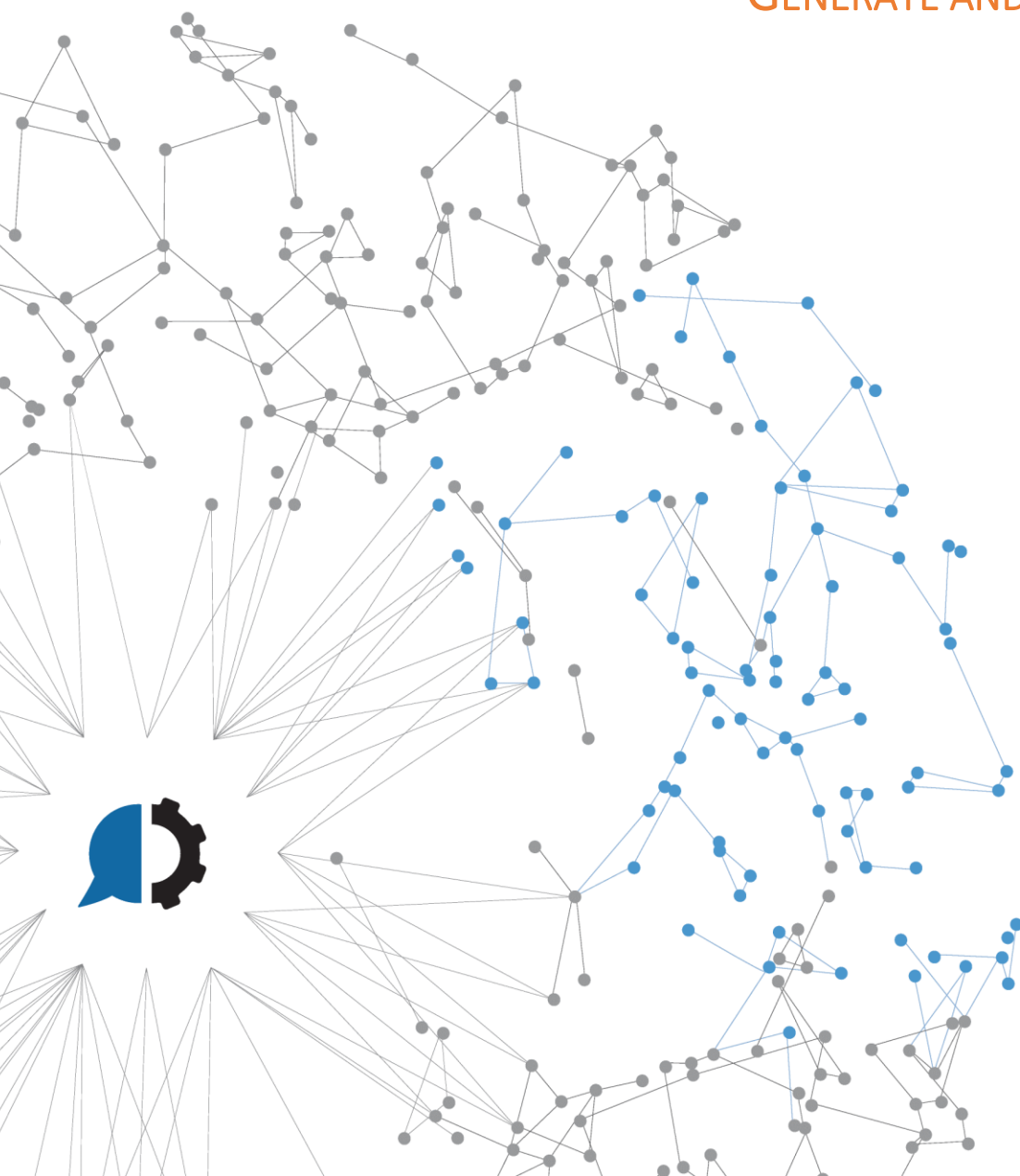




DocuSign BOT

GENERATE AND REFRESH TOKEN





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OVERVIEW

This how to guide introduces the *DocuSign Bot - Generate and Refresh Token*. 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 - Generate and Refresh Token*** is based in the ***DocuSign OAuth Authorization Code Workflow***. It executes the **OAuth2** access token request ***"/oauth/token"*** to the URL provided by DocuSign. It uses a ***"grant_type"*** parameter with ***"authorization_code"*** (authorization code workflow) type for first time token generation. Once the Token is generated within the first execution of the bot, it will use a ***"grant_type"*** with ***"refresh_token"*** in order to refresh the Token during next executions. The expiration time for the token is by default 8 hours. We recommend analyzing its behavior and set the execution of this bot accordingly to your needs in order to use the generate token on a daily basis and make any DocuSign Bot work with it.

Check out the [PREREQUISITES](#) and the [HOW TO EXECUTE THE DOCUSIGN BOT - GENERATE AND REFRESH TOKEN](#) sections to get detailed information.



PREREQUISITES

- **Automate:** The DocuSign Bot depends on Automate software 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 Graph:** The minimum requirements are:
 - **Create an application in the DocuSign eSignature API & Keys section:** You will need to create an application within the DocuSign platform to be able to configure the proper scope and requests for the token that will be used 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 ▼



- Configure your application to support the **OAuth Authorization Code Workflow**: Within the Application configuration screen, set an App Name and set the **Authentication to User Application > Authorization Code Grant**. Create a Secret Key and save it safely. You will need this value and the Integration Key (Client ID) to set the bot configuration. You will find more information about the Authorization Code Grant Workflow [here](#). Remember to set the **redirect URL** as shown:

General Info

App Name *

Automate

Integration Key

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

f8f1



Authentication

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



User Application

- ☒ Authorization Code Grant
- ☐ Implicit Grant

Secret Keys

× *****959f

+ ADD SECRET KEY



Service Integration

RSA Keypairs (ID)

+ ADD RSA KEYPAIR

Additional settings

Redirect URIs

× http://localhost

+ ADD URI



- **Authorization Code for first execution:** Once the application is created and configured you will be able to get the authorization code needed for first time bot execution. For this you will need to open a personalized URL (change the **##CLIENT_ID##** with yours) in your browser and you will receive the authorization code in your browser address bar. Note that in the URL we must specify the **scopes** needed and the redirect URI. In this example, the scopes are: **signature and offline_acces**. Some other scopes might be added if needed. You will need to provide your login information and once you accept the request permission, you'll get the Auth Code within your browser address bar.

Remember that the code is associated with the username provided during login, as well as the token generated with the Auth Code. So, the token generated by using this authorization code will be associated with this username.

Next, you can find an example of the request URL in the Acceptance Window. Here's how you get the code:

Request URL:

https://DocuSignAuthURL?response_type=code&scope=offline_access%20signature&client_id=##CLIENT_ID##&redirect_uri=http://localhost

Note that the DocuSign Auth URL will be as follow:

- <https://account-d.docusign.com/oauth/auth> For the Demo Platform.
- <https://account.docusign.com/oauth/auth> For the Production Platform.

Acceptance Window:

The image shows a DocuSign authentication window. At the top is the DocuSign logo. Below it, the text reads: "Authentication Example Application is requesting permission to:". This is followed by a bulleted list: "• Create and send envelopes. Obtain links for starting signing sessions." Below the list, a disclaimer states: "The application you are connecting to is not provided by DocuSign, Inc. By clicking Accept, you are allowing the application to use your information in accordance with their respective terms of service and privacy policies." At the bottom, there are two buttons: a yellow "ACCEPT" button and a white "CANCEL" button.

Authorization Code:

http://example.com/callback/?code=eyJ0eXAiOi...81QFsje43QVZ_gw&state=a39fh23hnf23

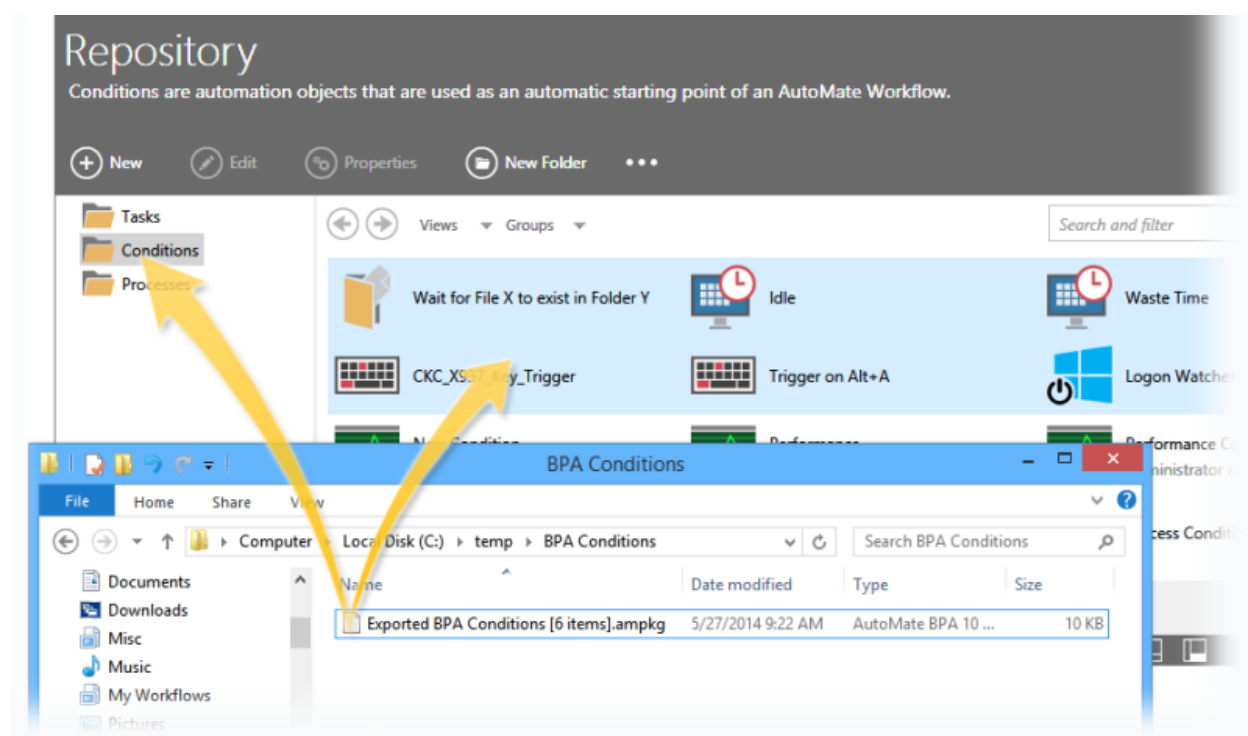


HOW TO IMPORT AN AUTOMATE TASK

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.



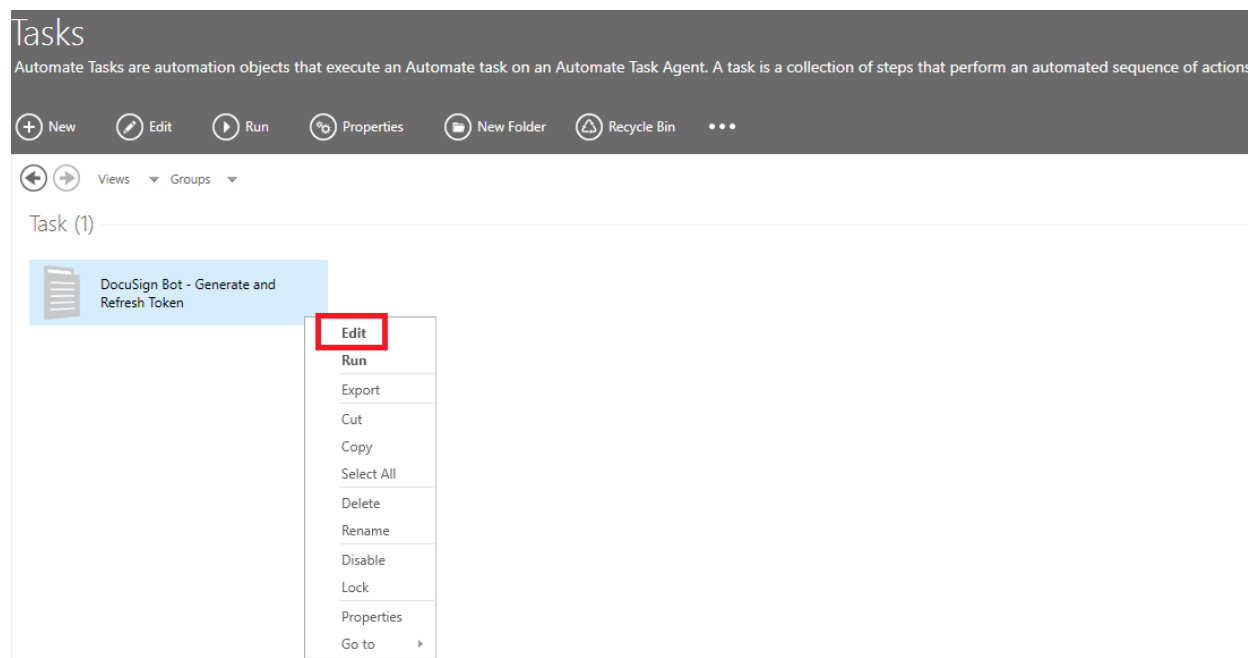


HOW TO EXECUTE THE DOCUSIGN BOT - GENERATE AND REFRESH TOKEN

If this is the first time running this task, you 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_GetTokenURL:** The URL used to request a DocuSign Token. It is set to the default URL provided by DocuSign:
 - <https://account-d.docusign.com/oauth/token> *For the Demo Platform.*
 - <https://account.docusign.com/oauth/token> *For the Production Platform.*
- **var_AuthCode:** This is the Authorization Code from the step-by-step provided by DocuSign (mentioned in the prerequisites). This is used just when first running in case a token and the refresh token do not exist.
- **var_RedirectUri:** The URL for redirection. By default, it is set to <http://localhost>. We don't really need this value for the Bot operation, but it is a requisite.
- **var_ClientId:** This **ID** is unique to your app and is used for initiating OAuth. It is call *Application Integration Key* in DocuSign.



- **var_ClientSecret:** This will be the **Client Secret** generated within the DocuSign App that you created.
- **var_TokenFileOutput:** This will be the path and filename in which you want the bot to create the txt file with the token and token refresh string generated. Default:

C:\Automate\DocuSignToken.txt

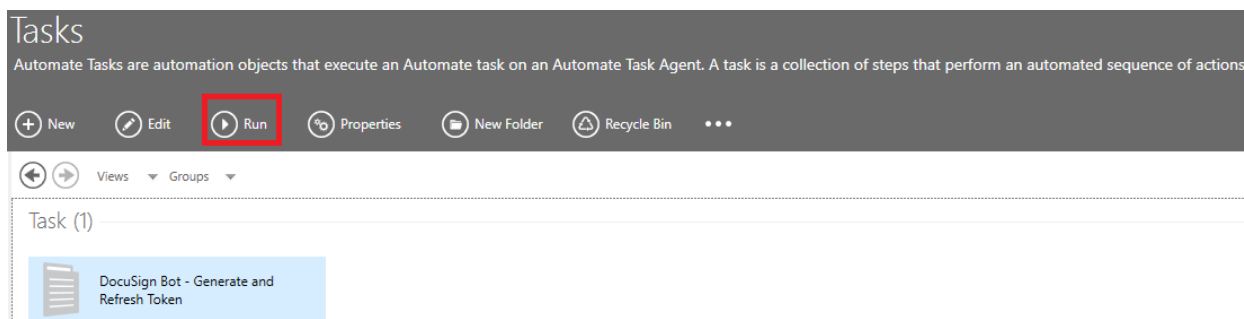
Here is an example of the content of the text file generated:

```
*DocuSignToken.txt - Notepad
File Edit Format View Help
access_token:eyJ0eXAiOiJhbnVCIjImFsZyI6I1JT
refresh_token:eyJ0eXAiOiJhbnVCIjImFsZyI6I1JT
```

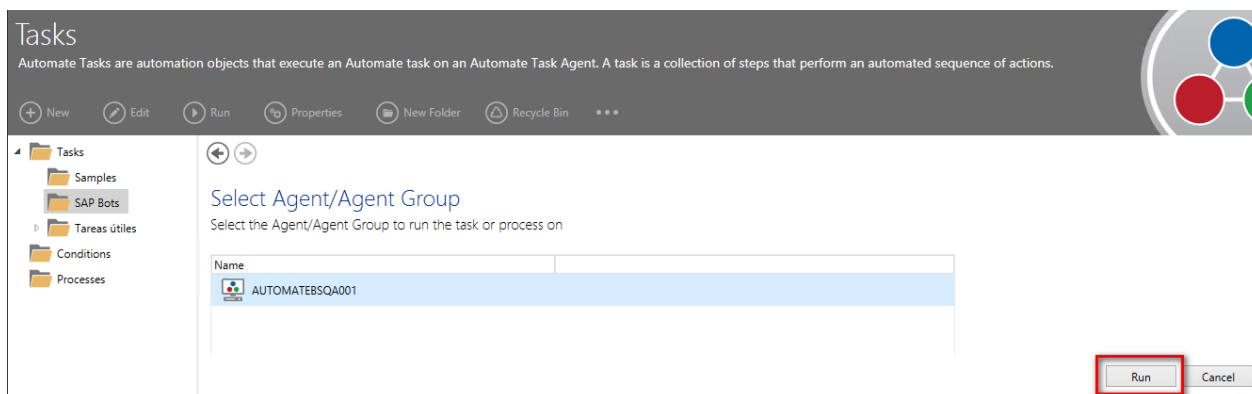
IMPORTANT: If the **Authorization Code** is changed, you need to delete this file before first Bot Execution.

Save and close the task

Select the task and click on **Run**



Select your **Agent** and click on **Run** again





APPENDIX A - 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 - Generate and Refresh Token*.



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