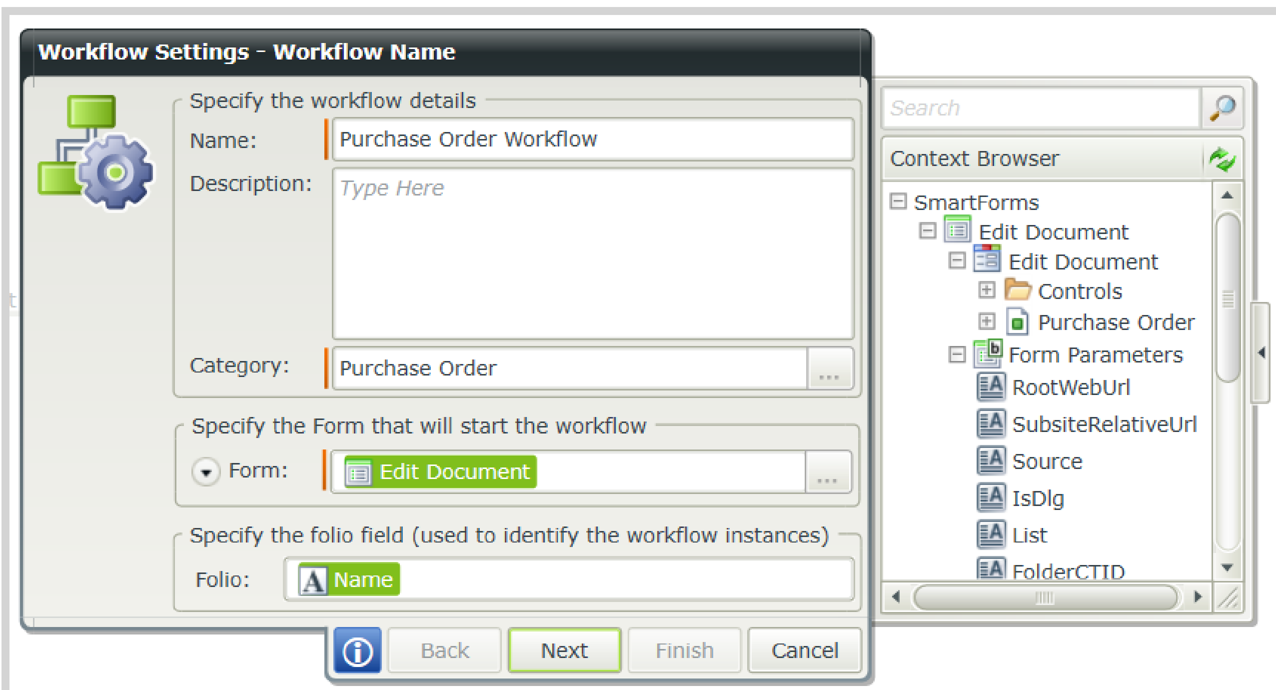
Step 2: Design the Workflow

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.

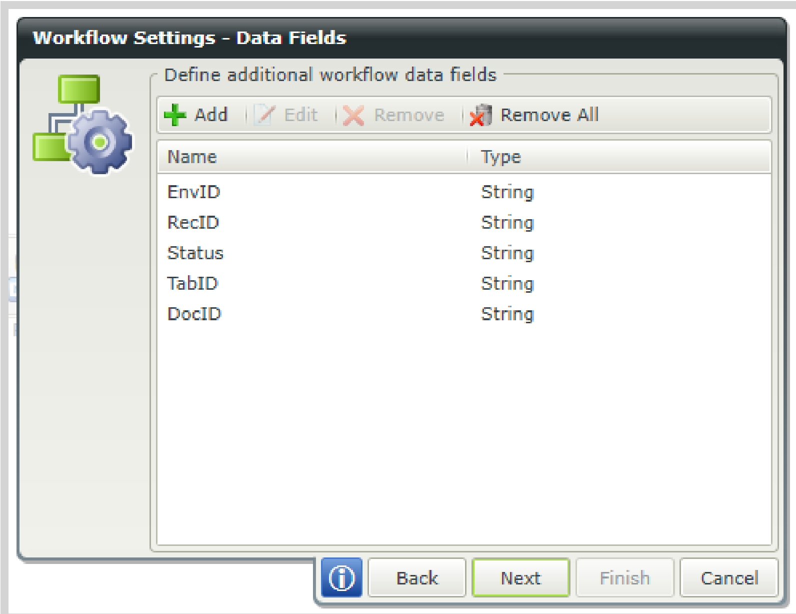


1. On the **Workflow Settings - Workflow Name** ensure the screen is set as shown below.

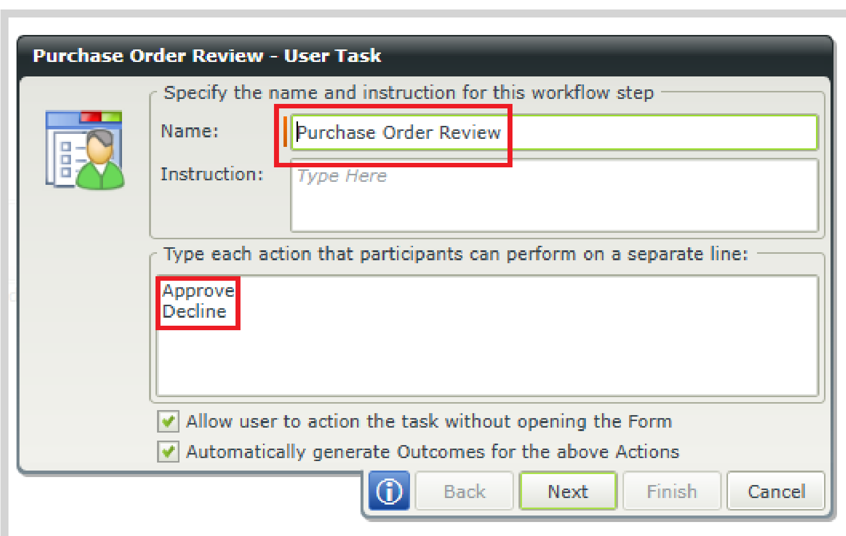


2. Click **Next**.
3. On the **Workflow Settings - Data Fields** page click the **Add** button and add the following Data Fields as string types:
   - **EnvID** (This field will be used to store the Envelope ID)
   - **RecID** (This field will be used to store the Recipient ID)
   - **Status** (This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

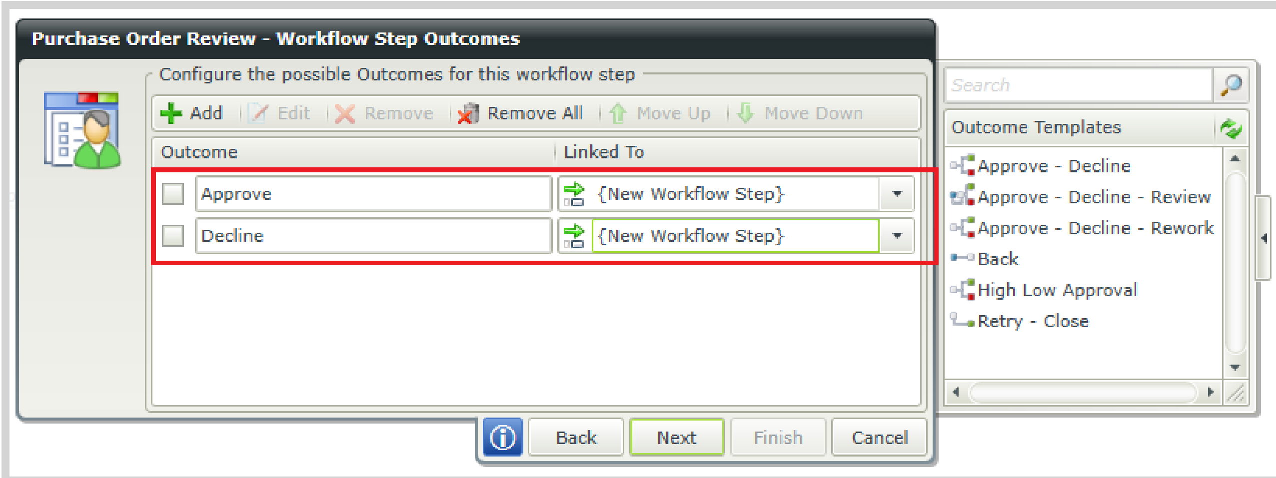
- **TabID** (This field will be used to store the Tab ID)
- **DocID** (This field will be used to store a unique Document ID)



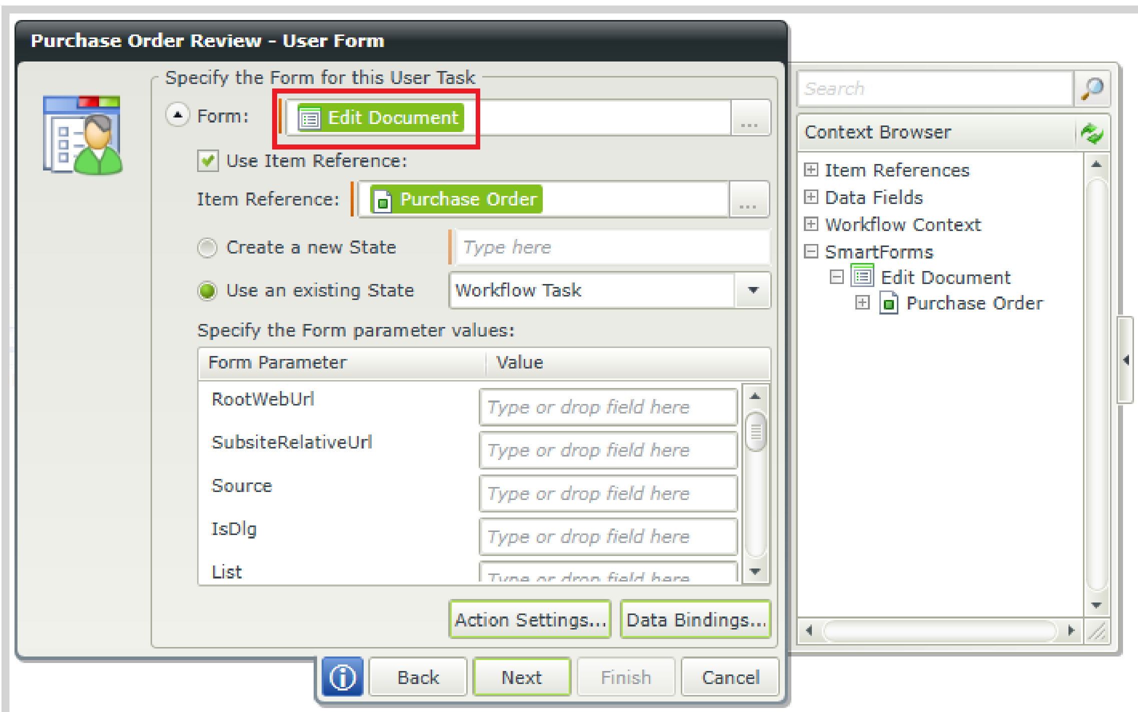
4. Click **Next** until the **Workflow Settings - Workflow Rights** page, then click **Finish**.
5. Drag a **User Task (SmartForms)** wizard onto the canvas.
6. Name the User Task **Purchase Order Review** and add to two actions called **Approve** and **Decline**.



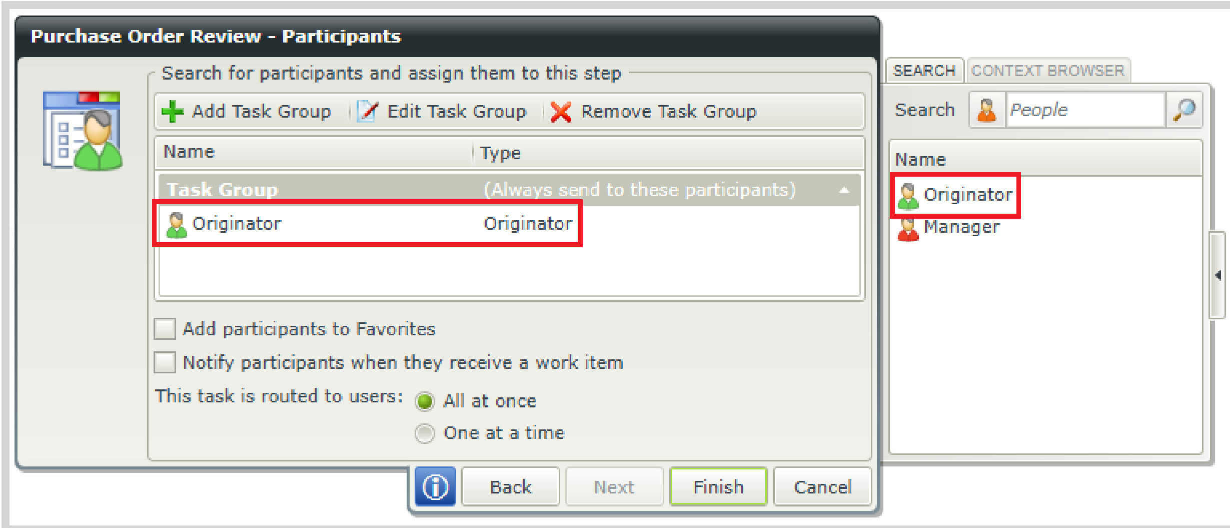
7. Click **Next**.
8. On the **Workflow Step Outcomes** screen ensure the following is setup.



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



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



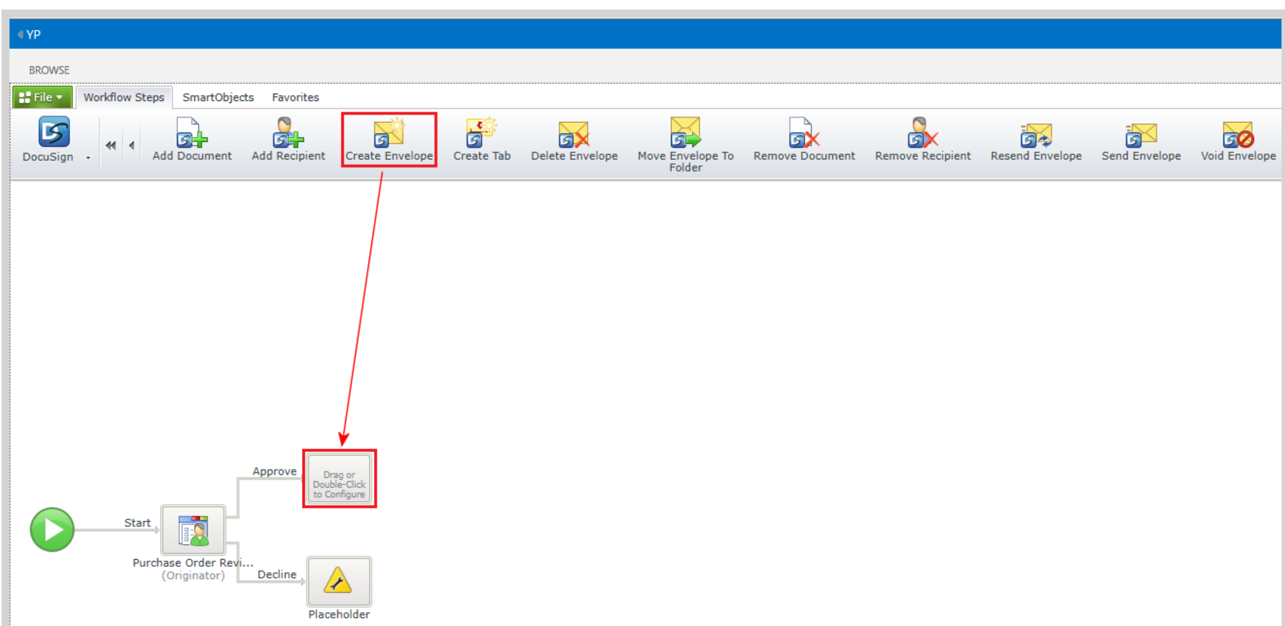
12. Click **Finish.**

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.



2. Configure the first screen of the Create Envelope wizard as follows. See the screenshot at the end of these sub-steps for an example of what the first screen of the wizard should look like.

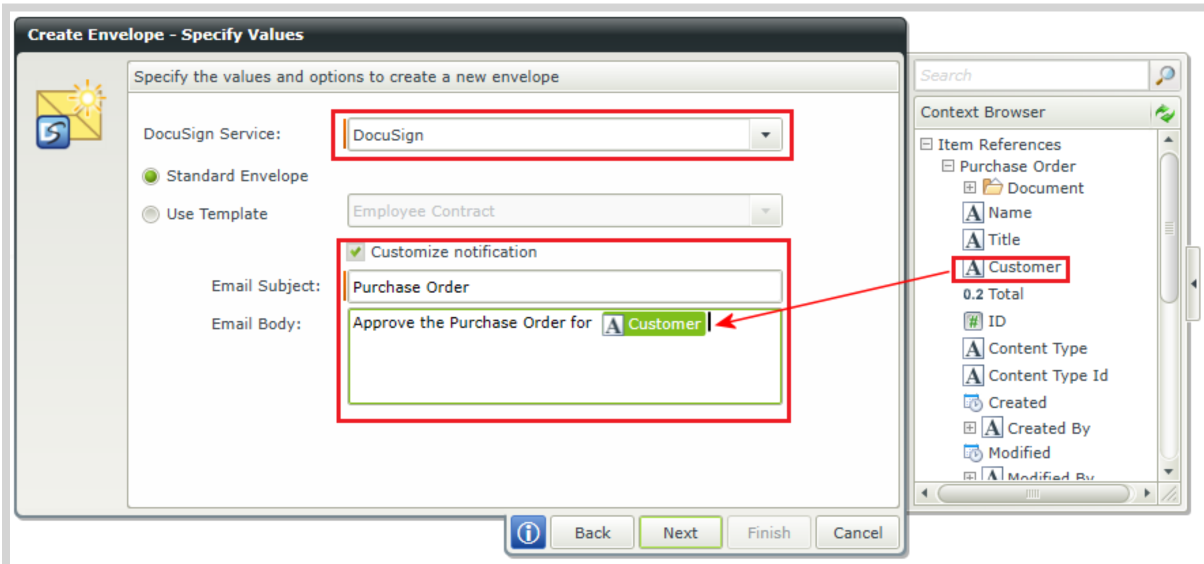
   a. On the **Create Envelope - Specify Values** page, select the appropriate DocuSign Service Instance from the **DocuSign Service** dropdown.

b. Check the **Customize notification** check box.

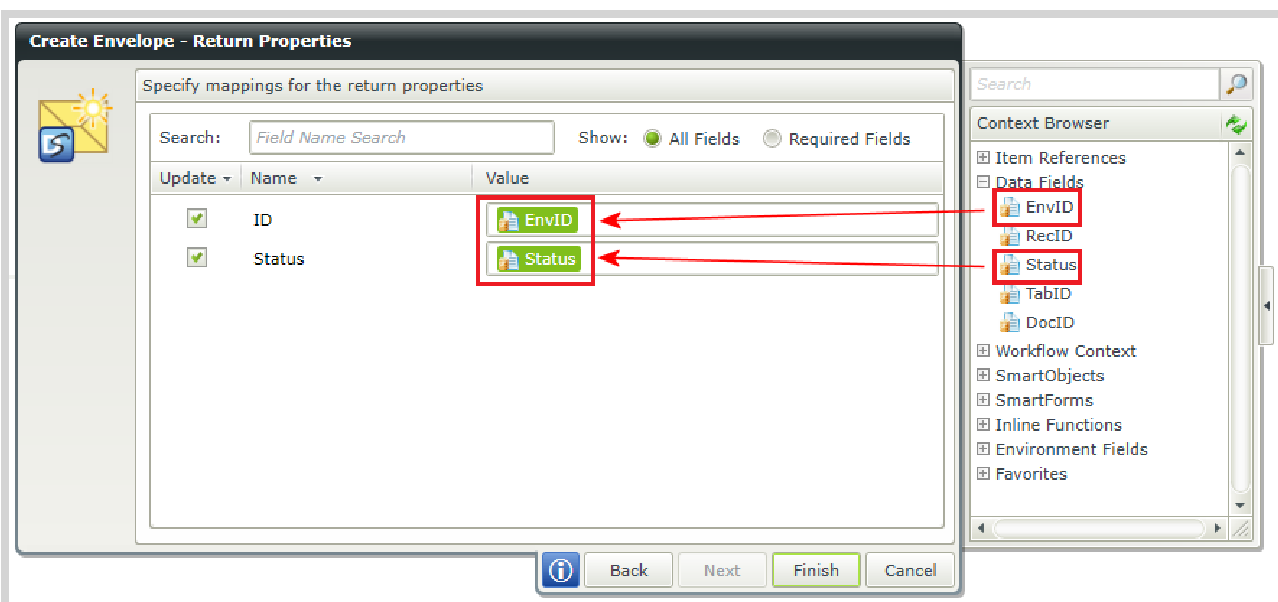
c. In the **Email Subject** section type **Purchase Order.**

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.



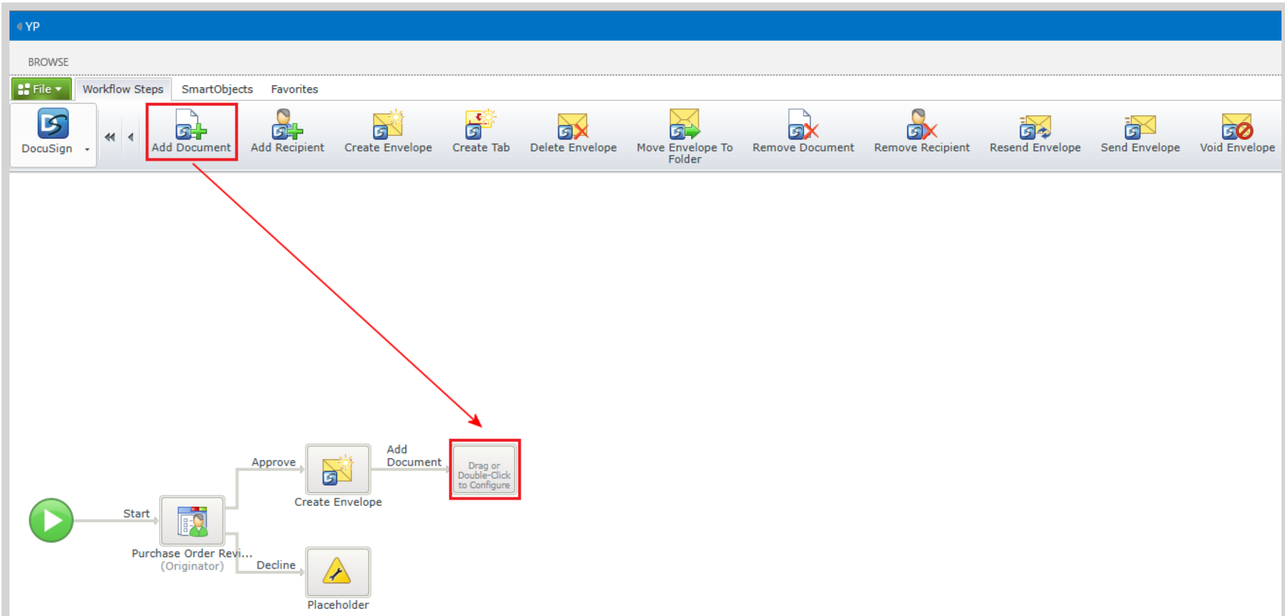
3. Click **Next** until you get to the **Return Properties** page, drag the **EnvID** and **Status** data fields from the context browser to the **ID** and **Status** fields, and then click **Finish.**



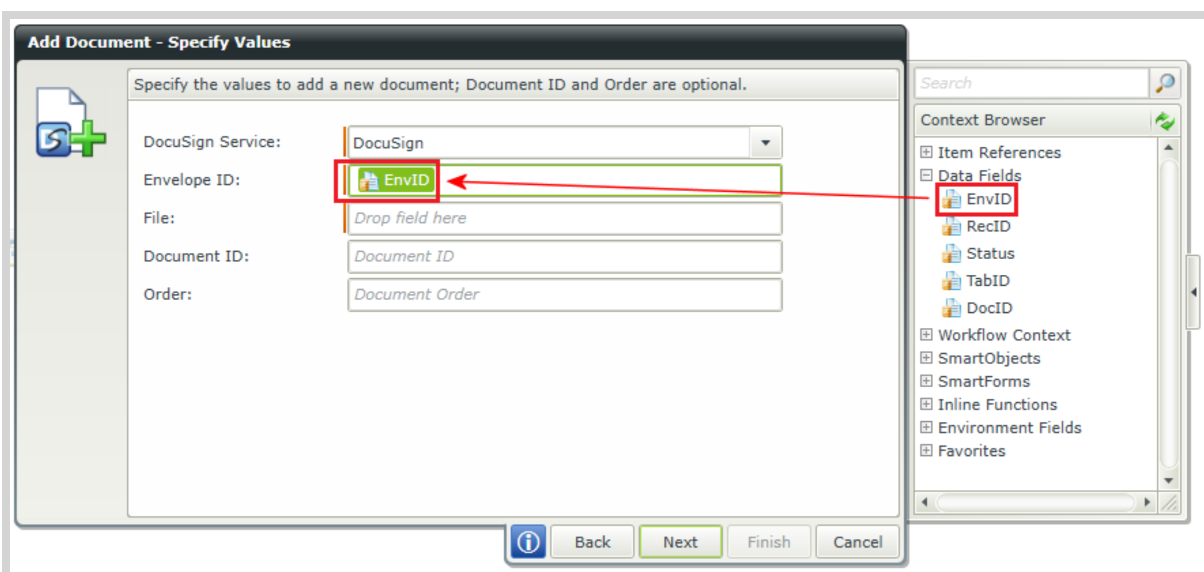
Step 4: Add and Configure the Add Document wizard

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

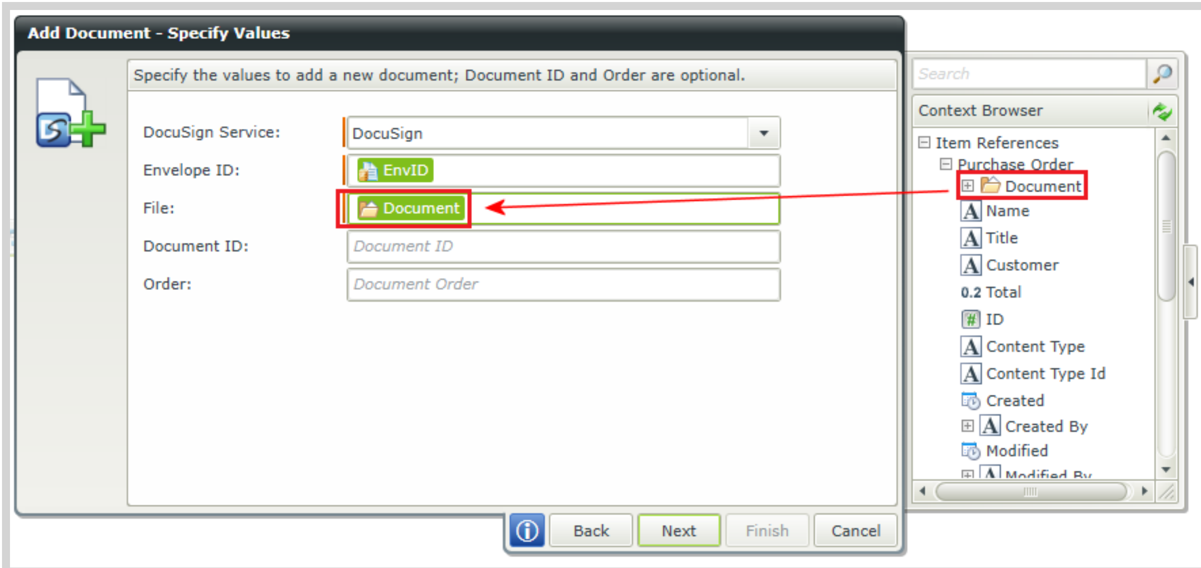
1. Hover the cursor over the **Create Envelope** wizard and click the **Workflow Step Outcomes** option.
2. On the **Workflow Step Outcomes** page add a new outcome called **Add Document**.
3. Drag the **Add Document** wizard in to the new step that was added to the workflow.



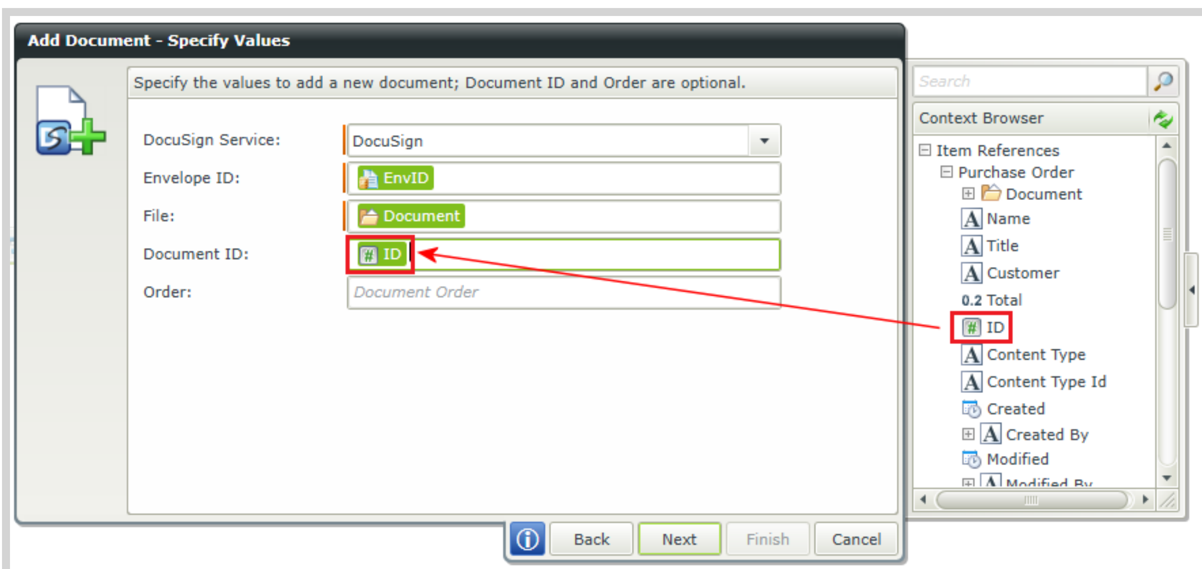
4. Configure the first screen of the Add Document wizard as follows:
   a. On the **Specify Values** page select the appropriate DocuSign Service Instance form the **DocuSign Service** dropdown.
   b. Expand the Data Fields node in the context browser and drag the **EnvID** data field in to the **Envelope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



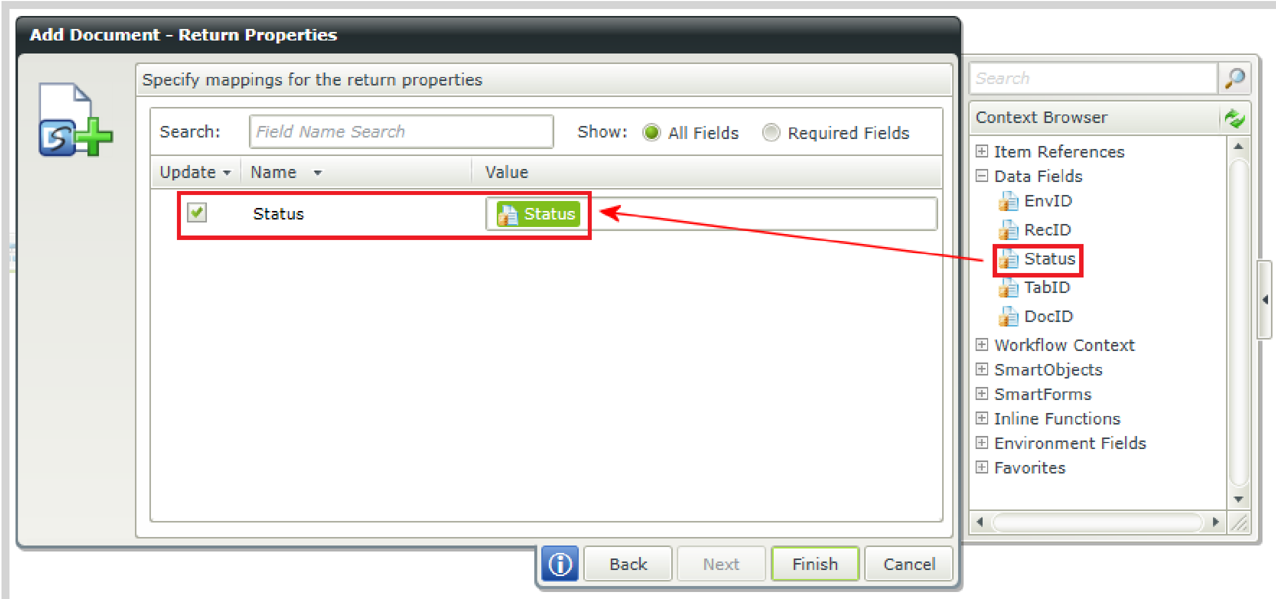
   c. Expand the Item References node in the context browser and drag the **Document** property in to the **File** field.



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.



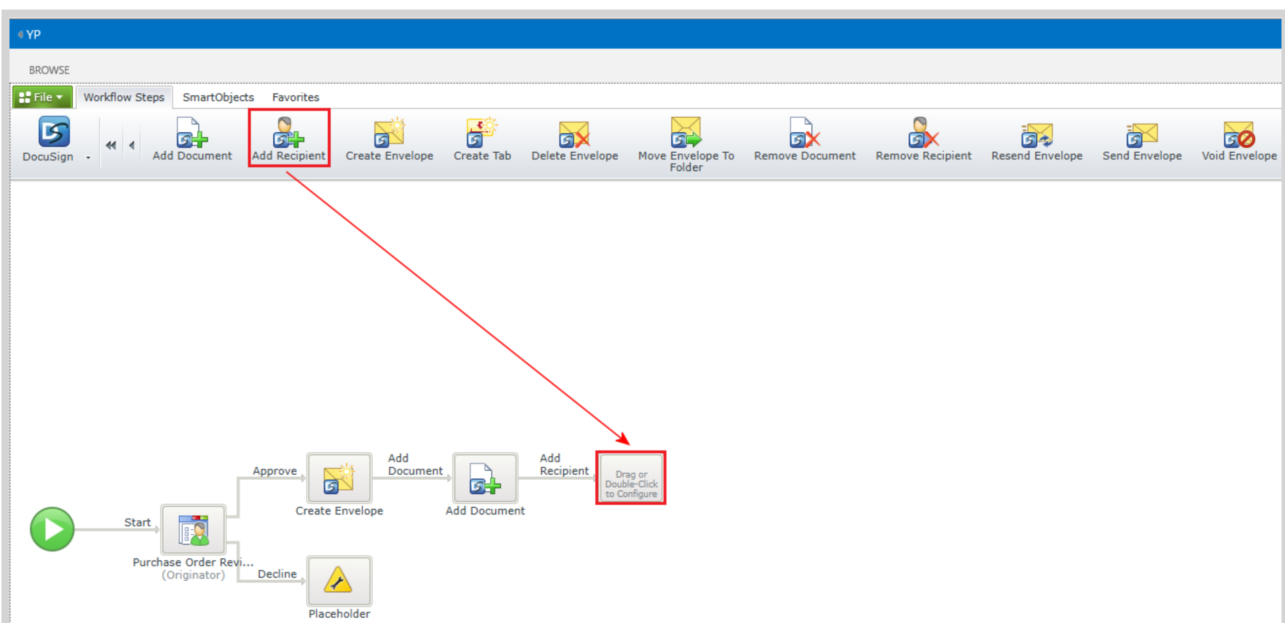
5. Click **Next.** On the **Return Properties** page, drag the **Status** property from the Data Fields node in the context browser to the **Status** field, and click **Finish**.



Step 5: Add and Configure the Add Recipient wizard

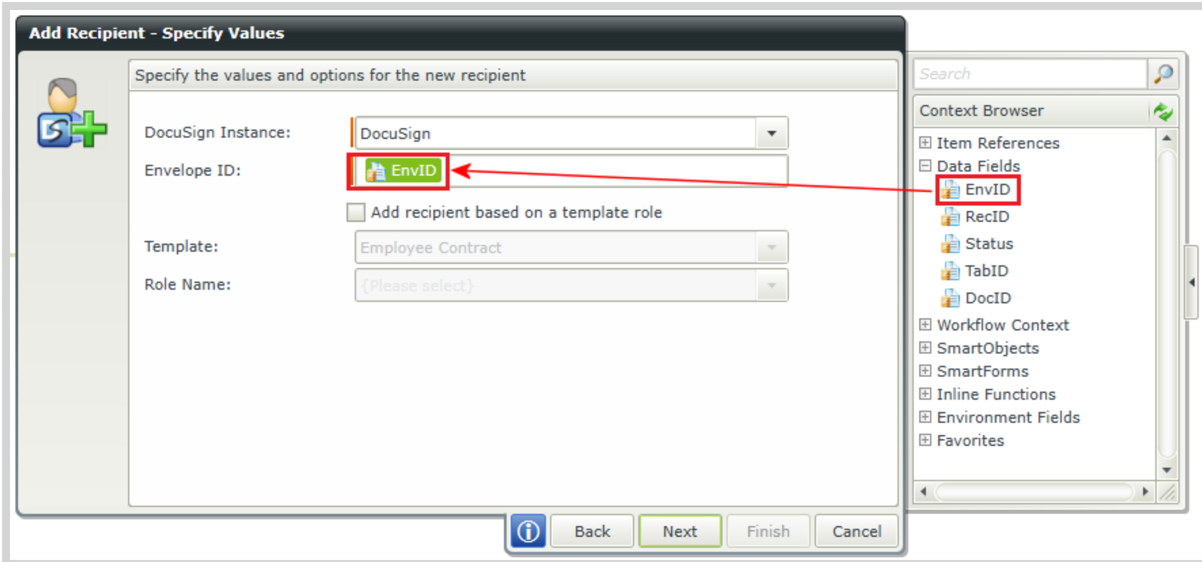
In this step you will add a DocuSign recipient to the envelope using the Add Recipient wizard.

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.

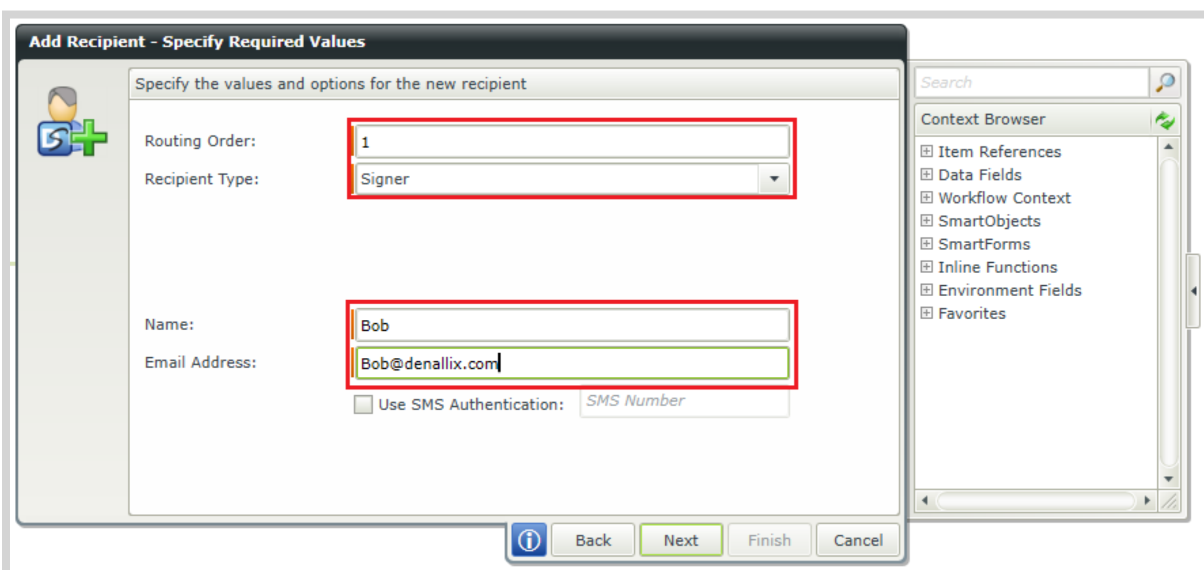


4. Configure the first screen of the Add Recipient wizard as follows:
   a. On the **Specify Values** page, select the appropriate DocuSign Service Instance from the **DocuSign Instance** dropdown.
   b. Expand the Data Fields node in the context browser and drag the **EnvID** data field in to the **Envelope**

ID option.

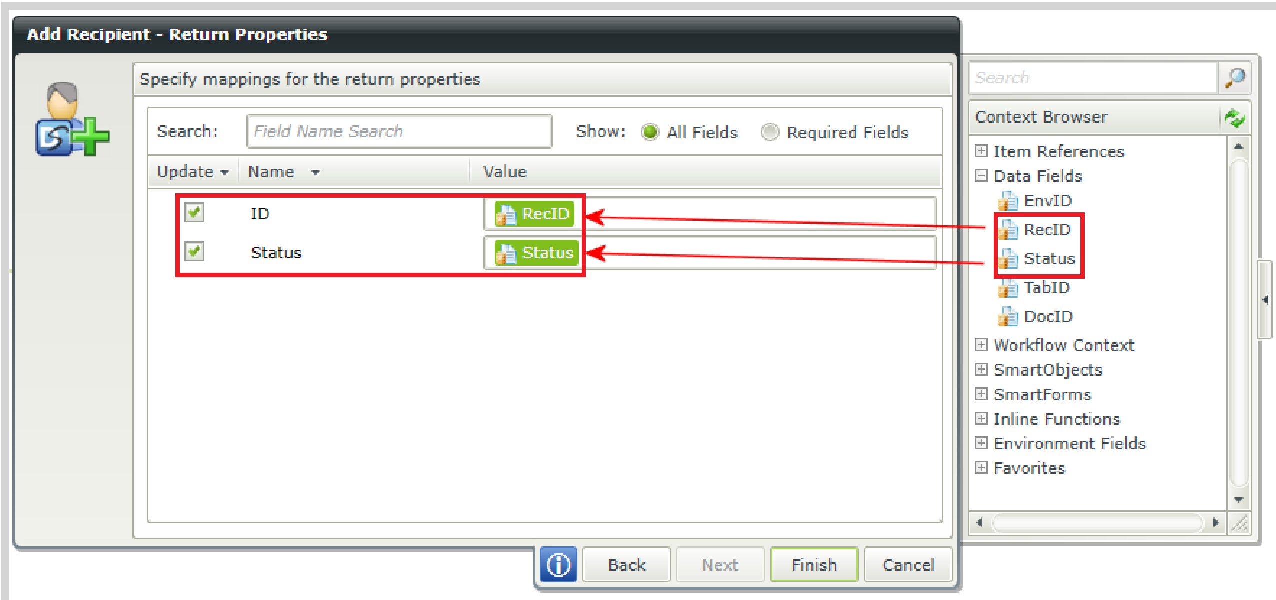


5. Click **Next.**
6. Configure the second screen of the Add Recipient wizard as follows:
   a. On the **Specify Required Values** screen, insert a **1** into the **Routing Order** field.
   b. Select the **Signer** option from the **Recipient Type** dropdown.
   c. Type the name of user who will be 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.



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:

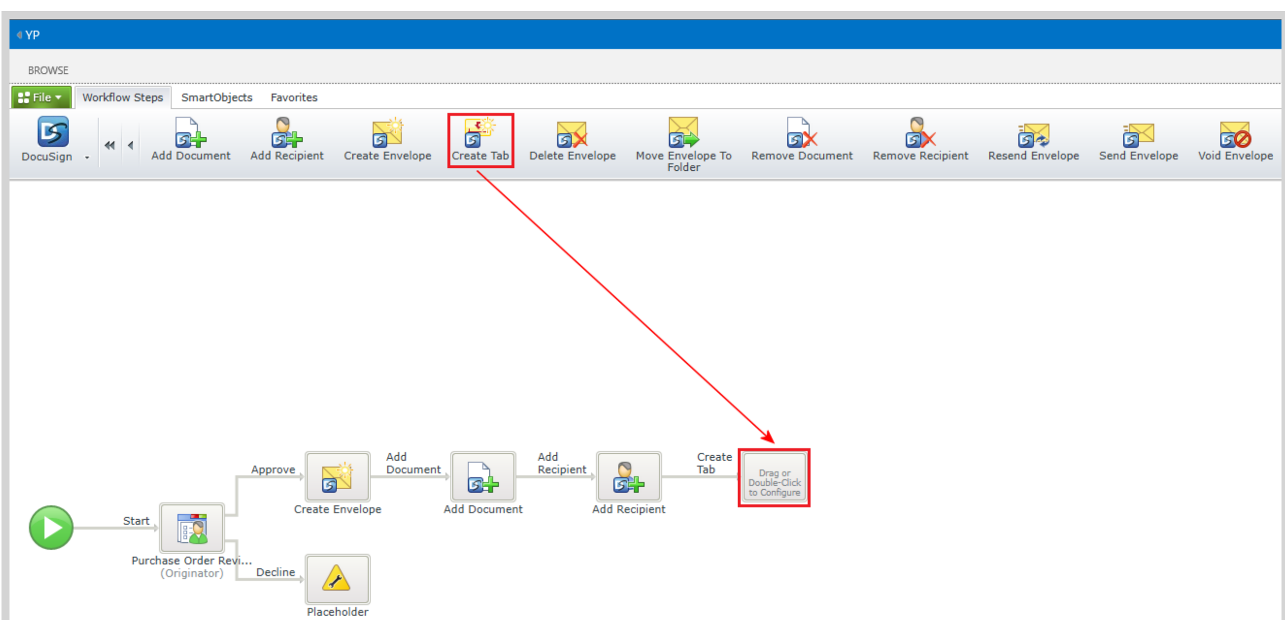


9. Click **Finish.**

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.

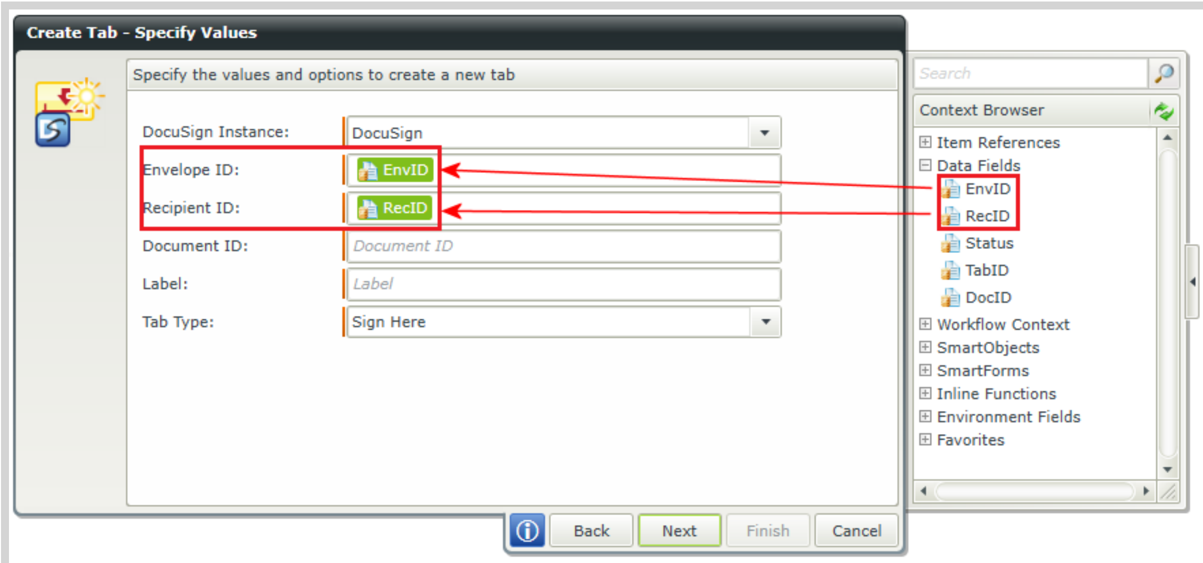
1. Hover the cursor over the Add Recipient wizard and click the Workflow Step Outcomes option.
2. On the Workflow Step Outcomes screen add a new step called Create Tab.
3. Drag the **Create Tab** wizard in to the new workflow step that was added.



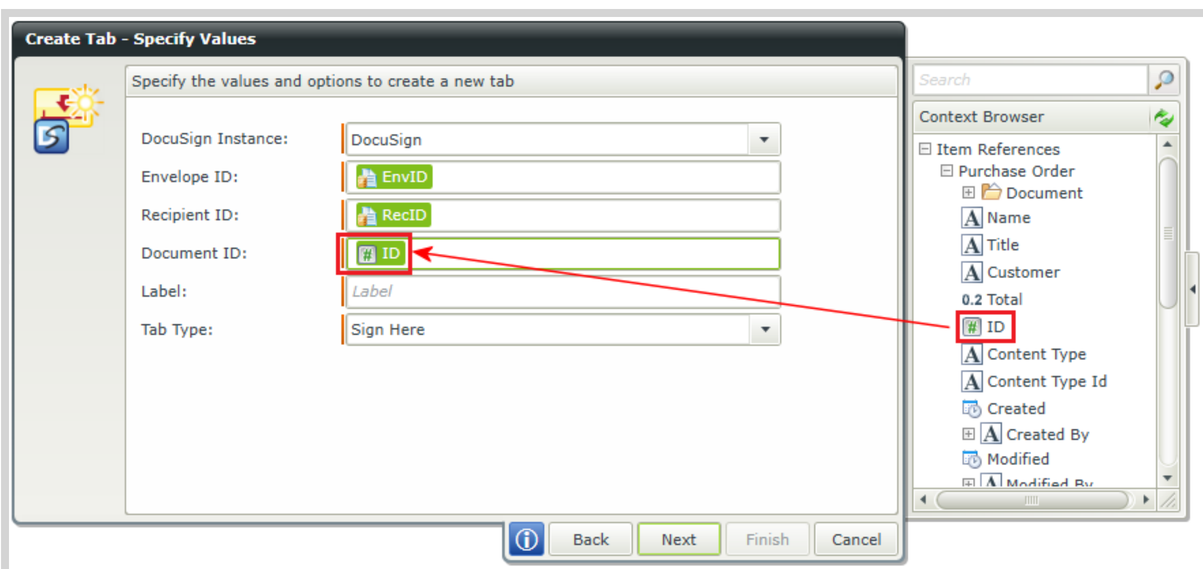
4. Configure the first screen of the wizard as follows:

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:



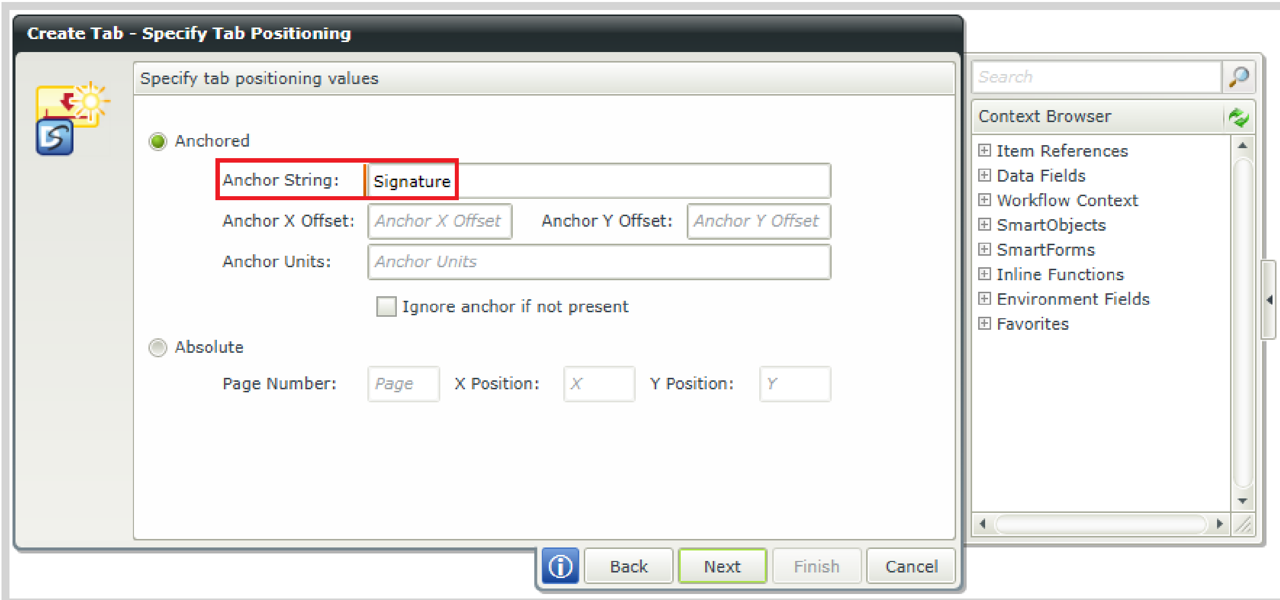
c. Expand the Item References then the Purchase Order nodes in the context browser and drag the **ID** property in to the **Document ID** field (Make sure that you use the same ID field that you had used for the Document ID in the Add Document Step).



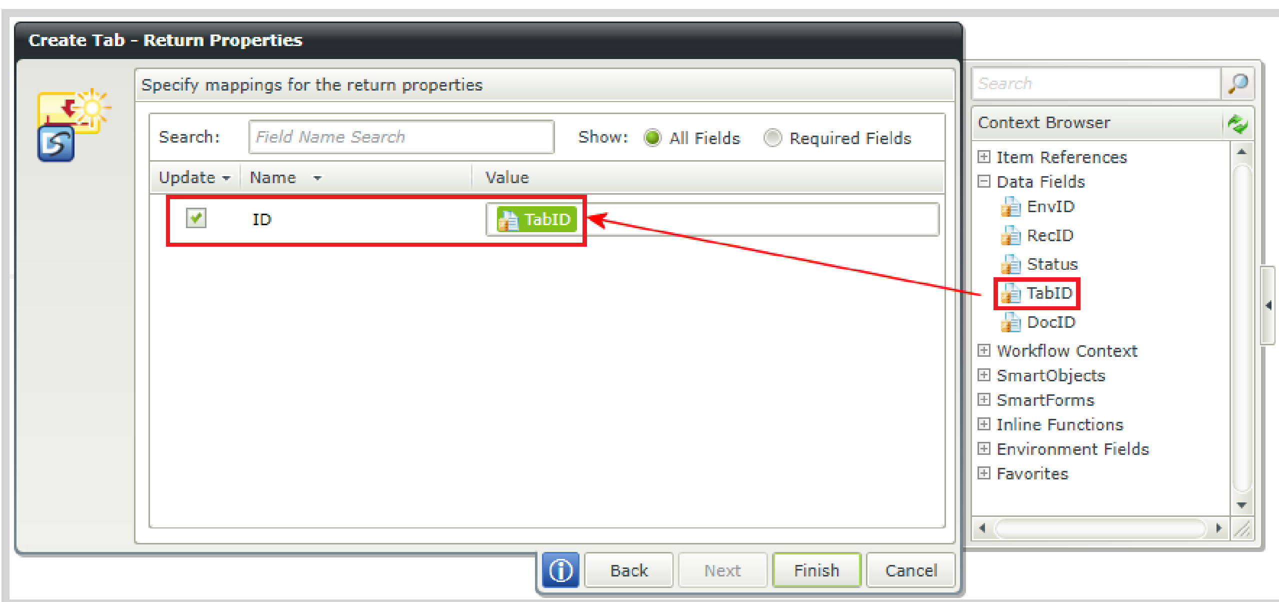
d. Enter **Signature** in the **Label** field. The purpose of this field is that wherever the field **Signature** is present in the document the DocuSign Tab will be added. In the **Tab Type** dropdown select the **Sign Here** option.

5. Click **Next.**

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



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:



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.

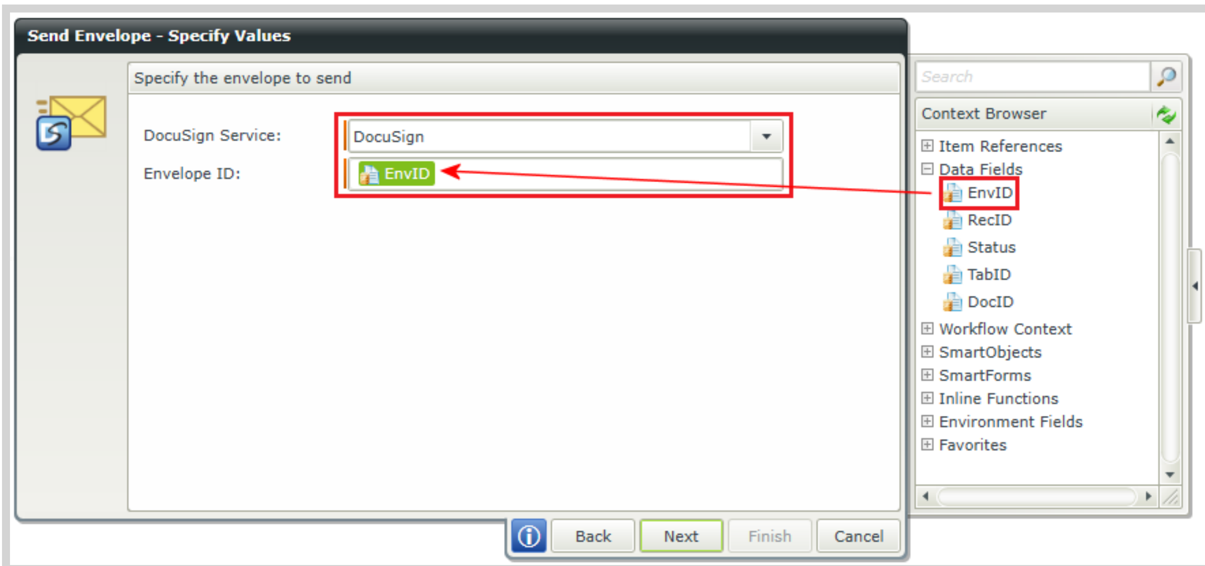
1. Hover the cursor over the Create Tab wizard and click the **Workflow Step Outcomes** option.
2. On the **Workflow Step Outcomes** screen add a new outcome called **Send Envelope**.

3. Drag the **Send Envelope** Wizard in to the new step.

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

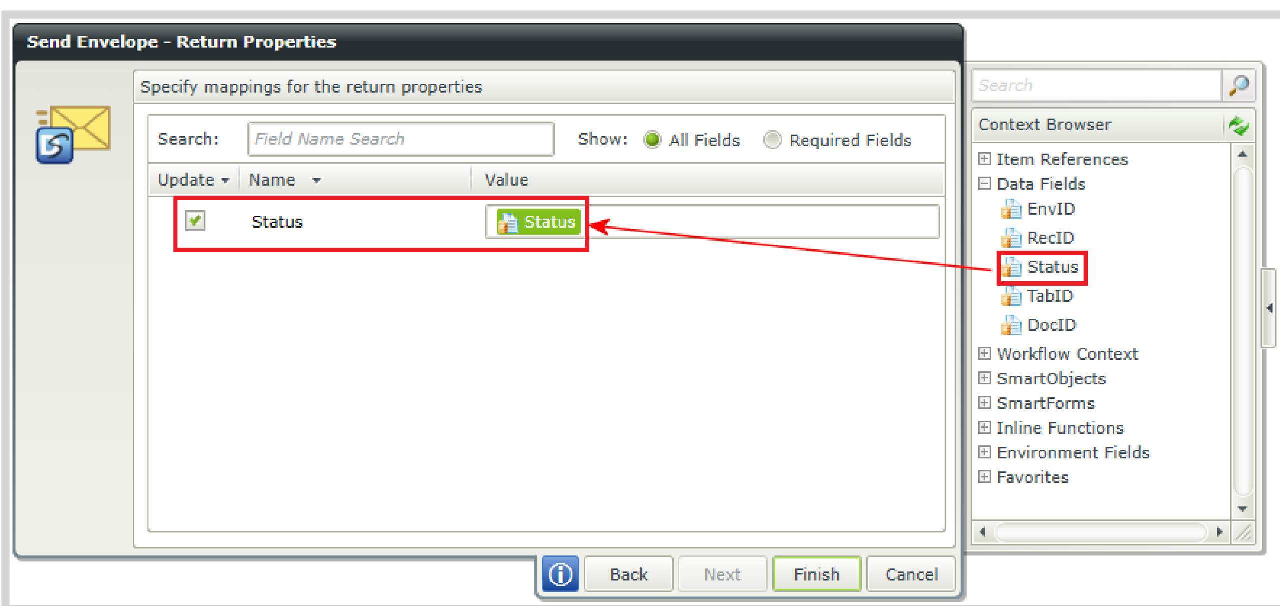
   a. On the **Specify Values** screen, select the appropriate DocuSign Service Instance from the **DocuSign Service** dropdown.

   b. Expand the Data Fields node in the context browser and drag the **EnvID** data field in to the **Envelope ID** field.



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.

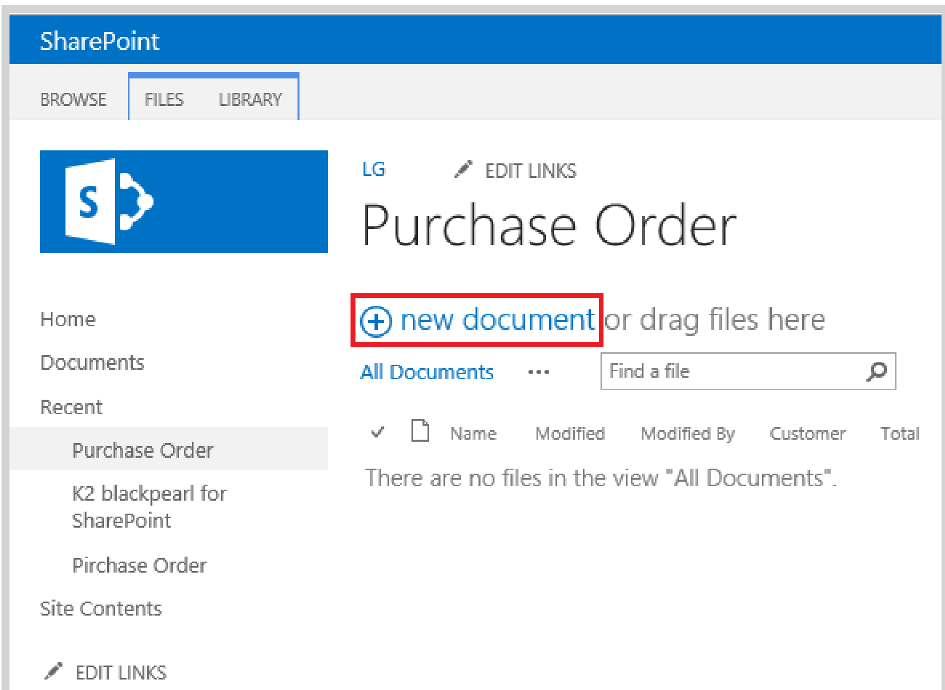


7. Click **Finish**.

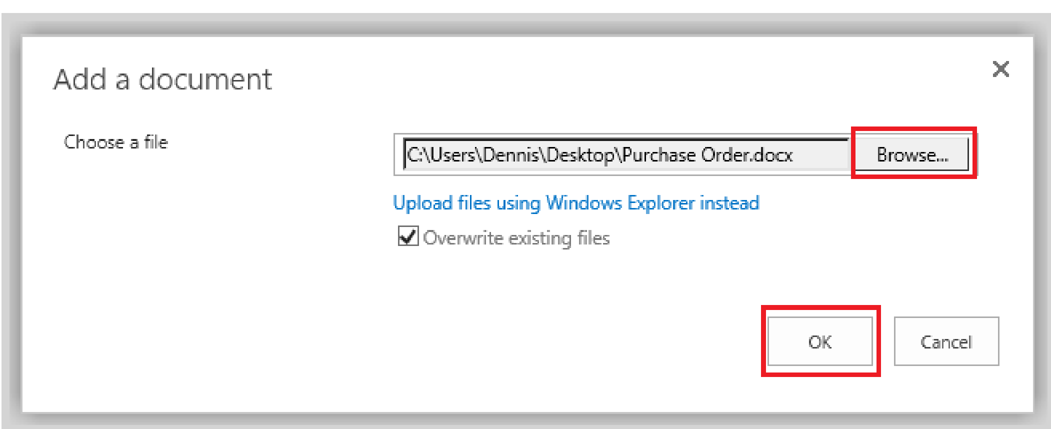
Step 8: Save, Deploy and Testing the Workflow

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

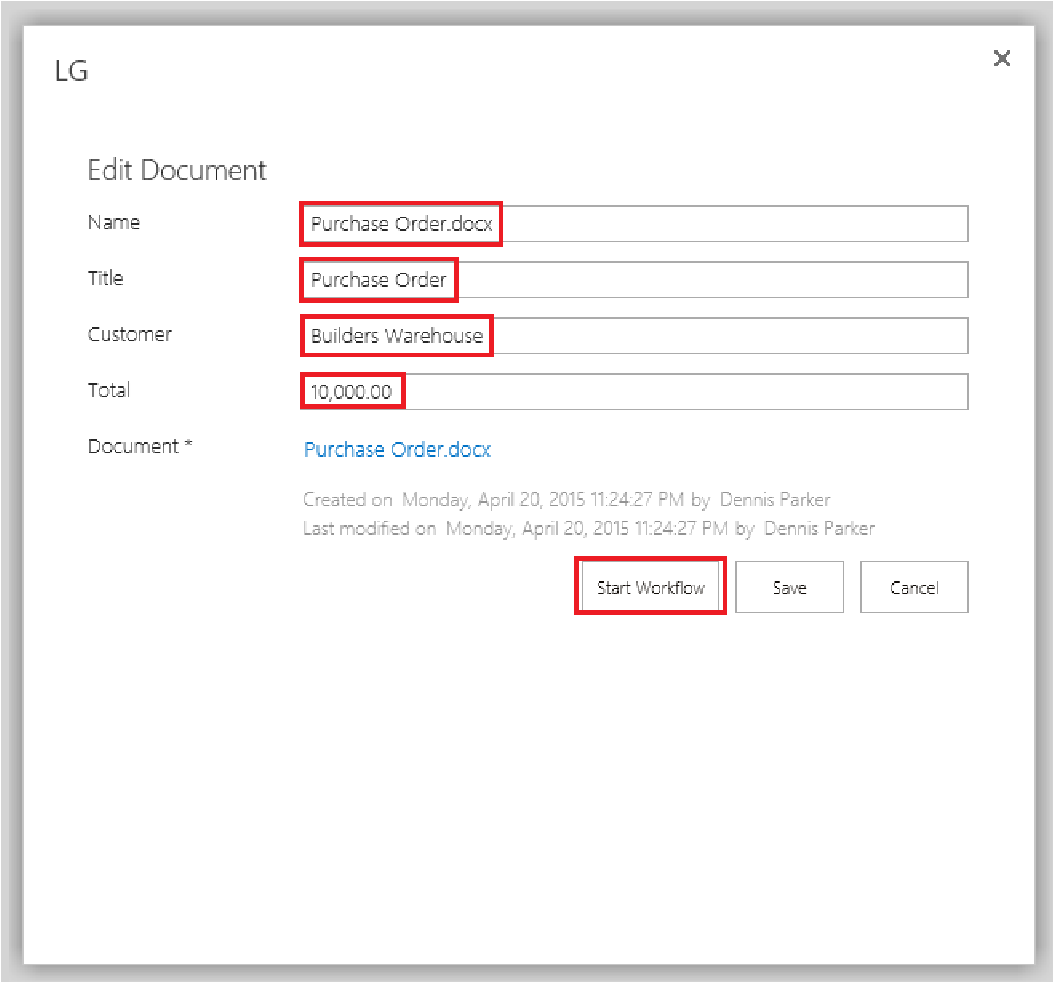
1. Click **File** and **Save** the workflow.
2. Click **File** again and **Deploy** the workflow.
3. Once the workflow has been deployed successfully, click **Close and Exit**.
4. Browse to the **Purchase Order** Document Library.
5. Click on the **new document** button, to add a new document to the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



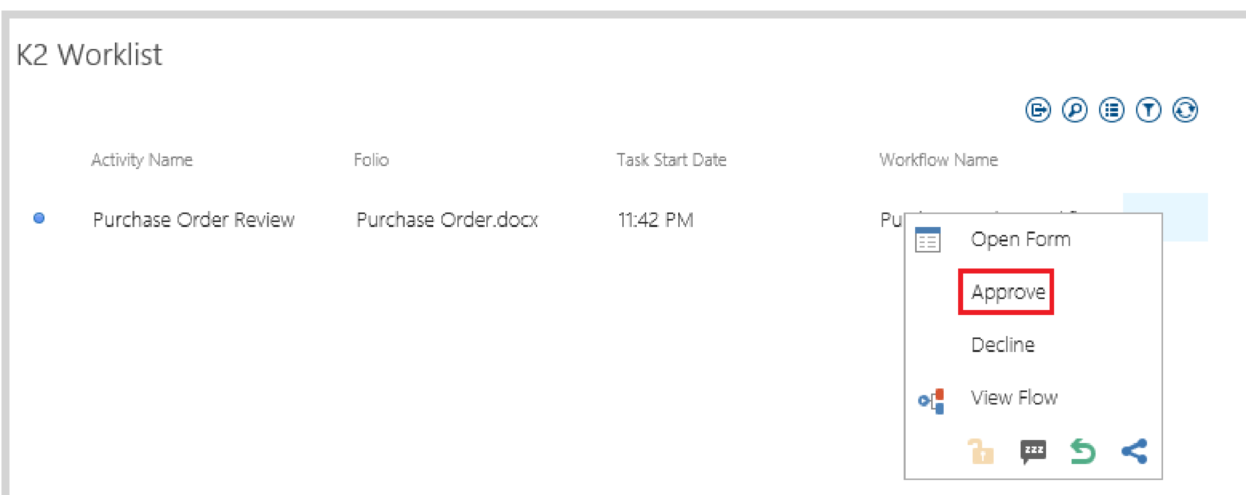
6. On the **Add Document** page click **Browse** and select the Document to be added to the document library.
7. Click **OK.**



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



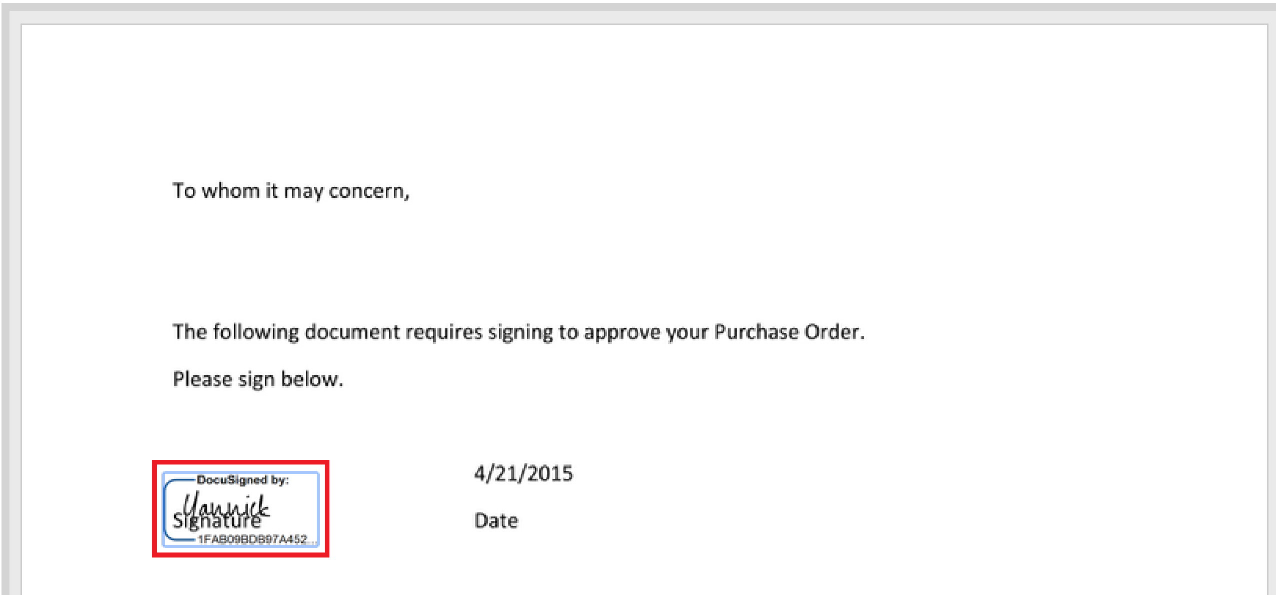
9. Go to the K2 Worklist App on the Site Collection or Sub Site and there will be a new task available.
10. Click on the task and select the **Approve** option.



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 requires signing to approve your Purchase Order.

Please sign below.

DocuSigned by:
Signature
1FAB09BDB97A452

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. KB001689 - How To: Deploy a DocuSign integrated workflow

Terms of Use

Acceptance of Terms

THIS DOCUMENTATION IS SUBJECT TO THE FOLLOWING TERMS OF USE ("TOU"). SOURCECODE TECHNOLOGY HOLDINGS INC. RESERVES THE RIGHT TO UPDATE THE TOU AT ANY TIME WITHOUT NOTICE. THE MOST CURRENT VERSION OF THE TOU CAN BE REVIEWED BY CLICKING ON THE "TERMS OF USE" LINK IN THE TABLE OF CONTENTS.

Copyright

© 2008-2015 SOURCECODE TECHNOLOGY HOLDINGS, INC. ALL RIGHTS RESERVED. SOURCECODE SOFTWARE PRODUCTS ARE PROTECTED BY ONE OR MORE U.S. PATENTS. OTHER PATENTS PENDING. SOURCECODE, K2, K2 BLACKPEARL, K2 SMARTFORMS AND APPIT ARE REGISTERED TRADEMARKS OR TRADEMARKS OF SOURCECODE TECHNOLOGY HOLDINGS, INC. IN THE UNITED STATES AND/OR OTHER COUNTRIES. THE NAMES OF ACTUAL COMPANIES AND PRODUCTS MENTIONED HEREIN MAY BE THE TRADEMARKS OF THEIR RESPECTIVE OWNERS.

Third-Party Integration

SOURCECODE MAY MODIFY, ADJUST OR REMOVE FUNCTIONALITY IN THE K2 SOFTWARE IN RESPONSE TO CHANGES MADE TO VERSIONS OF THE RELEVANT MICROSOFT OR OTHER THIRD PARTY PRODUCTS. THIS DOCUMENTATION MAY PROVIDE ACCESS TO OR INFORMATION ON CONTENT, PRODUCTS, AND SERVICES FROM THIRD PARTIES. SOURCECODE TECHNOLOGY HOLDINGS INC. IS NOT RESPONSIBLE FOR AND EXPRESSLY DISCLAIMS ALL WARRANTIES OF ANY KIND WITH RESPECT TO THIRD-PARTY CONTENT, PRODUCTS, AND SERVICES.

Notice regarding content of this documentation

WHILE EFFORTS WERE MADE TO VERIFY THE COMPLETENESS AND ACCURACY OF THE INFORMATION CONTAINED IN THIS DOCUMENTATION, THE DOCUMENTS AND RELATED GRAPHICS CONTAINED IN THIS DOCUMENTATION COULD INCLUDE TECHNICAL INACCURACIES OR TYPOGRAPHICAL ERRORS. SOURCECODE TECHNOLOGY HOLDINGS INC. MAY MAKE IMPROVEMENTS AND/OR CHANGES IN THE DOCUMENTATION AT ANY TIME AND WITHOUT NOTICE. ERRORS AND INACCURACIES MAY BE REPORTED IN WRITING TO DOCUMENTATION@K2.COM