



ERP-348 Integration Process - DocuSign Envelope integration into Icertis

Status	Approved
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Jira Request ID	 ERP-86 - Jira project doesn't exist or you don't have permission to view it.
Jira Development ID	 ERP-348 - Jira project doesn't exist or you don't have permission to view it.

High-Level Specification

Application System (Source)	Icertis
Application System (Target)	DocuSign
Source System Interface	Icertis
Target System Interface	DocuSign
Business Process Reference	03.03.03 Manage Contracts

Functional Overview

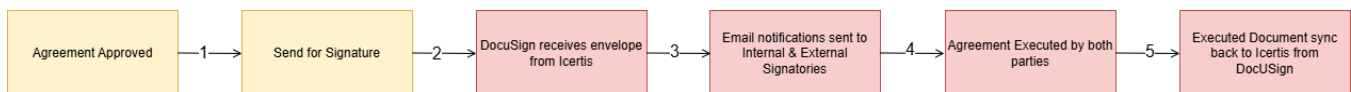
This document details the DocuSign integration requirement between Syensqo DocuSign and Icertis Contract Intelligence (ICI). This document provides all necessary information to enable and guide the configurator to effectively integrate ICI with DocuSign.

Scope and Objectives

Scope Includes:

1. Standard OOTB Integration of DocuSign with Icertis for Agreement Signatures by Internal & External signatories (Contract Execution)

Process Flow Diagram



Step	Description	Comment
1	Approved agreement in Icertis is sent for Electronic Signature	Agreement status changes to Waiting for External/Internal Signature
2	When clicked on Send for Signature button, standard DocuSign integration is triggered. Envelope is sent to DocuSign from Icertis	DocuSign receives the envelopes from Icertis through standard DocuSign Adaptor
3	Email notification from DocuSign is sent to internal and external signatories based on the sequence of steps configured in Signatory Rules	

4	Agreement is digitally signed by both parties separately. After each signature, update is sent back to Icertis	Status in Icertis is updated based on the signatory sequence. If External Party has signed then the status will be Waiting for Signature from Internal party and vice versa
5	DocuSign sends the signed agreement back to Icertis	Status in Icertis is updated to Executed

Assumptions

NA

Dependencies

- Signature workflow rules must be configured in Icertis for Electronic Signature or else DocuSign integration will not work.
- While configuring the integration at DocuSign end, the user must be an Account Administrator.
- While configuring the integration at Icertis end, the user must be assigned ESign Admin role.

Security, Integrity and Controls

As this is a standard integration through an adaptor, all security requirements are followed as per standard.

Configuration Requirements

Following configuration needs to be completed in both Icertis and DocuSign platform:

- DocuSign: In DocuSign, the configuration is a two step process.**
 - Configure Account
 - Log in to the DocuSign account as an **Account Administrator**.
 - Go to the **Setting tab**.
 - In the left navigation panel, click **INTEGRATIONS > Connect**.
 - Click **Add Configuration** and select **Custom** from the dropdown list.
 - In the **Add Custom Configuration** section, update the following sections:
 - Go to the **Listener Settings** section.
 - Select **Active Connection** in the **Status** dropdown.
 - Add a **Name** for the connect.
 - Add a **URL to Publish** as *https://syensqo-dev/ESignCallBack/Initiate*. (For UAT it will be *https://syensqo-uat/ESignCallBack/Initiate*, for Prod it will be *https://syensqo/ESignCallBack/Initiate*).
 - Go to the **Event Settings** section.
 - Select **REST v2.1** in the **Date Format** dropdown.
 - Select **Send Individual Messages (SIM)** in the **Event Message Delivery Mode** dropdown.
 - Go to the **Trigger Events** section.
 - From the **Envelope Events** list, select **Envelope Sent**, **Envelope Declined**, and **Envelope Voided**.
 - From the **Recipient Events** list, select **Recipient Signed/Completed**, **Recipient Declined**, **Recipient**, and **Reassign**.
 - Go to the **Include Data** section.
 - Select **Custom Fields**, **Extensions**, **Recipients**, and **Tags** from the list.
 - Go to the **Integration and Security** Settings section. Select **Enable Manual TLS**.
 - Click **Save Configuration**. You can see the configuration you created.
 - Add App in Account created above
 - Log in to DocuSign account as an **Account Administrator**.
 - Go to **Setting > Connect**.
 - Select the configuration which was created as above.
 - Go to **Setting > Apps and Key**
 - Capture the following information.
 - The User ID.
 - The API Account ID.
 - The Account Base URI.
 - Click **Add App and Integration key**.
 - Add a **Name** for the app and click **Add**.
 - The app is automatically assigned an integration key (GUID) value that cannot be changed. Note the **Integration key value**.
 - Click **Generate RSA** to create a new, automatically generated GUID value that represents the ID for the private and public key pair.
 - Note down the **Private key**. Click **Close**.
 - Click **Save**.
- Icertis Side Configuration - Post configuring the above steps, the following configuration needs to be performed in Icertis.**
 - In Icertis, navigate to **Configurations > System Configurations > ESign Configurations**.
 - Click **Create>DocuSign Account**.
 - Configure the following fields:

Field	Description	Values
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Provider Name	The provider is autogenerated based on the option selected in 2.b Default value - DocuSign	Default value - DocuSign
Bio Pharma Account	This setting is used for Life Science industry documents.	No
Account Name	The name of the esign account.	Syensqo-Dev: iCertisDev (Same name should be configured in DocuSign so that apps are easily recognized)
Callback URI	Callback URLs are essential for Icertis Platform and esign applications to notify one another that something has occurred, enabling the latter to respond accordingly.	For Syensqo-Dev: https://syensqo-dev.icertis.com/ESignCallBack/Initiate For Syensqo-UAT: https://syensqo-uat.icertis.com/ESignCallBack/Initiate For Syensqo Prod: https://syensqo.icertis.com/ESignCallBack/Initiate
Callback Authentication Type	Dropdown with two values (IP and OAuth). Note: If OAuth is selected, additional OAuth configuration is required.	IP
Append Certification	If enabled, a certification of completion from the esign provider is added to the executed agreement. This serves as proof of consent for verification and audit trail.	No
Max Envelope Size (MB)	Specify the maximum size for the esign envelope. The maximum size supported is 4069 MB.	25MB (Default)
Send as Signature	Select the source through which the email will be sent to sign documents. – Sender : esign email is sent using the Agreement Owner credentials. – Account Owner : esign email is sent using Account Owner credentials. – Specific User : esign email is sent using the specified email address.	Sender
Client Id	This ID identifies the client making the request. For DocuSign , this is the User ID from the account.	ced82a57-4d3c-4f30-9de7-ffc063a87ddd
Client Secret	The client secret is used to authenticate the client ID. For DocuSign , this is the RSA Private key	Client Secret
Service URI	The base URL for the account which is used to make Rest API calls. This is used by Icertis Platform to send information to the esign provider.	https://demo.docusign.net/restapi/v2.1/
Account ID	This is the API account ID from DocuSign account	68ce1f86-6c05-4fdf-bb86-c47464d83b62
API Key	This is the Integration key for the app that is added in DocuSign	RSA Secret Key
OAuth Base Path	This is the Base URL used for OAuth 2.0 authentication. The default autopopulated value is account.docusign.com .	account.docusign.com .

Special Requirements

Not Applicable

Design Rationale

Streamline the contract execution process by embedding DocuSign's eSignature capabilities within the Icertis Contract Intelligence (ICI) platform. This enables faster agreement turnaround, reduces manual effort, and ensures compliance with electronic signature standards.

Processing Logic

Processing within Source (Icertis)

- **Trigger Point**: When clicked on Send for Signature button, Icertis initiates the e-signature process.
- **Envelope Creation**: Icertis prepares the document and metadata (signatories, roles, signing order) and sends it to DocuSign via standard adaptor.
- **Configuration**: Admins configure DocuSign account details (Client ID, Secret, RSA Key, API Key) in Icertis UI.

- **Callback Setup:** A callback URL (<https://syensqo-dev/ESignCallBack/Initiate>) is configured to receive status updates from DocuSign.

Processing within Middleware

Not Applicable

Processing within Target (DocuSign)

- **Envelope Handling:** DocuSign receives the envelope, routes it to signatories, and manages the signing workflow.
- **Status Updates:** DocuSign sends real-time updates to Icertis via the callback URL.
- **Signed Document Return:** Once signed, the document is returned to Icertis and attached to the agreement record. Agreement status is changed to Executed.

Interface Dependency

- Signature provider selection is rule-based and depends on attributes entered by the user in the agreement.

Interface Constraints

- **File Size Limit:** DocuSign supports documents up to 4069MB per envelope.
- **Signing Order:** Sequential or parallel signing must be defined in Icertis.

Delivery Requirements

- Integration between Icertis and DocuSign is through standard adaptor.

Delta or Full Load Requirements

Not Applicable

Interface Alert & Monitoring

- **Audit Trail**
 - Available within Icertis for each signature transaction.
 - Available within DocuSign.
 - Certification of Completion is also captured as logs within the agreement document as proof of consent for audit & verification. This is an optional.

Interface Reporting

Not Applicable

Language Requirements

Not Applicable

User Interface Requirements

- **Embedded Experience:** Users initiate and track signatures within Icertis UI.
- **Status Visibility:** Real-time status updates shown in agreement summary.
- **Admin Configuration UI:** Self-service configuration for DocuSign setup.

Volumetrics

- **Initial Load Volumes:** No bulk initial load; integration is triggered per agreement.
- **Expected Frequency:** Real-time per agreement; multiple agreements may be processed concurrently.

Performance Consideration

Not Applicable

Error Handling

- **Send for Signature:** If DocuSign is down when clicked on Send for Signature, user has an option to retry from the UI.
- **Status/Document Sync:** If DocuSign fails to sync the status/document, then the retry mechanism in place will try to sync the status /documents back to Icertis. If retry fails, then raise a support ticket to DocuSign to resolve the issue.

Testing

How to Test

- **Positive Test Cases:**
 - Agreement sent successfully to DocuSign.
 - All signatories complete signing.
 - Signed document returned and attached in Icertis.
- **Negative Test Cases:**
 - Invalid DocuSign credentials.
 - Callback URL unreachable.
 - Signatory declines to sign.

Test Conditions and Expected Results

ID	Condition	Expected Results
TC01	Agreement is created and Approved in Icertis. Clicked on Send for Signature button in Icertis. Agreement status changes to Waiting for Signature <External/Internal>	Envelope created in DocuSign, email alert is sent to the signatories for signature
TC02	Agreement is signed by both the parties successfully	Status updated to "Executed" in Icertis. Signed document is sent back to Icertis
TC03	Invalid API key in DocuSign Configuration	Error displayed in Icertis that the DocuSign API connection failed
TC04	Agreement is sent for signature, signatory clicks on Decline button (reject agreement signature)	Status of the agreement is updated back to "Approved"

Test Considerations/Dependencies

Not Applicable

Other Information

Development Details

Package

Package Name	Parent Package

Other Development Objects

Object Type	Object Name	Purpose/High Level Logic	Design Rationale Reference

Appendix

See also

File	Modified
File -DocuSign Process Flow.tmp draw.io Draft	Oct 29, 2025 by RAI-ext, Praveen
File DocuSign Process Flow draw.io diagram	Oct 29, 2025 by RAI-ext, Praveen

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Change log

Version	Published	Changed By	Comment
CURRENT (v. 8)	Nov 19, 2025 07:19	TILBEE-ext, Amanda	
v. 7	Nov 17, 2025 11:00	RAI-ext, Praveen	
v. 6	Nov 14, 2025 13:03	RAI-ext, Praveen	
v. 5	Nov 14, 2025 13:03	RAI-ext, Praveen	
v. 4	Nov 12, 2025 16:36	KUMAR-ext, Rajesh	
v. 3	Nov 03, 2025 05:58	RAI-ext, Praveen	
v. 2	Oct 29, 2025 05:05	RAI-ext, Praveen	
v. 1	Oct 29, 2025 03:56	RAI-ext, Praveen	

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

Nov 19, 2025	Actor	Type	Activity	Version
Approved	 TILBEE-ext, Amanda	State	changed state to Approved at 9:06 am	v8
Lead Approval	 TILBEE-ext, Amanda	State	gave <i>POD Lead Review</i> approval at 9:06 am	
	WENNINGER-ext, Sascha	State	assigned approval <i>POD Lead Review</i> to  TILBEE-ext, Amanda at 7:50 am	
		State	changed expiry date to '26 Nov, 2025 07:50 am' at 7:50 am	

		State	changed state to Lead Approval at 7:50 am	v8
Edited following Tech Review	WENNINGER-ext, Sascha	State	gave <i>Minor change</i> approval at 7:50 am	
			<i>typos fixed</i>	
	 TILBEE-ext, Amanda	Edit	updated the page at 7:19 am	
		State	changed state to Edited following Tech Review at 6:19 am	v8
