Adobe Sign for ServiceNow

Quick Start Guide
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Overview
Adobe Sign for ServiceNow is a custom integration developed to bring easy access to the powerful tools of Adobe Sign within your instance of ServiceNow. We provide you with the tools to build robust workflows and catalog items to move your document signing and storage processes to the cloud.

Creating a workflow:

What are Workflows:
Workflows are the backbone of your Adobe Sign Catalog item. While adding variables and creating items makes the form appear with the appropriate fields, we also need to create a workflow that takes this information and allows Adobe Sign to send out the agreement.

Accessing the Workflows Menu:
As an administrator, type Workflows in the filter bar to find the Workflow Editor option under Orchestration.
Click on **Workflow Editor** to open the *Workflow page* below:

In the right-hand panel, click on the + sign to the right of the workflows search field.

This begins the process of creating a new workflow by opening a **New Workflow** template page

- Enter a Name for the workflow
- Associate the workflow to a Table
For this example, we have named the workflow *Test Expense Report* and chosen the *Requested Item* table.

With the name and table in place, click **Submit**.

![Diagram showing a basic workflow with Begin and End points.](image)

A basic workflow with a *Begin* and *End* point launches.

Next we add pieces to this workflow to define our desired workflow.

![Diagram showing workflow connections.](image)

Workflows connect pieces by arrows and the basic layout has our workflow simply flowing from beginning to end.

To add functionality in between, start by deleting the arrow connecting the Begin and End objects by clicking the arrow and pressing the delete key.
Since we are creating an expense report item - we expect a user to attach an expense report. To do so, bring in the Adobe Sign pack that allows us to get attachment information.

Access this by selecting the **Packs** tab in the right-hand panel.
Drag the **Adobe Sign - Get Attachment Data** pack into the screen which will produce a pop-up configuration window like this:

Populate the fields:

- **Name**: This is the name you choose for this pack
- **Stage**: We can set a stage so that if we look back at this workflow we know what stage the item is in
  - In this case, we know that the request is approved if we accept the attachment data.
- **Adobe Agreement Name**: This inserts the agreement name from the front end of the form.
- **Adobe Email Address**: Using ServiceNow User accounts, Adobe Sign can automatically find the email address of the submitter, the submitters manager and the cost center and send the agreement to them using the syntax shown.
- **Adobe Msg**: This is a preset message that can be created in ServiceNow.
Click **Submit** to save the pack configuration.

Next, click and drag from the **Always** box (on the **Begin** object) to the new pack object.  

**Note:** You can click and drag the individual objects in the workflow so that the workflow remains visually organized.

![Workflow diagram](image)

The next step in this workflow is to send the attachment out to the recipient, without a preview.  

From the **Pack** tab in the right-hand menu, drag in the **Send Attachment, No Preview** pack to add it to the workflow.  

The pack configuration window opens:

![Activity Properties](image)
There are two ways to populate the fields that you see:

- You can enter the field values manually
- You can populate the fields by dragging the correct label from the Data tab on the right
  - For example - from the Data tab, drag the `encodedBody` item to any field that asks for an encoded body item

Follow the same process for any additional packs that you add to the workflow; drag them to the screen, populate the fields.

In this expense report example, the following packs are configured as below:
Pack: Set Values

The Set Values activity sets the value of the fields specified below into the current record. More Info

Set these values:
- Agreement ID
- ${data.get(4).agreementId}
- -- choose field --
- -- value --

Pack: Wait For Condition

The Wait for condition activity causes the workflow to wait until the current record matches the specified condition. More Info

You can use the condition builder and/or a script to specify the condition that workflow evaluates for the current record. If you include a script, indicate that the condition is met by setting the answer variable to 'true'. For workflow to consider the condition met, all conditions specified -- whether in the builder or in a script -- must be true.
Pack: Attach Signed Agreement

Activity Properties: Adobe Sign - Attach Signed Agreement

- Name: Attach Signed Agreement
- Stage: 
- Agreement id: ${current.x_adosy_adobesign_agreement_id}
- Sys id: ${current.sys_id}

Pack: Set Values

- Name: Finish RITM
- Stage: 

Values

The Set Values activity sets the value of the fields specified below into the current record. More Info

- Active: false
- State: Closed Complete
- -- choose field --: -- value --
Once all the pieces are in the editor window, connect them with arrows so that each step flows into the next step until the workflow reaches the end.

Drag the *Failure* branches to the *End* object so the workflow ends if there is a failure in any of the critical steps.

Now that all the pieces have been logically connected, publish the workflow by clicking **Publish**.

Now that you’ve published your workflow you can attach it to a catalog item.

- If you ever want to edit the workflow - come back to this page and click **Checkout**
Reminders/Common Pitfalls:

How to diagnose issues:

If you run into problems when using your catalog item, the best way to find the error is to find the fault in the workflow. To do this, run your catalog item and then type **Requested Items** in the filter bar.

Here you will find a list of requested items.

Use the column headers to sort the records, and look for a **State** or **Document Status** that indicates a problem.

Click on the item record to open an instance of the workflow.
With the workflow page open, find the pack that shows the error (red object header). Clicking on this will show you what activity of the workflow the catalog item is in.

Commonly the actual error will be in the pack immediately preceding the pack that displays the red header, indicating that a bad value was passed.

Hover your mouse over the appropriate box to determine the error:

**Agreement ID error:** This generally deals with the *Get Attachment Data* pack and the error presents itself with the *Send Attachment* pack. This usually happens if the values in the "Adobe Email Address" field were entered incorrectly, or the email addresses of the users placed in this field are not valid.

- Ensure that the current user, the current user’s manager, and the cost center manager’s email address are all populated.
- Ensure that the current user has an associated manager.

**Connect Error:** Check the connection to Adobe Sign in the *Adobe Sign Administration* pane by typing *Adobe Sign* in the filter pane. Then click *Connect to Adobe.*
How to Create a Catalog Item:

A catalog item in ServiceNow is essentially an object that an administrator creates to perform some action that can be encapsulated in one clickable item.

The following example leverages the expense report workflow built in the previous section.

Catalog Item Creation:

As an administrator, type Catalog Items in the menu filter bar.

Click on Catalog Items (underneath Adobe Sign Administration)

A list of all catalog items built into Adobe Sign is displayed:

Click New to create a new catalog item.
A new Catalog Item template page opens.

1. **Name**: The name of your catalog item. Preface with “Adobe - Sign” for easy identification
2. **Workflow**: Click the magnifying glass to select the workflow you want to attach to this item
3. **Icon**: Upload an image that can represent the item as an icon
4. **Short Description**: Enter a short one sentence description
5. **Description**: The longer description of your catalog item should express the full function of the item
6. **Submit**: Once the Catalog Item is defined, click Submit to save it

Fill out the fields to best represent your catalog item:

- **Name**: The name of your catalog item. Preface with “Adobe - Sign” for easy identification
- **Workflow**: Click the magnifying glass to select the workflow you want to attach to this item
- **Icon**: Upload an image that can represent the item as an icon
- **Short Description**: Enter a short one sentence description
- **Description**: The longer description of your catalog item should express the full function of the item
- **Submit**: Once the Catalog Item is defined, click Submit to save it
After clicking submit you will be presented with a list of all the catalog items.

Click on the item you made and scroll all the way to the bottom to look at the variable fields.

Here you can enter variables for your catalog item.

In the example of the expense report, we see three entered variables:

- **Adobe_agreement_name**: This variable takes the name of the agreement
- **Cost_center**: This variable finds the appropriate cost-center for the expense report
- **Adobe_attach_macro**: This variable finds the attachment that needs to be uploaded by a user.

**Example Variable Creation - Adobe_agreement_name:**
In the **Type** field, *Single Line Text* is chosen, as the agreement name should be a short value.

**Examples are listed below:**

Enter what you want the user to see in the question in the **Question** field and click update.

Do the same thing for the other variables which include a cost-center and an attachment macro.

Examples are listed below:
Variable: Cost Center

Type: Reference
Catalog item: Adobe Sign - Expense Report

Question: Cost Center
Name: cost_center

Variable: Attachment Macro

Type: Macro
Catalog item: Adobe Sign - Expense Report

Question: Attach Your Expense Report
Name: adobe_attach_macro

Specify the Question that explains the options available to the end user when ordering the item.
Once you've built the front-end of the form click "Try it" on the top right to try it!

Enter some test items in the field and see if your item works!
Sending Agreements with the Catalog Item

Once the catalog item is created, users can access the item (via the icon) from the Service Catalog or Service Portal to send signable documents (agreements).

Service Catalog:

Type Service Catalog in the filter bar and click on Service Catalog in the resulting menu.

You can find the item either in your Top Requests, or via the Adobe Sign items on the service catalog page:
Sent Agreement Item Status

Once an agreement item is sent, you can view the status of the item by typing requested items in the filter bar and clicking on the Requested Items link in the resulting menu.

The Requested Items presents you a page listing all the requested catalog items that have been invoked so far.

Click on any item record in the list, and you open a new window with the specific details about that item.
Accessing "My Agreement" Items

Individual users that want to view only the agreement items that they have sent can do so by typing *my documents* in the filter bar, and click on the *My Documents* link in the resulting menu.

Clicking on the *My Documents* item shows the user all the documents that are associated with their account - agreements that they have sent to others, or agreements that they have signed.

Clicking on any one line item opens a page that shows the status of the request and the document's attached. This item acts as the store of records, allowing a real-time view of all requested actions from agreement recipients, as well as the (downloadable) signed documents.
Service Portal
In addition to the Service Catalog, catalog items can also be accessed via a Service Portal.

Creating a Service Portal Page:
Type Service Portal in the filter bar, and click on the Pages link in the resulting menu:

Give your page a Title and ID
Click Submit to create the page.
Once you've created the page, click on the item to open it.

Scroll down and click on **Open in Designer**

Drag a **4-4-4** Container into the page
Place an **Icon Link** (from the Widgets menu) inside the container

![Icon Link](image)

Click on the pencil to edit the icon link

![Edit Icon Link](image)

Create an Expense Report with Adobe Sign

Create an Expense Report
Populate the item to your choosing. There is an example below.

**Note:** The *Attach Macro* is incompatible with the Service Portal. When editing a catalog item in the portal, make sure the link you provide points to a catalog item that uses pre-uploaded documents only.

Now that you've created the page you can go back to ServiceNow and click *Try it out* to test your new portal page!