

MATRIX42 MARKETPLACE PRODUCTS

DocuSign Connector

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Description

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Imagine the following UseCase:

An internal or external user needs a VPN access to get access to the company network from the home office. The order request for this is initiated via the Matrix42 Self Service Portal. Once the approval process has been successfully completed, the provisioning process is started. This includes the provision of a hardware or software token. During the approval or provisioning process, the user must also digitally sign a document.

DocuSign Connector

With the DocuSign Connector, the described UseCase can be fulfilled. The PDF, Word or HTML documents prepared by you can be individually provided with "placeholders", so that text modules such as user name, customer name, addresses, etc., but also signature or confirmation fields, can be dynamically inserted into the document by our add-on. At the required point in the approval or provision process, we trigger the signature process in DocuSign via our solution. You decide whether the process in Matrix42 waits for DocuSign to confirm the signature or not.

A new data provider is available in Matrix42 for configuring the connector. In addition to the

general connection information for DocuSign, any number of document configurations can be created here. In general, one configuration per different process to achieve a high flexibility.

The DocuSign Connector at a glance:

- Supported file formats: PDF, Word, HTML
- Free definition of placeholders per document
- Configuration of necessary signature fields or confirmations per document
- Creation of any number of DocuSign configurations in the data provider
- Flexible configuration options for whether the Matrix42 workflow waits for confirmation of the signature by DocuSign or not
- Flexible and easy integration into various Matrix42 processes
- Use of the DocuSign solution in the cloud allows integration of users who do not have access to the Matrix42 system

Requirements:

- Existing DocuSign license incl. authentication data and private key for automated use of the DocuSign API (The required data can be read from the DocuSign user account)
- Use of a product version that is officially supported by Matrix42. If there are several valid Long-Term versions, only the last valid LT version is supported
- Automatic installation of two NuGet Powershell modules for initial implementation on the Matrix42 App Server via Workflow Studio must be allowed
- Internet access for communication with DocuSign

Additional information

Digital Workspace Platform (DWP) Compatibility	11.x
Platform	Digital Workspace Platform (DWP)
AppFabric Required	No
License metric	Per Installation
Manufacturer	Cubefinity GmbH
Contract type	Subscription
Product link	https://marketplace.matrix42.com/product/docusign-connector/