

Workday Trial Installation{#workday-trial-installation}

Overview {#overview}

This document is designed to help Workday customers learn how to activate a trial account with Adobe Sign and then integrate it into Workday tenant. To use Adobe Sign within Workday, you need to know how to create and modify Workday items such as:

- Business Process Framework
- Tenant Set-up and configuration
- Reporting and Workday Studio Integration

Note: If you have an existing Adobe Sign account, there is no need to start a trial. You may contact your Client Success Manager to request Workday integration.

The high-level steps to complete integration are:

- Activate your trial account with Adobe Sign
- Generate an Integration Key in Adobe Sign
- Install the Integration Key into the Workday Tenant

Activate Your Adobe Sign Trial Account {#activate-sign-trial-account}

To request a 30-day trial of Adobe Sign, you need to fill this [registration form](#).

Note: We strongly recommend that you use a valid functional email address to create the trial and not a temporary email. You need to access this email to verify the account, so the address must be valid.

Request a trial.

Adobe Sign streamlines the signing process in Workday.

With trusted e-signatures from Adobe integrated directly into Workday, your employees can accelerate signatures in processes such as NDAs, offer letters, onboarding and training compliance.

Easily collect legally binding e-signatures—from anywhere, on any device—to increase organizational efficiency and agility, reduce legal risk, and impress employees and contractors with a delightful digital experience.

Simply fill out the form to request a trial.

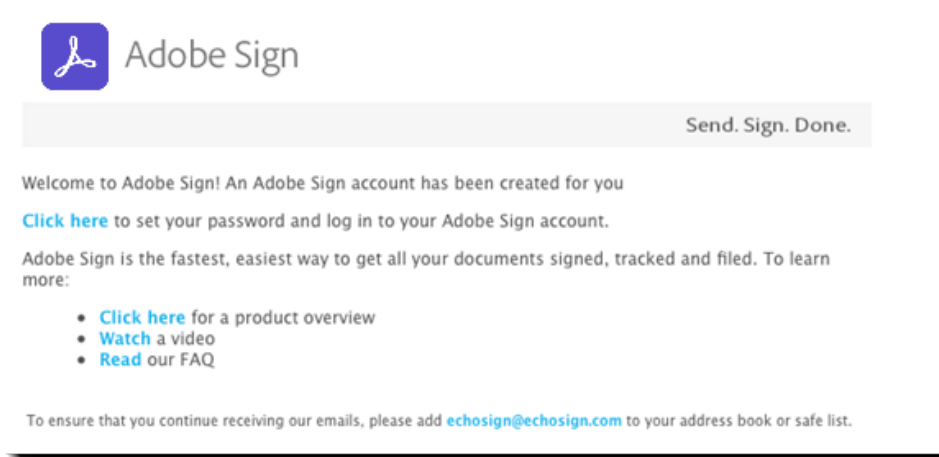
Free 30-day Adobe Sign trial.

Sign up now. No credit card required.

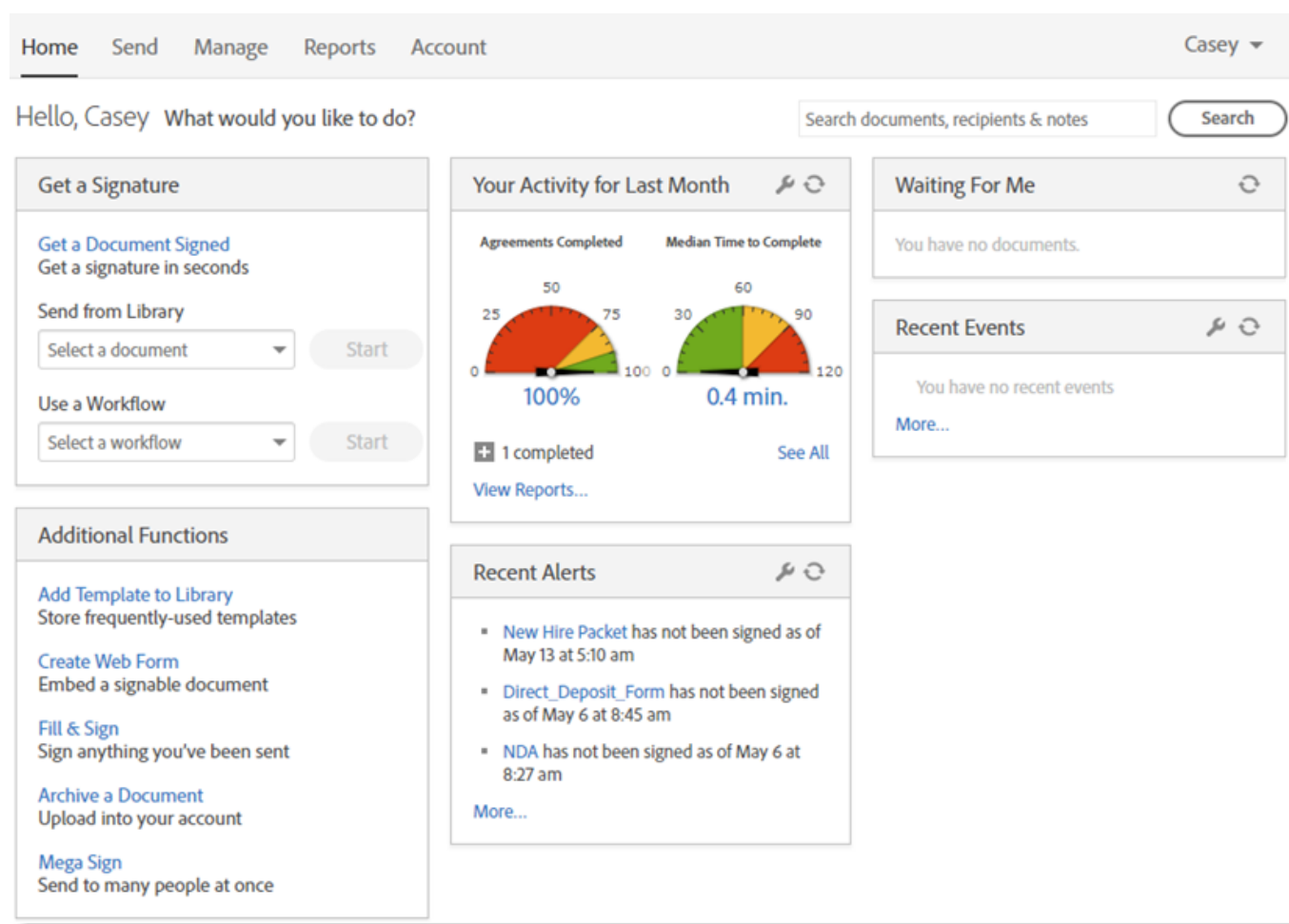
First Name: *	Last Name: *
<input type="text" value="Casey"/>	<input type="text" value="Jones"/>
Job Title: *	Business Email: *
<input type="text" value="System Integrator"/>	<input type="text" value="Casey@MyDomain.com"/>
Phone Number: *	Company Name: *
<input type="text" value="555-555-1212"/>	<input type="text" value="My Company"/>
Employee Range: *	Are you an existing Adobe Sign customer? *
<input type="text" value="10-99"/>	<input type="text" value="No, I'm not a current"/>

By supplying my contact information, I authorize Adobe to contact me via email, phone, and postal mail about its products and services. [Learn more or opt out](#).

Within one business day, an Adobe Sign on-boarding specialist provisions your account (in Adobe Sign) for Workday. Once complete, you receive a confirmation email as shown below.



Follow the directions in the email to initialize your account and access your Adobe Sign *Home* page.



Generate an Integration Key {#generate-an-integration-key}

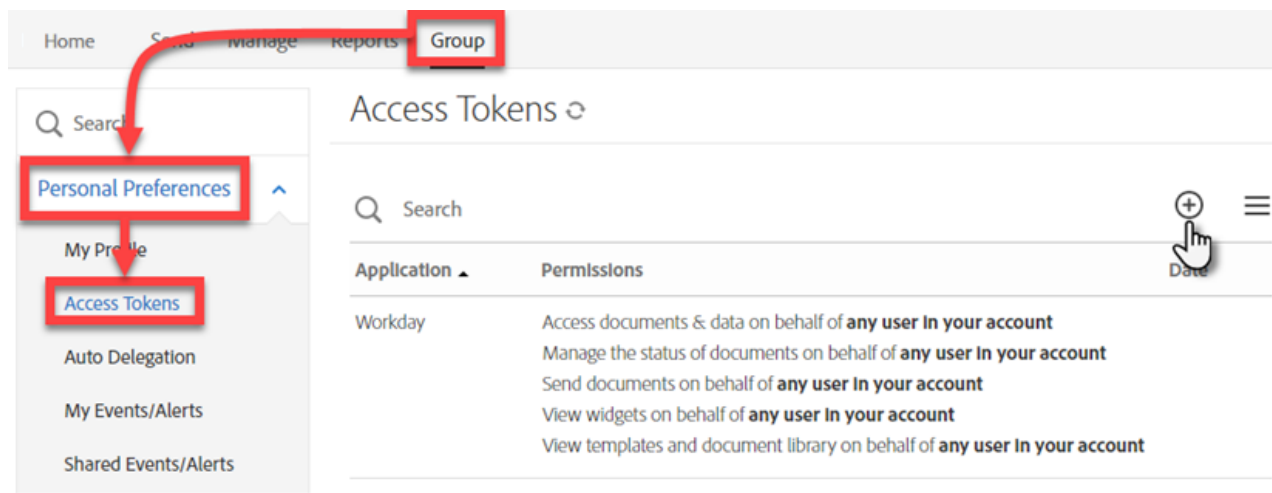
For new installations, you need to generate an integration key in Adobe Sign and then enter it into Workday. This key authenticates the Adobe Sign and Workday environments to trust each other and share content.

To generate an Integration Key in Adobe Sign:

1. Log in to your administrator in Adobe Sign.

2. Navigate to **Account > Personal Preferences > Access Tokens**.
3. Click the **circled plus icon** on the right side of the window.

It opens the *Create Integration Key* interface.



4. Provide an intuitive name for your key, such as Workday.

The Integration Key must have the following elements enabled:

- agreement_read
- agreement_write
- agreement_send
- widget_read
- library_read

A screenshot of the 'Create Integration Key' dialog box. The title bar says 'Create Integration Key'. The main text explains that Integration Keys can be used to enable legacy third-party applications to access Adobe Sign data. It states that if an application requires an Integration Key, one should be created by providing a name and selecting permissions. It also notes that the key will have permanent access until revoked. Below this, there is a text input field for 'Integration Name' with the value 'Workday'. Underneath is a table with three columns: 'Enabled?', 'Scope', and 'Description'. The 'Enabled?' column contains checkboxes, some of which are checked. The 'Scope' column lists various permissions, and the 'Description' column provides details for each. At the bottom right, there are 'Cancel' and 'Save' buttons.

Enabled?	Scope	Description
<input type="checkbox"/>	user_read	View users in your account
<input type="checkbox"/>	user_write	Create or manage users within your account
<input type="checkbox"/>	user_login	Login on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_read	Access documents & data on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_write	Manage the status of documents on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_send	Send documents on behalf of any user in your account
<input checked="" type="checkbox"/>	widget_read	View widgets on behalf of any user in your account
<input type="checkbox"/>	widget_write	Create, edit or publish widgets on behalf of any user in your account
<input checked="" type="checkbox"/>	library_read	View templates and document library on behalf of any user in your account
<input type="checkbox"/>	library_write	Manage the templates and document library on behalf of any user in your account
<input type="checkbox"/>	workflow_read	View workflows on behalf of any user in your account
<input type="checkbox"/>	workflow_write	Create workflows on behalf of any user in your account

5. Click **Save**

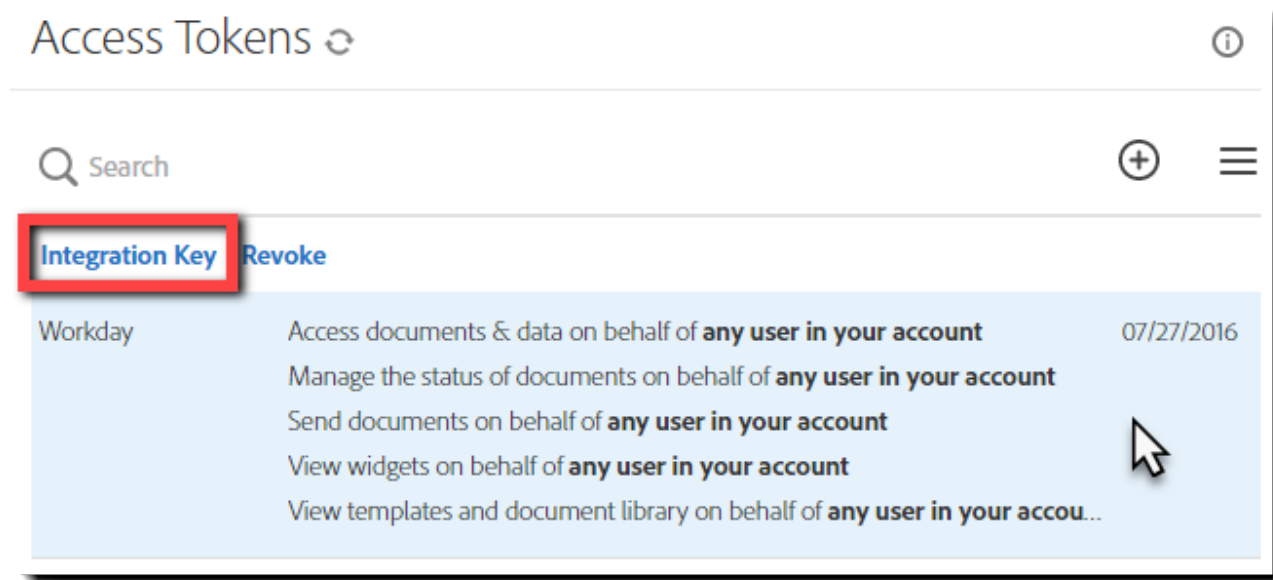
The *Access Tokens* page is exposed showing the keys designed in your account.

6. Click the key definition created for Workday

The *Integration Key* link is exposed at the top of the definition

7. Click the **Integration Key** link.

It exposes the Integration key.



8. Copy this key and save in a secure place for the next step.

9. Click **OK**



Configure the Workday Tenant {#configuring-the-workday-tenant}

Install the Integration Key {#install-the-integration-key}

Installing the Integration Key into the Workday tenant establishes the trust relationship with Adobe Sign. Once that relationship is in place, any Business Process can have a *Review Document* step added that enables the signature process.

Note: Adobe Sign is branded as “Adobe Document Cloud” throughout the Workday environment.

To install the Integration Key:

1. Log in to Workday as an account administrator
2. Search for **Edit Tenant Setup - Business Processes**

It opens the *Edit Tenant Setup - Business Processes* page.

3. Provide information for the following four fields:
 - **Adobe Document Cloud Acknowledgment:** A fixed text acknowledgment of the integration.
 - **Adobe Document Cloud API Key:** Where the Integration Key is installed
 - **Adobe Document Cloud Sender Email Address:** The email address of the group level administrator in Adobe Sign
 - **Remove documents awaiting eSignature when Document is Canceled:** An optional configuration that removes documents from the signature cycle if a document is canceled in Workday.

Home Edit Tenant Setup - Business Processes workday

Edit Tenant Setup - Business Processes

Tenant Adobe Sign

User for Business Process Time Delay Background Processes

Enable Inbox Archive for Terminated Employees ☐

Apply Routing Restrictions during Delegation ☐

Adobe Document Cloud Acknowledgment

By inserting your Adobe Document Cloud eSign Services API key, you are acknowledging to use the Adobe Document Cloud eSign Services integration and enabling Adobe Document Cloud to be an eSignature service provider. Your use of Adobe Document Cloud is governed by the Adobe Document Cloud eSign Service terms of use. You acknowledge that when using the Adobe Document Cloud eSign Service you are leaving the Workday Service and any data transmitted with be governed by Adobe Document Cloud eSign Services terms of use.

Adobe Document Cloud API Key

Adobe Document Cloud Sender Email Address

Remove documents awaiting eSignature when Document is Canceled ☒

4. Next, complete the installation:

1. Paste your Integration key into the *Adobe Sign API Integration Key* field.
2. Enter the email address of the Adobe Sign administrator into the *Adobe Document Cloud Sender Email Address* field
3. Click **OK**

Adobe Document Cloud API Key

Adobe Document Cloud Sender Email Address

Remove documents awaiting eSignature when Document is Canceled ☒

Adobe Sign functionality can now be added to any Business Process by adding a *Review Document* step and configuring it to use “**eSign by Adobe**” as the eSignature type.

Configure the Review Document step {#configure-the-review-document-step}

The document for the Review Document step can be a static document; a document generated by a Generate Document step within the same business process; or, a formatted report created with the Workday Report Designer. All of these cases can be augmented with [Adobe Text Tags](#) to control the look and position of the Adobe Signing specific components. The document source must be specified within the business process definition. It is not possible to upload an ad hoc document while the business process is executing.

Unique to using Adobe Sign with a Review Document step is the ability to have serialized Signer Groups. Signer groups allow you to specify role-based groups that sign in sequence. Adobe Sign does not support parallel signing groups.

For assistance configuring the Review Document step, you may refer to the [Quick Start guide](#).

Support {#support}

Workday Support {#workday-support}

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

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

- [Troubleshoot eSignature Integrations](#)
- [Review Documents Step](#)
- [Dynamic Document Generation](#)
- [Offer Document Generation Configuration tips](#)

Adobe Sign Support {#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](#)
- [Review Document configuration and examples](#)

Contact Adobe Sign Support