DocuSign Bot

Update or Close Users from Excel INPUT

Content

OVERVIEW

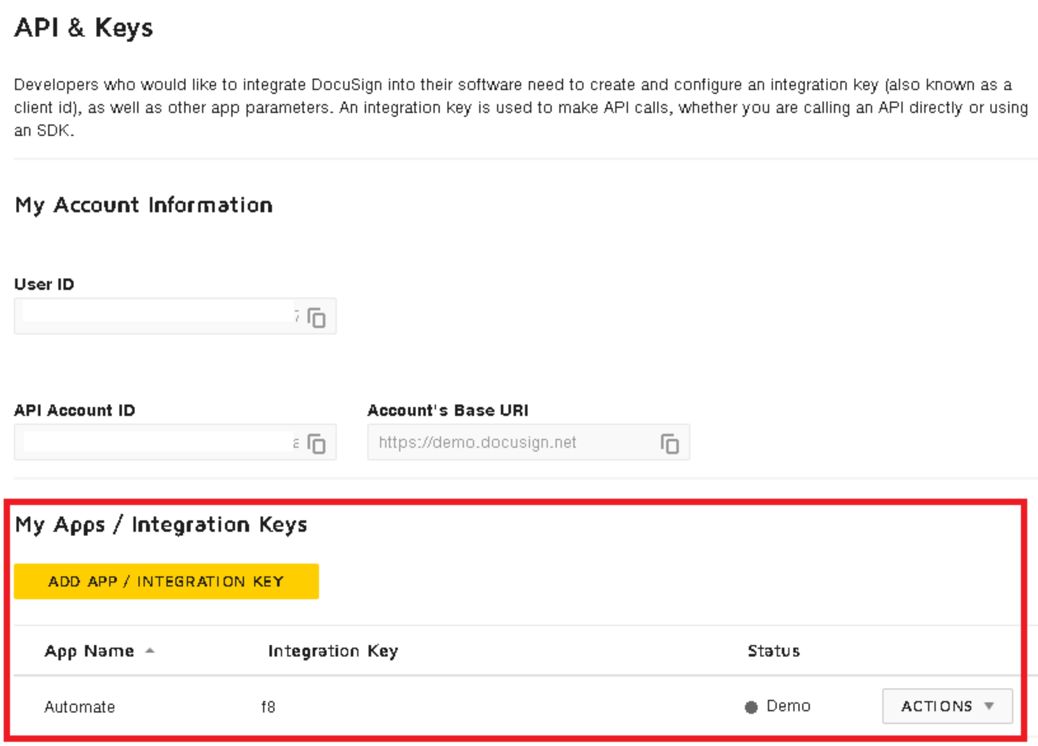
This how to guide introduces the *DocuSign Bot - Update or Close Users from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate, we can 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 - Update or Close Users from Excel INPUT*** is based in the DocuSign eSignature REST API. It updates or closes users associated with a particular account that manages them in DocuSign by executing the "***/accounts/ {accountId} /users***". HTTP ***PUT*** *method* for *updating* and the HTTP ***DELETE*** *method* for *closing*. You cannot delete users in DocuSign, instead, it changes the status to "closed". The actions are performed according to the data provided in the INPUT Excel file and updates it with the resulting of the execution. This bot uses the API Token authentication method to avoid using username and password. The token is associated to the account used to scope authorization, so you might need a bot for each account. 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* available 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.

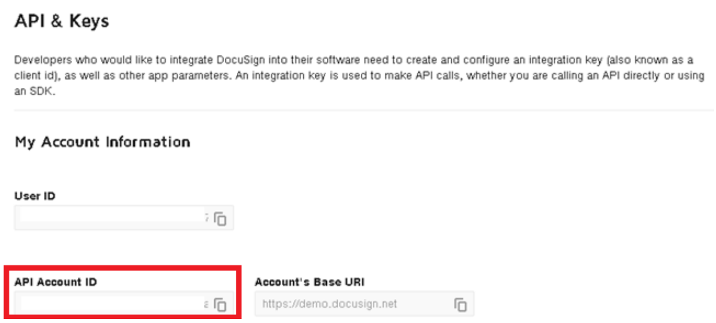
PREREQUISITES

- Automate: The DocuSign Bot needs 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 scope 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 section:



- 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*

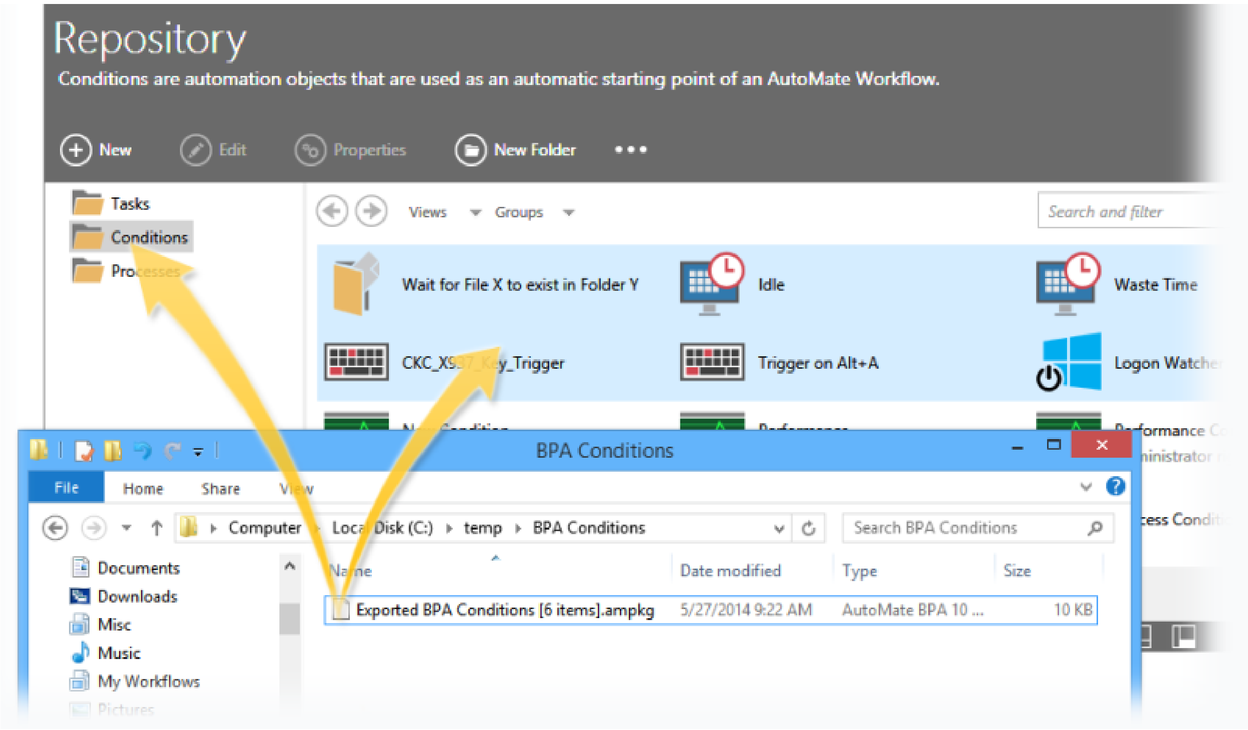
    - *For the Production Platform: https://{server}.docusign.net/*

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 - Update or Close Users 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	G
1	DocuSign User Fields - For User closing, just add the User ID.						
2	User ID	User Name (First Name and Last Name)	Email	Language Culture If Blank: "en"	Permission Profile ID If Blank: 10482819 (DS Viewer)	Group ID If Blank: Everyone	Close Membership X or leave Blank to Update Fields

H	I	J
Updated/Closed?	Details	
Yes/No	Date	Result Message

NOTES:

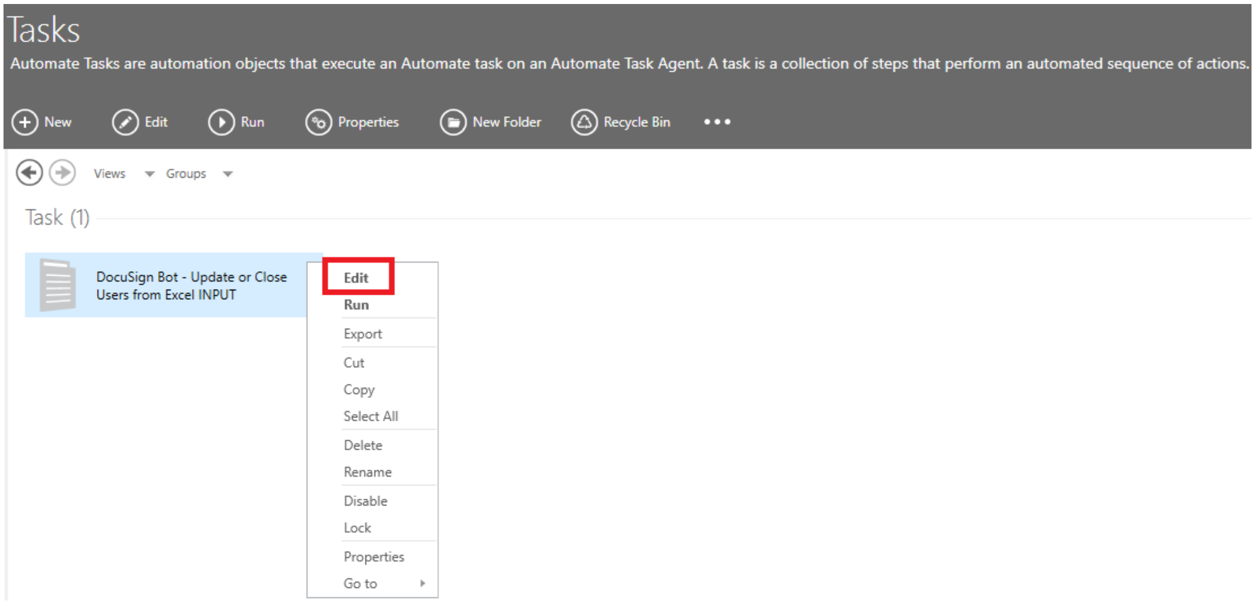
- *Red fields* are mandatory.
- Pay attention to the comments in red for the fields.
- The Column G indicates if the user will be Update or Deleted. For deletion, mark this column with a "X" and in this case you will just need to complete the User ID in column A.
- Columns H to J in the INPUT file will be filled with the result of the execution, updated or closed actions. See APPENDIX A for an example on the resulting.

How to execute the DocuSign Bot - Update or Close Users 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 to. This will be the ID of the user account that manages those users.
- var_ExcelInputFile: Set the location path and name of the DocuSign Update Users INPUT file for user's creation. Example: *C:\DocuSign Update 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:

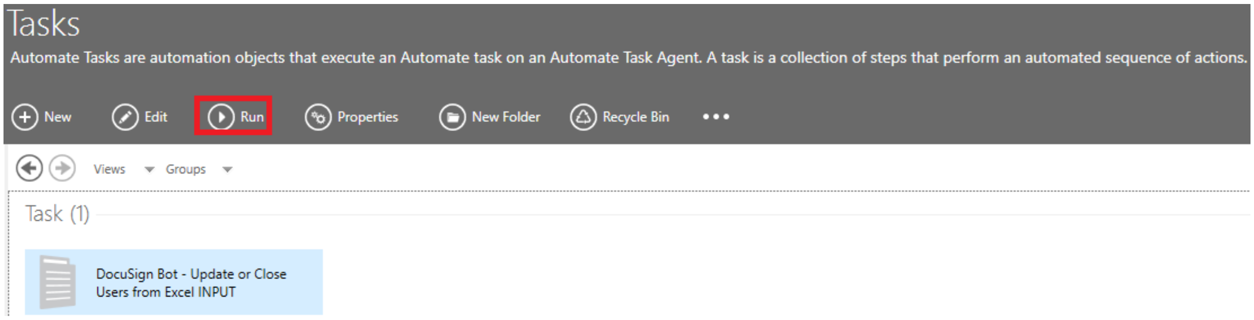
  access_token:TokenString

  Example of the file with the Token:

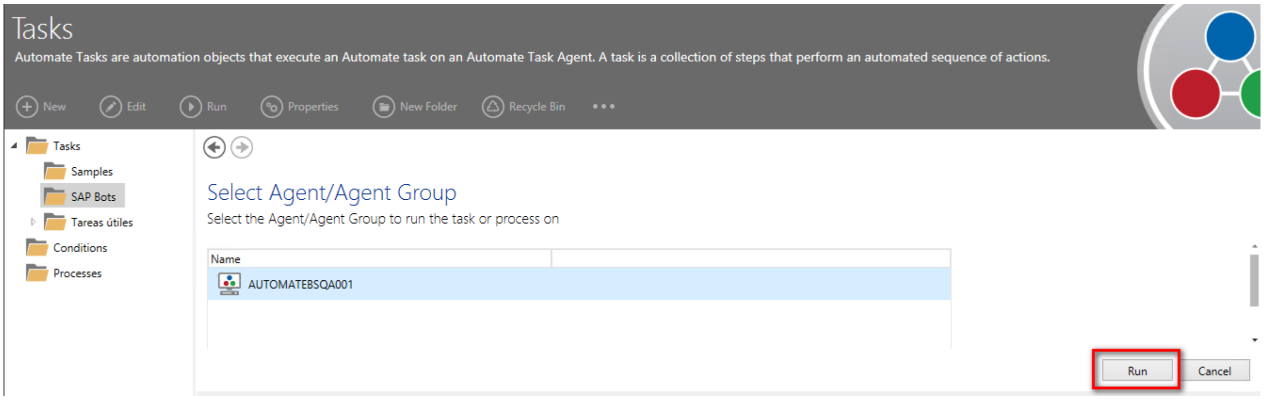
Note that there is a refresh_token value, this is managed by DocuSign Bot - Generate and Refresh Token

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 Users view result

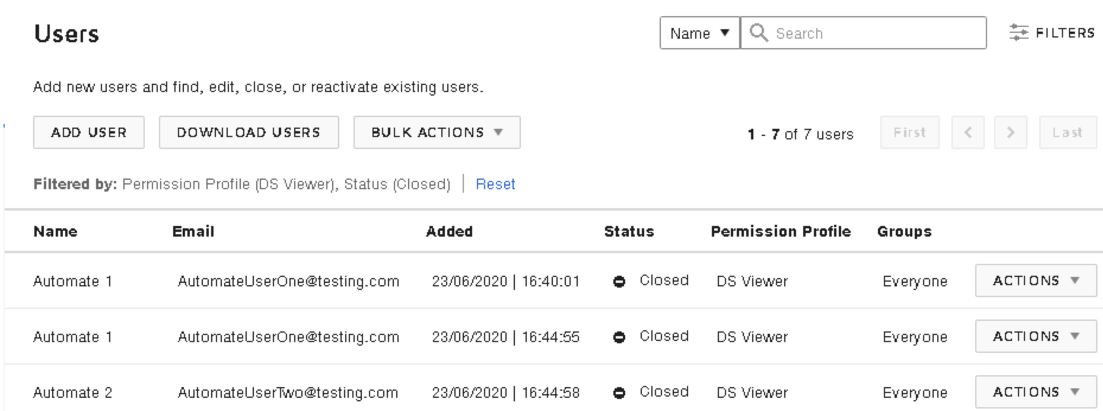
Excel INPUT file with results:

B	C	D	E	F	G
DocuSign User Fields - For User closing, just add the User ID.					
User Name (First Name and Last Name)	**Email**	**Language Culture** If Blank: "en"	**Permission Profile ID** If Blank: 10482819 (DS Viewer)	**Group ID** If Blank: Everyone	**Close Membership** X or leave Blank to Update Fields
Automate 1	AutomateUserOneUpdated@testing.com	pt_BR	10482819		
Automate 4	AutomateUserTwo@testing.com		10482818	7397929	X
					X

Note that the execution result is written from column H to J. Column J will have a message with the result.

H	I	J
Updated/Closed?	**Details**	
Yes/No	**Date**	**Result Message**
YES	25/06/2020 1:31:53 PM	User updated.
YES	25/06/2020 1:31:55 PM	The User was closed.
YES	25/06/2020 1:27:09 PM	The User was closed.

DocuSign Users View result (illustrative image):



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 - Update or Close Users from Excel INPUT.*