helpsystems

DocuSign Bot

Request Single Document Signature by Email from Excel INPUT

Content

Overview

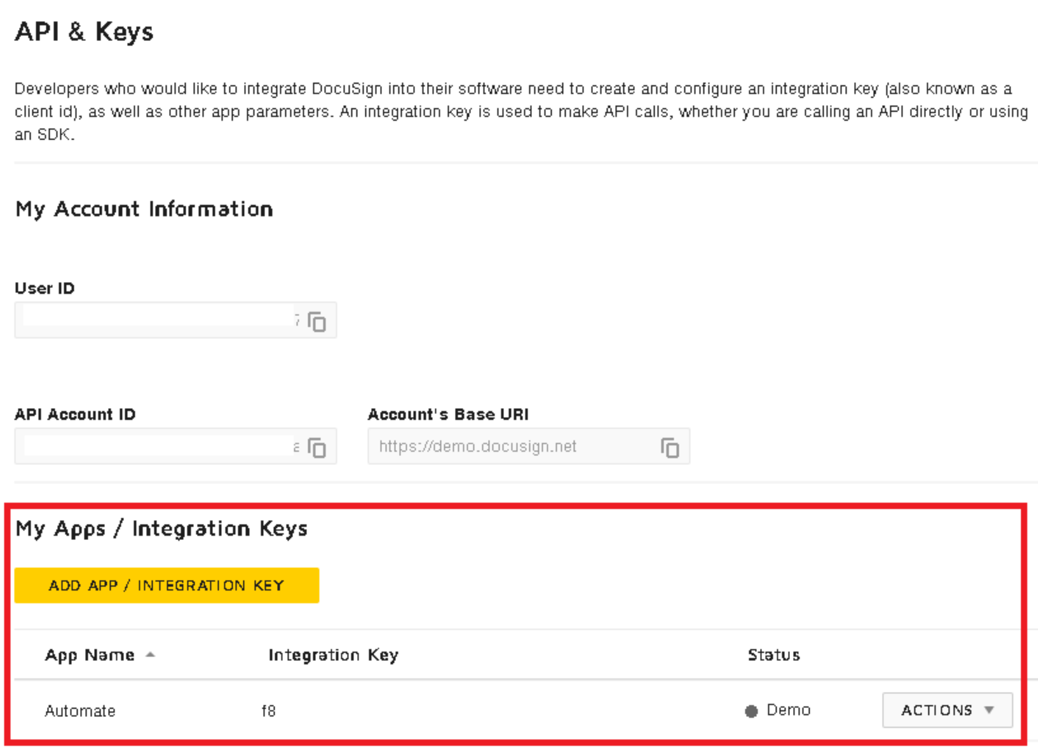
This how to guide introduces the *DocuSign Bot - Request Single Document Signature by Email from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate, we can take over manual steps which greatly reduces repetitive activities and improves the quality and consistency of the work. The top processes being automated are report generation, file movement, data import and export, and scheduling batch processing.

The ***DocuSign Bot - Request Single Document Signature by Email from Excel INPUT*** is based in the DocuSign eSignature REST API. It creates new envelopes with the file to sign in DocuSign by executing the "***/accounts/ {accountId}/envelopes***" HTTP **POST** method with the data provided in the INPUT Excel file and updates it with the results of the execution. You will be able to decide to send the signature request by email to the recipients or just create the envelopes and store them as a draft. This bot uses the API Token authentication method to avoid using username and password. *The token is associated with the user account used for authorization*, so you will need a bot for each user account that needs to send signature requests. Check out the Prerequisites and the HOW TO GENERATE THE INPUT FILE sections to get detailed information.

There is also a *DocuSign Bot - Generate and Refresh Token* bot that will provide an easy way for first creation and refreshing of the token for this bot to work. By default, the token expires after 8 hours. This bot is based in the OAuth Authorization Code Workflow.

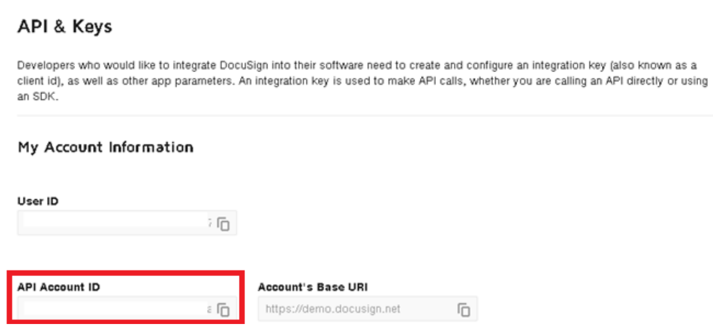
PREREQUISITES

- Automate: The DocuSign Bot depends on Automate software in order to work. The minimum supported versions are:
    - Automate Ultimate 11.2
    - Automate Plus 11.2
    - Automate Desktop 11.2
- Automate Markup Language file (.AML): The primary file type used in Automate which contains the steps of our DocuSign Bot task
- DocuSign: Our minimum requirements are:
    - Application for integrations created in the DocuSign eSignature: You will need to create an application within the DocuSign platform to be able to configure the proper scope and requests for the token creation and use it for the connections of other DocuSign Bots. You will find it by going to your ADMIN area > INTEGRATIONS > API and Keys section. You will need to be an administrator (DS Admin), so if you do not have permissions, ask your DocuSign administrator. More information on how to create the app can be found [here](#).



- DocuSign Token generated with proper permissions scopes for the Bot execution: Once the application is created and configured you will be able to generate the token for connection. This token must be generated with the proper permission scopes. For this bot to work you will need the following scopes: ***signature and offline_acces.*** The ***signature*** scope is required for all methods in the eSignature REST API including account management, creating, sending, listing, viewing envelopes, templates, and other objects. The ***offline_acces*** is for being able to execute the requests in an offline fashion (the way the bot works). There are various OAuth Workflows that you can choose for the token generation, however, remember that we also provide a ***DocuSign Bot - Generate and Refresh Token*** that's based in the ***DocuSign OAuth Authorization Code Workflow*** that you can use for this matter. It also has a user guide that better explains this Workflow.

- DocuSign API Account ID: This ID is the one associated with your DocuSign account (Platform). You can get it by going to the ADMIN area > INTEGRATIONS > API and Keys:



- DocuSign eSignature API Version: This bot was created using the DocuSign eSignature API v2.1.

- Automate constants to be create to set the DocuSign connection values:

  - const_DocuSignURL: The DocuSign URL for your platform:

    - *For the Demo Platform: https://demo.docusign.net*

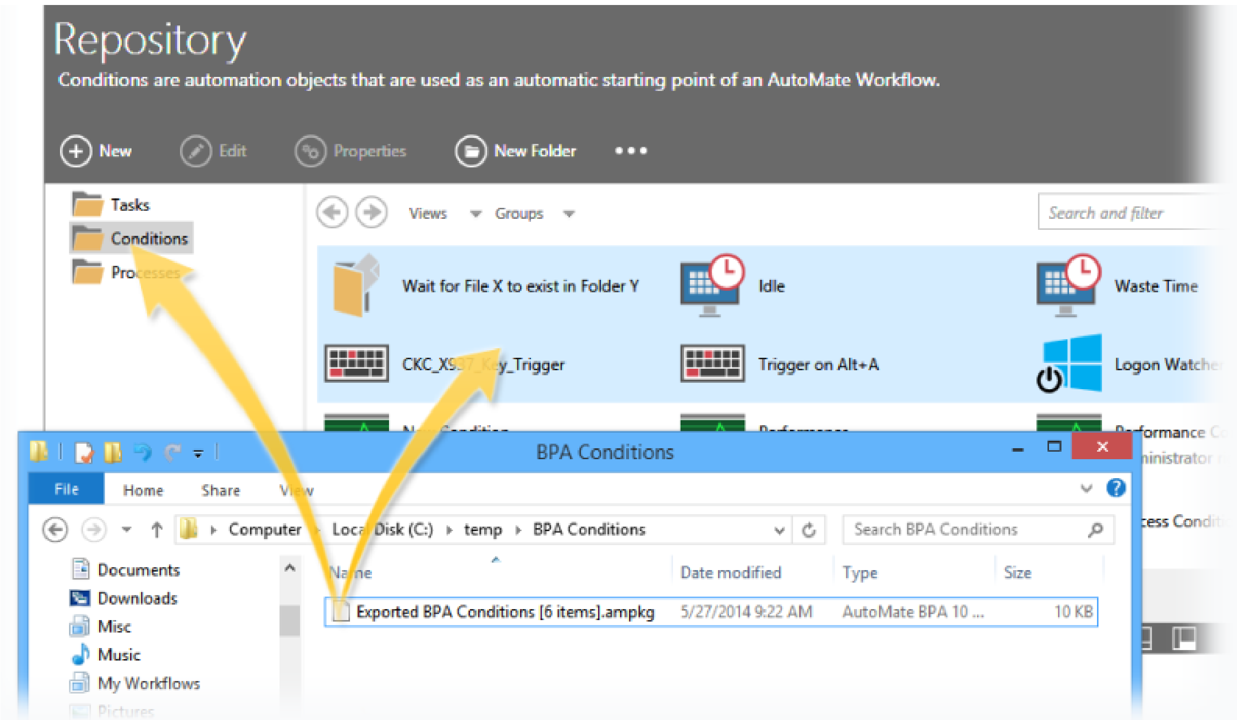
    - *For the Production Platform: https://{server}.docusign.net/*

How to import an AutoMate task

Compatible file types can be imported to the repository via drag-and-drop

From the Server Management Console, navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the SMC. Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.



How to generate the input file

The input file ***"DocuSign Bot - Request Single Document Signature by Email from Excel INPUT.xlsx"*** shipped with this DocuSign bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

The Excel INPUT file

A	B	C	D	E	F
DocuSign Request Single Document Signature by Email fields					
Document Name Name and extension	**Documents Foder Path**	**Email Subject**	**Email Body Message**	**Recipients** Format: Recipient1 <Recipient1@domain.com>;Recipient2 <Recipient2@domain.com>	**Send Emal?** If Blank it will not be sent and the envelope will be created..

G	H	I
Create or Sent?	Details	
Yes/No	Date	Envelope ID / Result Message

NOTES:

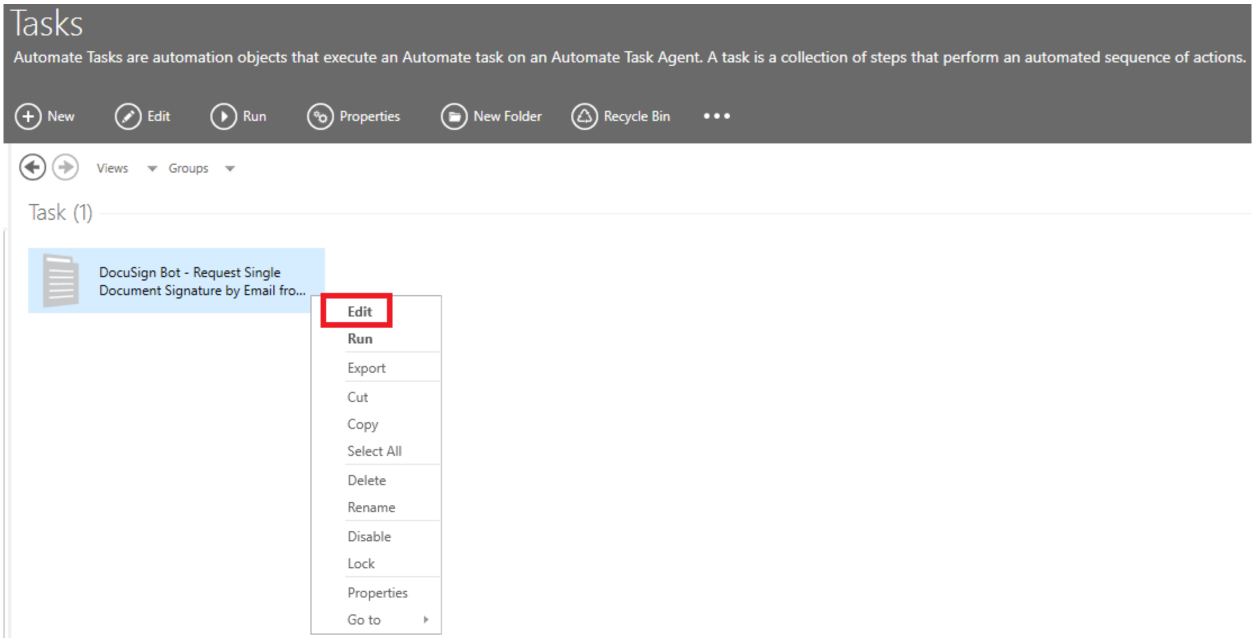
- All fields are mandatory.
- Pay attention to the comments in the fields.
- **Column F** will indicate if the document signature request email will be sent or just create the envelope as Draft. Mark it with "X" for sending.
- **Column A** has the document **name** and **extension** and in the **column B** you will set the folder path in which the documents are stored. They are automatically converted to PDF files by DocuSIgn.
- **Columns G to I** in the INPUT file will be filled with the result of the execution and the Envelope ID, the executed action and status when created. See APPENDIX A for an example on the resulting.

HOW TO EXECUTE THE DOCUSIGN BOT - REQUEST SINGLE DOCUMENT SIGNATURE BY EMAIL FROM EXCEL INPUT

If this is the first time running this task, we will need to set some parameters:

Open the Server Management Console and locate the imported task

Edit the imported task by right clicking on the task and selecting edit



From step 2 edit the next variables according to you desired output:

- var_AccountID: Set the Account ID to which the users are associated. This will be the ID of the user account that manages those users.
- var_ExcelInputFile: Set the location path and name of the DocuSign Create Users INPUT file for user's creation. Example: *C:\DocuSign Create Users INPUT.xlsx*
- var_DocuSignToken: Set your token for connection (String) or the path of the file with the token information. Remember that the token will be associated to the account we connect with. DocuSign token to execute the connection/request with. It can be set to the token value itself or the path in which the .txt file with the token inside is located.

  Example: ***C:\Automate\DocuSignToken.txt***

  In the case of using a .txt file, the token must have the next format/structure:

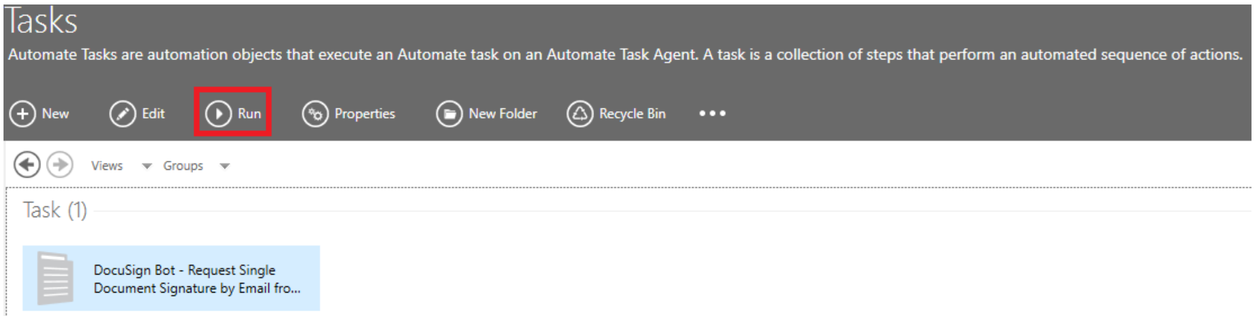
  access_token:TokenString

  Example of the file:

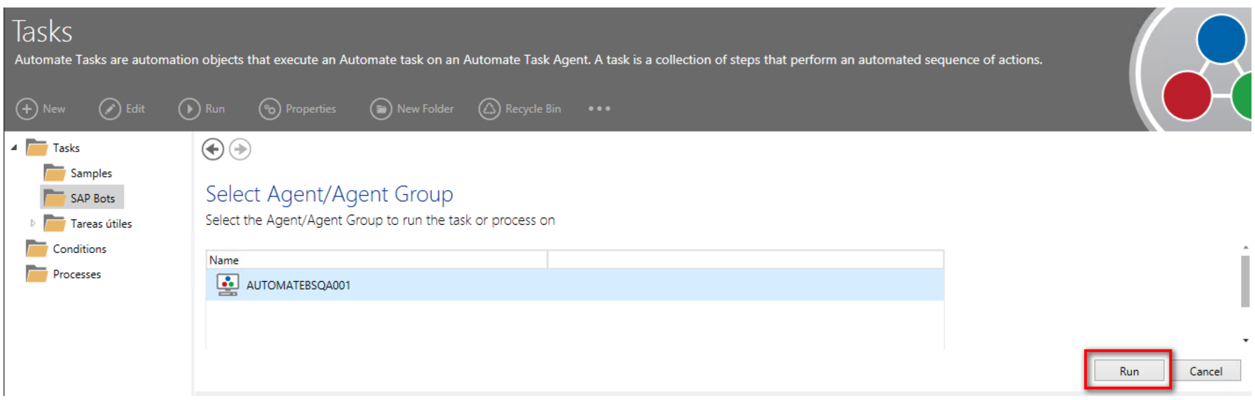
Note that there is a refresh_token value, this is managed by DocuSign Bot - Generate and Refresh Token

Save and close the task

Select the task and click on Run



Select your Agent and click on Run again



Appendix A – Excel INPUT file with results and DocuSign Envelopes view result

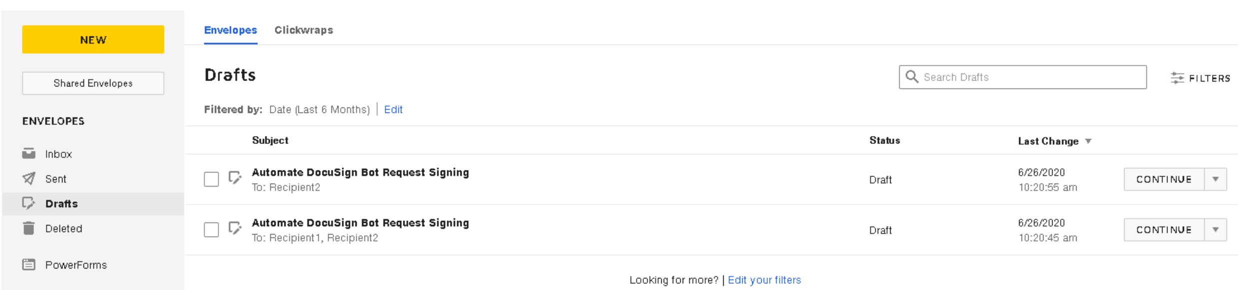
Excel INPUT file with results:

A	B	C	D	E
DocuSign Request Single Document Signature by Email fields				
Document Name Name and extension	**Documents Foder Path**	**Email Subject**	**Email Body Message**	**Recipients** Format: Recipient1 <Recipient1@domain.com>;Recipient2 <Recipient2@domain.com>
CSV File.csv	D:\test\DocuSign\	Automate DocuSign Bot Request Signing	Sent from Automate DocuSign Bot	Recipient1 <Recipient1@domain.com>;Recipient2 <Recipient2@domain.com>
PDF File.pdf	D:\test\DocuSign\	Automate DocuSign Bot Request Signing	Sent from Automate DocuSign Bot	Recipient1 <Recipient1@domain.com>
Word File.docx	D:\test\DocuSign\	Automate DocuSign Bot Request Signing	Sent from Automate DocuSign Bot	Recipient2 <Recipient2@domain.com>

Note that the execution result is written from column G to I. Column I will have the Envelope ID, the executed action and status.

G	H	I
Created or Sent?	**Details**	
Yes/No	**Date**	**Envelope ID / Result Message**
YES	26/06/2020 10:20:47 AM	Envelop 15271270-72c2-4130-9c61-0ad48b58353e created with status created.
YES	26/06/2020 10:20:52 AM	Envelop 713981c9-2bbe-421b-a754-28815a53459f created with status sent.
YES	26/06/2020 10:20:56 AM	Envelop 3bfd12c0-3bbe-45f4-8dea-6ae3d225b62d created with status created.

DocuSign Envelopes View result:



Appendix B - Troubleshooting

- Logs: Each iteration of our bot creates a log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *DocuSign Bot - Request Single Document Signature by Email from Excel INPUT.*