



# **DocuSign Package**

## **Readme**

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**Version 1.0**

**10/29/2021**

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# 1. Introduction

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This document contains all essential information for the user to make full use of this DocuSign package. It includes the description of the functions/capabilities and step-by-step procedure to setup and use the actions in the DocuSign package setup & configuration of the AARI for Web process.

## 1.1 Overview

The DocuSign package is designed to mail the documents stored in local system to the recipient, get it signed and download the signed document to the local system.

***Note: This is the first version of the package and supports adding only one document at a time to a single recipient.***

## 1.2 Use cases

The key use cases include:

- Getting documents signed to apply for a credit card, loan, bank account etc.,

## 2. Requirements & Prerequisites

### 2.1 System Requirements

Below are the minimum system requirements for running bots as an Automation 360 (Cloud deployed) or Community Edition user on your local machine.

#### Hardware Requirements

Device	Processor	RAM	Storage (Free Space)	Network
Machine	Intel Core i5 2.6 GHz	4 GB minimum 8 GB recommended	32 GB	1 GbE
Bot Creator and Bot Runner	No additions to the machine requirements	No additions to the machine requirements	Add 100 through 150 KB per Automation Anywhere script  Add 40 through 50 GB per long-term project	No additions to the machine requirements

#### Browser Requirements

The user interface for Automation 360 is through a browser. Login to your device then login to Enterprise Control Room through a browser.

Browser	Browser Version	Automation Anywhere plug-in version <sup>2</sup>	Supported bot functions by Bot agent version		
Google Chrome <sup>1</sup>	57 or later	11 or 12	2.0.2	1.0.2	1.0.1
Microsoft Internet Explorer	11	N/A	None	Debugger only	All except Credential Vault

(1) Google Chrome re-verification

**CAUTION:** Google Chrome requires re-verification of permissions when the Automation Anywhere Google Chrome extension (Version 11.3.3 or later) is updated. If prompted, click **Enable this item** in the Google Chrome message. Alternatively, re-enable the extension through [chrome web store](#). Similarly, if you are deploying your Bot Runners from a master image, accept the permission from within that image.

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## (2) Google Chrome plug-in versions

A2019 supports Chrome plug-in version 11. If you have other versions installed, you might not be able to record tasks using the **Record** feature or **Capture** action. To resolve this issue, do the following:

1. Rename the automation.chrome.agent registry key to automation.chrome.agent.old. The registry key is available at: Computer\HKEY\_CURRENT\_USER\Software\Google\Chrome\NativeMessagingHosts
2. Disable all other Google Chrome plug-in versions you have installed, except for version 11.

## 2.2 Prerequisites

- Automation 360 setup to run in your machine
- Bot creator license
- DocuSign Account

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## 3. Getting Started

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### 3.1 Quick Start

#### 3.1.1 Setup

- Install the bot from Bot Store into your Control Room.
- Navigate to 'DocuSign – Automation Anywhere' folder within the Bot Store folder to examine the installed bots, and package.
- Active DocuSign developer account

##### DocuSign setup details:

- A DocuSign Developer Account <https://developers.docusign.com/>
- A registered App with its Private Key and Integration Key (Client ID). Make sure that grant type is set to "Implicit Grant"
- Your API Account ID and API Username
- **Before you can make any API calls, you must get your user's consent for your app to impersonate them. This has to be done for every DocuSign app once.** Create a callback URL for the app in the DocuSign console and post the following URL in a browser window before you do the first API call with the package actions. You find more details about this step [here](#).

`https://account-d.docusign.com/password?scope=signature  
impersonation&client_id=<Client ID /Integration Key of the  
App>&redirect_uri=<Callback URL that already exists or you created for this app>`

Quickstart App-1

SAVE

CANCEL

General Info

App Name \*

Quickstart App-1

Integration Key

Your integration key (also known as a client id) is a unique identifier for your app.

aabx

3186e

Authentication

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

User Application

☐ Authorization Code Grant

☒ Implicit Grant

Service Integration

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

RSA Keypairs (ID)

+ GENERATE RSA

+ UPLOAD RSA

Additional settings

Redirect URIs

×

http://localhost:8080/authorization-code/callback

×

http://localhost:8080/ds/callback

×

https://localhost:9090/ds/callback

### 3.1.2 Configuration and Use

Setup the following parameters in the credential vault:

**Locker Name:** DocuSignLocker

**Credential Name:** DocuSignCredentials

**Attributes:**

- DocuSign Base URL: <https://demo.docusign.net> (Sample URL)







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- Account ID
- Client ID
- API User ID
- Private Key

### **Bot:**

#### **DocuSign Package Actions:**

##### ✓ DocuSign

-  End Session
-  Get Document
-  Get Envelope Status
-  Send Envelope PDF
-  Send Envelope Excel
-  Start Session

#### **Action: Start Session**

Parameter	Mandatory	Sample data
Start Session - Required to establish a session with DocuSign	Yes	Ex: Default or any name you prefer
DocuSign Base URL - DocuSign URL to establish connection	Yes	Use this if you are using a trial account - <a href="https://demo.docusign.net">https://demo.docusign.net</a>
Account Id – API Account Id on DocuSign dashboard	Yes	Ex: f644566d-9947-4f47-b344-91002b4e4e00
Client Id – This is the app Integration key in DocuSign	Yes	Ex: f644566d-9947-4f47-b344-91002b4e4e00
API User ID – User id in DocuSign dashboard under My Account Information	Yes	Ex: f644566d-9947-4f47-b344-91002b4e4e00



Private Key	Yes	Enter the private key without pre/post boundary text. i.e., do not add the text “-----BEGIN RSA PRIVATE KEY-----” and “-----END RSA PRIVATE KEY-----” at the beginning and ending of the key
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**Action: Send Envelope PDF/Excel** – This action sends an email with the document to the recipient and responds back with the Envelope Id.

Parameter	Mandatory	Sample data/Comments
Session name	Yes	Use the same name as used in the Start Session action
PDF file	Yes	Select the Input file to be signed. Sample document is included in the bot
Signer Full Name	Yes	Recipient’s name
Signer eMail	Yes	Recipient’s email
Page	No	Page where the signature needs to be placed. If the page number is incorrectly entered, Anchor will be given preference
Anchor	Yes	Text identified to place the digital signature
Offset X	Yes	Anchor tagging enables you to place tabs at every location where a specified text string, also known as an anchor, is found in a document. Please refer to this link for more <a href="#">details</a> .
Offset Y	Yes	Anchor tagging enables you to place tabs at every location where a specified text string, also known as an anchor, is found in a document. Please refer to this link for more <a href="#">details</a> .

envelope ID	Yes	Reference id received from the API call (Variable sEnvelopeld)
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**Action: Get Envelope Status** – This checks the status of the envelope to check if the customer has signed the document.

Parameter	Mandatory	Sample data/Comments
Session Name	Yes	Use the same name as used in the Start Session action
Envelope Id	Yes	Enter the variable sEnvelopeld which is the output from the action Send Envelope PDF/Excel
Envelope status	Yes	(Variable name: sEnvelopeStatus) – Possible status details below <ul style="list-style-type: none"> <li>• Sent: Document sent to customer but not yet signed</li> <li>• Completed: Customer has signed the document</li> </ul>

**Action – Get Document** - This action downloads the signed documents from DocuSign to the bot runner machine.

Parameter	Mandatory	Sample data/Comments
Session Name	Yes	Use the same name as used in the Start Session action
Envelope Id	Yes	Enter the variable sEnvelopeld which is the output from the action Send Envelope PDF/Excel
Document Id	Yes	Enter the word combined. This package supports adding one more file at a time to a single recipient.
PDF file path	Yes	Output file location. Use the variable sSignedDocumentPath

Get document	Yes	Select any variable. If the file is downloaded successfully, it will include the message "File Successfully downloaded"
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**Action – Close Session** - This action closes the session started by the Start Session Action.

Parameter	Mandatory	Sample data/Comments
Session Name	Yes	Use the same name as used in the Start Session action

**Sample PDF file:**

**Eagle One Financial Credit Card Application**

Full Name	Edward B. Harrison
Address	4853 Spadafore Drive
City	Oil City
State	PA
Zip	16301
Country	USA
Marital Status	Married
Date of Birth	3/15/1975
Phone Number	814-758-5262
Email Id	EdwardBHarrison@teleworm.us
Employment Status	Employed
Employer Name	Jaggery Palms Pvt Ltd
Monthly Income	\$8800
Rent / Monthly Payment	\$2200
Type of Card Applying for	Platinum

I acknowledge that I have read and do hereby accept the terms and conditions contained in this document.

Signature



Edward.pdf

Customer is expected to sign this document above the text 'Signature' using DocuSign.

### **Execution Setup:**

Before you click 'Run', enter the following parameters:

**sInputFile:** Add PDF document to the file variable.

Edit variable

Cancel

Apply

Type

File

Name

sInputFile

Max characters = 50

Description (optional)

A Control Room or desktop file or folder

Max characters = 255

☒ Use as input

☐ Use as output

☐ Constant (read-only)

Default value (optional)

Control Room fileDesktop folder or file

Specific path

Regex

C:\temp\Edward.pdf

Browse...

**sRecipientEmail:** Enter the recipient email

Edit variable

Type

String

Name

sRecipientEmail

Max characters = 50

Description (optional)

Text

Max characters = 255

☐ Use as input

☐ Use as output

☐ Constant (read-only)

Default value

arjunom

**sSignedDocumentPath:** Enter the path for the signed document to be downloaded.

## Edit variable

Type

String

Name

sSignedDocumentPath

Max characters = 50

Description (optional)

Text

Max characters = 255

☐ Use as input

☐ Use as output

☐ Constant (read-only)

Default value

C:\temp\EdwardSigned.pdf

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## 4. Support & FAQs

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### 4.1 Support

Free bots and packages are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Automation 360](#).

### 4.2 FAQs

Q: Can I make changes to this bot/package?

A: Absolutely. Free packages/bots are for you to make use of, customize, and/or include in your builds as you see fit.

Q: Can I upgrade the packages for this bot?

A: Yes – but know that the bot was created/tested on a specific package version. Any modifications to that may result in unexpected outcomes – so make sure to test the bot/subtask after making any package version modifications.

For questions relating to Automation 360: See the [Automation 360 FAQs](#).

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## Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0.0.0	10/29/2021	Stefan Karsten/Arjun S Meda	Initial version of the process

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## Appendix B: References

No.	Topic	Reference Link
1	Overview of Automation 360	Click <a href="#">here</a>
2	Guidance: Building basic Automation 360 bots	Click <a href="#">here</a>
3	Guidance: Building Automation 360 action packages	Click <a href="#">here</a>
4	APeople Community Forum	Click <a href="#">here</a>
5	Automation Anywhere University	Click <a href="#">here</a>