

## **Oracle® Cloud**

Using the DocuSign Adapter

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This guide describes how to configure and add the DocuSign Adapter to an integration in Oracle Integration Cloud Service.

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# Preface

*Using the DocuSign Adapter* describes how to configure the DocuSign Adapter as a connection in an integration in Oracle Integration Cloud Service.

## Topics:

- [Audience](#)
- [Related Resources](#)
- [Conventions](#)

## Audience

*Using the DocuSign Adapter* is intended for developers who want to use the DocuSign Adapter in integrations in Oracle Integration Cloud Service.

## Related Resources

For more information, see these Oracle resources:

- Oracle Cloud  
<http://cloud.oracle.com>
- *Using Oracle Integration Cloud Service*
- *Using the Oracle Mapper*
- *Getting Started with Oracle Cloud*
- *Managing and Monitoring Oracle Cloud*
- Oracle Public Cloud Machine documentation in the Oracle Help Center:  
<http://docs.oracle.com>

## 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.

Convention	Meaning
<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.

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# Getting Started with the DocuSign Adapter

Review the following conceptual topics to learn about the DocuSign Adapter and how to use it as a connection in integrations in Oracle Integration Cloud Service. A typical workflow of adapter and integration tasks is also provided.

## Topics

- [About the DocuSign Adapter](#)
- [What Application Version Does the DocuSign Adapter Support?](#)
- [About Oracle Integration Cloud Service](#)
- [About Oracle Integration Cloud Service Connections](#)
- [About Oracle Integration Cloud Service Integrations](#)
- [About DocuSign Adapter Use Cases](#)
- [Typical Workflow for Creating and Including an Adapter Connection in an Integration](#)

## About the DocuSign Adapter

To integrate your applications with DocuSign, add the DocuSign Adapter as an integration in Oracle Integration Cloud Service.

You can replace your paper and ink signature processes with fully automated electronic signature workflows. Use a browser or mobile device to send, sign, track, and manage the review and signature process. Key features of DocuSign Adapter include:

- Specified signer routing order for multiple signers
- Delegation of signing responsibility to others

DocuSign Adapter is one of many predefined adapters included with Oracle Integration Cloud Service. You can configure DocuSign Adapter as a target connection in an integration in Oracle Integration Cloud Service. For information about Oracle Integration Cloud Service, connections, and integrations, see the following sections:

- [About Oracle Integration Cloud Service](#)
- [About Oracle Integration Cloud Service Connections](#)
- [About Oracle Integration Cloud Service Integrations](#)

## What Application Version Does the DocuSign Adapter Support?

The DocuSign Adapter is compatible with version 2 of the DocuSign REST API.

## About Oracle Integration Cloud Service

Oracle Integration Cloud Service is a complete, secure, but lightweight integration solution that enables you to connect your applications in the cloud. It simplifies connectivity between your applications and connects both your applications that live in the cloud and your applications that still live on premises. Oracle Integration Cloud Service provides secure, enterprise-grade connectivity regardless of the applications you are connecting or where they reside.

Oracle Integration Cloud Service provides native connectivity to Oracle Software as a Service (SaaS) applications, such as Oracle Sales Cloud, Oracle RightNow Cloud, and so on. Oracle Integration Cloud Service *adapters* simplify connectivity by handling the underlying complexities of connecting to applications using industry-wide best practices. You only need to create a *connection* that provides minimal connectivity information for each system. Oracle Integration Cloud Service *lookups* map the different codes or terms used by the applications you are integrating to describe similar items (such as country or gender codes). Finally, the visual data mapper enables you to quickly create direct mappings between the trigger and invoke data structures. From the mapper, you can also access lookup tables and use standard XPath functions to map data between your applications.

Once you integrate your applications and activate the integrations to the runtime environment, the dashboard displays information about the running integrations so you can monitor the status and processing statistics for each integration. The dashboard measures and tracks the performance of your transactions by capturing and reporting key information, such as throughput, the number of messages processed successfully, and the number of messages that failed processing. You can also manage business identifiers that track fields in messages and manage errors by integrations, connections, or specific integration instances.

## About Oracle Integration Cloud Service Connections

Connections define information about the instances of each predefined configuration you are integrating. Oracle Integration Cloud Service includes a set of predefined *adapters*, which are the types of applications on which you can base your connections, such as Oracle Sales Cloud, Oracle Eloqua Cloud, Oracle RightNow Cloud, and others. A connection is based on an adapter. A connection includes the additional information required by the adapter to communicate with a specific instance of an application (this can be referred to as metadata or as connection details). For example, to create a connection to a specific RightNow Cloud application instance, you must select the Oracle RightNow adapter and then specify the WSDL URL, security policy, and security credentials to connect to it.



[Video](#)

## About Oracle Integration Cloud Service Integrations

Integrations are the main ingredient of Oracle Integration Cloud Service. An integration includes at the least a trigger (source) connection (for requests sent to Oracle Integration Cloud Service) and invoke (target) connection (for requests sent from Oracle Integration Cloud Service to the target) and the field mapping between those two connections.

When you create your integrations, you build on the [connections](#) you already created by defining how to process the data for the trigger (source) and invoke (target) connections. This can include defining the type of operations to perform on the data, the business objects and fields against which to perform those operations, required



schemas, and so on. To make this easier, the most complex configuration tasks are handled by Oracle Integration Cloud Service. Once your trigger (source) and invoke (target) connections are configured, the mappers between the two are enabled so you can define how the information is transferred between the trigger (source) and invoke (target) data structures for both the request and response messages.



[Video](#)

## About DocuSign Adapter Use Cases

The DocuSign Adapter can be used in scenarios such as the following.

- Select the **Send an envelope or create a draft** in one integration to create an envelope and send it to recipients or save it as a draft. Select and configure the REST Adapter as the source. Appropriate data mapping between the REST Adapter and DocuSign Adapter is performed in the mapper. Invoke the integration endpoint with a REST client to send a POST request to the REST Adapter. The DocuSign Adapter sends the data as a payload while invoking the configured operation in DocuSign.
- Select the **Get envelope status changes** operation in one integration to return envelope status changes for all envelopes. Appropriate data mapping between the REST Adapter and DocuSign Adapter is performed in the mapper. The REST Adapter sends a GET request to the DocuSign Adapter, which returns status change information for all envelopes.

## Typical Workflow for Creating and Including an Adapter Connection in an Integration

You follow a very simple workflow to create a connection with an adapter and include the connection in an integration in Oracle Integration Cloud Service.

This table lists the workflow steps for both adapter tasks and overall integration tasks, and provides links to instructions for each step.

Step	Description	More Information
1	Create the adapter connections for the applications you want to integrate. The connections can be reused in multiple integrations and are typically created by the administrator.	<a href="#">Creating an DocuSign Adapter Connection</a>
2	Create the integration. When you do this, you add source and target connections to the integration.	<a href="#">Creating an Integration</a> and <a href="#">Adding the DocuSign Adapter Connection to an Integration</a>
3	Map data between the source connection data structure and the target connection data structure.	<a href="#">Mapping Integration Cloud Service Data of Using Oracle Integration Cloud Service</a>

Step	Description	More Information
4	(Optional) Create lookups that map the different values used by those applications to identify the same type of object (such as gender codes or country codes).	<i>Creating Lookups of Using Oracle Integration Cloud Service</i>
5	Activate the integration.	<i>Managing Integrations of Using Oracle Integration Cloud Service</i>
6	Monitor the integration on the dashboard.	<i>Monitoring Integration Cloud Services of Using Oracle Integration Cloud Service</i>
7	Track payload fields in messages during runtime.	<i>Assigning Business Identifiers for Tracking Fields in Messages and Managing Business Identifiers for Tracking Fields in Messages of Using Oracle Integration Cloud Service</i>
8	Manage errors at the integration level, connection level, or specific integration instance level.	<i>Managing Errors of Using Oracle Integration Cloud Service</i>

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# Creating an DocuSign Adapter Connection

A connection is based on an adapter. You define connections to the specific cloud applications that you want to integrate. The following topics describe how to define connections.

## Topics

- [Prerequisites for Creating a Connection](#)
- [Uploading an SSL Certificate](#)
- [Creating a Connection](#)
- [Editing a Connection](#)
- [Cloning a Connection](#)
- [Deleting a Connection](#)

## Prerequisites for Creating a Connection

A DocuSign user name, password, and integrator key are required to create a DocuSign Adapter connection. A DocuSign integrator key is a unique identifier for each DocuSign integration and it is used to authenticate your API calls with DocuSign. To move your integration to DocuSign production, you must be certified and get your integrator key authorized by DocuSign.

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### Note:

To create a connection, a trusted public certificate is required. Typically, the certificate is included with Oracle Integration Cloud Service. If you cannot locate the public certificate, contact your administrator. If you download a public certificate, rename the file extension to .crt. To upload the certificate, see [Uploading an SSL Certificate](#).

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1. Log on to your DocuSign developer account. If you do not have an account, create one here: <https://www.docusign.com/developer-center#form-devaccount>.
2. Click the profile icon in the upper right corner and select **Go to Admin**.
3. Click **API and Keys** in the left menu.
4. Click **Add Integrator Key**.
5. Enter a description for the integrator key.

6. Click **Add URI** in the **Redirect URIs** field and enter `https://{ICS_HOST}:{ICS_SSL_PORT}/icsapis/agent/oauth/callback`.  
Replace `ICS_HOST` and `ICS_SSL_PORT` with values specific to your environment.
7. Click **Add**.
8. Copy or record the integrator key. The key is required to create the connection in Oracle Integration Cloud Service.
9. Create the connection. See [Creating a Connection](#).

## Uploading an SSL Certificate

Certificates are used to validate outbound SSL connections. If you make an SSL connection in which the root certificate does not exist in Oracle Integration Cloud Service, an exception is thrown. In that case, you must upload the appropriate certificate. A certificate enables Oracle Integration Cloud Service to connect with external services. If the external endpoint requires a specific certificate, request the certificate and then upload it into Oracle Integration Cloud Service.

To upload a certificate:

1. From the Oracle Integration Cloud Service home page, click the **Administration** tab in the upper right corner.

All certificates currently uploaded to the trust store are displayed in the Certificates dialog. The **Filter By > Type** list displays the following details:

- **Preinstalled:** Displays the certificates automatically installed in Oracle Integration Cloud Service. These certificates cannot be deleted.
- **Uploaded:** Displays the certificates uploaded by individual users. These certificates can be deleted and updated.

You can also search for certificates in the **Search** field. The search results are limited to a maximum of ten records sorted by name for performance and usability reasons. To ensure that your search results are more granular, enter as much of the certificate name as possible.

2. Click **Upload** at the top of the page.
3. In the Upload Certificate dialog box, enter a unique identifier for the certificate.  
This is a name you can use to identify the certificate.
4. Click **Browse** to locate the certificate file (.cer).
5. Click **Upload**.
6. Click the certificate name to view details such as the subject of the certificate, the issuer of the certificate, the date the certificate was issued, and the date the certificate expires.

## Creating a Connection

The first step in creating an integration is to create the connections to the applications with which you want to share data.

1. In the Integration Cloud Service toolbar, click **Designer**.
2. On the Designer Portal, click **Connections**.
3. Click **New Connection**.

The Create Connection — Select Adapter dialog is displayed.

4. Select an adapter from the dialog. You can also search for the type of adapter to use by entering a partial or full name in the Search field, and clicking **Search**.

The New Connection — Information dialog is displayed.

5. Enter the information to describe the connection.
  - Enter a meaningful name to help others find your connection when they begin to create their own integrations. The name you enter is automatically added in capital letters to the **Identifier** field.
  - Select the role (direction) in which to use this connection (trigger, invoke, or both). Only the roles supported by this adapter are displayed for selection. When you select a role, only the connection properties and security policies appropriate to that role are displayed on the Connections page. If you select an adapter that supports both invoke and trigger, but select only one of those roles, then try to drag the adapter into the section you did not select, you receive an error (for example, configure an Oracle RightNow Cloud Adapter as only an invoke, but drag the adapter to the trigger section).
  - Enter an optional description of the connection.

**New Connection - Information**

Enter information that describes the connection. Use a meaningful name and description to help others find your connection when they create their own integrations. The Identifier must be unique and can be set only when the connection is created.

\* Connection Name:

\* Identifier:

Connection Role:

Description:

6. Click **Create**.

Your connection is created and you are now ready to configure connection details, such as email contact, connection properties, security policies, and connection login credentials.

## Adding a Contact Email

From the Connection Administrator section of the connection, you can add a contact email address for notifications.

1. In the **Email Address** field, enter an email address to receive email notifications when problems occur.
2. In the upper right corner, click **Save**.

## Configuring Connection Security

Use this procedure to define the security settings for your DocuSign Adapter connection.

1. Click **Configure Credentials**.

**DocuSign OAuth Authorization Code Credentials** displays in the **Security Policy** field by default. This value cannot be changed. This policy supports the OAuth 2.0 resource owner password credentials grant.

2. Complete these fields:
  - a. In the **Access Token URI** field, enter the URI used to retrieve the access token.  
  
The URI for production is <https://demo.docusign.net/restapi/v2/oauth2/token>. The URI for development is <https://docusign.net/restapi/v2/oauth2/token>.
  - b. In the **Integrator Key** field, enter the DocuSign integrator key. See [Prerequisites for Creating a Connection](#).
  - c. In the **Username** field, enter your DocuSign user name.
  - d. In the **Password** field, enter your DocuSign password.
  - e. In the **Confirm Password** field, enter your DocuSign password.
3. Click **OK**.
4. Test your connection. See [Testing the Connection](#).

## Testing the Connection

Test your connection to ensure that it is successfully configured.

1. In the upper right corner of the page, click **Test**.  
  
If successful, the following message is displayed and the progress indicator shows 100%.  
  
`The connection test was successful!`
2. If your connection was unsuccessful, an error message is displayed with details. Verify that the configuration details you entered are correct.
3. When complete, click **Save**.

## Editing a Connection

You can edit connection settings after creating a new connection.

1. In the Oracle Integration Cloud Service toolbar, click **Designer**.
2. On the Designer Portal, click **Connections**.
3. On the Connections page, search for the connection name.
4. Select **Edit** from the connection **Actions** menu or click the connection name.



The Connection page is displayed.

5. To edit the notification email contact, change the email address in the **Email Address** field.
6. To edit the connection properties, click **Configure Connectivity**. Note that some connections do not include this button. If your connector does not include a **Configure Connectivity** button, then click the **Configure Credentials** button.

## Cloning a Connection

You can clone a copy of an existing connection. It is a quick way to create a new connection.

1. In the Oracle Integration Cloud Service toolbar, click **Designer**.
2. On the Designer Portal, click **Connections**.
3. On the Connections page, search for the connection name.
4. Select **Clone** from the connection **Actions** menu.



The Clone Connection dialog is displayed.

5. Enter the connection information.
6. Click **Clone**.
7. Click **Edit** to configure the credentials of your cloned connection. Cloning a connection does not copy the credentials.

See [Editing a Connection](#) for instructions.

## Deleting a Connection

You can delete a connection from the connection menu.

1. In the Oracle Integration Cloud Service toolbar, click **Designer**.
2. On the Designer Portal, click **Connections**.
3. On the Connections page, search for the connection name.
4. Click **Delete** from the connection **Actions** menu.



The Delete Connection dialog is displayed if the connection is not used in an integration.

5. Click **Yes** to confirm deletion.



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## Creating an Integration

Integrations use the adapter connections you created to your applications, and define how information is shared between those applications. You can view, export, create, import, edit, or delete integrations; create integrations to publish or subscribe to messages; add and remove request and response enrichment triggers; and create routing paths for different target endpoints in integrations. Click the following topics for more information.

### Topic

- [Creating Integrations \(in \*Using Oracle Integration Cloud Service\*\)](#)



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## Adding the DocuSign Adapter Connection to an Integration

When you drag the DocuSign Adapter into the invoke area of an integration, the Cloud Endpoint Configuration Wizard appears. This wizard guides you through configuration of DocuSign Adapter endpoint properties.

The following sections describe the wizard pages that guide you through configuration of the DocuSign Adapter as an invoke in an integration. The DocuSign Adapter cannot be used as a trigger in an integration.

### Topics

- [Configuring Basic Information Properties](#)
- [Configuring DocuSign Adapter Invoke Operations Properties](#)
- [Configuring DocuSign Adapter Request Parameters](#)
- [Reviewing Configuration Values on the Summary Page](#)

For more information about DocuSign Adapter, see [About the DocuSign Adapter](#).

## Configuring Basic Information Properties

You can enter a name and description on the Basic Info page of each adapter in your integration.

### Topics

- [What You Can Do from the Basic Info Page](#)
- [What You See on the Basic Info Page](#)

## What You Can Do from the Basic Info Page

You can specify the following values on the Basic Info page. The Basic Info page is the initial wizard page that is displayed whenever you drag an adapter to the section of the integration canvas supported by your adapter.

- Specify a meaningful name.
- Specify a description of the responsibilities.

## What You See on the Basic Info Page

The following table describes the key information on the Basic Info page.

Element	Description
What do you want to call your endpoint?	<p>Provide a meaningful name so that others can understand the responsibilities of this connection. You can include English alphabetic characters, numbers, underscores, and dashes in the name. You cannot include the following:</p> <ul style="list-style-type: none"><li>• Blank spaces (for example, My Inbound Connection)</li><li>• Special characters (for example, #;83&amp; or righ(t)now4)</li><li>• Multibyte characters</li></ul>
What does this endpoint do?	<p>Enter an optional description of the connection's responsibilities. For example: This connection receives an inbound request to synchronize account information with the cloud application.</p>

If you are configuring the SOAP Adapter, there is an additional property.

Element	Description
Preview updated SOAP adapter runtime	<p>You can uptake the new 16.3.3 functionality exposed by the SOAP Adapter.</p> <ul style="list-style-type: none"> <li><b>Yes:</b> Provides 16.3.3 functionality (TLSv1.2 support, the ability to suppress timestamps for requests and ignore timestamps upon response, and the ability to disable validation of the SOAP action in the WSDL). The underlying transport mechanism used is the cloud SDK-based JCA transport.</li> <li><b>No:</b> Uses 16.2.5 functionality. The underlying transport mechanism used is the Oracle Service Bus-based HTTP transport.</li> </ul>

**Note:** If you import a pre-16.3.3 integration into Oracle Integration Cloud Service 16.3.3 that includes the SOAP Adapter, you must open the adapter in edit mode and explicitly select **Yes** to uptake the new 16.3.3 functionality.

## Configuring DocuSign Adapter Invoke Operations Properties

Enter the DocuSign Adapter invoke operation values for your integration.

### Topics

- [What You Can Do from the DocuSign Adapter Operations Page](#)
- [What You See on the DocuSign Adapter Operations Page](#)

### What You Can Do from the DocuSign Adapter Operations Page

The table provides definitions for the DocuSign Adapter API operations that can be performed on the target. These operations are listed on the DocuSign Adapter Operations page.

Operation	Description	Introduced in Release
Send an envelope or create a draft	Creates an envelope and sends it to recipients or saves it as a draft envelope.	16.2.1
Send an envelope from a template	Creates an envelope from an existing template and sends it or saves it as a draft envelope.	16.2.1
Retrieving envelope and documents	When the envelope status is completed, returns the signed document and associated certificate from the server.	16.2.1
Get envelope status changes	Returns envelope status changes for all envelopes.	16.2.1
Get individual envelope status	Returns the overall status for a single envelope.	16.2.1
Send draft envelope	Sends a single draft envelope.	16.2.1
Void envelope	voids a single in-process envelope.	16.2.1
Modify draft envelope email subject and message for draft envelope	Modifies the email subject and message of draft envelopes.	16.2.1
Purge documents	Places envelope documents and metadata in a purge queue so they can be removed from DocuSign.	16.2.1

## What You See on the DocuSign Adapter Operations Page

The following table describes the key information on the DocuSign Adapter Operations page.

Element	Description
Select Operation	Select the API operation to perform.

## Configuring DocuSign Adapter Request Parameters

Enter the DocuSign Adapter request parameters.

### Topics

- [What You Can Do from the DocuSign Adapter Request Parameters Page](#)
- [What You See on the DocuSign Adapter Request Parameters Page](#)

## What You Can Do from the DocuSign Adapter Request Parameters Page

You can configure the request query parameters on the DocuSign Adapter Request Parameters page. This page is displayed when you select an operation that includes request parameters. The parameters that are displayed are dependent on the operation selected. For example, the parameters in the following table are available for the operation `Get envelope status changes`.

Parameter	Description	Introduced in Release
<code>transactionIds</code>	Returns a comma separated list of envelope transactionIds when included in the query string. Returns a list of envelope transactionIds when included in the request_body. transactionIds are only valid in the DocuSign system for seven days.	16.2
<code>status</code>	The list of current statuses to include in the response. By default, all envelopes found are returned. If values are specified, then of the envelopes found, only those with the current status specified are returned in the results.	16.2
<code>from_to_status</code>	The status type checked for in the from_date/to_date period. If changed is specified, then envelopes that changed status during the period are returned. If created is specified, then envelopes created during the period are found. The default is changed.	16.2
<code>envelopeId</code>	Specifies the envelope ID.	16.2
<code>ac_status</code>	Specifies the authoritative copy status for envelopes.	16.2
<code>to_date</code>	Returns items up to the specified date. If a value is not provided, the default search is to the current date.	16.2
<code>custom_field</code>	Specifies the envelope custom field name and value searched for in the envelope information.	16.2
<code>from_date</code>	Returns items on or after the specified date. If a value is not provided, the default search is the previous 30 days.	16.2

## What You See on the DocuSign Adapter Request Parameters Page

The following table describes the key information on the DocuSign Adapter Request Parameters page.

Element	Description
Query Parameters	Filters the query parameters by name.
Available Query Parameters	Lists the available query parameters for the selected API operation.
Selected Query Parameters	Lists the selected query parameters for the selected API operation.

## Reviewing Configuration Values on the Summary Page

You can review the specified adapter configuration values on the Summary page.

### Topics

- [What You Can Do from the Summary Page](#)
- [What You See on the Summary Page](#)

### What You Can Do from the Summary Page

You can review configuration details from the Summary page. The Summary page is the final wizard page for each adapter after you have completed your configuration.

- View the configuration details you defined for the adapter. For example, if you have defined an inbound trigger (source) adapter with a request business object and immediate response business object, specific details about this configuration are displayed on the Summary page.
- Click **Done** if you want to save your configuration details.
- Click a specific tab in the left panel or click **Back** to access a specific page to update your configuration definitions.
- Click **Cancel** to cancel your configuration details.

### What You See on the Summary Page

The following table describes the key information on the Summary page.

Element	Description
Summary	<p>Displays a summary of the configuration values you defined on previous pages of the wizard.</p> <p>The information that is displayed can vary by adapter. For some adapters, the selected business objects and operation name are displayed. For adapters for which a generated XSD file is provided, click the XSD link to view a read-only version of the file.</p> <p>To return to a previous page to update any values, click the appropriate tab in the left panel or click <b>Back</b>.</p>



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# Creating Mappings and Lookups in Integrations

You must map data between source connections and target connections in integrations. You can also optionally create lookups in integrations.

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**Note:** When mapping attachments, the name of the document in the payload and the attachment name must be identical.

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## Topics

- Mapping Integration Cloud Service Data (in *Using Oracle Integration Cloud Service*)
- Creating Lookups (in *Using Oracle Integration Cloud Service*)

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# Administering Integrations

Oracle Integration Cloud Service provides you with the information and tools required to activate, monitor, and manage your integrations in the runtime environment.

**Topic**

- Administering Integration Cloud Service (in *Using Oracle Integration Cloud Service*)

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