

Oracle® Banking Origination

Docusign Integration Guide



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Oracle Banking Origination Docusign Integration Guide, Release 14.8.1.0.0

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Preface

This topic contains the following sub-topics:

- [Purpose](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Critical Patches](#)
- [Diversity and Inclusion](#)
- [Conventions](#)
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Purpose

This guide is to help with integration of Oracle Banking Origination with DocuSign for e-signing of the documents in origination process.

Audience

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at [Critical Patches, Security Alerts and Bulletins](#). All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which user supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that user enter.

Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

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Integration Guide

This topic provides the information about the DocuSign Integration Guide with Oracle Banking Origination.

User 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 maintenance.

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.

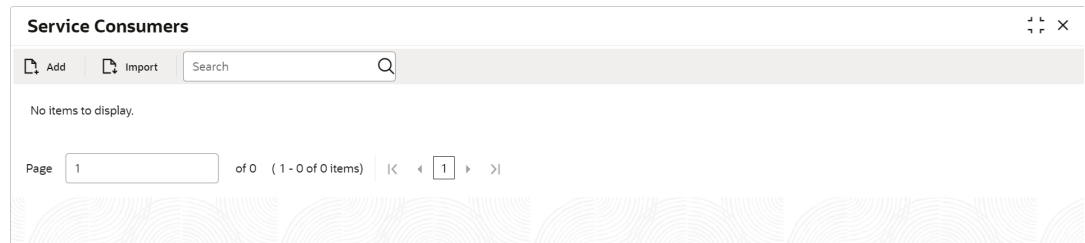
1.1.1 Maintenance of Service Providers and Consumer Services

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

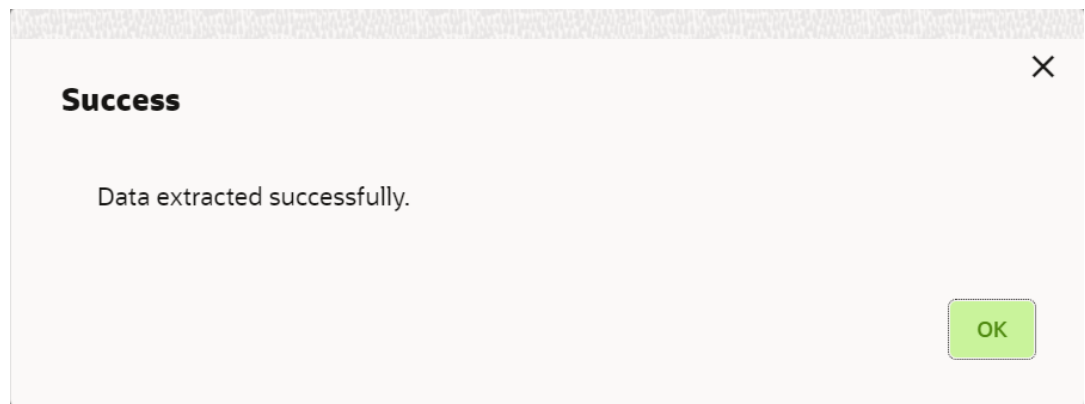
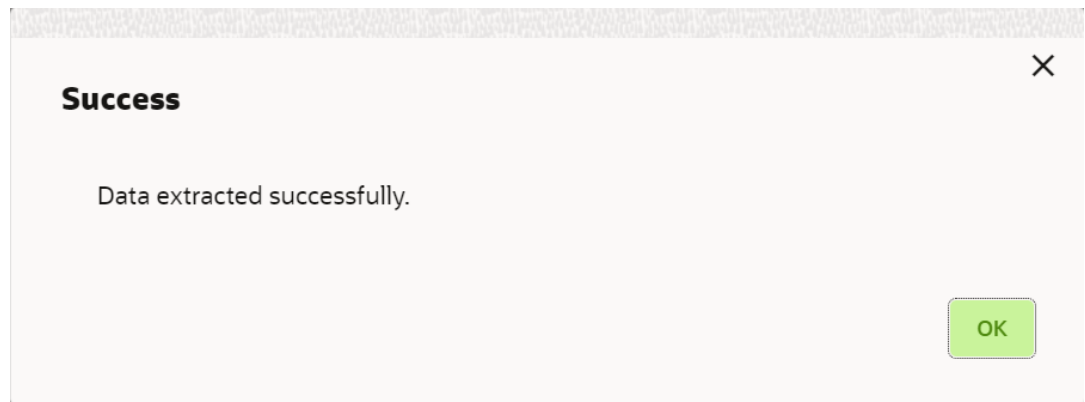
To maintain Oracle Banking Routing Hub configuration in common core for Oracle Banking Origination.

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**.

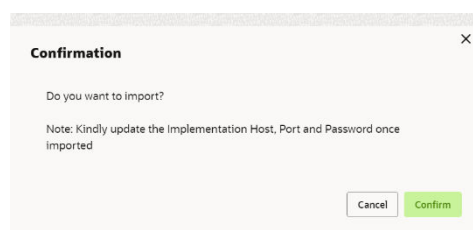
Figure 1-4 Confirmation

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 authentication 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.

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

Figure 1-6 Edit Service Consumers

Actions	Name	Value
⋮	userId	
⋮	oauthBasePath	account-d.docusign.com
⋮	scope	signature

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

Figure 1-7 Add Group

Edit Service Consumer

Name: RPM_ORIGINATION

Audit Type: Service level configuration

Environment Variables

Group: DOCUSIGN

Actions	Name	Value
---------	------	-------

Save

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

Edit Service Consumer

Environment Variables

Group: DOCUSIGN

Actions	Name	Value
⋮	userId	
⋮	oauthBasePath	account-d.docusign.com
⋮	scope	signature

Save

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

Edit Service [X]

ID: Status: ☒

Audit: ☒ Yes ☐ No
⚠ Applicable if the Audit type at 'Service Consumer' is 'Service level configuration'

Description:

Add

Actions	Attribute Name	json path
⋮	accountId	\$.env.DOCUSIGN.accountId

Save

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

Edit Service [X]

ID:

Status: ☒

Audit: ☒ Yes ☐ No

⚠ Applicable if the Audit type at 'Service Consumer' is 'Service level configuration'

Description:

Add

Actions	Attribute Name	json path
⋮	accountId	\$.env.DOCUSIGN.accountId

Save

- 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

The Expression Editor dialog box contains two identical sections for defining conditions. Each section has three input fields: 'Attribute' (a dropdown menu), 'Operator' (a dropdown menu), and 'Value' (a text input field). Below these fields is a 'Condition Type' dropdown menu. The first section has 'Attribute' set to 'RECIPIENT_AUTH_METHOD', 'Operator' set to '==', 'Value' set to '"NOAUTH"', and 'Condition Type' set to '||'. The second section has 'Attribute' set to 'RECIPIENT_AUTH_METHOD', 'Operator' set to '==', 'Value' set to '""', and 'Condition Type' set to 'Select'. A 'Required' label is positioned below the 'Select' dropdown. A 'Save' button is located at the bottom right of the dialog.

Figure 1-12 Saved Expression

The Edit Route dialog box displays the configuration for a route named 'Create_Docusign_Envelope_No_Autl'. It includes a 'Start/Stop' section with 'START' and 'STOP' buttons. The 'Auto Shutdown' toggle is turned on. Under the 'Rule' section, the 'Custom Rule' radio button is selected, and the rule expression is displayed in a text area: `( RECIPIENT_AUTH_METHOD == "NOAUTH" ) || ( RECIPIENT_AUTH_METHOD == "" )`. Below the rule expression is a button labeled 'Expression Editor'. The 'Transformations' section is currently collapsed. At the bottom, there is a 'Save' button and a tabbed interface with tabs for 'Actions', 'Product Processor', 'Implementation', and 'Transformation'.

- i. The figure above shows all other authentication routes,

Figure 1-13 Service Consumers

Service Consumers

RPM_ORIGINATION > Consumer Services > Create_Docusign_Envelope

Transformation Routing

Add Search

Actions	Name	Start/Stop	Rule	Product Processor	Implementation	Service
⋮	Create_Docusign_Envelope_KBA_Auth_Route		(RECIPIENT_AUTH_METHOD == "KBA")	DOCUSIGN 1.0	DOCUSIGN_RESTAPI	Create an Envelop
⋮	Create_Docusign_Envelope_No_Auth_Route		(RECIPIENT_AUTH_METHOD == "NOAUTH") (RECIPIENT_AUTH_METHOD == "")	DOCUSIGN 1.0	DOCUSIGN_RESTAPI	Create an Envelop
⋮	Create_Docusign_Envelope_IDV_Auth_Route		(RECIPIENT_AUTH_METHOD == "IDV")	DOCUSIGN 1.0	DOCUSIGN_RESTAPI	Create an Envelop

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- 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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