



Task Center & DocuSign Integration Guide

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Revision History

Version*	Release Date	Prepared By	Reviewed By	Approved By	Remarks / Revision Details
1.0	28-Feb-2025	V Rishikesh			Initial version / list modifications made
1.1	9-Jul-2025		Muthuveeramuni		Reviewed

*Note: ISO Compliance team provides the next version number based on the changes made and the last baseline release of the document.

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1.0 Business Context

The integration between **SAP Task Center** and **DocuSign** addresses the need for seamless task management across business processes that require document approvals and signatures. By embedding DocuSign workflows directly into SAP Task Center, organizations can manage signing activities within their centralized task management platform, reducing operational silos and manual coordination between systems.

This integration provides **real-time task synchronization**, allowing business users to receive, act upon, and track DocuSign-related tasks without switching applications. The solution improves **compliance, visibility, and efficiency** by ensuring that document-based approvals are automatically reflected in the broader task management lifecycle.

The use of the **Cherrywork IWM Adapter** ensures secure, scalable data exchange between systems, aligning with enterprise integration standards while minimizing custom development efforts.

2.0 Scenario Overview

The integration scenario involves the following key components:

- **DocuSign:** Used for initiating, managing, and tracking document signature workflows.
- **Cherrywork IWM Adapter:** Acts as the intermediary, receiving webhook notifications from DocuSign, transforming and storing data for SAP Task Center consumption.
- **SAP Task Center:** Provides users with a unified task inbox where DocuSign-related tasks appear alongside other enterprise tasks.

The integration works by configuring DocuSign webhooks to send status updates (envelope and recipient events) to the adapter. The adapter parses and stores this data. SAP Task Center periodically pulls task updates from the adapter every **30 seconds** via a scheduled process.

User actions within SAP Task Center (e.g., completing a task) are propagated back to DocuSign through API calls, ensuring **bi-directional synchronization**.

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This scenario enables users to:

- Receive DocuSign task notifications inside SAP Task Center
- View and complete DocuSign actions through embedded interfaces
- Maintain real-time visibility into signing progress

3.0 Introduction

3.1 Overview of the Integration

The integration between SAP Task Center and DocuSign significantly enhances task management by embedding DocuSign workflows such as document signing and approval processes directly into the SAP Task Center environment. This integration allows users to manage tasks related to DocuSign within a single interface with real time synchronization ensuring that updates in one system are immediately reflected in the other system.

To achieve this robust integration the configuration process uses the Cherrywork IWM Adapter which securely facilitates the exchange of task related data between SAP Task Center and DocuSign. This approach not only streamlines task management but also provides consistent and unified experience for users.

In this document you will find a detailed overview of the integration scenario architectural diagrams that illustrate the interaction between key components and comprehensive configuration steps for establishing the connection between SAP Task Center and DocuSign using the Cherrywork IWM Adapter.

3.2 Purpose of the Document

This document serves as a comprehensive guide for integrating SAP Task Center with DocuSign using the Cherrywork IWM Adapter. Its purpose is to provide clear instructions and technical insights to ensure a seamless connection between the two systems. It is intended for system administrators, developers, and integration specialists who are responsible for configuring, deploying, and maintaining the integration. The document outlines the integration scenario, details the architecture, and explains the configuration steps required to enable secure and real time task synchronization between SAP Task Center and DocuSign.

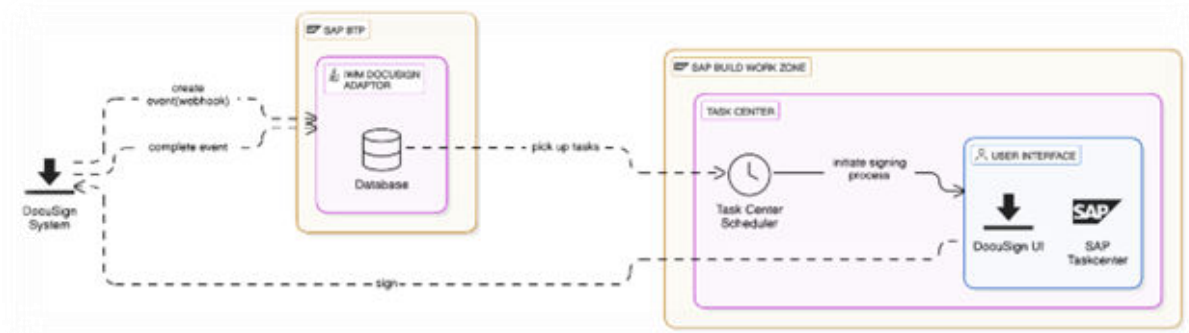
3.3 Architecture

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This integration includes a DocuSign system, a custom adapter, a database, the SAP Task Center, and the user interface. The DocuSign system triggers webhook events when the status of an envelope or recipient changes. The adapter receives these events, transforms the data, and maps it to the appropriate tasks before storing it in the database. This process ensures that all the necessary information is available for the SAP Task Center.

The SAP Task Center uses a scheduler mechanism to pull all the tasks from the adapter (Note As of recording this document there is no push mechanism officially supported by SAP). This scheduler polls the adapter every 30 seconds to retrieve updated tasks. When a user takes action in the Task Center, the corresponding changes are processed by DocuSign and sent back to the adapter via webhook events. The delta scheduler then captures the updated information during its next polling cycle so that the task data remains current and accurate.

This design provides a seamless integration between DocuSigns native signing workflows and the task management capabilities of SAP Task Center. The frequent 30 second polling interval allows for near real time updates and ensures that users are always working with the most recent data. This integration reduces the need for manual intervention and improves overall operational efficiency.

4.0 Prerequisites

4.1 Required software and dependencies

The integration requires the following components and configurations:

1. Task Center Adapter Application

- A Spring Boot application built using Java 21 and Spring version 3.4.3.

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- The application is containerized using Docker with the openjdk:21-jdk-slim base image.
- The Docker image is available for customers to deploy in their respective cloud environments.

2. DocuSign System

- Configured for each customer's specific tenant.
- Includes all necessary customizations and settings required for integration.

3. Task Center Application

- Integrated with an Identity Provider (IDP) to manage secure access.
- Each user is assigned a unique global user ID for authentication and login.
- These components work together to ensure a seamless and secure integration between DocuSign and the SAP Task Center environment.

4.2 Authentication details

user-system-map-controller		^
POST	/v1/usersMap/addUsers	▼
GET	/v1/usersMap/allUsers	▼
DELETE	/v1/usersMap/deleteUser	▼

Authentication is handled by the respective applications. The adapter functions solely as an intermediary that transfers data between endpoints. User management and authorization are maintained by each system individually.

User management between the source system DocuSign and the Task Center is facilitated through an API exposed by the Task Center adapter. This API maps DocuSign users to the corresponding Task Center global user IDs. Each user onboarded in DocuSign must be added to the Task Center adapter via a POST API call that accepts two parameters: the DocuSign email address and the global user ID. The endpoints for additional operations such as delete and get are documented and accessible through the Swagger page at </swagger.html>.

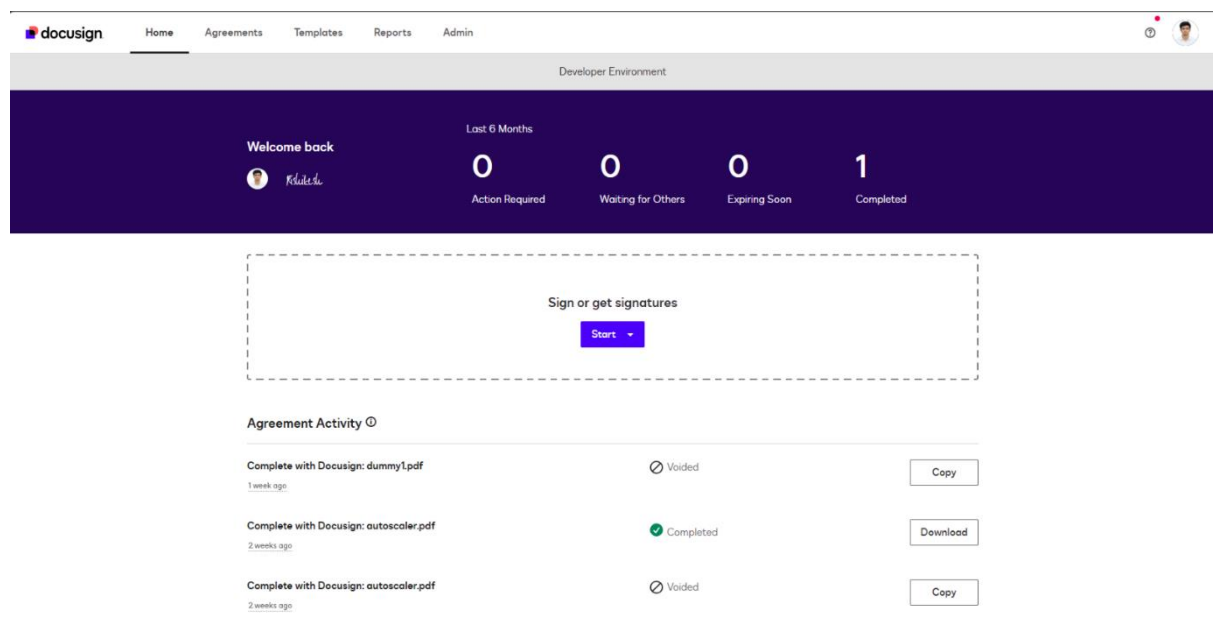
Since this functionality is intended for administrative use, there is no dedicated user interface apart from the Swagger page. If further customizations are required, such as

synchronization between the source system and the adapter, automated user pull features, or other enhancements, please contact the support team with your business requirements. Terms and conditions apply.

4.3 Environment Setup

DocuSign Configuration

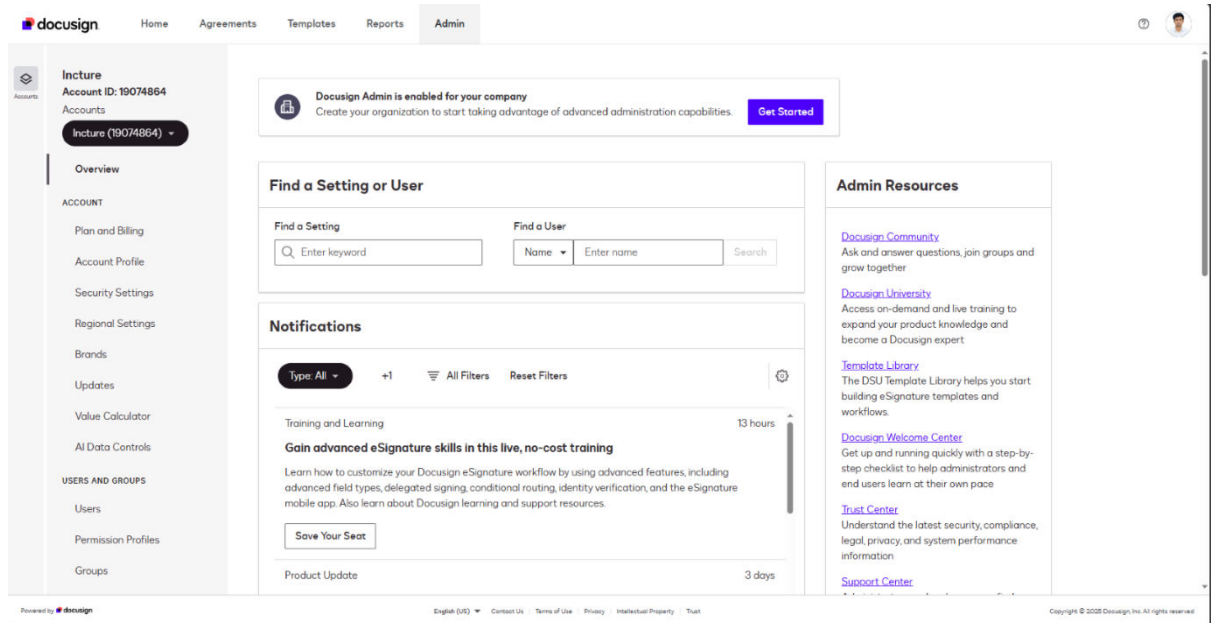
First, set up the DocuSign account for the specific tenant and add all necessary components based on your requirements. Refer to the official DocuSign documentation for detailed setup instructions. Once the initial configuration is complete, navigate to the admin menu to review account details and additional settings.



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Locate the Connect section and select the option to add a configuration, then choose Custom. A new screen will appear with the required configuration details. Enter a name and provide the URL to publish. This URL should be the adapter URL appended with /webhooks/docusign. The endpoint details can also be found in the Swagger documentation under the name Webhooks Controller.

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Connect

Docusign Connect is a push service that sends real-time data updates to external applications.

Configurations Connect Keys OAuth 2.0 Publish Logs Failures Dashboard

Add Configuration

- Custom
- Custom Recipient
- Box
- Salesforce
- OneDrive
- eOriginal
- Legacy formats >

Configuration ID	Status	Failures	Actions
10458189	Active	0	

Edit Custom Configuration

Save Configuration

Listener Settings

Status: Active Connection

Configuration ID: 10458189

Name: webhooks-qa

URL to Publish: https://cherryworkproducts.worknet-qa.cfa...

☒ Enable Log (maximum 100)

☒ Require Acknowledgement

Event Settings

Data Format: REST v2.1

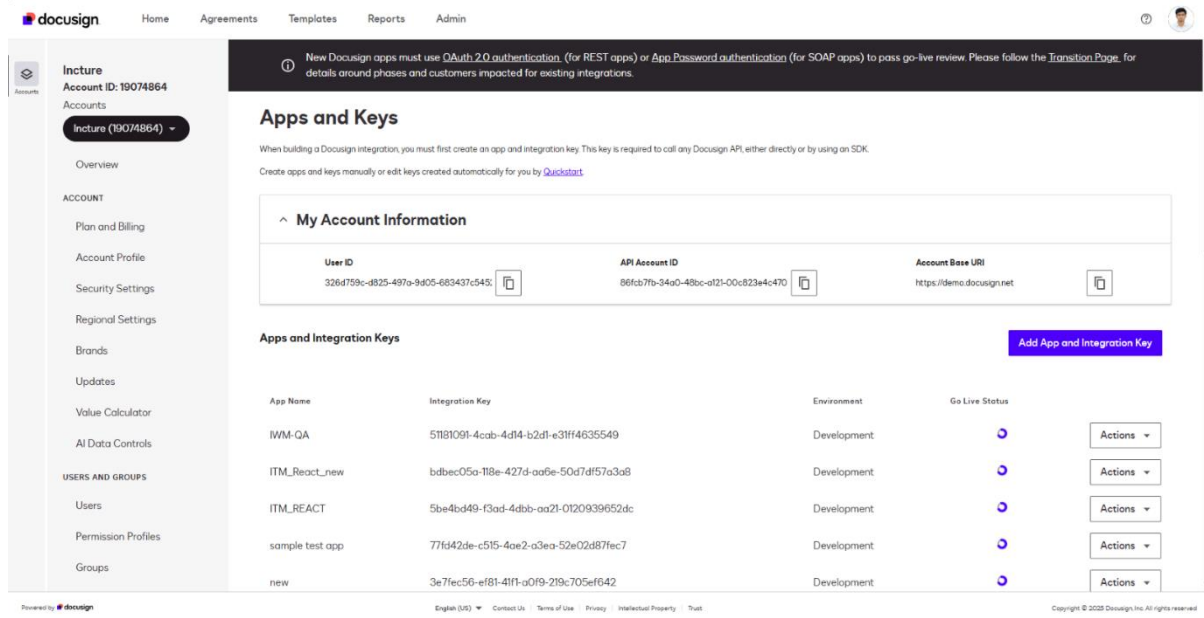
Next, specify the trigger events required for your integration. Select only the necessary events to avoid overloading the system with excessive data, which could lead to increased costs. In the associated users section, enable all users by default or adjust according to your business logic. Once these steps are complete, save the configuration. By default, all enabled events are sent to the adapter, which then parses the data into the required format and stores it in tables for the Task Center to retrieve.

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5.0 IWM Adapter Configuration



Create an integration key in DocuSign. If one does not already exist, generate a new key by navigating to the admin tab, then to the App and Key field, and selecting Add App and Integration Key. Once the key is created, retrieve the Admin user ID, API account ID, account base URL, public key, private key, and the integration key. Update these details in the adapter's application properties file following the provided example. These configurations are mandatory for ensuring effective communication with the DocuSign system and for successful data caching.

6.0 Task Center Application Configuration

Create a destination for the adapter application that connects to the external system. A sample destination configuration is provided for reference. Once the destination is established, several schedulers will run within the application to pull all available tasks from the adapter. You can monitor this process by reviewing the logs in the Task Center application.

This setup ensures a seamless integration between DocuSign, the IWM Adapter, and the Task Center application, facilitating efficient task management and synchronization.

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7.0 DocuSign Webhook Integration

7.1 Webhooks configuration from DocuSign

As described in Section 2.3 of the Environment Setup, DocuSign webhooks can be configured using DocuSign's Connect functionality. The adapter provides the receiver endpoint that processes the incoming data. Currently, the webhook service is included free of charge as part of the standard envelope-sending plan. Please note that this offering may change in the future in accordance with DocuSign's terms and conditions.

At present, the adapter's webhook handler supports only envelope and recipient events. If clients require additional event handling, customization of the adapter will be necessary, and such modifications may be subject to additional costs and terms and conditions.

7.2 API Endpoints and Data Flow in Task Center

The adapter processes all incoming data from the DocuSign system, mapping users and envelopes to corresponding tasks and storing this information in the database. The Task Center application then uses a scheduler mechanism to periodically pull these tasks into the system. Currently, the push mechanism from the adapter to Task Center is not officially supported by SAP. Once implemented, this update will allow the adapter to push tasks directly into Task Center, reducing the current 30-second delay associated with the scheduler pull.

All endpoints utilized by Task Center are documented in the adapter's Swagger interface. Key endpoints include those for task retrieval (task pull) and task definition. Since the integration involves embedding DocuSign within Task Center via an iframe, user actions are handled natively by DocuSign. The system directly calls DocuSign's actions API, and relevant events are forwarded to the adapter, ensuring that Task Center is updated in real time.

This design not only streamlines task management but also lays the foundation for future enhancements, such as a direct push mechanism to further reduce latency.

7.3 Scheduler Mechanism

The screenshot displays the SAP Task Center Administration interface. On the left, the 'Connectors' tab is active, showing a list of destinations: MSTEams and Docusign, both with a status of 'OK'. The main area is divided into two panels. The left panel, titled 'Docusign', shows the 'Jobs' section with four job types: CONFIG, INITIAL, META, and DELTA, all with a status of 'OK'. The 'DELTA' job is highlighted. The right panel, also titled 'Docusign', shows the 'Logs' section for the 'DELTA' job type. It displays a table of logs with columns for Message, Start, End, and Status. The logs show successful completion of tasks with no errors.

As of the current documentation, SAP does not support a push mechanism for the Task Center application. All task definitions and updates are managed through a pull mechanism using schedulers. The Task Center application employs four distinct schedulers: config, initial, meta, and delta. The delta scheduler is of primary interest since it runs every 30 seconds to retrieve the latest tasks from the system, while the other schedulers handle initial data pulls and configuration updates. For additional configuration details, please refer to the official SAP documentation on Task Center.

During a delta pull, the Task Center calls the /tasks API on the adapter, providing parameters such as the last updated time and other required details to facilitate an effective data pull. The adapter's endpoint is designed to process these parameters without any additional input from the user. In the event of an API failure, the Task Center will automatically retry the pull every 30 seconds.

The overall process operates as follows: when a user performs an action in Task Center, the corresponding action is triggered directly in the source system. DocuSign webhooks then send the event to the adapter, which updates the response on the API. Consequently, the next scheduled delta pull retrieves the updated information. During this period, users are redirected to a temporary page that displays the action taken along with the corresponding response.

8.0 Configure Destinations for SAP in the BTP Subaccount

To enable SAP Task Center to connect with the Cherrywork IWM Adapter and other relevant services, it is necessary to configure destinations in the SAP BTP (Business Technology Platform) subaccount. Destinations serve as connection definitions that SAP

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BTP uses to access external services securely. This is an normal destination creation with the required details for further details on the destination please refer to the SAP official document of destinations.