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Overview

The Adobe Sign integration for Microsoft SharePoint provides an integrated solution for creating, sending, tracking and managing electronic signatures. The integration is available for Microsoft SharePoint 2010 and works with both hosted and on premise instances of SharePoint. The solution is developed as a plugin for Microsoft SharePoint and provides:

- Ability to add Adobe Sign as a SharePoint web part, which can be used by SharePoint users for sending and tracking documents for signature
- Send any document from a SharePoint document library for signature
- Ability to send documents to a single recipient or sending to a batch of recipients using SharePoint lists and mapping data from SharePoint lists into documents when the documents get sent for signature
- Adding electronic signature as an activity within SharePoint workflows to automate the process of documents being sent for signature based on events within SharePoint
- Archival of all signed agreements within SharePoint

Requirements

The Adobe Sign solution can only be installed and configured by a Microsoft SharePoint administrator; you will also need administrative privileges on the SharePoint server to install the solution. Please consult SharePoint documentation and your organization’s SharePoint administrator for additional systems permissions that may be required to install SharePoint plugins. To configure the solution, you also need to be an account administrator on Adobe Sign and have access to your Adobe Sign account API Key. System requirements below encompass both the server and client components required to successfully install and run Adobe Sign for SharePoint.

- Microsoft SharePoint hosted or on premise
- Internet Explorer 8+
Install the Adobe Sign WSP on Site Collection

Upload and Activate the .wsp Package

1. Obtain the latest .wsp package
2. Navigate to Site Collection > Site Settings > Web Designer Galleries > Solutions
   
   Note: _catalogs/solutions/Forms/AllItems.aspx

3. Upload the .wsp file
4. **Activate site feature manually:**
   a. Navigate to *Site Settings > Site Actions > Manage site features*
   b. Click the **Activate** button next to *Adobe eSign Workflow Actions*
   c. Click the **Activate** button next to *Adobe eSign Workflow Actions Config List*
Populate the eSign Config List

Populating the eSign Config list will require you to generate and input several unique fields.

It is recommended that you open Notepad or some other text editor so you can save the generated keys, then input them all at one time.

You will need to:

- Generate the `eSignIntegrationKey` (done in the Adobe Sign app)
- Obtain the `spTenantID` in SharePoint
- Generate the `spClientID` and `spClientSecret` keys in SharePoint
- Grant the new service principal permissions in SharePoint
- Insert the `esignConnectorURL`

**Step 1: Generate the `eSignIntegrationKey`**

To generate an Integration Key in Adobe Sign:

1. Log in to your administrative user for your Adobe Sign account
2. Navigate to **Account > Adobe Sign API > API Information**
3. Click the **Integration Key** link in the middle of the page
The Create Integration Key interface loads:

4. Provide an intuitive name for your key (e.g. SharePoint)

5. The Integration Key must have the following elements enabled:
   - agreement_read
   - agreement_write
   - agreement_send
   - library_read

6. Click Save once the key is configured.

   The Access Tokens page is exposed showing the keys defined in your account.

7. Click the key definition created for SharePoint
a. The Integration Key link is exposed at the top of the definition.

8. Click the Integration Key link

The Integration key is exposed:

9. Copy this key and save it to add to the eSign Config List

10. Click OK

a. You are now done in the Adobe Sign application and can log out
Step 2: Obtain the *spTenantID*

To obtain the *spTenantID* value:

1. Navigate to **Site Settings > Users and Permissions > Site App Permissions**.
2. Under the App Identifier, copy the part after `@`
   
   ```
   ie: i:0i.l|ms.sp.ext|d559ac84-d8e6-4515-9229-8966b92849w01@870fe83b-ye9d-96d3-n1d0-9et51ar2e792e
   ```
3. Save this value to insert into the eSign Config List

Step 3: Generate the *spClientID* and *spClientSecret* keys

To generate the *spClientID* and *spClientSecret* keys:

1. In the URL for your SharePoint site, after `sharepoint.com/sites/{yoursite}` paste the following string: `_layouts/15/appregnew.aspx`
   
   ```
   https://adobe.sharepoint.com/sites/aswkflow/_layouts/15/appregnew.aspx
   ```
   
   **Note:** *Don’t miss the underscore leading layouts*
   - A new page opens that will allow you to generate both keys
2. Click the **Generate** buttons for both **Client ID** and **Client Secret**
3. Copy both keys and save them to enter into the eSign Config List
4. Insert the following literal values into the remaining fields:
   a. **Title** – Adobe Sign
   b. **App Domain** – spintegration.echosign.com/sharepoint
5. Click **Create**
   - This puts a new service principal in Azure AD
   - You can reuse the same principal across site collections

**Step 4: Grant the new service principal permissions**

Grant the new service principal permissions to the site by

1. In the URL for your SharePoint site, after `sharepoint.com/sites/{yoursite}` paste the following string: `_layouts/15/appinv.aspx`.
   a. This has to be done on every site where workflows will run.
      
      ![Image of app information](image)

      *Note: Don’t miss the underscore leading *layouts*

The fields should contain the content for the application from the previous step:

- **App Id** – This is the Client ID you just generated
- **Title** – Adobe Sign
- **App Domain** – `spintegration.echosign.com/sharepoint`
- **Redirect URL** - [https://spintegration.echosign.com/sharepoint](https://spintegration.echosign.com/sharepoint)
2. Copy and paste the below code into the Permission Request XML: field
   
   ```xml
   <AppPermissionRequests AllowAppOnlyPolicy="true">
   <AppPermissionRequest Scope="http://sharepoint/content/sitecollection"
   Right="FullControl" />
   </AppPermissionRequests>
   ```

   **Note**: The app will elevate the user to run with app permissions (Full control in the example above. You can reduce the permission grant to allow full control of a site or lesser level):

3. Click **Create**
4. Click **Trust It** when the page reloads

You can see the resulting permissions in **Site Settings > Site App Permissions**

**Step 5: Insert the eSignConnectorURL**

The eSignConnectorURL is the literal value: **https://spintegration.echosign.com/sharepoint**
Configure the eSignConfig List

1. In the Site Contents of the site where the Adobe eSign Workflow Config List feature was activated, find and click on the eSignConfig list
2. Create new item to open a new config form

3. Fill in the following values:
   - Title - "Config"
   - spClientID – Insert the ClientID value from Step 3
   - spClient Secret – Insert the ClientSecret value from step 3
   - spTenantID – Insert the TenantID from step 2
   - eSignIntegrationKey – Insert the Adobe Sign Integration Key from step 1
   - eSignConnectorURL – Enter: https://spintegration.echosign.com/sharepoint
   - debugStatements – No

4. Click Save
Security Considerations for Reading the eSignConfig List from Workflow Action

It is best practice to only allow site collection administrators access to eSignConfig list.

If the workflow is started by the user who has access to eSignConfig list, then the workflow will run without problems. However, if the user does not have access to the list, then the workflow actions need to be wrapped into app step.

1. On the site where the workflow is published
   a. Navigate to Site Settings > Site Features
   b. Activate Workflows can use app permissions feature.
2. Get the id of the workflow service principal
   a. Navigate to Site Settings > Site App Permissions
      Example: Workflow i:0i.t|ms.ext|d55e6c84-d8e6-4515-9229-896we4554601@870f107b-dc9d-47d3-9ad0-9d851rr2e762e
3. Give the workflow service principal permissions in _layouts/15/appinv.aspx similar to what we did with the actual application
4. Trust the Workflow service principal

Now the app step should be available in SharePoint Designer (restart is required):