

Xerox[®] Connect App for DocuSign[®] with Single Sign-On (SSO)



Quick Start Guide for use with Xerox[®] Connect App for DocuSign[®] With Single Sign-On (SSO).

DESCRIPTION

The Xerox Connect App for DocuSign with SSO is a Xerox Gallery App that allows customers to scan from the Xerox device using Xerox[®] Workplace Solutions (Xerox[®] Workplace Suite and Xerox[®] Workplace Cloud) as the Single Sign-On mechanism, then digitally sign in DocuSign. The Xerox DocuSign App with SSO is available to customers who purchase the app and can be downloaded using a Xerox App Gallery account. The app is also available to try during the trial period defined. The Xerox DocuSign App with SSO is for use with Xerox[®] ConnectKey[®] Technology enabled Multifunction Printers, AltaLink[®], and VersaLink[®] devices.

Device Requirements

Throughout this guide, the word “device” is used synonymously and interchangeable with MultifunctionPrinter and Printer.

All devices require the following:

- Xerox Extensible Interface Platform (EIP) must be enabled to allow the App to be installed.
 - o Devices must support EIP 3.5 or higher.
- ConnectKey App Installation (Weblet Install Policy) must be enabled to allow installation of the App.
- Ensure the device is able to communicate with the Internet.

Note:

- Some networks require a proxy to communicate with the Internet.
- If Verification of SSL is enabled on the device, ensure the security certificates are loaded on the device.
- By default, the Xerox Solutions Certificates are preloaded on all 2016 Xerox ConnectKey Technology-enabled i-Series, AltaLink, and VersaLink devices.

For more information on the settings above, refer to the Xerox App Gallery Online Support at <http://www.support.xerox.com/support/xerox-app-gallery>.

INSTALLING THE XEROX DOCUSIGN APP WITH SSO

The following procedure assumes you have created a Xerox App Gallery account. If you do not have access to a Xerox App Gallery account, refer to the Xerox App Gallery Quick Start Guide for instructions on creating an account.

Note: For detailed instructions on adding a device and adding or installing Apps to your Xerox App Gallery account, see the documentation links at the end of this guide.

INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (PAID APP)

1. Go to the Xerox App Gallery URL: <https://appgallery.services.xerox.com>
2. Select Log in.
3. Enter a valid Email and Password.
4. On the devices tab, add a Multifunction Printer or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select the **Buy** button.
7. Accept the End User License Agreement (EULA).
8. Configure the app when prompted, referring to the available Admin Guide.
9. Select the devices that you would like to buy the App for then select **Checkout**.
10. Fill out Billing information and select **Place Order**. Select **Done**.

INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (TRIAL APP)

1. Go to the Xerox App Gallery URL: <https://appgallery.services.xerox.com>
2. Select Log in.
3. Enter a valid Email and Password.
4. On the devices tab, add a Multifunction Printer or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select **Try It** button.
7. Accept the End User License Agreement (EULA).
8. Select the devices that you would like to trial the App on and then select **Install**.

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CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS LISTED IN XEROX WORKPLACE SUITE

Important: Xerox Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps

1. Launch Xerox Workplace Suite.
2. Click Settings.
3. Select Single Sign-On.
4. If your newly purchased app displays in the list, click it and select Exchange Keys.
5. This will send an email request to Xerox SSO Apps.
6. The administrator of the SSO Apps will then email the Xerox Workplace Suite Administrator the required key.
7. The Xerox Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS NOT LISTED IN XEROX WORKPLACE SUITE

Important: Xerox Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps

1. Launch Xerox Workplace Suite.
2. Click Settings.
3. Select Single Sign-On.
4. If your newly purchased app does not display in the list, click Action -> New.
5. Fill in the Description, Publisher, and Publisher Email address, App ID and Redirect URL.

This information should be part of the description on the App Details screen in the App Gallery. If this information is not available, contact the app creator.

6. Select Send.
7. Click on the app and select Exchange Keys.
8. This will send an email request to Xerox SSO Apps.

9. The administrator of the SSO Apps will then email the Xerox Workplace Suite Administrator the required key.
10. The Xerox Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

HOW TO USE DOCUSIGN:

You need to have a DocuSign account to use the app. If you do not have an account, please visit: <https://www.docusign.com/> to register

1. Select the app on the MFD
2. Log in to your DocuSign account.
3. Once logged in, you will have 4 options:
 - a. Print
 - b. Scan
 - c. Scan and Create
 - d. Scan with Template
1. Select Print button
2. Browse to the location you wish to print from (Inbox, Deleted, Draft, or Sent)
3. Select an envelope and then select the item(s) in the envelope you wish to print.
4. Set Printing options
5. Select the Print Button to print the job(s).
1. Select Scan button
2. Enter a name for the envelope
3. Enter name of document
4. Set Scanning options
5. Select Scan
6. The envelope is then added to the "Drafts" folder on the DocuSign site.
7. Using a web browser on your computer or the DocuSign mobile app, log into your DocuSign account, select the envelope, enter recipients and add signature fields, if needed.
8. Select Send
1. Select Scan and Create
2. Identify up to 5 recipients and define their action
3. Enter email message
4. Set Scanning options
5. Select Scan
6. Optionally, in the preview mode, place signature fields in the document
7. Send the completed envelope to the defined recipients
8. The job will show up in your Sent folder on DocuSign
9. Once signed it will then be moved to your Inbox.

1. Select Scan with Template after creating a template at the DocuSign site
2. Select the template to be used
3. Enter name of document
4. Set Scanning options
5. Select Scan
6. Select either Save to DocuSign or Send directly to recipients

Support

Xerox App Gallery Knowledge base

<http://www.support.xerox.com/support/xerox-app-gallery/support/enus.html>

Xerox App Gallery documentation

<http://www.support.xerox.com/support/xerox-appgallery/documentation/enus.html>

DocuSign Support

<https://support.docusign.com/guides/ndse-user-guide-working-with-templates?source=demo>

Customer Support Forum

The customer support forum can be found at <http://forum.support.xerox.com/>

Supported Multifunction Printers (MFPs) and Printers

The list of supported Multifunction Printers and Printers can be found at the following location:

<https://www.xerox.com/en-us/connectkey/apps>