



Adobe Sign for Workday

Quick Start Guide

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Overview

This document provides Workday administrators with the steps required for the customization of Workday Business Processes to include Adobe Sign where obtaining a signature is required. This is a configuration guide and not intended to be a comprehensive training manual for Workday.

To use Adobe Sign within Workday you must possess or develop an understanding of how to create and modify Workday items such as: Business Process Framework, Tenant Set-up and configuration, Reporting and Workday Studio Integration.

Review Document Step

Adobe Sign for Workday is exposed via the **Review Document** step that can be added to any of over 400 Business Processes within Workday. These include “Offer”, “Distribute Documents and Tasks”, and “Propose Compensation” among others.

Review the comprehensive Workday community documentation about the *Review Document* step here:

<https://doc.workday.com/#/reader/3DMnG~27o049IYFWETfTQ/TboWWKQemecNipWgxLAjgg>

Define a functional Review Document step:

1. Insert a **Review Document** step
2. Specify the Groups (roles) that can act upon the Review Document step.

Business Process Steps	Notifications	Subprocess For	Related Links		
Business Process Steps 6 items					
Step	Order	If	Documents Included	Optional	Group
Q	Configure Document Review	bc	1	No	Candidate as Self Manager

Configure the Document Review step:

1. Specify the *eSignature Integration* type as **eSign by Adobe**
2. Add rows to the Signature Grid
 - The signature grid specifies the serial order in which the document is routed for signature. Each row can contain one or more roles and each row represents a step in the signing process
 - Every member of the role within a particular step is notified that a signing event is pending
 - Once a single person from the role signs, the row step is completed and the document is moved to the next row step
 - When all rows have been signed, the Review Document step is complete

3. Specify the document to be signed. If this is an Offer BP, you can use the document from a Generate Document step. Otherwise, choose an existing document or report.
 - Repeat step 3 for as many documents as you require

← Configure Review Document Step

Effective Date * 07/20/2016

Workflow Step * Offer for Global Modern Services step bc - Review Documents

Document Effective As Of * X Today  

1 eSignature Integration Type E-sign by Adobe 

2 items

	Order	Signature Group
 	 	X Manager 
 	 	Candidate as Self

Documents

3 Document * X ba - Generate Offer Letter 

If all conditions are true the document will be available to be reviewed in the selected, Document Conditions are not supported.

Conditions (empty)

Instructions This is a dynamically generated offer letter. W00t

Business Process Step Notes

The Business Process Framework is quite powerful and beyond comprehensive explanation here. However, there are a couple of items to note:

- Every Business Process must have a completion step
 - Ideally, it's at the end of the business process
- Setting a completion step is off of the related actions menu of the search icon
 - This is only possible while “viewing” the BP, not while “editing” it
- Every step of the business process is executed sequentially
 - You can change the order of a step by changing the order value
 - To insert a step between items “c” and “d”, specify a new item as “ca”

Example: Offer

The Offer BP is a subprocess of the Job Application Dynamic BP which needs to be configured to execute the Offer BP. It is triggered when the Job Application state is moved to “Offer” or “Make Offer”.

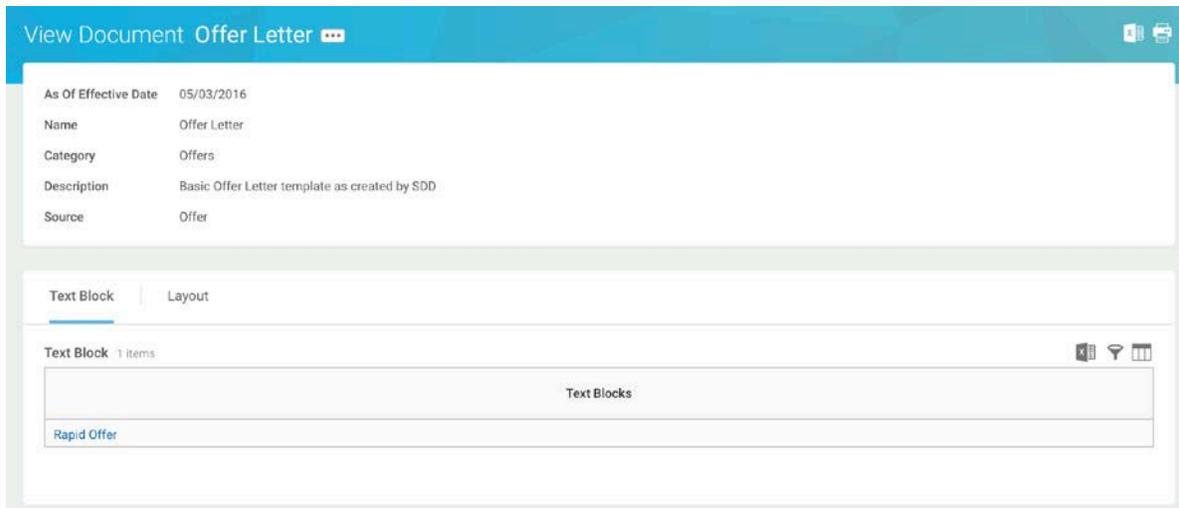
In this example, a Review Document step is using a Dynamic Document step for both North America and Japan.

Step	Order	If	Type	Specify	Step Label Override	Documents Included	Optional	Group
	a		Initiation				No	
	b		Action	Propose Compensation Offer/Employment Agreement			No	Initiator
	ba	Country != Japan?	Action	Generate Document	Generate Offer Letter		No	Recruiter
	bb	Country = Japan?	Action	Generate Document	Generate Japanese Offer Letter		No	Recruiter
	bc		Review Documents		Review and Sign Offer Letter	1	No	Candidate as Self Manager
	d		Action	Make Offer Decision			No	Recruiter

This BP does the following:

- The initiator of the BP will be asked to propose compensation for the candidate (step b).
- Use a step condition to test whether the current country is NOT Japan
 - If true, execute step “ba” which uses an English language document
 - If false, execute step “bb” which uses a Japanese language document
- Step “bc” is the Document Review step
 - This is where the signature process is defined
- Step “d” is the decision point to make an offer
 - This is the completion step and is required

The Dynamic document being generated in step “ba” is called *Offer Letter* and contains a single text block named *Rapid Offer*. You could add multiple text blocks such as header, salutation, compensation, stock, closing, terms, etc. as required.



The Dynamic offer letter below was created in the Workday rich text editor. Items highlighted are Workday provided objects that reference contextual data. Items in {{brackets}} are [Adobe Text tags](#).

Congratulations!

Dear First Name,

We strive to hire everyone - and you are no exception.

We are pleased to offer you the position of Business Title - Proposed at Company for Position Restrictions. We propose to pay you eventually the sum of Base Pay per year.

Please sign, respond by COB Today + 1 Day.

{{Signature_es_:signer1:signature}}

Manager

{{Date_es_:signer1:date}}

{{Signature_es_:signer2:signature}}

Candidate Name

{{Date_es_:signer2:date}}

Within the *Review Document* step, the dynamic document is referenced from the previous step and defines the sequential signature process via two signing groups.

The behavior illustrated below will route the dynamically generated document first to the hiring Manager, and then to the Candidate.

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Workflow Step * Offer for Global Modern Services step bc - Review Documents

Document Effective As Of * X Today  

eSignature Integration Type E-sign by Adobe 

2 items

	Order	Signature Group
 	 	X Manager 
 	 	Candidate as Self

Documents

Document * X ba - Generate Offer Letter 

Example: Distribute Documents

The *Distribute Documents or Tasks* Business Process contains a mandatory step, *Action of Review Distribution of Documents*. This BP is triggered by the task *Distribute Documents or Tasks*.

You can add a *Review Document* step to this BP to send a document to multiple people to individually sign, but you **cannot** remove the *Action of Review Distribution of Documents* step.

To suppress the behavior of this BP, you can add a step condition that always evaluates false to the *Review Distribution of Documents*.

The document that will be distributed for mass signature is the document or report specified within the *Review Document* step.

Note: When triggering the task, you are specifying the document to send. This document will only be routed to the *Review Distribution of Documents* and not to the *Review Distribution* step.

Business Process Steps		Notifications	Allowed Actions by Role	Allowed Services	Allowed Subprocess For	Related		
Business Process Steps 3 items								
Step		Order	If	Type	Specify	Documents Included	Optional	Group
Q		a		Initiation			No	
Q		b	Skip Step?	Action	Review Distribution of Documents or Tasks		No	Employee As Self
Q	Configure Document Review	c		Review Documents		1	No	Employee As Self

Example: Reporting

Workday has a rich reporting infrastructure. To look at the details of the Adobe Sign process, inspect the elements of the *Review Document Event*.

Below is a simple custom report that can be run across all BPs looking for Adobe Sign transactions and their status.

Columns | Sort | Filter | Prompts | Output | Share | Advanced

13 items

Business Object	Field
Review Document Event	Business Process Type
Review Document Event	Business Process Event
Review Document Event	Date Initiated
Review Document Event	Days Since Initiated
Review Document Event	Due Date
Review Document Event	Date and Time Completed
Review Document Event	Review Document Status
Review Document Event	Awaiting Persons
Review Document Event	Awaiting Signers
Review Document Event	Days Since Assignment
Review Document Event	Assignment Date
Review Document Event	Documents
Review Document Event	Review Document Events

The following report was generated by looking at *Offer*, *Onboarding*, and *Propose Compensation* BPs within an implementation tenant.

You can see:

- The documents out for signature
- The associated BP step
- The next person awaiting signature

Business Process Type	Business Process Event	Date Initiated	Days Since Initiated	Due Date	Date and Time Completed	Review Document Status	Awaiting Persons	Awaiting Signers	Days Since Assignment	Assignment Date	Documents	Review Document Events
Offer	Review Documents for Offer for Job Application: David Ortiz - R-00048 Program Manager	07/13/2016	6		07/13/2016 12:05:41.884 PM				0			
Offer	Review Documents for Offer for Job Application: richard schmidt - R-00048 Program Manager	07/13/2016	6		07/13/2016 09:34:50.047 AM	Completed			0			
Offer	Review Documents for Offer for Job Application: David Ortiz - R-00048 Program Manager	07/13/2016	6		07/13/2016 12:06:48.690 PM	Not Started	David Ortiz	David Ortiz	6	07/13/2016 12:06:00.670 PM		
Onboarding	Review Documents for Onboarding for Vikesh Chopra	07/18/2016	1			Not Started	Logan McNeil Vikesh Chopra	Vikesh Chopra	1	07/18/2016 10:45:51.235 AM	Proprietary Rights Agreement	

Signed Documents

The Workday signature cycle suppresses all email notifications by Adobe Sign. Users are informed of pending actions within their Workday inbox.

Once a document has been completely signed by all Signature Groups, a copy of the signed document is distributed to all members of the Signature Group via email. This behavior can be suppressed, if desired (contact your Adobe Sign Success Manager or the [Adobe Sign Support team](#)).

Within Workday, signed documents are accessed on the full process record.

- Worker documents are found on the Worker Profile
- Candidate documents (offer letters) are found on the Candidate profile

Below shows a signed offer letter for the candidate Chris Foxx.

The screenshot displays the Workday interface for a candidate profile. At the top, there is a search bar with 'r-00048' and the Workday logo. The user profile for Logan McNeil is visible in the top right. The main header shows 'chris foxx' and 'For: R-00048 Program Manager'. Below this, there are tabs for 'Step', 'Source', 'Contact Information', and 'Recruitment'. The 'Offer' tab is selected, and the 'Attachments' sub-tab is active. A table titled 'Generated Documents' shows one item:

Document	Signature Type	Signed By	Signature Date	Uploaded Document
Offer Letter: 2016-07-13 08_20 PDT.pdf	E-sign by Adobe	chris foxx Robin Sanders	07/13/2016 08:36:27 AM	Offer Letter_uploaded

Support

Workday Support

Workday is the integration owner, and should be your first point of contact for questions about the function or scope of the integration, feature requests or problems in day to day performance of the integration.

The workday community has several good articles on how to troubleshoot the integration and generate documents:

- Troubleshoot eSignature Integrations
https://doc.workday.com/#/reader/3DMnG~27o049YFWETfTQ/zhA~hYlID3Hv1wu0CvHH_g
- Review Documents Step
<https://doc.workday.com/#/reader/3DMnG~27o049YFWETfTQ/TboWWKQemecNipWgxLAjgg>
- Dynamic Document Generation
<https://community.workday.com/node/176443>
- Offer Document Generation Configuration tips
<https://community.workday.com/node/183242>

Adobe Sign Support

Adobe Sign is the integration partner, and should be contacted if the integration is failing to obtain signatures, or if notification of pending signatures fails.

Adobe Sign Customers should contact their Customer Success Manager (CSM) for support. Alternatively, Adobe Technical Support can be reached by phone: 1-866-318-4100, wait for product list then enter: 4 and then 2 (as prompted).

- Adding Adobe Text Tags to Documents
https://helpx.adobe.com/content/dam/help/en/sign/adobesign_text_tags_guide.pdf