Adobe Sign for Workday

Quick Start Guide
Contents
Overview .................................................................................................................................................................................. 3
Review Document Step .................................................................................................................................................................. 4
Business Process Step Notes .......................................................................................................................................................... 6
  Example: Offer ......................................................................................................................................................................... 7
  Example: Distribute Documents ........................................................................................................................................ 10
  Example: Reporting .............................................................................................................................................................. 11
Signed Documents ...................................................................................................................................................................... 12
Support ....................................................................................................................................................................................... 13
  Workday Support ................................................................................................................................................................. 13
  Adobe Sign Support ............................................................................................................................................................ 13
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-27o049IYFWETFtTQ/TboWWKQemecNipWgxLAjg

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.

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.
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.

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.
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.
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.

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
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.
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~27o049IYFWETFtTQ/zhA--hYlld3Hv1wu0CvHH_g
- Review Documents Step
  https://doc.workday.com/#/reader/3DMnG~27o049IYFWETFtTQ/TboWWKQemecNiWgxLAjqg
- 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