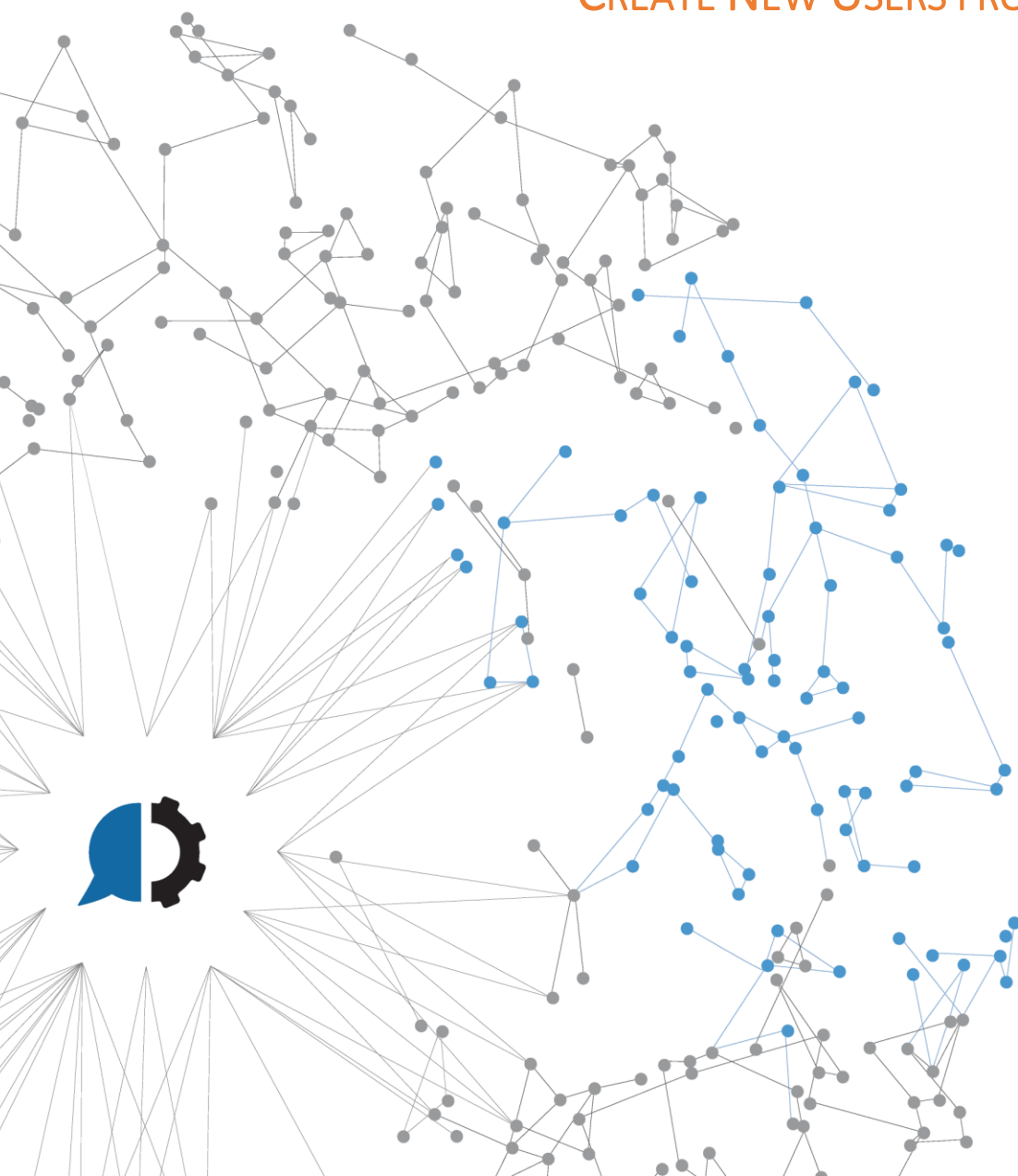




DOCUSIGN BOT

CREATE NEW USERS FROM EXCEL INPUT





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OVERVIEW

This how to guide introduces the *DocuSign Bot - Create New 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 - Create New Users from Excel INPUT*** is based in the DocuSign eSignature REST API. It creates users associated with a particular Account that will manage them in DocuSign by executing the *“/accounts/{accountId}/users”* HTTP POST method with the data provided in the INPUT Excel file and updates it with the result of the execution. *The users will receive a DocuSign email for account activation after creation.* This bot uses the API Token authentication method to avoid using username and password. The token is associated with 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](#) 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 find found [here](#).

API & Keys

Developers who would like to integrate DocuSign into their software need to create and configure an integration key (also known as a client id), as well as other app parameters. An integration key is used to make API calls, whether you are calling an API directly or using an SDK.

My Account Information

User ID

API Account ID

Account's Base URI

My Apps / Integration Keys

[ADD APP / INTEGRATION KEY](#)

App Name ^	Integration Key	Status	
Automate	f8	● Demo	ACTIONS ▼



- **DocuSign Token generated with proper permission scopes for 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_access***. 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_access*** 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 the 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:

API & Keys

Developers who would like to integrate DocuSign into their software need to create and configure an integration key (also known as a client id), as well as other app parameters. An integration key is used to make API calls, whether you are calling an API directly or using an SDK.

My Account Information

User ID

API Account ID

Account's Base URI

- **DocuSign eSignature API Version:** This bot was created using the DocuSign eSignature API v2.1.
- **Automate constants created 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/>

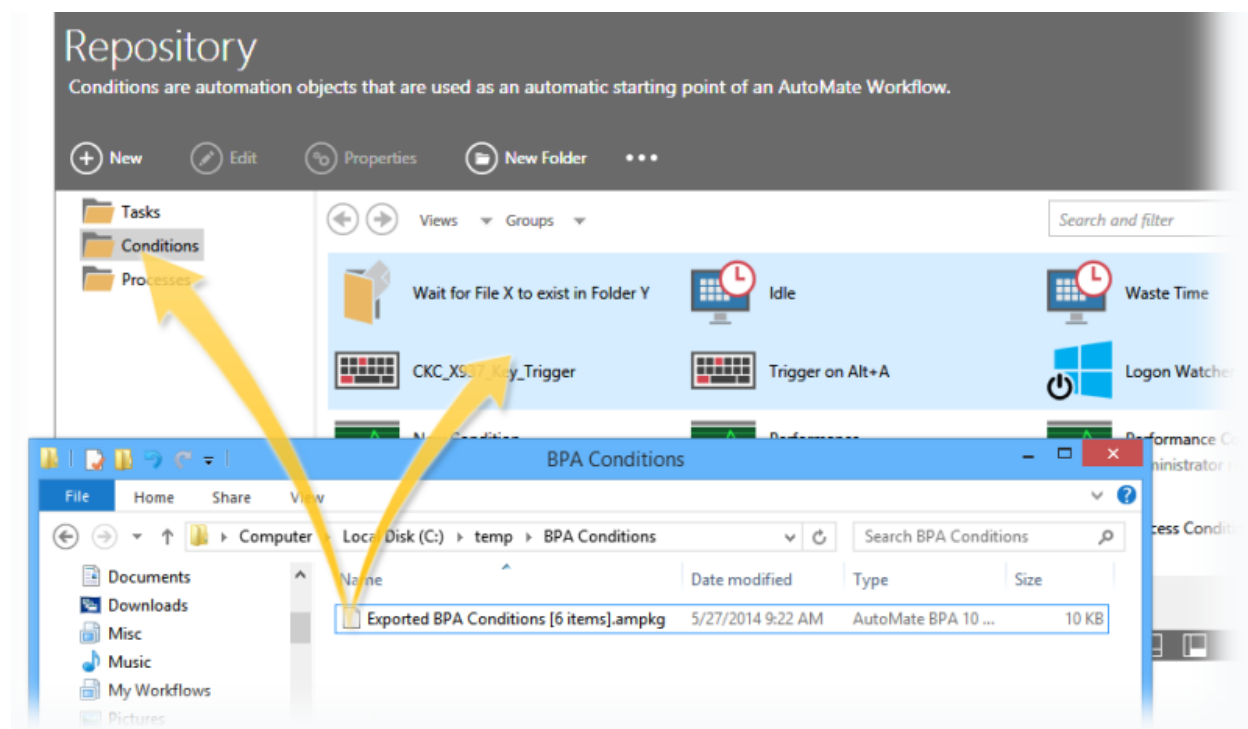


HOW TO IMPORT AN AUTOMATE TASK

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 - Create New 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						
2	User Name	First Name	Last Name	Email	Language Culture IF Blank: "en"	Permission Profile ID IF Blank: Won't be assigned	Group ID IF Blank: Everyone

H	I	J
Created?	Details	
Yes/No	Date	User ID / Result Message

NOTES:

- **Red fields** are mandatory.
- Pay attention to the comments in the fields.
- Columns H to J in the INPUT file will be filled with the result of the execution and the User ID when created. See [APPENDIX A](#) for an example of the results.

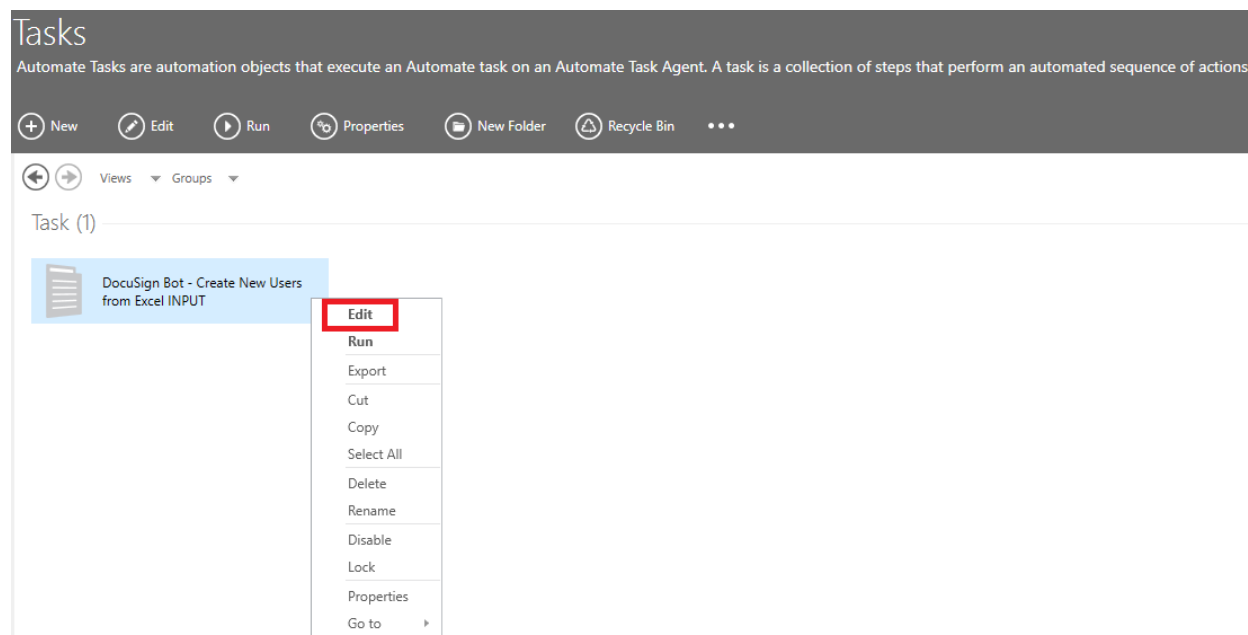
HOW TO EXECUTE THE DOCUSIGN BOT - CREATE NEW USERS FROM EXCEL INPUT

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 your 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 with 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:

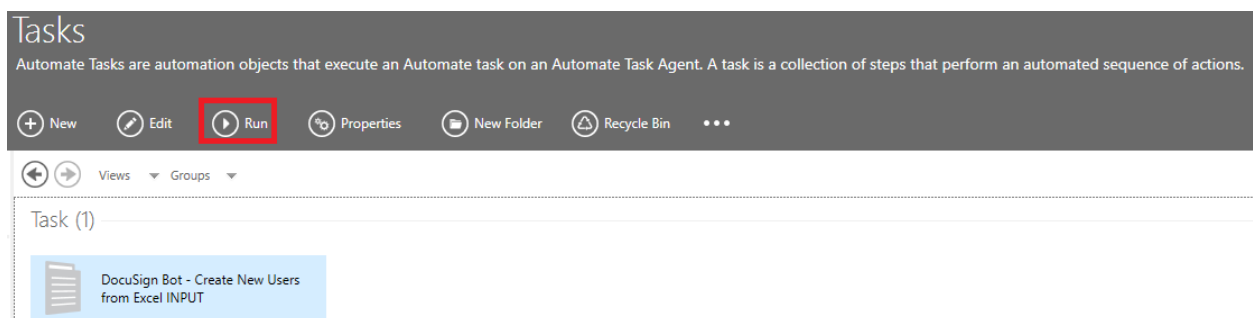


```
*DocuSignToken.txt - Notepad
File Edit Format View Help
access_token:eyJ0eXAiOiJNVCIzImFsZyI6I1JT
refresh_token:eyJ0eXAiOiJNVCIzImFsZyI6I1JT
```

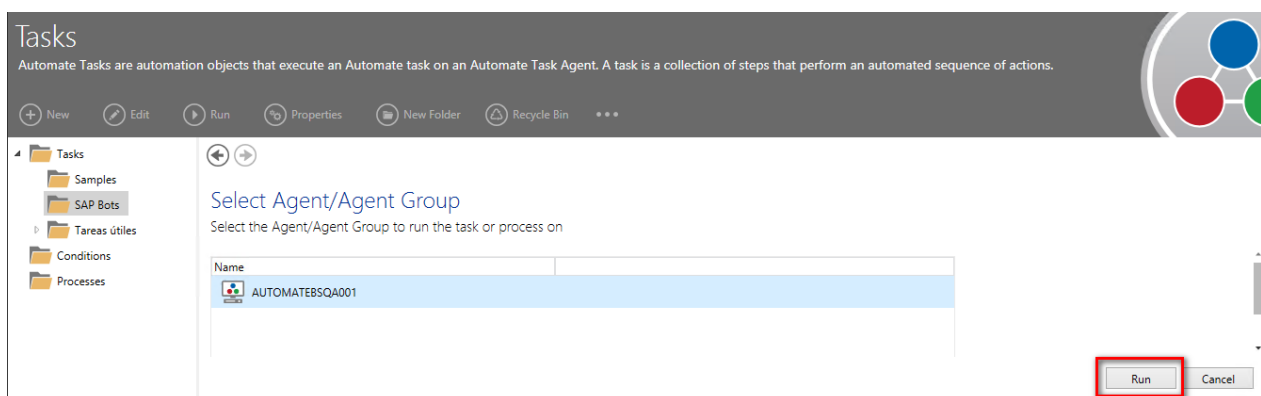
Note that there is a refresh_token value, this is managed by DocuSign Bot - Generate and Refresh Token

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:

	A	B	C	D	E	F	G
1	DocuSign User Fields						
2	User Name	First Name	Last Name	Email	Language Culture If Blank: "en"	Permission Profile ID If Blank: Won't be assigned	Group ID If Blank: Everyone
3	Automate 1	AutomateUser	One	AutomateUserOne@testing.com			
4	Automate 2	AutomateUser	Two	AutomateUserTwo@testing.com	pt_BR		
5	Automate 3	AutomateUser	Three	AutomateUserThree@testing.com			

Note that the execution result is written from column H to J. Column J will have the User ID created.

H	I	J
Created?	Details	
Yes/No	Date	User ID / Result Message
YES	25/06/2020 11:26:17 AM	0b19e20e-bc5d-4d5e-b7f7-f73f6f04735d
YES	25/06/2020 11:26:47 AM	d3189001-75f9-4e1f-8796-ba5f5e26ba95
YES	25/06/2020 11:26:56 AM	e1b1aa11-0cf8-41d0-a2d5-31e6aba774ee

DocuSign Users View result:

Users

Name

FILTERS

Add new users and find, edit, close, or reactivate existing users.

ADD USERDOWNLOAD USERSBULK ACTIONS

1 - 7 of 7 users First < > Last

Filtered by: Permission Profile (DS Viewer), Status (Closed) [Reset](#)

Name	Email	Added	Status	Permission Profile	Groups	
Automate 1	AutomateUserOne@testing.com	23/06/2020 16:40:01	Closed	DS Viewer	Everyone	ACTIONS
Automate 1	AutomateUserOne@testing.com	23/06/2020 16:44:55	Closed	DS Viewer	Everyone	ACTIONS
Automate 2	AutomateUserTwo@testing.com	23/06/2020 16:44:58	Closed	DS Viewer	Everyone	ACTIONS



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 - Create New Users from Excel INPUT*.



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and AutoMate processes, encrypt and secure data, and provide easy access to the information people