



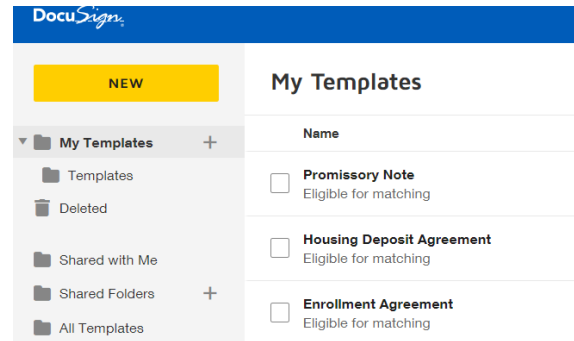
DocuSign API Documentation

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Introduction and Overview

The Campus Café / DocuSign integration uses REST based web services to present a student or applicant a digitally signed document. Upon completion of the digital signing, Campus Café is notified by DocuSign of the availability of the completed document, prompting Campus Café to automatically retrieve and store a copy of the file in the student’s or applicant’s activity tracking record.



DocuSign provides an interface for uploading institutional forms and embedding signature tabs within them. Campus Café is designed to access your account and list the digital document templates that you prepare so that one may be attached to a workflow definition in Campus Café’s activity tracking system. For effective integration, set a unique, descriptive name for each template. This will assist you in selecting the appropriate template for a given workflow definition. A screenshot of the DocuSign templates screen is below.

Important notes about template signing order: Campus Café only supports an initial student signature, meaning the document will be returned to Campus Café after the student signs regardless of whether there are additional signatories needed.

Additionally, there must be a signature with Role “Student” and name and email blank, otherwise clicking the Sign Document link in the Campus Café Document Portal will not bring the user to the document. See below example.

Role	Student		NEEDS TO SIGN	MORE
Name				
Email				

API Setup in DocuSign Development Environment

DocuSign **requires** customers to link any integration, including Campus Café, to its development environment and test 20 documents before finalizing the integration in a production environment.

1. Create an account at <https://account-d.docusign.com>
2. Click Admin
3. Click API and Keys
4. Click Add APP/ Integration Key
5. Enter a name for the app (e.g. Campus Café)
6. Click Add
7. Copy the Integration Key for future use
8. Under Authentication, choose Authorization Code Grant
9. Under Service Integration, click Add RSA Keypair
10. Copy the private key for future use
11. Click OK
12. Under Redirect URIs, click Add URI
13. Populate the redirect URI with the Campus Café redirect value for your institution:
`https://<your school address>/cafeweb/login`
14. Click Save
15. Click on the Users menu item
16. Next to the user that Campus Cafe will use to create and send document envelopes click Actions and select Edit. (Later, the user will need to approve Campus Café as a surrogate so that Campus Café can automatically create signing entities.)
17. Copy the user's API username for later use

Map Campus Café to DocuSign Development Environment

1. Log in to Campus Café
2. Navigate to Admin → Web App Config
Set the following parameters as follows:
DOCUSIGN_AUTH_REDIRECT_URL - https://<your school address>/cafeweb/login
DOCUSIGN_AUTH_URL - https://account-d.docusign.com
DOCUSIGN_BASE_URL - http://www.docusign.com/developer-center
DOCUSIGN_IMPERSONATED_USER - the API value retrieved for the user that Campus Café will impersonate
DOCUSIGN_INTEGRATOR_ID – the Integration Key from DocuSign
DOCUSIGN_REDIRECT_URL - https://<your school address>/cafeweb/login
DocuSign REST API URL - https://docusign.net/restapi

Configure Private Key for DocuSign Development Environment

The private RSA key must be saved into a text file in an unusual format (see example below). Add the characters ‘\n’ to the end of each line, excepting the last line. Each line must also conclude with a carriage return. Example below.

```
-----BEGIN RSA PRIVATE KEY-----\n\
pIIEpAIBAACKAQEAnFAeOXCeMiSVFDZSvMzvIGm6rQQgo5VvAuk6FE3zpn03cv42\n\
WEaKZiVM4PeoOe/g9w0XML+4PPCX+80twFImKRxH5T+JgMtSOHrcYx/w4eSA61Sj\n\
Su0Po5uuK2IZ8I05CMqeY2eULQI+n8mJfHFm6uzzd3UCczq08bHJQZIXnpIJAI8W\n\
ik15A/aq7MUcIFP95x13h1vJbUuvCXAGQyKrceuoHEA9vqyYt5r31EJGf2otU+cq\n\
6zqGXEvQOnzoKm91aS7bIh2fUahMzdrIKy3Y68ImwlWaiF3Y2cUaPbA24S+p+14U\n\
1C5i4RF4+eHyJEHHeVuijIhytQYvOfZdr/y6ZQIDAQABAoIBACCZ+i/PPANny1sP\n\
mHKnyJsJSji/OWJ87o4cIDovbW9XfzLh7+o57jAvO+1Y5fKNhC1qwsK1V2MIaB6J\n\
/ZQWwXMMjzfsuIyNfaJGqJG3id92FKSCnCCUu638bLuNxFSpbDUvCH3LWSJAAMai\n\
Fx//kLLAhyQEag0ex2Btgg+bv+/jke4HeBryWH0CgYEAp8/TQMfV4tfURvfXVPGy\n\
mPxQksGrqt2FdEc6sYkiZgaFbgrTcrxKYWEYO0vWoKwXrmFuSi2N0rBsnqtpG/W8\n\
tFKjCeWP+hbMEA6QvVNBSGFBSJSgq/5TDN2ZA0DeZBxJn5LHzP4pJ5ogVx3ligiq\n\
811zBA5ZfS4zge3HhSJurKmlxXbWH1XAPqsxm0PsbmgqJVph+Rnbi9/HtA/LMdo\n\
CL3jbQKBgQCBKiwIsLnEX2xoxAUfwIYmSmd2z9eKGubiGcLLhKSc+haaeKHCxv6\n\
4+Apn0QoBNbFMIGrSY0HGRGggwz3fiXIWDJSR2b6ftNhr+f7LwQ34EEzkUEyZZgB\n\
n87dRczN9dQWW2BnOFMJTYzTEFx/bvq1//Y/axjpm9SzMj/ZLa/47g==\n\
-----END RSA PRIVATE KEY-----
```

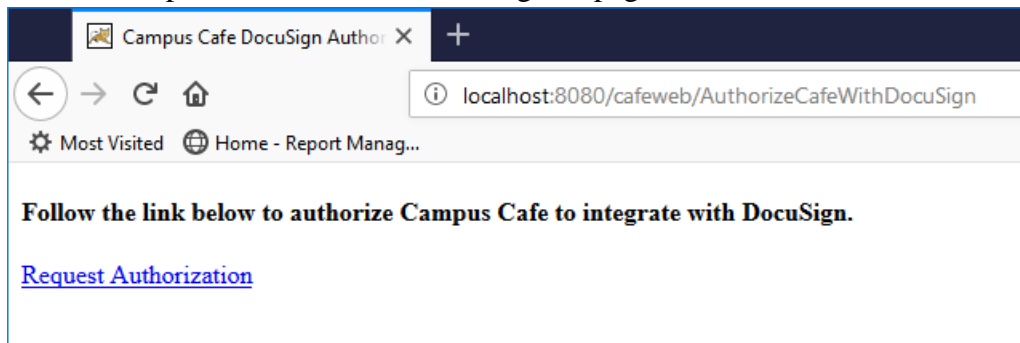
Once the file is properly formatted, send to Campus Café and a Campus Café administrator will place the file within the Campus Café <host deployment directory>/WEB-INF/classes subdirectory in the file docusign.config.properties

Important: Wait for confirmation from Campus Café prior to proceeding.

Campus Café DocuSign Authorization in Development Environment

Campus Café must be authorized to impersonate a user defined in your DocuSign account. With the values described above generated and saved to Campus Café's WebApp Config:

1. Log in to Campus Café with an administrative level account (specifically, with permission 293)
2. In your browser, enter the URL:
`https://<your school address>/cafeweb/AuthorizeCafeWithDocuSign`
3. You will be presented with the following webpage



4. Click Request Authorization
5. Log into DocuSign with the user created for Campus Café to impersonate
6. Campus Café will now be approved to create document envelopes with DocuSign

DocuSign Webhook in Development Environment

The Campus Café DocuSign integration is designed to automatically retrieve signed documents and store them into Campus Café's Activity Tracking system. This happens programmatically; no configuration is required to enable this feature.

Set Up DocuSign Activity Tracking in Campus Café

Once the previous steps are completed, workflows and activity tracking templates that contain documents routed through DocuSign may be created.

Create the workflow

1. Log in to Campus Café
2. Navigate to All Users → Workflow Definitions
3. To create an Admissions DocuSign workflow definition, select Member A (Admissions),
To create a Financial Aid DocuSign workflow, select Member F (Financial Aid)
Choose other members depending on business process
4. In the Definition Name box add a name for the workflow
5. Click Add
6. From the type menu, select a type. For admissions, MISSINGDOC is recommended. For financial aid, DOCUMENT is recommended.
7. In the Description box enter a description
8. Under attachment choose who may add, view or delete the document by checking the boxes
9. At the bottom of the page under DocuSign Template there is a box. Click the magnifying glass to see DocuSign Templates. Templates created in the development environment appear here. If none appear, confirm that you have at least one template saved in DocuSign and that your configuration values are accurate.
10. Click Select next to the desired template
11. Click Save

Link workflow with activity tracking template

The activity tracking template allows the connection of an activity to a person.

1. Navigate to All Users → Activity Tracking Templates
2. In the Member box, choose the same member under which you created the workflow
3. In the Template Name box, enter the name of the activity template
4. Click Add
5. Enter at least a description
6. In the Work Flow Name drop down, select the workflow created earlier

Activity Tracking Template Detail:

Member: A Template Name: SIGN_ENROLL Header ID: 3255

Information that is red is required

Member* Template Name*

Template Header Fields

Description:	<input type="text" value="Attach document for digital signing"/>	
Active:	<input type="text" value="-- choose one --"/>	
Admissions Portal Request Trigger:	<input type="text" value="-- choose one --"/>	
Quick Comment:	<input type="checkbox"/>	
Constraint 1:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 2:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 3:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 4:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 5:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 6:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 7:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 8:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>
Constraint 9:	<input type="text" value="-- choose one --"/>	<input type="text" value="-- choose one --"/>

Entered By: 660088110 Entered Date: 20190111 Changed By: Changed Date: 0

Selected Template WorkFlow Fields
Detail ID: 3256

Work Flow Name:	<input type="text" value="A:SIGN_ENROLL:Attach document for digital signing"/>
Detail Description:	<input type="text"/>
Days Out:	<input type="text" value="0"/>
Optional Default Comment #1 Text:	<input type="text"/>
Optional URL:	<input type="text"/>

This Template has tracking and can not be entirely deleted.

All Template WorkFlow Listing

Edit	Delete	Work Flow Edit	Group Order	Work Flow Name
			1	SIGN_ENROLL

7. Click Save

Test DocuSign Documents

DocuSign needs at least 20 documents signed via the Campus Café integration.

IMPORTANT: The test individual must have an email address tied to his or her Campus Café account. The user testing must also have access to permission 1198 to access the document portal.

1. Attach an activity (Person Selected → Activity Tracking) associated with a DocuSign template to the record. Add at least 20 of these activities *on the same date*.
2. Using the Document Portal (Person Selected → Document Portal) sign at least 20 of the activities associated with a DocuSign template.

Request DocuSign Review

1. Log in to your DocuSign development account at <https://account-d.docusign.com/>
2. Click Admin
3. Click API and Keys
4. Click the Actions to the right of the key created for Campus Café
5. Click Go Live Review
6. Enter the date when you signed at least 20 documents via Campus Café
7. Click Review
8. Wait 5-20 minutes for the review to complete. Refresh the webpage to and check under Status. If all works well, it should say Review Passed

Request DocuSign Go Live

1. After the review is passed, log in to your DocuSign development account at https://account-d.docusign.com
2. Click Admin
3. Click API and Keys
4. Click the Actions to the right of the key created for Campus Café
5. Click Go Live
6. A series of popups will ask you to confirm your accounts
7. The review may take a few business days but is typically a few hours
8. When the Status says Live proceed to next step

API Setup in DocuSign Production Environment

1. Log in to your **production** DocuSign account at <https://account.docusign.com>
2. Click Admin
3. Click API and Keys
4. To the left of the integration key created in development (the name may change but the key will be the same), click Actions → Edit
5. Under Authentication, choose Authorization Code Grant
6. Under Service Integration, click Add RSA Keypair
7. Copy the private key for future use
8. Click OK
9. Under Redirect URIs, click Add URI
10. Populate the redirect URI with the Campus Café redirect value for your institution:
`https://<your school address>/cafeweb/login`
11. Click Save
12. Click on the Users menu item
13. Next to the user that Campus Café will use to create and send document envelopes click Actions and select Edit. (Later, the user will need to approve Campus Café as a surrogate so that Campus Café can automatically create signing entities.)
14. Copy the user's API username for later use

Map Campus Café to DocuSign Production Environment

1. Log in to Campus Café
2. Navigate to Admin → Web App Config
Set the following parameters as follows:
DOCUSIGN_AUTH_REDIRECT_URL - `https://<your school address>/cafeweb/login`
(unchanged)
DOCUSIGN_AUTH_URL - `https://account.docusign.com`
DOCUSIGN_BASE_URL - `https://docusign.net`
DOCUSIGN_IMPERSONATED_USER - the API value retrieved for the user that Campus Café will impersonate.
DOCUSIGN_INTEGRATOR_ID - the Integration Key from DocuSign (unchanged)
DOCUSIGN_REDIRECT_URL - `https://<your school address>/cafeweb/login`
(unchanged)
DocuSign REST API URL - `https://[DocuSign server name].docusign.net/restapi`

Configure Private Key for DocuSign Production Environment

The new private RSA key from **production** must be saved into a text file in an unusual format (see example below). Add the characters ‘\n’ to the end of each line, excepting the last line. Each line must also conclude with a carriage return. Example below.

```
-----BEGIN RSA PRIVATE KEY-----\n\  
MIIEpAIBAAKCAQEAnFAeOXCeMiSVFDZSvMzvIGm6rQQgo5VvAuk6FE3zpn03cv42\n\  
WEaKziVM4PeoOe/g9w0XML+4PPCX+80twFImKRxH5T+JgMtSOHrcYx/w4eSA61Sj\n\  
Su0Po5uuK2IZ8I05CMqeY2eULQI+n8mJfHFm6uzzd3UCczq08bHJQZIXnpIJAi8W\n\  
ik15A/aq7MUcIFP95x13h1vJbUuvCXAGQyKrcceuHEA9vqyYt5r31EJGf2otU+cq\n\  
6zqGXEvQOnzoKm91aS7bIh2fUAhMzdrIKy3Y68ImwlWaiF3Y2cUaPbA24S+p+14U\n\  
lC5i4RF4+eHyJEHHeVuijIhytQYvO7Zdr/y6ZQIDAQABAoIBACCZ+i/PPANny1sP\n\  
mHKNyJsJSji/OWJ87o4cIDObW9XfzLh7+o57jAvO+1Y5fKNhC1qwsk1V2MIaB6J\n\  
+v0F7Yqszzl0b0awGJ5YXjwlPcWu60byq3MqYjPEelgfPVI7wUzaf4aF/Zhb3PV\n\  
fUB+aOfRSbsr9ZeVevAOalkLxpMQrpsI2DCY35LU7yWDH+x0ZnjGdGkCgYEAnnNe\n\  
7QKVlKpndXwsKx7srof9cE8KAAQEfcyLhTmCNTUNkEpA5qeX3J2jqd7qkYAGj4Q\n\  
/ZQWwXMMjzfsuIyNfaJGqJG3id92FqSCnCCUu638bLuNxFSpbDUvCH3LWSJAAMai\n\  
Fx//kLLAhyQEag3ex2Btgg+bv+/jke4HeBryWH0CgYEAp8/TQMfv4tFURvfXVPGy\n\  
mPxQksGrqt2FdEc6sYkiZgaFbgrTcrxKYWEYO0vWoKwXrmFuSi2N0rBsnqtpG/W8\n\  
8qhIFZEIk1lWBLNL+Zoz5mFhT62Z/S0zq87bMJ35R6SmhT8AmPxCKtTQulam0x85\n\  
mU41hvpue6qVgvUAM8c1OOECgYBD8MpCLDqBLXQBL0YtEyx/RbZJIsrymyaF31/w\n\  
tFKjCeWP+hbMEA6QvVNBsgfBSJSgq/5TDN2ZA0DeZBxJn5LHzP4pJ5ogVx3ligiq\n\  
811zBA5Zfs4zge3HhSJurKmlxXbWH1XAPqsxm0PsbmgqJVph+Rnbi9/HtA/LMdoo\n\  
CL3jbQKBgQCB6iwIsLnEX2xoxAUfwIIYmSmd2z9eKGubiGcLLhdSc+haaeKHCxv6\n\  
4+Apn0IoBNbFMIGrSY0HGRGggwz3fiXIWDJSR2b6ftNhr+f7LwQ34EEzkUEyZZgB\n\  
n87dRczN9dQWW2BnOFMJTYzTEFx/bvq1/Y/axjpm9SzMj/ZLa/47g==\n\  
-----END RSA PRIVATE KEY-----
```

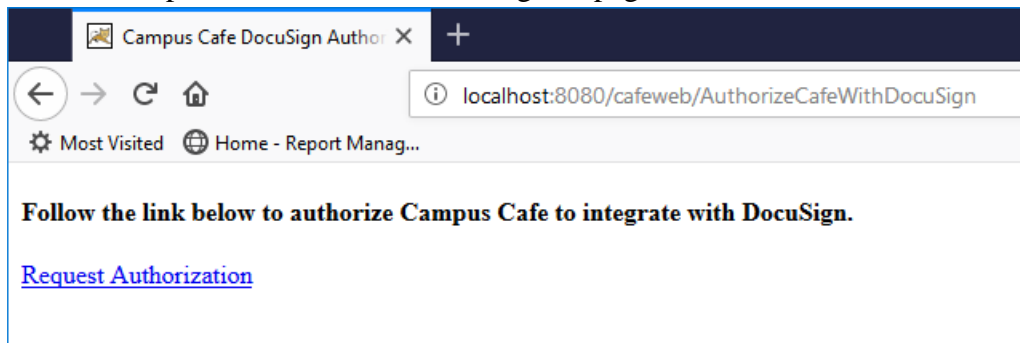
Once the file is properly formatted, send to Campus Café and a Campus Café administrator will place the file within the Campus Café <host deployment directory>/WEB-INF/classes subdirectory in the file docusign.config.properties

Important: Wait for confirmation from Campus Café prior to proceeding.

Campus Café DocuSign Authorization in Production Environment

Campus Café must be authorized to impersonate a user defined in your DocuSign account. With the values described above generated and saved to Campus Café's WebApp Config:

1. Log in to Campus Café with an administrative level account (specifically, with permission 293)
2. In your browser, enter the URL:
`https://<your school address>/cafeweb/AuthorizeCafeWithDocuSign`
3. You will be presented with the following webpage



4. Click Request Authorization
5. Log into DocuSign with the user created for Campus Café to impersonate
6. Campus Café will now be approved to create document envelopes with DocuSign

Attach Campus Café Workflows to Documents in DocuSign Production Environment

Follow the steps in the Set Up DocuSign Activity Tracking in Campus Café section to attach templates in the DocuSign production environment to Campus Café Workflows.

DocuSign Applicant & Student Experience

Permissions

- Permission 1198 grants access to the Document Portal where individual users can sign documents.

Applicant Admission Experience

Once an Activity Tracking record has been added to an applicant account, the individual will see a Sign Document link on the Admissions Status Page (see below).

Missing Forms

All forms below must be received in order for your application to be considered complete.

Description ▲	Date Added ⇅	Date Received ⇅	Comments	Attachment ⇅	Sign Document ⇅
Attach document for digital signing	02/05/2019			+	Sign Document
Bank Statement	10/19/2017			+	
College Transcript Request	08/02/2017		Northeastern University		
Essay Request	08/02/2017	12/01/2017	500 Words or less please.	Essay.docx ✎ ✖	
High School Transcript Request	08/02/2017		Xaverian High School		
Letter of Recommendation	08/02/2017	08/04/2017	Professor Cosmo Von Nostrand http://localhost:8080/cafeweb/images/Recommendation1.docx	LetterofRecommendation.docx ✎ ✖	

Upon clicking this link, the applicant will be forwarded to DocuSign to complete the signing task. After the signing task is completed, DocuSign will return the signed document as a PDF to Campus Café. The file will then be saved to the individual's activity tracking record.

Subsequent attempts to click on the 'Sign Document' link will return the student to the existing document in DocuSign.

Applicant or Student Financial Aid Experience

Documents will also appear on the Financial Aid Status Portal under the Forms section.

Administrators reach the page by bringing up the person's record and navigating to Person Selected → FinAd Status → Forms.

Students and applicants reach the page by navigating to My Info → FinAd Status → Forms

Financial Aid Status Portal: Karen (Karrie) Holbrook

Profile

Costs

Awards

Forms

Letters

Here is the tracking items header

Description	Date Added	Date Received	Comments	Attachment	Sign Document
DocuSign promissory note	03/14/2019				Sign Document
FAFSA Copy	08/02/2017	08/04/2017		FAFSA_Copy.docx ✖	
Parent 1040	08/02/2017	08/04/2017		P1040.docx ✖	
Photo ID	08/02/2017	08/04/2017		PhotoID.jpg ✖	

Showing 1 to 4 of 4 entries

Upon clicking Sign Document, the applicant will be forwarded to DocuSign to complete the signing task. After the signing task is completed, DocuSign will return the signed document as a PDF to Campus Café. The file will then be saved to the individual's activity tracking record.

Subsequent attempts to click on the 'Sign Document' link will return the student to the existing document in DocuSign.