

# Oracle® Banking Originations Cloud Service

## DocuSign Integration Guide



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ORACLE®

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# Preface

This topic contains the following sub-topics:

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

## Purpose

This guide is to help with Integration of Oracle Banking Originations Cloud Service 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

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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                                                                                                                                |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b> | 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 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 with Oracle Banking Originations Cloud Service.

User can integrate Oracle Banking Originations Cloud Service with DocuSign for e-signing of the documents in origination process.

This guide 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 Originations Cloud Service.
- [Maintenance in Origination Preferences](#)  
This topic describes the systematic instructions to maintain Origination Preferences for Oracle Banking Originations Cloud Service.

### 1.1 Maintenance in Oracle Banking Routing Hub

This topic describes the systematic instructions to maintain Oracle Banking Routing Hub Configuration for Oracle Banking Originations Cloud Service.

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 Originations Cloud Service.
- [Maintenance of Environment Variables](#)  
This topic describes the systematic instructions to maintain Environment Variables in Oracle Banking Routing Hub Configuration for Oracle Banking Originations Cloud Service.

#### 1.1.1 Maintenance of Service Providers and Consumer Services

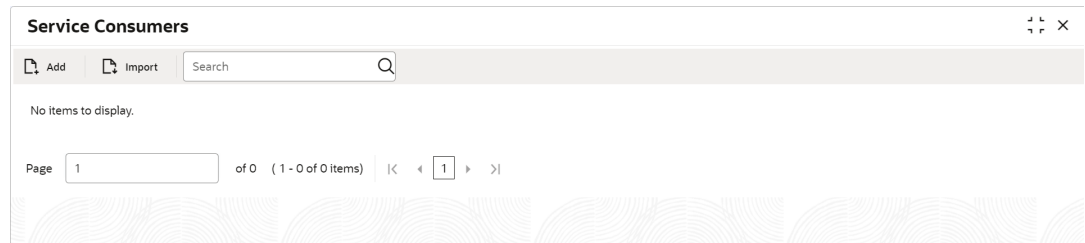
This topic describes the systematic instructions to maintain service providers and Consumer Services for Oracle Banking Originations Cloud Service.

To maintain Oracle Banking Routing Hub configuration in common core for Oracle Banking Originations Cloud Service.

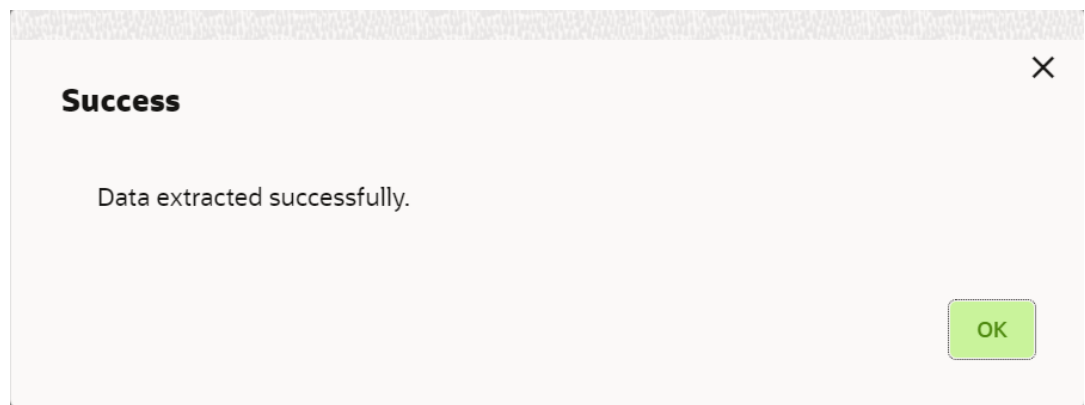
**To import the services:**

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

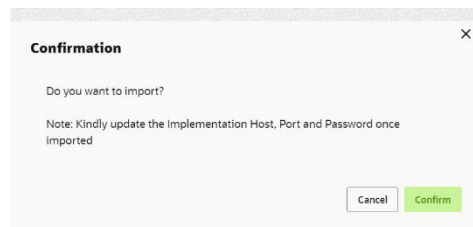
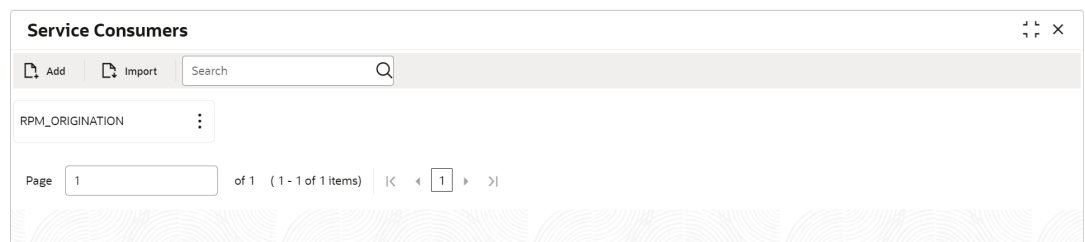
The **Service Consumers** screen displays.

**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**

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

**Figure 1-3 Confirmation****Figure 1-4 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        | <b>Usage:</b> Create Docusign Envelope using different authentication<br><b>Transformation:</b><br>Create_Docusign_Envelope_No_Auth_Transform<br>Create_Docusign_Envelope_Phone_Auth_Transform<br>Create_Docusign_Envelope_AccessCode_Auth_Transform<br>Create_Docusign_Envelope_IDV_Auth_Transform<br>Create_Docusign_Envelope_KBA_Auth_Transform<br>Get_JWT_Assertion<br>Get_JWT_Access-Token_Transform |
| Create_Docusign_Recipients_View | <b>Usage:</b> To generate URL for In-Person signing<br><b>Transformation:</b><br>Create_Docusign_Recipients_View_Transform<br>Get_JWT_Assertion<br>Get_JWT_Access-Token_Transform                                                                                                                                                                                                                         |
| Void_Docusign_Envelope          | <b>Usage:</b> Void created Docusign envelope<br><b>Transformation:</b><br>Void_Docusign_Envelope_Transform<br>Get_JWT_Assertion<br>Get_JWT_Access-Token_Transform                                                                                                                                                                                                                                         |
| Download_Docusign_Documents     | <b>Usage:</b> Download Signed Documents from Envelope<br><b>Transformation:</b><br>Download_Docusign_Documents_Transform<br>Get_JWT_Assertion<br>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 Originations Cloud Service.

To maintain **Environment Variables** in Oracle Banking Routing Hub configuration for Oracle Banking Originations Cloud Service.

### To import the services:

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



**Figure 1-5 Edit Service Consumers**

Environment Variables

Group: DOCUSIGN

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

Save

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

**Figure 1-6 Add Group**

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 1-7 Add Variable**

The screenshot shows a web interface for editing a service consumer. At the top, there's a title bar 'Edit Service Consumer' with a close button. Below it are two input fields. A section titled 'Environment Variables' is expanded, showing a toolbar with 'Add', 'Edit', and 'Delete' buttons. A 'Group' dropdown menu is set to 'DOCUSIGN'. Below this is a table with three columns: 'Actions', 'Name', and 'Value'. The table contains three rows of variables. At the bottom right is a 'Save' button.

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

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 1-8 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 1-9 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 1-10 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 1-11 Saved Expression**

The Edit Route dialog box displays configuration for a route named 'Create\_Docusign\_Envelope\_No\_Autl'. It includes a 'Start/Stop' section with 'START' and 'STOP' buttons. An 'Auto Shutdown' toggle switch is currently turned on. Below this, there are radio buttons for 'Default Rule' and 'Custom Rule', with 'Custom Rule' selected. A 'Rule' section contains a text input field with the expression: `( RECIPIENT_AUTH_METHOD == "NOAUTH" ) || ( RECIPIENT_AUTH_METHOD == "" )`. Below the rule field is an 'Expression Editor' button. A 'Transformations' section is visible with an 'Add' button. At the bottom, there are tabs for 'Actions', 'Product Processor', 'Implementation', and 'Transformation'. A 'Save' button is located at the bottom right.

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

Figure 1-12 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 Origination Preferences

This topic describes the systematic instructions to maintain Origination Preferences for Oracle Banking Originations Cloud Service.

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

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