
django-docusign Documentation

Release 0.7

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django-docusign is a Django application for DocuSign's digital signature SAAS platform.

It uses *pydocusign* as *Python* client. It implements *django-anysign* API.

Project status

django-docusign is under active development. The project is not mature yet, but authors already use it! It means that, while API and implementation may change (improve!) a bit, authors do care of the changes.

Also, help is welcome! Feel free to report issues, request features or refactoring!

Resources

- Documentation: <https://django-docusign.readthedocs.org>
- Python package: <https://pypi.python.org/pypi/django-docusign/>
- Bugtracker: <https://github.com/novapost/django-docusign/issues>
- Changelog: <https://django-docusign.readthedocs.org/en/latest/about/changelog.html>
- Roadmap: <https://github.com/novapost/django-docusign/milestones>
- Code repository: <https://github.com/novapost/django-docusign>
- Continuous integration: <https://travis-ci.org/novapost/django-docusign>

3.1 Install

django-docusign is open-source software, published under BSD license. See [License](#) for details.

If you want to install a development environment, you should go to [Contributing](#) documentation.

3.1.1 Prerequisites

- Python ¹ 2.7, 3.3 or 3.4. Other versions may work, but they are not part of the test suite at the moment.

3.1.2 As a library

In most cases, you will use *django-docusign* as a dependency of another project. In such a case, you should add *django-docusign* in your main project's requirements. Typically in `setup.py`:

```
from setuptools import setup

setup(
    install_requires=[
        'django-docusign',
        #...
    ]
    # ...
)
```

Then when you install your main project with your favorite package manager (like [pip](#) ²), *django-docusign* will automatically be installed.

3.1.3 Standalone

You can install *django-docusign* with your favorite Python package manager. As an example with [pip](#) ²:

```
pip install django-docusign
```

¹ <https://www.python.org/>

² <https://pypi.python.org/pypi/pip/>

3.1.4 Check

Check *django-docusign* has been installed:

```
python -c "import django_docusign;print(django_docusign.__version__)"
```

You should get *django_docusign*'s version.

References

3.2 About django-docusign

This section is about the *django-docusign* project itself.

3.2.1 Vision

django-docusign helps you integrate and use [DocuSign](#)³ within a Django project.

References

3.2.2 Alternatives and related projects

This document presents other projects that provide similar or complementary functionalities. It focuses on differences or relationships with *django-docusign*.

DocuSign's helper libraries

There are other libraries related to [DocuSign](#)⁴ service. Check <https://www.docusign.com/developer-center/quick-start/api-explorer/helper-library>

pydocusign

django-docusign uses [pydocusign](#)⁵, a Python library for [DocuSign](#)¹. *django-docusign* focuses on integration in *Django*.

django-anysign

[django-anysign](#)⁶ provides generic tools to integrate online signing in *Django*. *django-docusign* implements *django-anysign* API.

³ <https://www.docusign.com/>

⁴ <https://www.docusign.com/>

⁵ <https://pypi.python.org/pypi/pydocusign/>

⁶ <https://pypi.python.org/pypi/django-anysign/>

References

3.2.3 License

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3.2.4 Authors & contributors

Maintainer: Benoît Bryon <benoit@marmelune.net>, as a member of the [PeopleDoc](#) ⁷ team: <https://github.com/novapost/>

Developers: <https://github.com/novapost/django-docusign/graphs/contributors>

Notes & references

3.2.5 Changelog

This document describes changes between each past release. For information about future releases, check [milestones](#) ⁸ and *Vision*.

0.7 (2014-10-22)

Bugfixes & refactoring, mostly around `SignatureCallbackView`.

- Bug #20 - In `SignatureCallbackView`:
 - `update_signature` is not triggered if signature is not updated, when a signer, not the last, has just signed the envelope.

⁷ <http://www.people-doc.com>

⁸ <https://github.com/novapost/django-docusign/milestones>

- `update_signer` is triggered for every signer when signature and signers have “Sent” status (signature has just been created in embedded mode).
- Features #16 and #20 - In demo application, `SignatureCallbackView` is tested using `pydocusign`’s templates.
- Bug #17 - In demo application, added tests around settings view... and fixed it, so that it works as expected.
- Bug #18 - In demo application, replaced using `iterator.next()` instead of `list(iterator)[0]`.
- Refactoring #19 - Removed deprecated `SignatureCallbackView.clean_status`. Use `pydocusign.DocuSignCallbackParser.envelope_status` instead.

0.6 (2014-10-10)

Custom email subject and blurb.

- Feature #10 - `DocuSignBackend.create_signature` accepts `subject` and `blurb` arguments, in order to customize email subject and body for DocuSign messages and embedded signing page.

0.5 (2014-10-08)

Improvements around multiple signers.

- Feature #13 - `DocuSignCallbackView` also handles recipient notifications.
- Feature #11 - Improved ordering of signers, better management of DocuSign’s `routingOrder`.
- Feature #12 - Demo project shows how to implement signature of multiple signers.
- Bugfix #9 - Fixed default value of `signer_return_url` in `DocuSignBackend.post_recipient_view()`. Default value was not assigned if value was not passed as argument.

0.4 (2014-09-26)

- Feature #7 - Introduced `django_docusign.SignatureCallbackView`, as a generic view to handle DocuSign’s notification callbacks. Simplified demo’s code.

0.3 (2014-09-18)

Updated demo to manage DocuSign API callbacks.

- Feature #1 - Introduced support for DocuSign API callbacks (envelope updates). At the moment, the feature is mostly made of sample code in the demo project. It shows how *django-docusign* can be used to handle DocuSign’s API callbacks. The idea is to let users try the feature then, later, add most useful parts in `django_docusign` package.

0.2 (2014-09-16)

Introduced demo application (with tests).

- Feature #4 - Introduced demo application: illustrate and test API usage.
- Feature #3 - On signature creation, tabs can be computed by backend.

0.1 (2014-08-12)

Initial release.

- Introduced `django_docusign.backend.DocuSignBackend` with “create signature” and “post recipient view” features.

Notes & references

3.3 Contributing

This document provides guidelines for people who want to contribute to the *django-docusign* project.

3.3.1 Create tickets

Please use [django-docusign bugtracker](#)⁹ **before** starting some work:

- check if the bug or feature request has already been filed. It may have been answered too!
- else create a new ticket.
- if you plan to contribute, tell us, so that we are given an opportunity to give feedback as soon as possible.
- Then, in your commit messages, reference the ticket with some `refs #TICKET-ID` syntax.

3.3.2 Use topic branches

- Work in branches.
- Prefix your branch with the ticket ID corresponding to the issue. As an example, if you are working on ticket #23 which is about contribute documentation, name your branch like `23-contribute-doc`.
- If you work in a development branch and want to refresh it with changes from master, please [rebase](#)¹⁰ or [merge-based rebase](#)¹¹, i.e. do not merge master.

3.3.3 Fork, clone

Clone *django-docusign* repository (adapt to use your own fork):

```
git clone git@github.com:novapost/django-docusign.git
cd django-docusign/
```

3.3.4 Usual actions

The *Makefile* is the reference card for usual actions in development environment:

- Install development toolkit with [pip](#)¹²: `make develop`.

⁹ <https://github.com/novapost/django-docusign/issues>

¹⁰ <http://git-scm.com/book/en/Git-Branching-Rebasing>

¹¹ <http://tech.novapost.fr/psycho-rebasing-en.html>

¹² <https://pypi.python.org/pypi/pip/>

- Run tests with `tox`¹³: `make test`.
- Build documentation: `make documentation`. It builds `Sphinx`¹⁴ documentation in `var/docs/html/index.html`.
- Release *django-docusign* project with `zest.releaser`¹⁵: `make release`.
- Cleanup local repository: `make clean`, `make distclean` and `make maintainer-clean`.

See also `make help`.

Notes & references

¹³ <https://pypi.python.org/pypi/tox/>

¹⁴ <https://pypi.python.org/pypi/Sphinx/>

¹⁵ <https://pypi.python.org/pypi/zest.releaser/>

Indices and tables

- *genindex*
- *modindex*
- *search*