Oracle® Banking Origination

Docusign Integration Guide

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Oracle Banking Origination Docusign Integration Guide, Release 14.8.0.0.0

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Preface

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Purpose

This guide is to help with Integration of Oracle Banking Origination Product with Oracle Banking Digital Experience product.

Audience

This guide is intended for the Implementation and IT Staff to implement and maintain the software.

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Integration Guide

This topic provides the information about the Docusign Integration Guide.

You can integrate Oracle Banking Origination with Docusign for e-signing of the documents in origination process.

This document briefs about the specific steps needed for integration of these two products and specific maintenances.

This topic contains the following subtopics:

- Maintenance in Oracle Banking Routing Hub
  This topic describes the systematic instructions to maintain Oracle Banking Routing Hub Configuration for Oracle Banking Origination.
- Maintenance in Oracle Banking Origination Preferences
  This topic describes the systematic instructions to maintain **Origination Preferences** for **Oracle Banking Origination**.

1.1 Maintenance in Oracle Banking Routing Hub

This topic describes the systematic instructions to maintain Oracle Banking Routing Hub Configuration for Oracle Banking Origination.

This topic contains the following subtopics:

- Maintenance of Service Providers and Consumer Services
  This topic describes the systematic instructions to maintain **Service Providers** and **Consumer Services** for **Oracle Banking Origination.**
- Maintenance of Environment Variables
  This topic describes the systematic instructions to maintain **Environment Variables** in **Oracle Banking Routing Hub Configuration** for **Oracle Banking Origination**.

1.1.1 Maintenance of Service Providers and Consumer Services

This topic describes the systematic instructions to maintain **Service Providers** and **Consumer Services** for **Oracle Banking Origination.**

To maintain Oracle Banking Routing Hub configuration in common core for Oracle Banking Origination.

Specify **User ID** and **Password**, and login to **Home** screen.
To import the services:

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **Routing Hub**.
2. Under **Routing Hub**, click **Service Consumers**.

   The **Service Consumers** screen is displayed.

Figure 1-1 Service Consumers

3. Click **Import** and upload the **RPM_ORIGINATION_Consumer.json** file provided in the release and click **Extract**.

Figure 1-2 Success

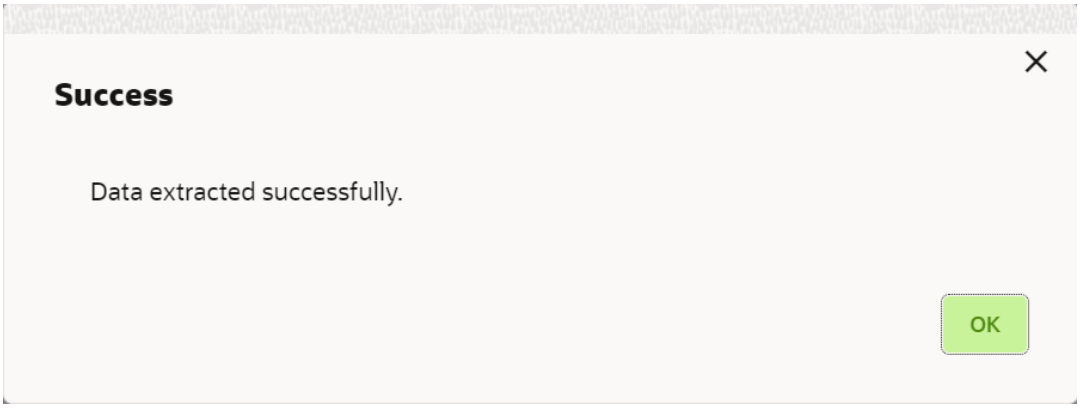
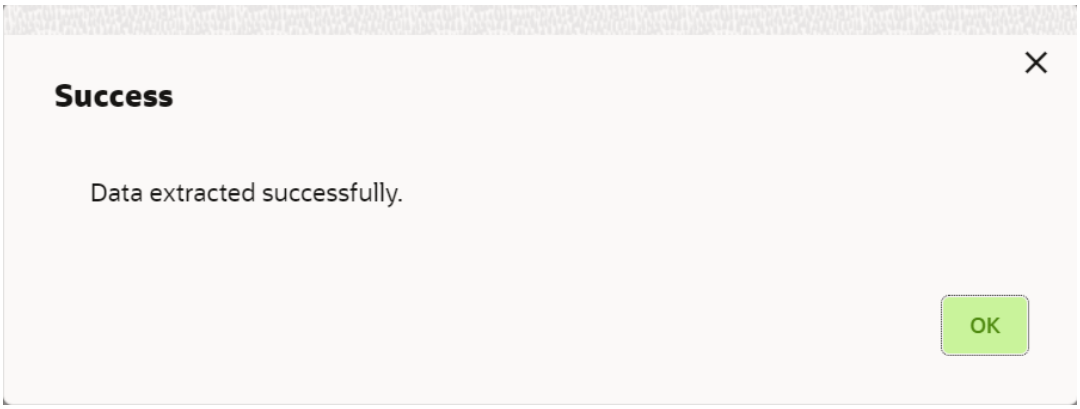


Figure 1-3 Success



4. Select **DOCUSIGN** ,and click **Import**.

Figure 1-4 Confirmation

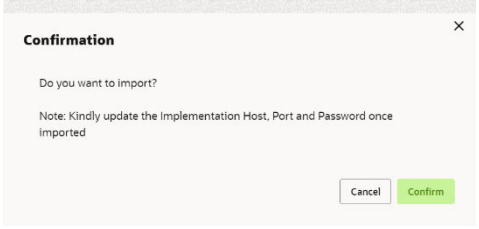


Figure 1-5 RPM Origination

5. Click **RPM_ORIGINATION**.Under **RPM_ORIGINATION**,click **DOCUSIGN**. Click **Edit**.
6. Change the host and port as per the oracle **DOCUSIGN** installation and Click **save** .
7. Repeat the same steps for all the DOCUSIGN Service Providers.
8. The below consumer services will be imported.

Table 1-1 Consumer Service

Consumer Service	Description
Create_Docusign_Envelope	**Usage**: Create Docusign Envelope using different authetication **Transformation**: Create_Docusign_Envelope_No_Auth_Transform Create_Docusign_Envelope_Phone_Auth_Transform Create_Docusign_Envelope_AccessCode_Auth_Transform Create_Docusign_Envelope_IDV_Auth_Transform Create_Docusign_Envelope_KBA_Auth_Transform Get_JWT_Assertion Get_JWT_Access_Token_Transform
Create_Docusign_Recipients_View	**Usage**: To generate URL for In-Person signing **Transformation**: Create_Docusign_Recipients_View_Transform Get_JWT_Assertion Get_JWT_Access_Token_Transform
Void_Docusign_Envelope	**Usage**: Void created Docusign envelope **Transformation**: Void_Docusign_Envelope_Transform Get_JWT_Assertion Get_JWT_Access_Token_Transform
Download_Docusign_Documents	**Usage**: Download Signed Documents from Envelope **Transformation**: Download_Docusign_Documents_Transform Get_JWT_Assertion Get_JWT_Access_Token_Transform

1.1.2 Maintenance of Environment Variables

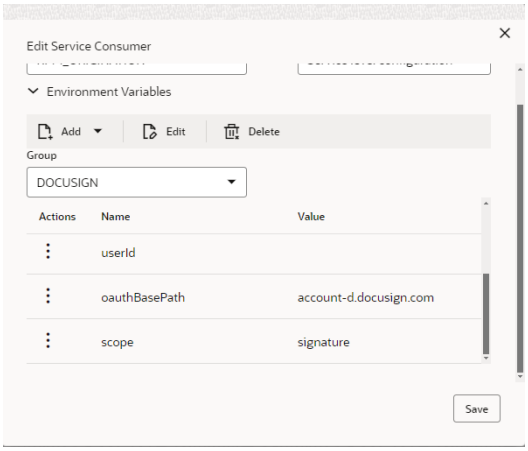
This topic describes the systematic instructions to maintain **Environment Variables** in **Oracle Banking Routing Hub Configuration** for **Oracle Banking Origination**.

To maintain **Environment Variables** in **Oracle Banking Routing Hub configuration** for **Oracle Banking Origination**.

Specify **User ID** and **Password**, and login to **Home** screen.
To import the services:

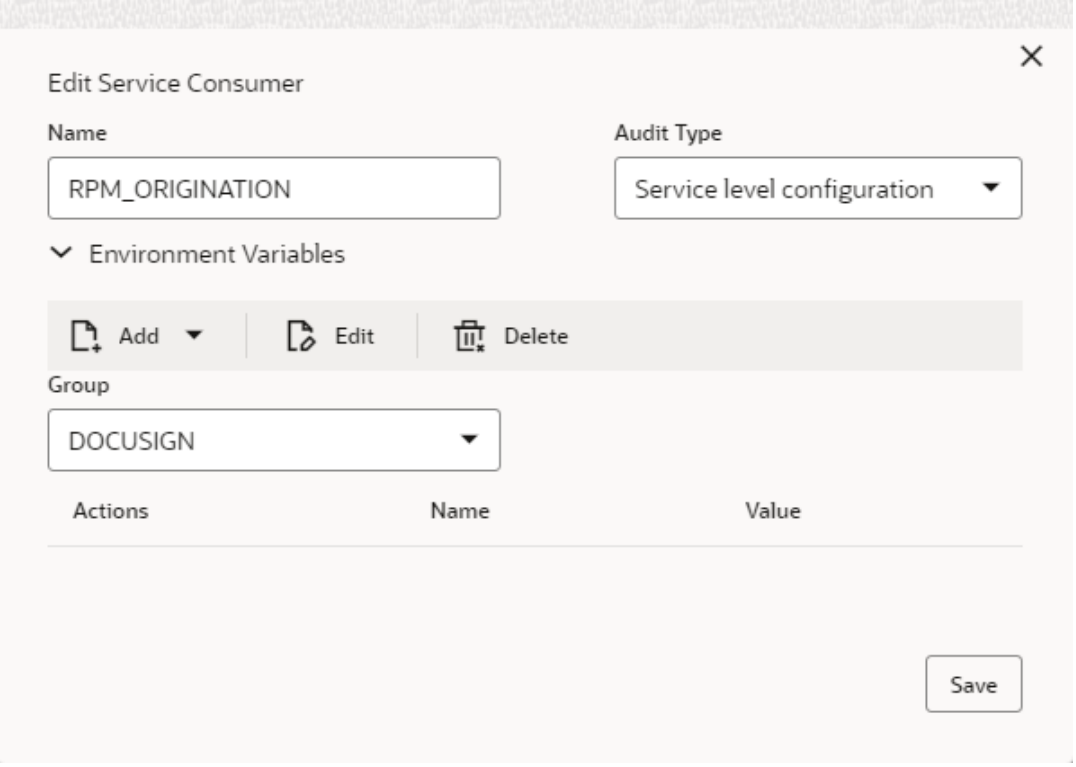
1. From **Home screen**, click **Core Maintenance**. Under **Core Maintenance**, click **Routing Hub**.
2. Under **Routing Hub**, click **Service Consumer**s.
3. Click **Edit**.

Figure 1-6 Edit Service Consumers



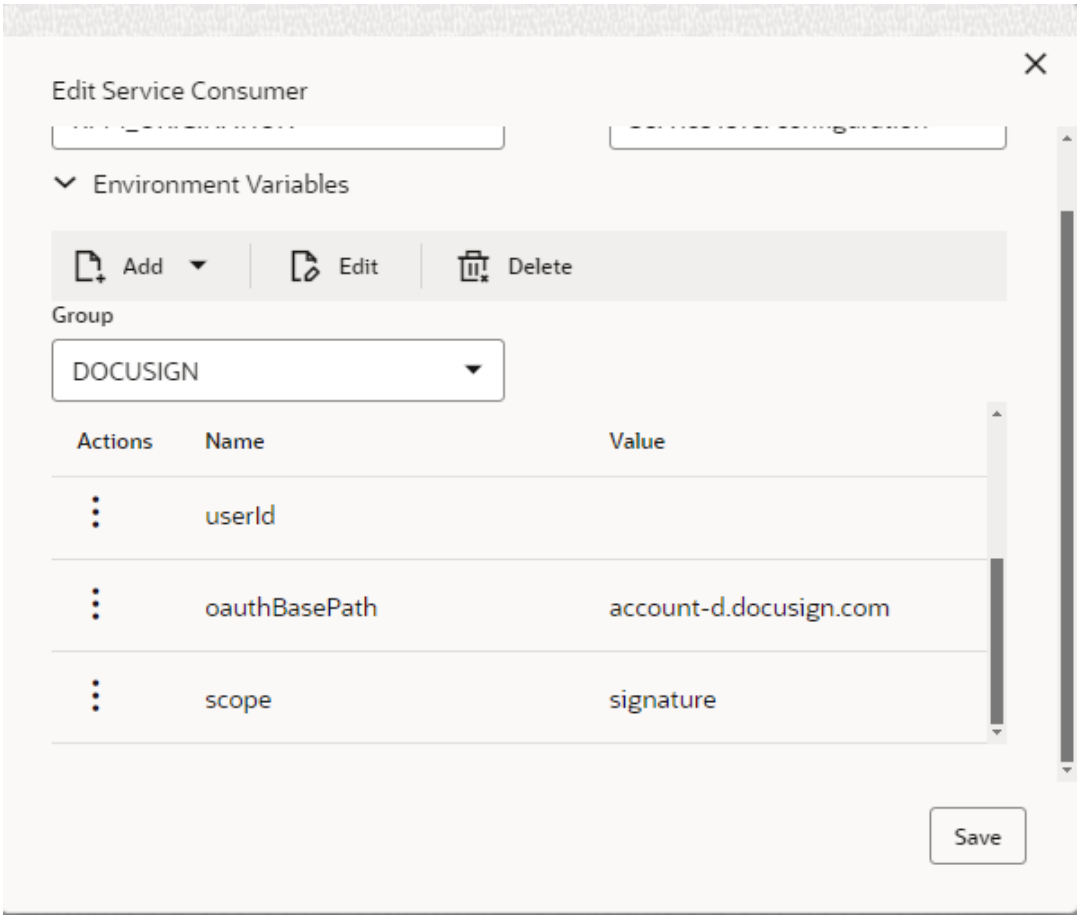
4. Under Environment Variables, add **DOCUSIGN** as new group.

Figure 1-7 Add Group



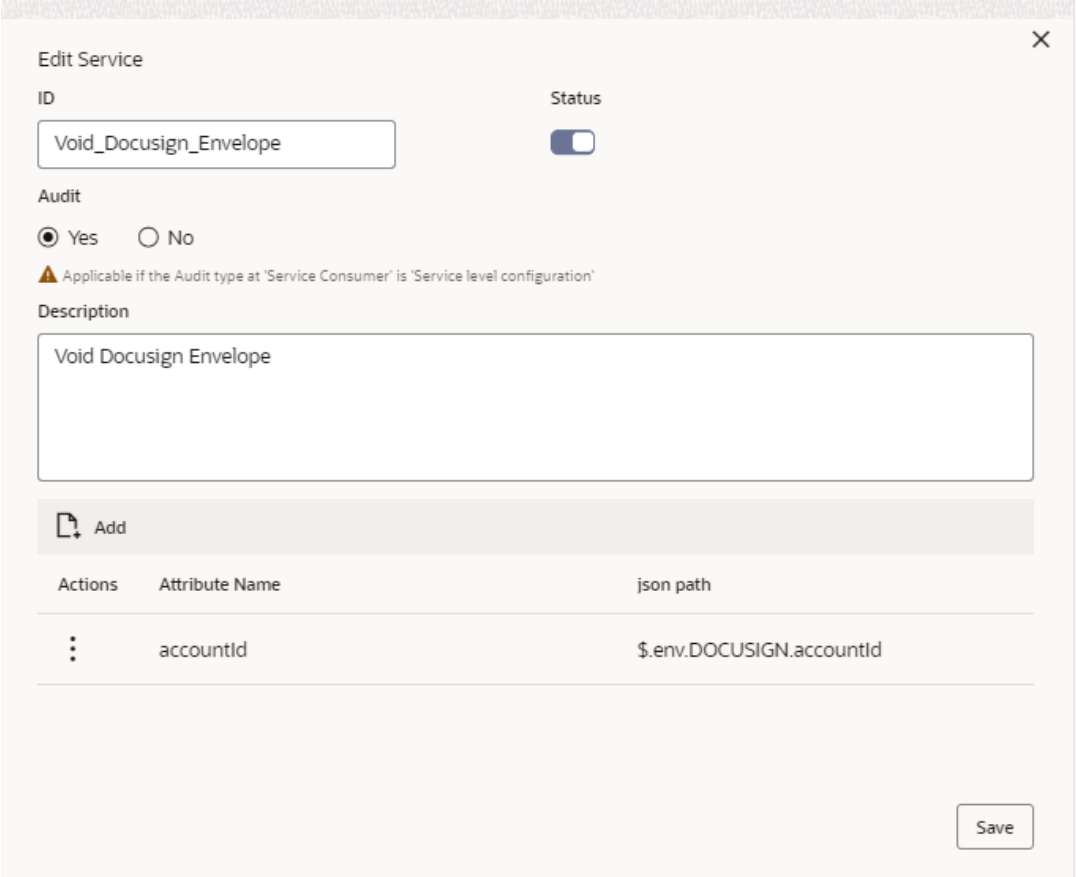
5. Add following as new variable and update respective values as per DOCUSIGN account and click **Save**.
   a. accountId : <**your_docusign_account_id**>
   b. recipientAuthMethod : default is **NOAUTH**
   c. clientId: <**your_integration_key**>
   d. userId: <**your_user_id**>
   e. oauthBasePath: default is **account-d.docusign.com (developer environment)**
   f. scope: default is **signature**

Figure 1-8 Add Variable



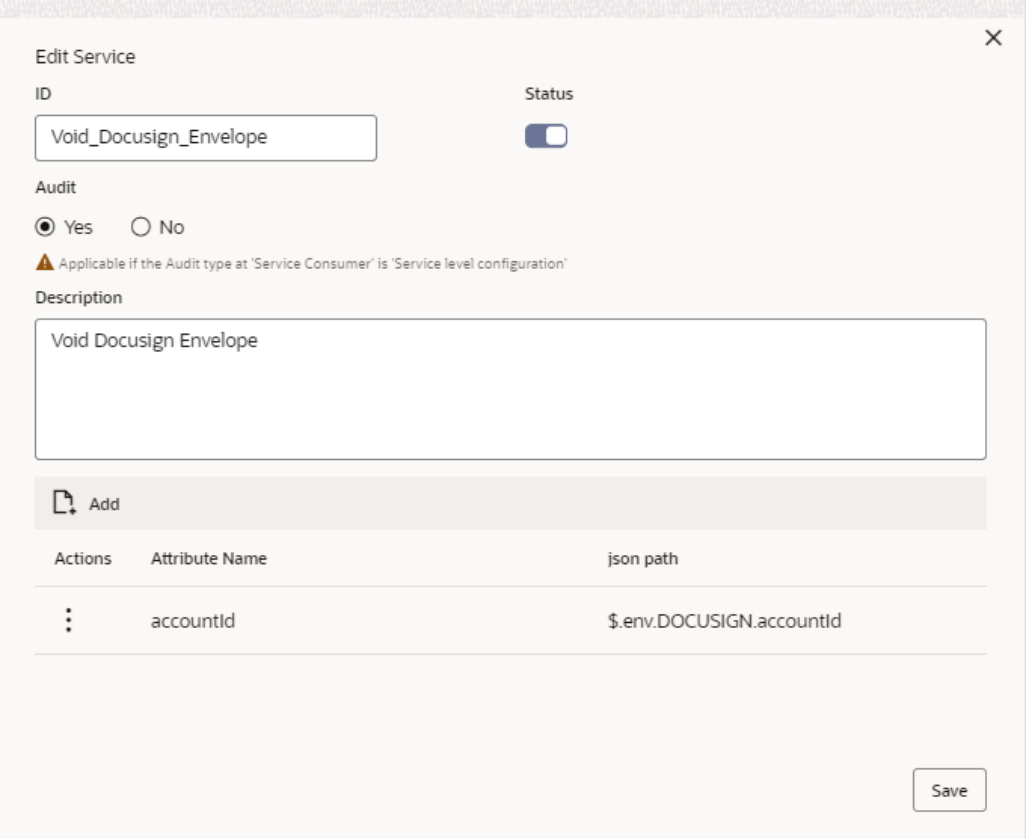
6. Click **RPM_ORIGINATION**.
7. Under **RPM_ORIGINATION**, click **Consumer Services**.
8. For all consumer services, refer Table 1-1 section.
   a. Search **Void_Docusign_Envelope.**
   b. Click **Edit.**
   c. Add **Account Id** as new attribute, add json path and Click **Save**.

Figure 1-9 Add Attribute



9. Follow the below steps for Create_Docusign_Envelope consumer service.
   a. Search **Create_Docusign_Envelope.**
   b. Click **Edit.**
   c. Add **RECIPIENT_AUTH_METHOD** as new attribute, add **$.env.DOCUSIGN.recipientAuthMethod** json path and click**Save**.

Figure 1-10 Edit Service



d. Click **Create_Docusign_Envelope** Consumer service.

e. Click **Routing**.

f. Click **Edit** for Create_Docusign_Envelope_No_Auth_Route route.

g. Click on **Custom Rule**. Click on **Expression Editor**.

h. Add **RECIPIENT_AUTH_METHOD** as attribute (refer 9.c) and **NOAUTH** as value.**Save**.

Figure 1-11 Expression Editor

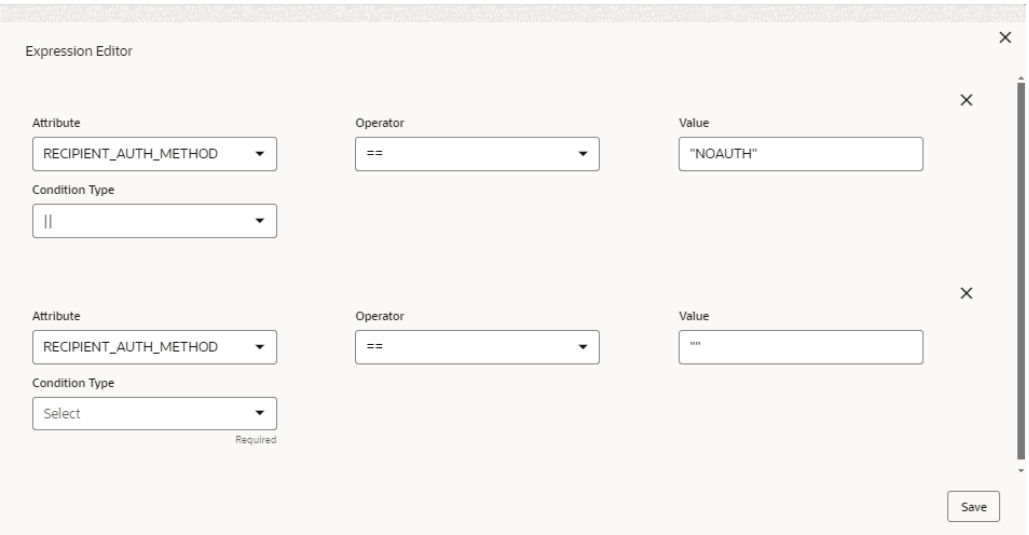
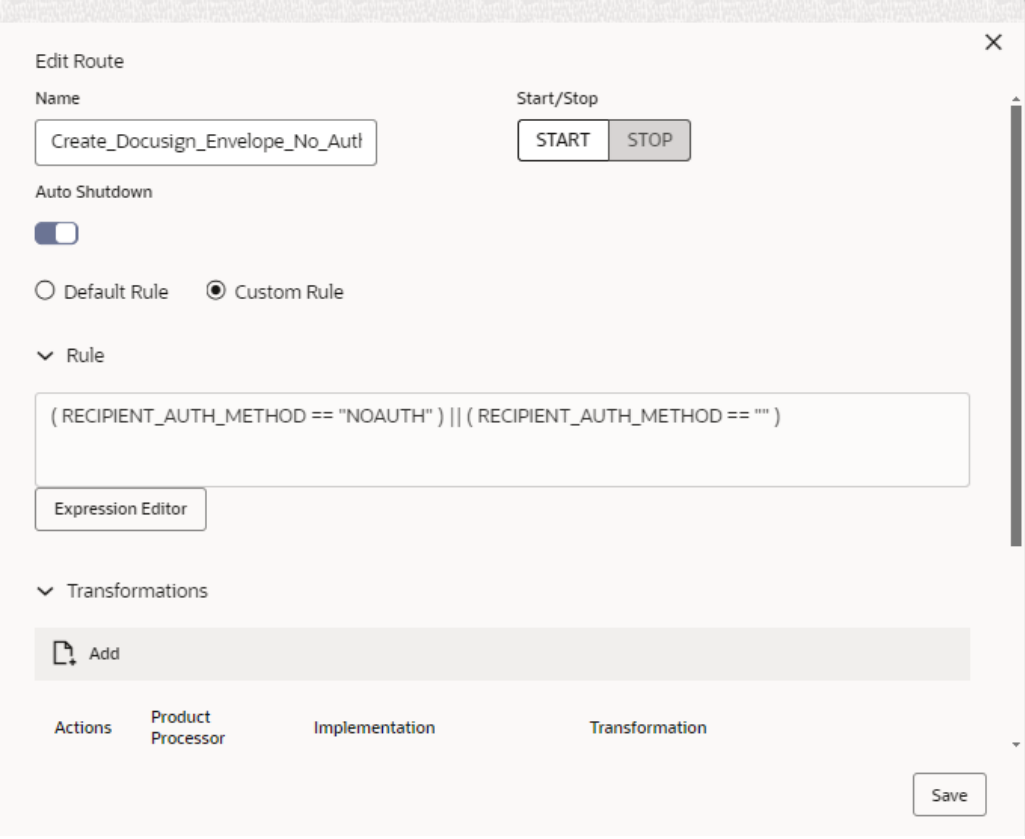
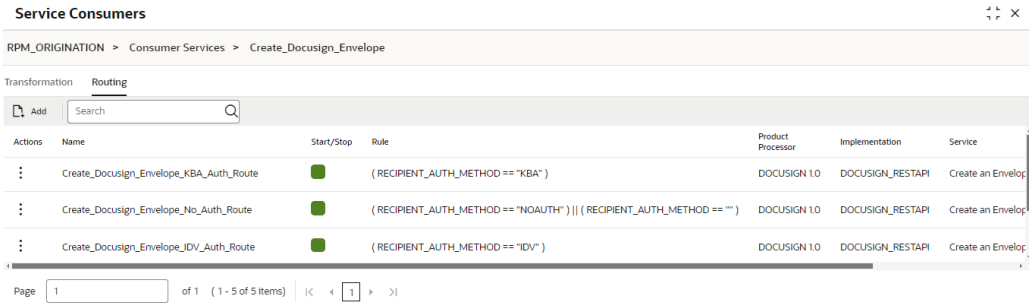


Figure 1-12 Saved Expression



i. The figure above shows all other authentication routes,

Figure 1-13 Service Consumers



j. For all authentication routes, you should follow these steps (f, g, h, i) as shown on the expression screen.

1.2 Maintenance in Oracle Banking Origination Preferences

This topic describes the systematic instructions to maintain **Origination Preferences** for **Oracle Banking Origination**.

Refer the **Origination Preferences** in **Configuration User Guide** to configure the **Docusign Integration**.

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